

# **United States Beauty & Personal Care Market By Product Type (Personal Care, Beauty Care), By Distribution Channel (Specialty Stores, Departmental Stores, Hypermarkets/Supermarkets, E-Commerce, Drug Stores, Others), By Region, Competition, Forecast & Opportunities 2019-2029F**

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## **Abstracts**

United States Beauty & Personal Care Market was valued at USD 87.64 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 7.19% through 2029. The United States Beauty & Personal Care market is a dynamic and rapidly evolving sector driven by trends like personalization, clean beauty, and the growing influence of social media. The market encompasses skincare, haircare, makeup, fragrances, and grooming products. Consumers increasingly demand sustainable, vegan, and cruelty-free products, prompting brands to innovate and adopt eco-friendly practices. The rise of online sales channels has further transformed the landscape, providing convenience and tailored experiences. Emerging technologies, including AI-driven skincare diagnostics and virtual try-ons, are reshaping consumer engagement, while wellness-oriented products continue to gain traction.

### **Market Drivers**

#### **Increasing Demand for Natural and Sustainable Products**

The growing consumer preference for natural, organic, and sustainable products is a major driver of the U.S. beauty and personal care market. Shoppers increasingly prioritize eco-friendly and cruelty-free brands that use ethically sourced ingredients and environmentally conscious packaging. According to a 2023 study, over 60% of U.S.

consumers actively seek out beauty products with 'clean' labels, signifying their concern for both personal health and environmental impact. The rise of Gen Z and millennial consumers, who heavily influence market trends, has fueled the demand for transparency and ethical practices, leading many companies to invest in certifications, carbon-neutral initiatives, and zero-waste production.

### The Rise of E-Commerce and Digital Innovation

E-commerce has significantly reshaped the beauty and personal care market in the U.S., driven by convenience and personalized shopping experiences. With online sales accounting for over 25% of the industry's revenue in 2024, platforms like Amazon, Sephora, and Ulta Beauty have leveraged AI-driven algorithms, virtual try-on technologies, and influencer collaborations to attract consumers. Social media platforms such as Instagram, TikTok, and YouTube also play pivotal roles, serving as hubs for beauty tutorials, reviews, and trends that drive purchasing decisions. Direct-to-consumer (DTC) brands like Glossier and Fenty Beauty have further disrupted traditional retail channels, offering highly customized digital experiences.

### Growing Male Grooming Segment

The male grooming segment has become a prominent driver in the U.S. beauty and personal care industry, with significant growth in skincare, beard care, and fragrance categories. Changing societal norms and increased awareness of personal grooming among men have expanded the market. Products like moisturizers, anti-aging creams, and grooming kits are seeing robust demand, especially from urban and millennial demographics. Brands are actively targeting male consumers through specialized marketing campaigns, partnerships with male influencers, and exclusive product lines. The rise of gender-neutral beauty products also supports this trend, making grooming more accessible and inclusive.

### Emphasis on Health and Wellness-Oriented Products

The shift towards holistic wellness has deeply impacted the U.S. beauty and personal care market, with consumers seeking products that offer both aesthetic and health benefits. In 2024, the focus on wellness among U.S. consumers has grown significantly, with around 50% now prioritizing wellness in their daily lives, up from 42% in 2020. This shift reflects the broader impact of the COVID-19 pandemic, as it has led many individuals to reassess their health and well-being. Hybrid skincare products infused with vitamins, antioxidants, and probiotics have gained immense popularity, blurring the

lines between cosmetics and wellness. Functional beauty products, such as those providing stress relief or improved sleep, are in high demand. In 2024, wellness-oriented beauty products accounted for approximately 40% of the total market share. Brands are also incorporating aromatherapy, adaptogens, and CBD into their offerings, appealing to the health-conscious consumer who values self-care and mindfulness as part of their beauty regimen.

## Key Market Challenges

### Intense Market Competition and Brand Saturation

The U.S. beauty and personal care market faces stiff competition due to the saturation of brands across various product categories. Both established players and new entrants compete for market share, creating a crowded space that challenges brand differentiation. This intense competition is further exacerbated by the rise of direct-to-consumer (DTC) brands and niche players targeting specific demographics or offering specialized products. For instance, the rapid proliferation of clean beauty and vegan brands has made it difficult for companies to stand out. Established brands must constantly innovate to retain loyalty, while new entrants face significant barriers in gaining visibility amidst market noise.

### Rising Raw Material Costs and Supply Chain Disruptions

The beauty and personal care industry is heavily reliant on a diverse range of raw materials, from natural extracts to synthetic chemicals. In recent years, the industry has been grappling with rising costs of raw materials, driven by factors like increased demand for organic ingredients and global supply chain disruptions. Events such as the COVID-19 pandemic and geopolitical conflicts have exacerbated these challenges, causing delays and cost hikes. These disruptions have impacted smaller companies disproportionately, as they lack the resources to absorb additional costs. Furthermore, consumer expectations for transparency and ethical sourcing add another layer of complexity, pushing brands to find sustainable yet affordable alternatives.

### Regulatory and Compliance Challenges

Navigating the complex regulatory landscape in the U.S. poses significant challenges for beauty and personal care brands. The Food and Drug Administration (FDA) and the Federal Trade Commission (FTC) closely regulate product claims, ingredient safety, and labeling standards. Non-compliance with these regulations can result in recalls,

finances, and reputational damage. Additionally, state-level regulations, such as California's Proposition 65 and its strict clean beauty standards, further complicate compliance. The pressure to align with evolving global standards, including bans on specific ingredients and requirements for eco-friendly packaging, also increases costs for companies. Smaller brands, in particular, struggle to allocate resources for regulatory adherence while maintaining profitability.

### Consumer Demand for Transparency and Ethical Practices

While the demand for transparency and ethical practices has driven innovation, it also presents challenges for brands attempting to meet these high standards. Consumers increasingly scrutinize ingredient lists, sourcing practices, and the environmental impact of products. Failing to meet expectations can result in negative publicity and loss of consumer trust, as seen in cases of 'greenwashing' where brands falsely claim sustainability. Transitioning to sustainable and ethical production often involves significant investment in supply chains, certifications, and packaging redesigns, which can be financially burdensome. Moreover, maintaining transparency while protecting proprietary formulations adds another layer of difficulty for brands in this competitive market.

### Key Market Trends

#### Integration of Technology in Beauty Experiences

The use of advanced technology has transformed the beauty and personal care market, elevating consumer experiences and operational efficiency. Artificial intelligence (AI) and augmented reality (AR) are increasingly integrated into shopping platforms, allowing customers to conduct virtual try-ons for makeup, hair colors, and even skincare products. AI-powered diagnostic tools analyze skin concerns and recommend tailored product solutions, driving personalization in unprecedented ways. Retailers are also adopting smart mirrors and voice-enabled devices to provide seamless in-store and online experiences. Moreover, blockchain technology is being employed to enhance transparency in ingredient sourcing, enabling consumers to verify product authenticity and ethical claims.

#### Expansion of Gender-Neutral Beauty Products

The rise of inclusivity and the breakdown of traditional gender norms have paved the way for gender-neutral beauty products. This trend is evident across categories,

including skincare, haircare, and fragrances, where brands are moving away from gender-specific marketing. Companies like Fenty Beauty and Milk Makeup are leading the charge, offering products designed for universal use and avoiding stereotypical branding. The demand for gender-neutral products is particularly strong among Gen Z consumers, who value self-expression and inclusivity. As this trend grows, it is reshaping product development and marketing strategies, prompting companies to focus on functionality and diverse representation.

### Influence of Social Media and Influencer Marketing

Social media continues to revolutionize the beauty and personal care industry, acting as a critical platform for product discovery, reviews, and trends. Platforms like Instagram, TikTok, and YouTube are hubs for beauty influencers who shape consumer preferences through tutorials, testimonials, and unboxing videos. The virality of content such as 'TikTok made me buy it' trends has driven sales for many brands. Micro-influencers, who cater to niche audiences, are also gaining traction, offering brands a more authentic and cost-effective way to connect with consumers. Live shopping events and collaborations with content creators further enhance engagement, making social media a cornerstone of marketing strategies.

### Growth of Wellness-Oriented Beauty Practices

The intersection of beauty and wellness is becoming increasingly pronounced, with consumers seeking products that address both aesthetic and holistic health needs. Self-care routines now emphasize relaxation, mental health, and physical well-being alongside skincare and grooming. Products infused with adaptogens, CBD, and aromatherapy ingredients are gaining popularity for their stress-relieving and wellness-boosting properties. The rise of beauty supplements, including collagen powders and biotin gummies, reflects the growing focus on beauty from within. Additionally, practices like skin fasting, where consumers reduce product usage to restore natural skin balance, and the minimalist skincare movement are reshaping the narrative around wellness-driven beauty.

### Segmental Insights

#### Product Type Insights

The Personal Care segment dominated the United States Beauty & Personal Care market, driven by increasing consumer focus on hygiene, wellness, and self-care.

Categories such as skincare, haircare, oral care, and deodorants experience consistent demand, with consumers seeking effective, high-quality products for everyday use. Personal care brands are increasingly incorporating natural and clean ingredients to align with growing consumer concerns about health and sustainability. Additionally, the expansion of wellness-oriented products, such as body lotions and vitamins, continues to fuel growth in this segment. As consumers prioritize self-care routines, the personal care market remains a cornerstone of industry expansion.

## Regional Insights

The South dominated the United States Beauty & Personal Care market, driven by its large and rapidly growing population, diverse demographics, and vibrant economic activity. States like Texas, Florida, and Georgia are key contributors, with high consumer spending on skincare, haircare, and wellness products. The region's warm climate fuels demand for sun protection and hydration-focused products, while urban centers like Miami and Atlanta foster trends in beauty innovation and luxury brands. Additionally, the South's significant e-commerce growth and rising influence of multicultural beauty preferences contribute to its leadership, making it a powerhouse in the country's beauty and personal care market.

## Recent Developments

In 2024, Beekman 1802 launched the Milk RX Advanced Better Aging Cream, an anti-aging product formulated with goat milk protein exosomes and polyglutamic acid, designed to lift, firm, and enhance collagen production.

In 2024, Blake Lively introduced her hair care brand, Blake Brown, featuring a collection of eight shampoos, masks, and styling products inspired by her personal hair regimen, emphasizing clean, cruelty-free, and sustainable formulations.

## Key Market Players

L'Oréal USA, Inc.

The Procter & Gamble Company

Unilever United States, Inc.

Bath & Body Works, Inc.

The Est?e Lauder Companies Inc.

Kenvue Inc.

Coty Inc.

Shiseido Americas Corporation

Mary Kay Inc.

Beiersdorf, Inc.

Kao USA Inc.

Revlon, Inc.

#### Report Scope:

In this report, the United States Beauty & Personal Care Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### United States Beauty & Personal Care Market, By Product Type:

Personal Care

Beauty Care

#### United States Beauty & Personal Care Market, By Distribution Channel:

Specialty Stores

Departmental Stores

Hypermarkets/Supermarkets

E-Commerce

Drug Stores

Others

United States Beauty & Personal Care Market, By Region:

South

West

Midwest

Northeast

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the United States Beauty & Personal Care Market.

Available Customizations:

United States Beauty & Personal Care Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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