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This report looks at the following areas:

- · Use of shampoo, conditioner and hairstyling products
- How frequently consumers use various haircare products or styling actions
- How consumers procure haircare products and retailers shopped
- Attitudes and behaviors toward haircare spending, haircare products and overall haircare routine
- Interest in haircare product innovations

With 2022 sales in excess of \$10 billion, the shampoo, conditioner and hairstyling products market has grown 16% since 2017. When adjusted for inflation, the market declined 3% during the period. In fact, 77% of haircare product users have noticed price increases in their shampoo and conditioning products in the last year. This has provided the impetus for trade-down behavior: 30% have purchased cheaper types of haircare products to save money. At the same time, 60% are paying more attention to hair health than they were a year ago. This means that although price is a concern, other purchase factors may carry more significance.

Price awareness/sensitivity can certainly influence consumer preference toward value or mass brands. Mass and masstige beauty price positioning cater to the broadest scope of consumers – those looking for nice quality, ontrend products while still being price conscious. Private label hairstyling products have been a recent success story, up 10% during the most recent 52-week period. Brands in this space are elevating quality to compete with mass brand positioning. The opportunity exists for private label to develop stronger innovative pipelines for other market segments.

Despite economic conditions, consumers' prioritization of appearance and health has enabled stellar growth of prestige haircare products. In 2022, prestige products represented 27.7% of category innovation, up 42.9% from 2018. Prestige brands are driving the skinification trend with multi-layered

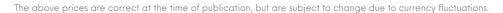


"The hallmark of the mature shampoo, conditioner and hairstyling product market is slow, steady growth. Its essentialness to one's personal care routine provides a reliable platform for industry players; however, consumers' prioritization of appearance and health is advancing expectations and innovation within the category."

Jennifer White Boehm,
 Director, US BPCH Reports

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approaches to haircare, akin to skincare regimes. Innovations addressing issues and deficiencies in hair/scalp health will continue to be an opportunity.

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