

The Hair Care Gap

An ingredient supplier's perspective

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Hair care market

Represents **USD 92 bn** globally

Rank **2**
in the global
cosmetics
market

21%
of the total
market
share

USD 129 bn
Market size in
2029 (forecast)

▲
+6.9% CAGR
(2024-2029)

Source: Euromonitor, 2025
Future of Haircare 2026 - WGSN Beauty

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Globally, hair care segments are on the rise, except for one



HAIRCARE: +9%

- Healthy hair and scalp care have become important to consumers
- Treatments (especially leave-in) are driving growth
- High end/premium products are growing, especially in Asia
- There's increasing demand for color care, curl care, and natural products



HAIR COLOURING: +5%

- Permanent color is strong, but semi- and demi- permanent colors are driving sales
- Aging populations in key markets like Japan and Italy are fueling sales
- Seasonal shades collections are helping growth



HAIR STYLING: +5%

- Strong increases are being witnessed in North America, with styling services showing dynamic growth in U.S. salons
- Curl enhancing and texture enhancing products are on the rise, but hair sprays have grown the most



HAIR TEXTURIZING: -14%

- Consumers now prefer more natural hairstyles and treatments that use fewer chemicals
- Perming is down almost 20%
- Straightening is slightly down globally – but it's still showing strong growth is in markets like India and Brazil (though a safer solution is expected)



Consumer *needs*

New values

Hair care products must show strong performance but also be affordable and sustainable to meet consumers' needs. They are also looking for new featured benefits that help protect from and tackle the consequences of climate change.

Supporting diversity

Inclusivity has become paramount for consumers who want to fully embrace their authenticity and self-expression. Brands are adapting and recognising the need for better personalisation and products adapted to different hair types and life stages

Hair therapy

Hair and scalp health become a priority. Consumers are looking for products that take a deep care of their hair and scalp but also promote their mood and a sense of wellbeing through rituals and new experiences.

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Trends travelling downstream from skin care.



Concepts such as biomimetic repair, peptides and barrier care appearing in skin care first, then translating to hair care.

Skin care sets the pace

Skincare benefits from daily use, visible biology and strong clinical narratives, so trends emerge and peak faster.

Technical barriers in hair “fibre” care



HAIR DOES NOT REGENERATE

There's no biological momentum – there is no self repair to amplify effects when dealing with damaged hair fibres.



HAIR IS LESS COMPLEX

There are fewer mechanisms to exploit. Innovation in hair care relies designing targeted, measurable interventions that transform the fibre itself.



RINSE-OFF LIMITS ACTIVE DELIVERY

Short contact times and formulation complexity make deposition and retention of actives technically challenging.



SCALE-UP REDUCES FEASIBILITY

Actives and precision materials often face yield cost barriers at commercial volumes. Until now...



Consumer rituals

Formulation and performance risks are higher in hair care
Consumers will tolerate experimentation on skin more readily than poor feel or build-up on hair.

Category switching costs are higher
Hair routines are harder to change, washing frequency, styling habits, all slow adoption.

Endorsement and education

Professional endorsement dampens trend volatility

Salon influence favours proven performance over rapid trend turnover.

Education requirements

Haircare innovations often need explanation around damage, structure and use, extending adoption timelines.



the science behind K18

K18 is a biology-first haircare brand, powered by biotech. Using the power of nature and human biology, K18 unlocks new solutions to the biggest challenges in haircare — all while delivering a healthy canvas for hair expression. K18 creates purposeful products that are simple, effective, and biocompatible.



While trends move more cautiously, they tend to last a long time once established.

For example, proteins have been a consistent force in hair care and continues to grow, reflecting enduring consumer demand

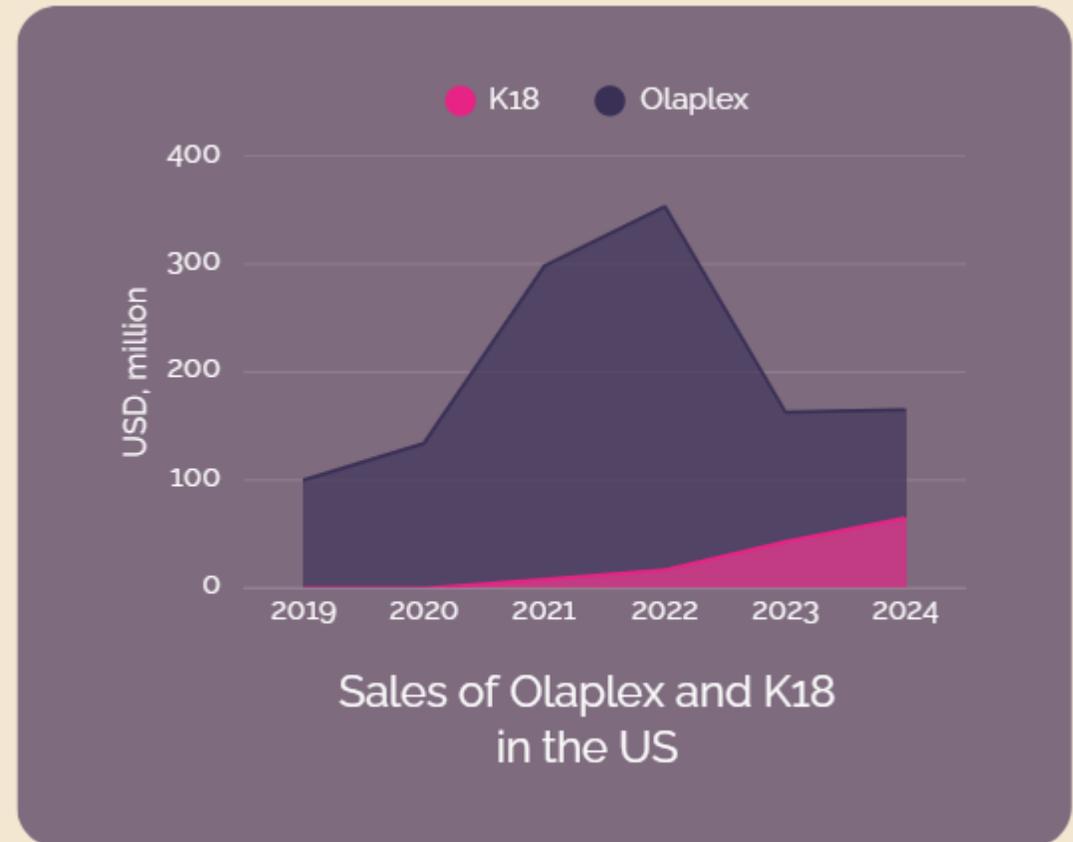
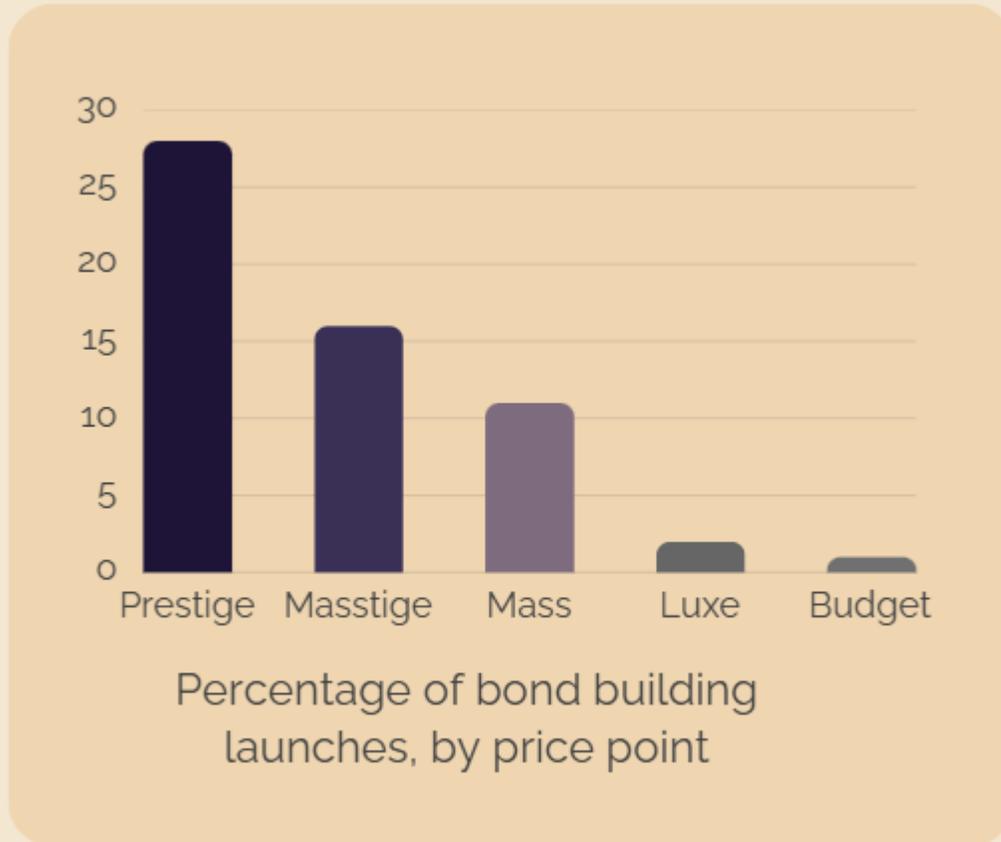
Haircare launches with proteins grew at ~29 % CAGR (2020–2024), showing ongoing innovation in protein actives.

Around 58 % of buyers now prefer protein-enriched shampoos.

Source : Innova Market Insights 2025 and ReAnnInn Insights

Emerging now: The bond building market

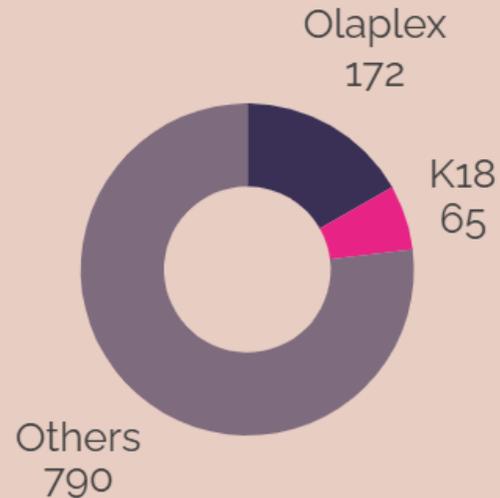
A \$0.8bn category reshaping hair repair



Source: Mintel and Kline, Aug 2025

Bond building market opportunities

The market is no longer dominated by two key players



US market "bond building" sales (USD, million)

Treatments on the rise, the strongest growth across all categories

Total growth in US market sales by product category from 2019 to 2024



Contrasting category dynamics: Skin vs hair care

Skin care stabilisation

As the category matures, growth is slowing.

Mass skin care is forecast to grow at just 0.9%, with masstige at 4.2%, and prestige in decline. This points to a category in a saturated phase where growth is about optimisation, rather than expansion.

Hair care premiumisation

Mass hair care is in decline at -1.5%, while masstige and prestige continue to grow strongly at 5.5% and 9.1%. This reflects increasing consumer willingness to invest in higher-performance solutions.

The closing gap

Innovation is reshaping hair care

Hair care is evolving beyond basic routines into **advanced repair** and treatment, increasing category **credibility** and consumer willingness to **invest**. Premium growth momentum is shifting.

As skin care softens across price tiers, hair care is absorbing premium spend, accelerating the convergence between the two categories and creating meaningful headroom for **innovation-led growth**.





KeraBio™ K31

Biomimetic bond builder

INCI: Aqua and Hydrolyzed sr-(Tripeptide-137 Hexapeptide-40 sh-Polypeptide-184 sh-Polypeptide-146)

Biotech powered biomimetic bond builder with pure, potent performance.

Delivers a vegan keratin recharge at the molecular level, elevating hair strength beyond repair.

Recommended usage level: Up to 0.1% active
Molecular weight: ~900 Da
Preservative: Benzyl alcohol

Bonds to hair keratin within the cortex (peptide binding assay, fluorescence microscopy)

Delivers 100% stronger hair than the leading commercial bond builder (cyclic fatigue)*

The more you use it the better it gets (cyclic fatigue, multi-application data)

Reset to virgin hair (DSC data, bleached/treated hair vs virgin control)*

99% derived natural
(ISO 16128)

Vegan suitable*

Readily biodegradable

Non-aquatoxic

Phenoxy ethanol-free

EU and UK REACH compliant

*Data generated at 0.5% active
Effective from 0.05% active

*can be considered to be generally suitable for vegan; however, as there is no single agreed definition nor a standard, global certification, if you are interested in making a vegan claim, please request our Vegan Suitability statement for specifics on this product, and compare to the certification(s) you are seeking to meet.

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