

Shampoo, Conditioner and Hairstyling Products - US - 2023

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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, on-trend 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

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Shampoo, Conditioner and Hairstyling Products - US - 2023



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas:**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Consumer trends**
- **Haircare products are essential in personal care**
Figure 1: Haircare product usage, 2023
- **Convenience is important to haircare routine**
Figure 2: Convenience in haircare, 2023
- **Awareness and actions toward hair health**
Figure 3: Attitudes toward haircare routine, 2023
- **Consumers feel the impact of inflation**
Figure 4: Haircare spending, 2023
- **Competitive strategies**
- **Mass and masstige brands balance price and quality**
Figure 5: Haircare innovation by beauty price positioning, 2022
- **Prestige brands boom because of skinification trends**
Figure 6: Percent change in haircare innovation by beauty price positioning, 2018-22
- **Market predictions**
Figure 7: Total US sales and fan chart forecast of shampoo, conditioner and hairstyling products, at current prices, 2017-27
Figure 8: Category outlook, 2023-28
- **Opportunities**
- **Repair, protect and grow healthy hair**
Figure 9: Interest in haircare innovations, 2023
- **Leveraging skincare ingredients that have established wellness associations**
Figure 10: Interest in haircare ingredients, 2023

MARKET SIZE AND FORECAST

- **Sales growth driven by inflation**
Figure 11: Total US sales and forecast of shampoo, conditioner and hairstyling products, at current prices, 2017-27

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Total US sales and forecast of shampoo, conditioner and hairstyling products, at inflation-adjusted prices, 2017-27

Figure 13: Total US sales and fan chart forecast of shampoo, conditioner and hairstyling products, at current prices, 2017-27

- **Spending remains above pre-pandemic levels, supported by inflation**

Figure 14: Average annual household spending on shampoo, conditioner and hairstyling products, 2017-22

SEGMENT PERFORMANCE

- **Shampoo dominates market as essential haircare product**

Figure 15: Sales of shampoo, conditioner and hairstyling products, by segment, 2022

- **All segments realize a steady increase in sales during the two-year period**

Figure 16: Total US retail sales of shampoo, conditioner and hairstyling products, by segment, at current prices, 2020 and 2022

- **Shoppers tap "other" channels for shampoo, conditioner and hairstyling product purchases**

Figure 17: Total US retail sales of shampoo, conditioner and hairstyling products, by channel, at current prices, 2020 and 2022

MARKET DRIVERS

- **Economic uncertainty and inflation perpetuate cost-conscious behavior**

Figure 18: Consumer Sentiment Index, 2007-22

Figure 19: Consumer Sentiment Index change from previous period, 2007-22

- **Aging populations presents a challenge to market**

Figure 20: Haircare product usage (NET), by age, 2023

Figure 21: Population aged 18 or older, by age, 2017-27

- **Increasingly diverse population requires product and marketing innovation**

Figure 22: Population by race and Hispanic origin, 2017-27

MARKET SHARE

- **Narrow margin separates Unilever and Procter & Gamble**

Figure 23: TRESemmé One Step Stylers, 2023

Figure 24: Native, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Sales of shampoo, conditioner and hairstyling products by company**

Figure 25: MULO sales of shampoo, conditioner and hairstyling products, by leading companies, rolling 52 weeks 2022 and 2023

- Church & Dwight's Batiste shampoo exhibits strong growth**

Figure 26: Batiste Instagram story, 2022

Figure 27: MULO sales of shampoo, by leading companies, rolling 52 weeks 2022 and 2023

- Mielle Organics gains traction through social media presence**

Figure 28: Mielle Oats & Honey Soothing Conditioner, 2023

Figure 29: MULO sales of conditioner, by leading companies, rolling 52 weeks 2022 and 2023

- Unilever hairstyling brands dominate segment**

Figure 30: Unilever hairstyling brands, 2023

Figure 31: MULO sales of hairstyling products, by leading companies, rolling 52 weeks 2022 and 2023

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- The budget squeeze fuels interest in value/mass brands**

Figure 32: Beauty brand preferences, 2022

- The rise of prestige haircare defies economic conditions**

Figure 33: Haircare innovation by beauty price positioning, 2022

Figure 34: Percent change in haircare innovation by beauty price positioning, 2018 to 2022

- Mass beauty brands offer brand recognition and accessible price points**

Figure 35: TRESemmé Pro Infusion Fluid Volume Conditioner, 2023

Figure 36: Haircare innovations of mass beauty price positioning, 2023

Figure 37: Private label haircare innovations, 2023

- Masstige beauty brands tap skincare-inspired ingredients, scientific claims**

Figure 38: Biolage Professional Hydra Source Blow Dry Shaping Lotion, 2023

Figure 39: Haircare innovations of masstige beauty price positioning, 2023

- Prestige haircare is booming because of skinification trend**

Figure 40: SEEN haircare, 2023

Figure 41: Philip B Scalp Booster, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 42: Haircare innovations of prestige beauty price positioning, 2023

THE SHAMPOO, CONDITIONER AND HAIRSTYLING PRODUCTS CONSUMER – FAST FACTS

- **Fast Fact 1: Routine drives category use**
- **Fast Fact 2: Need for convenience influences category**
- **Fast Fact 3: Hair health is the prime focus**
- **Fast Fact 4: Despite essentialness, economic woes impact market**

HAIR TEXTURE AND STRUCTURE

- **Most adults have natural textured hair**
Figure 43: Hair texture, 2023
- **Hair with more texture drives use of conditioner and treatment products**
Figure 44: Haircare product usage, by hair texture, 2023
- **Nearly a third of adults have fine hair**
Figure 45: Renpure Original Thickening Conditioner, 2023
Figure 46: Hair structure, 2023

HAIRCARE PRODUCT USAGE

- **Essential nature of haircare products drive penetration**
Figure 47: Haircare product usage, 2023
- **Shampoo and conditioner product usage**
Figure 48: TRESemmé 24 Hour Volume Shampoo, 2023
Figure 49: Shampoo and conditioner product usage, 2023
- **Hairstyling product usage**
Figure 50: Nexxus Unbreakable, 2023
Figure 51: Hairstyling product usage, 2023
- **Women dominate the market, but don't forget about the men**
Figure 52: Shampoo and conditioner product usage, by gender, 2023
Figure 53: Hairstyling product usage, by gender, 2023
- **Younger adults drive adoption of alternative/specialty haircare**
Figure 54: Shampoo and conditioner product usage, by age, 2023
Figure 55: Hairstyling product usage, by age, 2023
- **Black haircare has differentiated needs**
Figure 56: Shampoo and conditioner product usage, by race, 2023
Figure 57: Hairstyling product usage, by race/ethnicity, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

HAIR ROUTINES

- Simple hair styles are the go-to daily hair routine**
 Figure 58: NatureLab Perfect Clean Style Refresher Spray, 2023
- Hair treatments are being included as a regular part of the hair routine**
 Figure 59: Aveda Scalp Solutions, 2023
 Figure 60: Frequency of hair routines, 2023
- Women use styling tools as part of their haircare routine**
 Figure 61: Wella Professionals Fusion Mask, 2023
 Figure 62: Hair routines, by gender, 2023
- Younger adults participate in more haircare actions**
 Figure 63: Hair routines, by age, 2023
- Black consumers and Hispanic consumers engage in more complex hairstyles**
 Figure 64: Pattern conditioners, 2023
 Figure 65: Hair routines, by race/ethnicity, 2023

PURCHASE CHANNEL AND RETAILERS SHOPPED

- In-store remains the top procurement method for haircare products**
 Figure 66: Purchase channel, 2023
- Walmart is the go-to retailer for haircare purchases**
 Figure 67: Retailers shopped, 2023
- Preferred retailers shift among age groups**
 Figure 68: Retailers shopped, by age, 2023

ATTITUDES TOWARD HAIRCARE SPENDING AND ROUTINE

- Quick and simple without sacrificing health**
 Figure 69: Mermade Super Serum, 2023
- Consumers feel the impact of inflation**
 Figure 70: Attitudes toward haircare spending and routine, 2023
- Young adults drive hair health trends**
 Figure 71: Attitudes toward haircare spending and routine, by age, 2023
- Hair style and hair health are important to Black consumers**
 Figure 72: Attitudes toward haircare spending and routine, by race, 2023
- Adults with highly textured attentive to hair health**
 Figure 73: Attitudes toward haircare routine, by hair texture, 2023

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

ATTITUDES TOWARD HAIRCARE PRODUCTS AND ROUTINE

- **Elevating hair washing from routine to experiential**
- **Key concerns create opportunities**
Figure 74: Luseeta Biotin & B-Complex Hair Thickening Serum, 2023
Figure 75: Attitudes toward haircare products and routine, 2023
- **Young adults find enjoyment in haircare routine**
Figure 76: Amazon Beauty Rahua, 2022
Figure 77: Attitudes toward haircare products and routine, by age, 2023

INTEREST IN HAIRCARE INNOVATIONS

- **Innovations to repair, protect and grow healthy hair**
Figure 78: Pantene Miracle Rescue, 2023
Figure 79: JVN Pre-wash Scalp & Hair Treatment oil, 2022
Figure 80: Interest in haircare innovations, 2023
- **Women seek specialized products**
Figure 81: Vegamour, 2023
Figure 82: Interest in haircare innovations, by gender, 2023
- **Scalp treatments and overnight masks pique interest of young consumer**
Figure 83: John Masters Naturals Overnight Hair Mask, 2023
Figure 84: Interest in haircare innovations, by age, 2023
- **Hispanic consumers show interest across innovative concepts**
Figure 85: Interest in haircare innovations, by race/ethnicity, 2023

INTEREST IN HAIRCARE INGREDIENTS

- **Skinification of hair drives ingredient innovation**
Figure 86: Shaz & Kiks Strands Moringa Anti-Breakage Serum, 2023
Figure 87: John Paul Mitchell Systems Tea Tree Special Detox, 2023
Figure 88: Interest in haircare ingredients, 2023
- **Young adults are interested in trendy, immediate benefit ingredients**
Figure 89: Interest in haircare ingredients, by age, 2023
- **Food-inspired, exfoliating and fermented ingredients attract Black users**
Figure 90: Interest in haircare ingredients, by race/ethnicity, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Adults with coily hair are most interested in healthy hair ingredients**

Figure 91: Interest in haircare ingredients, by hair texture, 2023

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

APPENDIX – THE MARKET

Figure 92: Total US retail sales and forecast of shampoo, conditioner and hairstyling products, by segment, at current prices, 2017-27

Figure 93: Total US retail sales and forecast of shampoo, at current prices, 2017-27

Figure 94: Annual percent change in MULO sales of shampoo products, by value and volume, 2018-22

Figure 95: Total US retail sales and forecast of conditioner, at current prices, 2017-27

Figure 96: Annual percent change in MULO sales of conditioner products, by value and volume, 2018-22

Figure 97: Total US retail sales and forecast of hairstyling products, at current prices, 2017-27

Figure 98: Annual percent change in MULO sales of hairstyling products, by value and volume, 2018-22

Figure 99: US supermarket sales of shampoo, conditioner and hairstyling products, at current prices, 2017-22

Figure 100: US drugstore sales of shampoo, conditioner and hairstyling products, at current prices, 2017-22

Figure 101: US sales of shampoo, conditioner and hairstyling products through other retail channels, at current prices, 2017-22

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.