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Cross-category

NAIL COLOR AND CARE – US – 2024

With steep competition from the prof. nail service market, at-home brands must influence usage through nail health, convenience and cost-savings messaging.

Carson Kitzmiller, Senior Analyst, Beauty & Personal Care

31 JULY 2024 REPORT

Key issues covered in this Report

- Market context, drivers, size, forecast, segmentation and brand share breakdown of the nail color and care market in the US
- Innovation and marketing trends seen within the category including reusables, nail art, premiumization and cuticle care
- Professional nail service engagement and reasons for salon services over DIY
- At-home nail "services" and reasons for DIY over salon services
- At-home nail polish/artificial nail product usage
- Nail care and maintenance product usage
- Nail care behaviors and routines compared to a year ago
- Trade-up motivates in nail color
- Nail color purchase locations
- Attitudes and behaviors toward nail routines including nail health, supplement use and obstacles to use

Overview

The nail color and care market is projected to remain steady in 2024, with growth in nail treatments and artificial nails. There's a strong emphasis on nail/cuticle health, along with innovations in press-ons that offer easy application, nail art features, and affordability attracting DIY users. DIY enthusiasts appreciate the cost savings, the joy of self-nail care, and the need for quick solutions, leading them to skip salon visits. However, at-home brands should also cater to the half of adults who engage with salon services; salon clients often visit nail spas for relaxation, application assistance, and to avoid nail damage. Marketing strategies need to provide clear step-by-step instructions to encourage at-home usage and emphasize relaxing self-care themes through at-home product messaging.

While products like colored nail polish, top coats, and base coats remain popular, younger generations are gravitating towards gel polish, artificial nails, and nail art. Brands should draw inspiration from related sectors like skincare and bodycare to drive sustained growth, including ingredients and claims established in the macro BPC category. Brands must ensure a seamless nail care routine from start to finish, whether this includes a professional nail service or not, much like that of a skincare ritual to encourage at-home use.

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What you need to know

Natural, healthy nails take center stage

Almost seven in ten at-home users say they are embracing their natural nails and paying attention to their nail/cuticle health more than they were a year ago. Brands must support adults on their quest for natural, healthy nails through ingredient inclusions, cuticle support and gentle application/removal techniques.

Gen Z and Millennials have appetite for innovation

Traditional nail polish remains the top-used at-home format among adults, but younger consumers, particularly those aged 24-35 are more likely to use modern innovations like press-ons, gel polish and nail art.

Prioritize ease of application and removal

Among those using artificial formats, over three-quarters of adults say they use this format because they like to change their looks frequently and like to use them for one-night wear on special occasions. Brands must prioritize ease of application and removal to cater to occasion-based users.

Consumer trends: key takeaways

Support a mix of at-home and salon routines

With half of adults receiving a nail service in a salon in the past year, brands have the opportunity to cater at-home offerings to not only exclusive at-home users, but provide supplemental product offerings to support longevity and durability of nail services.

Opportunities exist in the pedicure space

With pedicures being a top-sought service in salons and about a third of adults across all ages giving themselves at-home pedicures, brands have the opportunity to promote targeted innovation for toenails, through press-on formats, easy application, and longevity claims.

HHI not a barrier for at-home color innovations

Thanks to the generally low-cost to participate in the at-home nail market, similar attitudes toward trade-up motivators (in nail color) are seen, no matter the household income, boding well for brands looking to market premium claims in the mass market.

Market size & forecast*

The at-home nail color and care market is expected to see slow growth with ~$100m in expected retail sales growth from 2024-29.

MARKET SIZE 2024 (EST)

$2.35bn

estimated value of nail color and care product retail sales

GROWTH IN 2024 (EST)

+1.2%

estimated retail sales growth. 2023-24

LONG-TERM GROWTH

+4%

in retail sales growth from 2024-29

** salon nail services are excluded from the market size and forecast, segment performance and brand sections of this Report but are covered in the consumer data.*

***Source:** Mintel*

Market predictions

Now (2024): artificials gain steam

While the total at-home category has seen slow growth, the artificial nail and accessories segment is growing at a faster clip, surpassing the nail color segment. Consumers are leaning into convenient and easy-to-use formats that don't break the bank.

Next (2025-26): convenience prevails

Convenience factors are expected to prevail in the market as users turn to at-home innovations for time- and cost-saving measures. While half of adults head to salons for nail services, Mintel expects the at-home market will focus on even more options that promote easy application and removal for occasion-based wearers.

Future (2027-28): safety and health discernment

While cost and convenience has been at the forefront of the category, interest in safety and health will gain steam, similar to that of the skincare and bodycare segments. With an increase in launches of at-home options, consumers will become more discerning toward ingredients, chemicals and nail/cuticle health.

***Source:** Mintel*

Opportunities: nail health, maintenance, and joy

Expand claims to include nail health benefits

While half of nail care users report at least some usage of nail or cuticle treatments, indicating opportunities to message added value inclusions of nail/cuticle health benefits, much like that of the skincare segment, appealing to consumers focused on total body wellness.

Combine maintenance and aesthetics

While replenishment cycles of tools and treatments is much slower than that of the polish and artificial nail segments, bundling aesthetic products with nail care tools/accessories may be an accessible way to get in front of new customers, particularly those who are paying more attention to their nail health.

Add joy, ease and relaxation to at-home routines

With adults turning to salons to be in a relaxing environments and many expressing enjoyment in at-home nail routines, nail brands must promote fun and self-care through a lens of ease when infiltrating at-home routines.

Market context

Market context

Consumer markets have faced an unprecedented level of turmoil in recent years, from the massive economic disruption in 2020 from COVID to 40-year highs across prices in 2022. Despite that, the US has continued to make significant economic improvements across key areas in the past year: inflationary pressures have come a long way since the 40-year highs seen in 2022, with annual inflation sitting at 3.3% as of May 2024, compared to the 9% it reached back in June 2022. The labor market has also remained resilient, with both and job and wage growth rising above expectations in May 2024, along with the unemployment rate continuing to sit close to historic lows.

From the time the Federal Reserve began aggressively raising interest rates in 2022, the US has since defied the odds despite many predicting that the country was headed towards a recession. Year-over-year inflation is slowly easing to the central bank's target rate of 2%, while the job market has held strong along with consistently healthy economic growth – bringing the US closer to a soft landing.

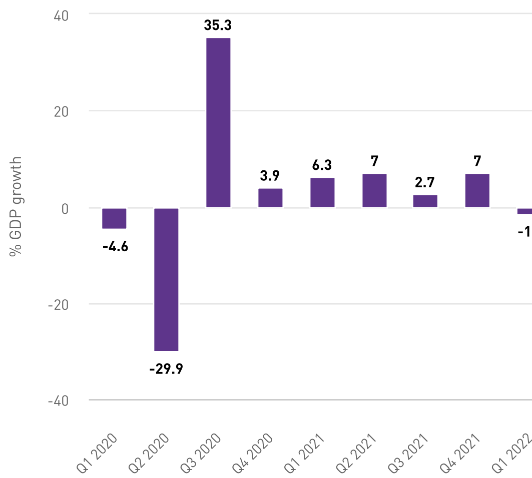
The US expanded by 1.3% in Q1 2024

According to the BEA's second estimate, real GDP increased at an annualized pace of 1.3% for the January-March 2024 period – falling below economists' expectations.

This deceleration is in part due to moderate declines in consumer spending over the past two quarters. Despite this softening, much of the economic expansion in Q1 2024 (roughly 70%) remains attributed to household spending.

With a busy summer season in full flow, which typically sees consumer spending rise, real GDP will likely see larger increases throughout Q2 and Q3 2024.

US: quarterly real GDP growth, 2020-24

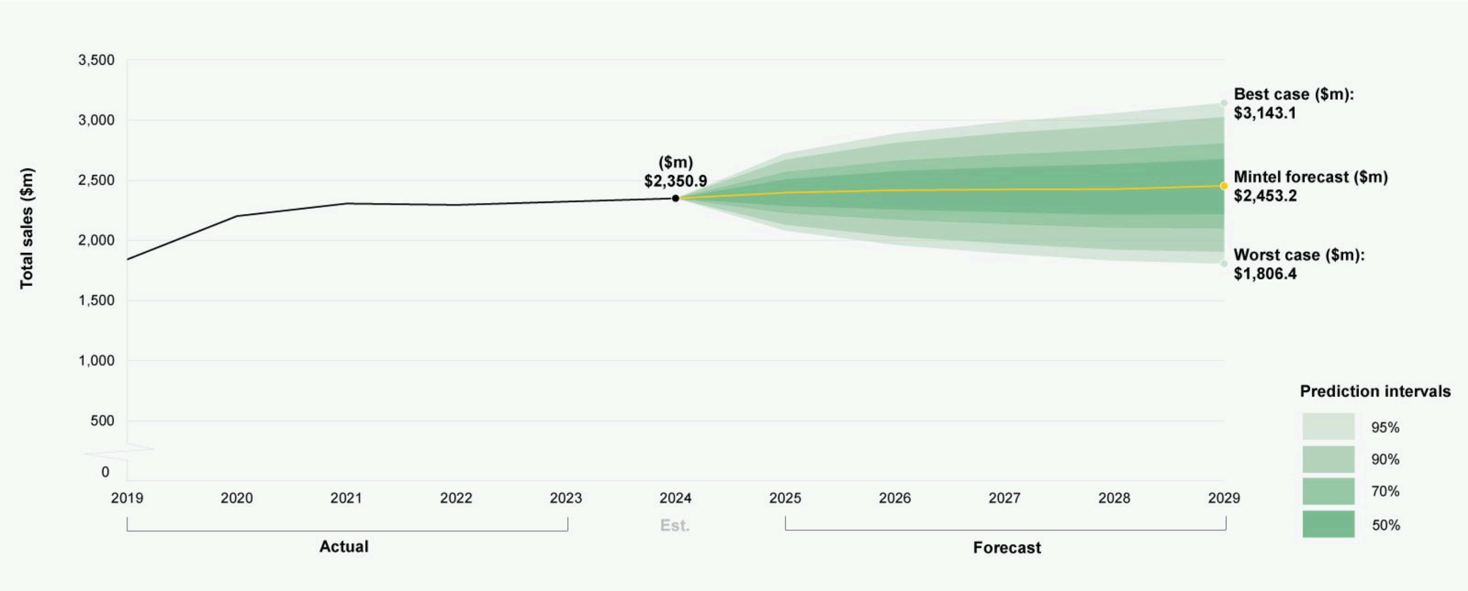


Source: *US Department of Commerce, Bureau of Economic Analysis, Q1 2020-Q1 202*

Sluggish growth expected to continue through 2029

Although the US at-home market has maintained following a year of double-digit expansion in 2020, growth remains sluggish in 2024. The preference for out-of-home nail services is still impacting sales in the at-home sector, even amidst rising consumer goods prices. Colored polish drives sales, but artificial nail products are now the growth leaders, offering opportunities for brands diversifying beyond traditional offerings.

US: retail sales and forecast of nail color and nail care, 2019-29



US – value fan chart: total market

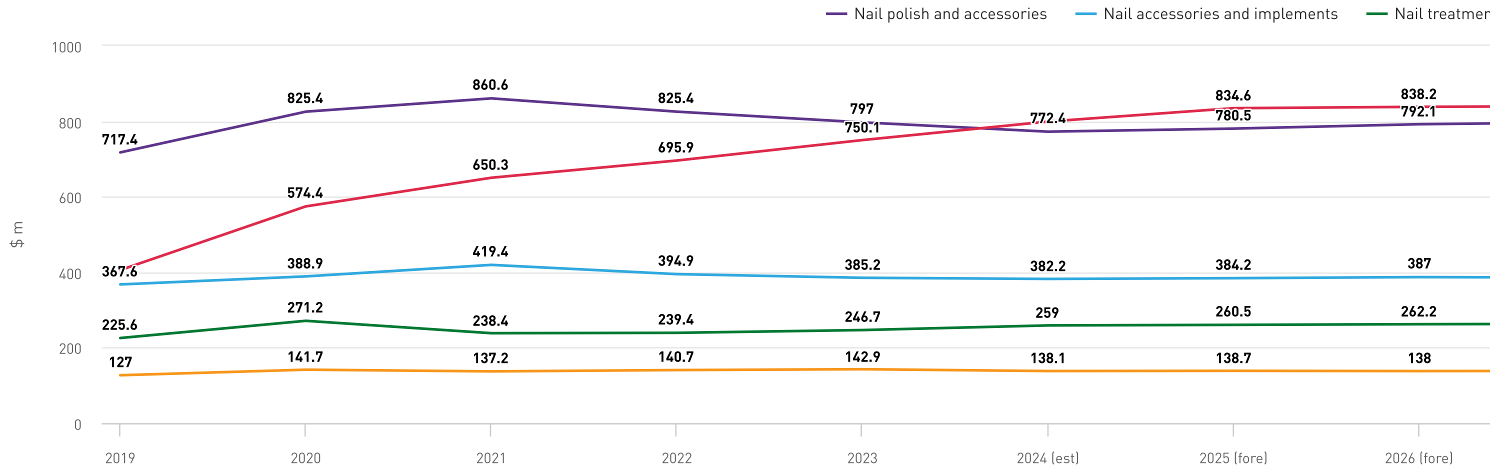
Source: *Mintel*

Market segmentation

Artificial nails expected to surpass nail polish

Artificial nails and accessories expected to take the top spot in 2024 thanks to easy-to-use and convenient formats flooding the US market.

US: total retail sales and forecast of nail color and care products, by segment, at current prices, 2019-29



Source: *Mintel*

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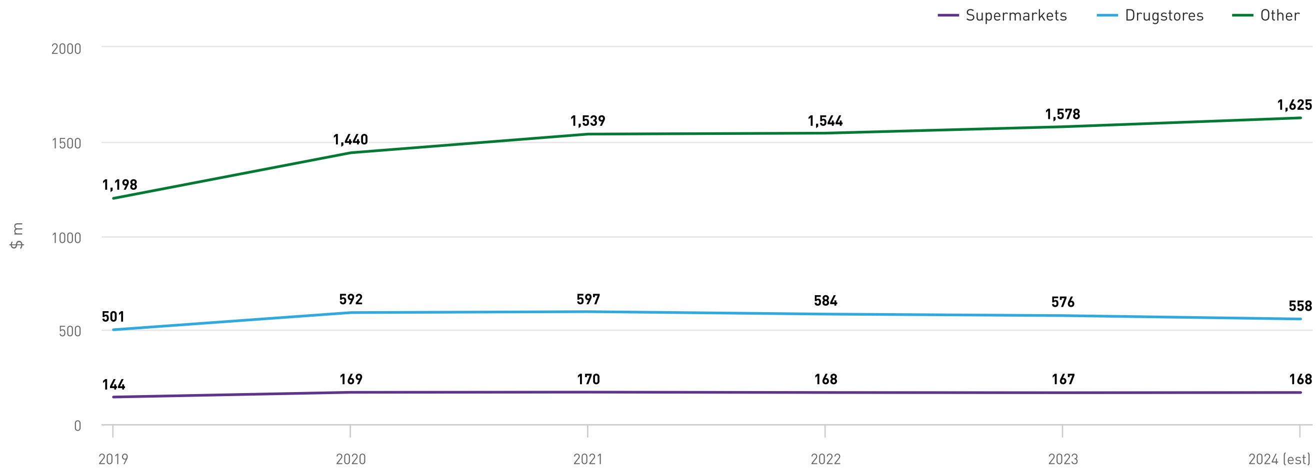
Non-traditional retailers remain the top channel for nail purchases

Supermarkets and drugstores have been traditional places for consumers to buy nail products, staying steady for five years. Meanwhile, the 'other' channel, including warehouse clubs, specialty beauty, and online retailers, drives growth for the category.

With many turning to social media for inspiration, a robust online presence is crucial to appeal to today's nail customers.

US: total retail sales of nail color and care products, by channel, at current prices, 2019-24



Note: *other retail channels include supercenters, warehouse clubs, beauty specialty stores, dollar stores, off-price retailers, online retailers, etc*

Source: *Mintel*

Market share/brand share

KISS remains top player with over a quarter of the market

US: multi-outlet sales of nail color and care products, by leading companies, rolling 52 weeks 2023 and 2024

Company	52 weeks ending May 21, 2023 $ million	Market share %	52 weeks ending May 19, 2024 $ million	Market share %	Sales change 2023-2024 %	Share change % point
Total	**1,757.5**	**100.0**	**1,754.4**	**100.0**	**-0.2**	**-**
KISS Products Inc	457.4	26.0	456.9	26.0	-0.1	0.0
JAB Holding Company	318.3	18.1	327.6	18.7	2.9	0.6
L'Oréal USA	174.0	9.9	156.4	8.9	-10.1	-1.0
KKR & Co Inc	82.4	4.7	99.4	5.7	20.7	1.0
Beauty 21 Cosmetics Inc	88.2	5.0	83.8	4.8	-5.0	-0.2
Olive & June	49.8	2.8	76.5	4.4	53.6	1.5
Subtotal	*1,170.2*	*66.6*	*1,200.7*	*68.4*	*2.6*	*1.9*
Private label	259.2	14.7	244.4	13.9	-5.7	-0.8
Others	328.2	18.7	309.3	17.6	-5.7	-1.0

Note: *values shown in this section encompass only sales through Circana's Multi-Outlet channels, while sales data shown in the Market Size and Market Segmentation sections of this Report cover the entire retail market; data may not equal totals due to rounding*

Source: *Circana InfoScan® Reviews/Mintel*

OPI gains market share in the nail polish sector

US: multi-outlet sales of nail polish and accessories, by leading companies and brands, rolling 52 weeks 2023 and 2024

Company	Brand	52 weeks ending May 21, 2023	Market share	52 weeks ending May 19, 2024	Market share	Sales change 2023-2024	Share change
		$ million	%	$ million	%	%	% point
Total		641.0	100.0	616.3	100.0	-3.9	-
JAB Holding Company	Sally Hansen	240.9	37.6	242.6	39.4	0.7	1.8
	Others	0.2	0.0	0.1	0.0	-46.5	0.0
	Total	241.1	37.6	242.7	39.4	0.7	1.8
L'Oréal USA	Essie	138.7	21.6	127.0	20.6	-8.4	-1.0
	Others	10.9	1.7	3.5	0.6	-67.7	-1.1
	Total	149.5	23.3	130.5	21.2	-12.7	-2.1
KKR & Co Inc	OPI	63.8	9.9	74.4	12.1	16.6	2.1
	Total	63.8	9.9	74.4	12.1	16.6	2.1
Beauty 21 Cosmetics Inc	LA Colors	50.2	7.8	48.7	7.9	-3.0	0.1
	LA Girl	6.5	1.0	7.6	1.2	16.3	0.2
	Total	56.7	8.8	56.3	9.1	-0.8	0.3
Private label		30.7	4.8	22.3	3.6	-27.2	-1.2
Others		99.3	15.5	90.1	14.6	-9.3	-0.9

Base: *values shown in this section encompass only sales through Circana's Multi-Outlet channels, while sales data shown in the Market Size and Market Segmentation sections of this Report cover the entire retail market; data may not equal totals due to rounding*

Source: *Circana InfoScan® Reviews/Mintel*

Tweezerman wins with extensive nail care tool offerings

US: multi-outlet sales of nail accessories and implements, by leading companies and brands, rolling 52 weeks 2023 and 2024

Company	Brand	52 weeks ending May 21, 2023	Market share	52 weeks ending May 19, 2024	Market share	Sales change 2023-2024	Share change
		$ million	%	$ million	%	%	% point
Total		304.2	100.0	299.1	100.0	-1.7	-
Revlon Inc	Revlon	32.9	10.8	31.0	10.4	-5.8	-0.5
	Total	32.9	10.8	31.0	10.4	-5.8	-0.5
Japonesque	Japonesque	22.1	7.3	22.1	7.4	0.1	0.1
	Total	22.1	7.3	22.1	7.4	0.1	0.1
Pacific World Corporation	Trim	20.6	6.8	19.5	6.5	-5.4	-0.3
	Others	2.1	0.7	2.3	0.8	9.6	0.1
	Total	22.7	7.5	21.8	7.3	-4.1	-0.2
Tweezerman International	Tweezerman	12.1	4.0	13.4	4.5	10.9	0.5
	Total	12.1	4.0	13.4	4.5	10.9	0.5
Private label		158.7	52.2	152.5	51.0	-3.9	-1.2
Others		55.7	18.3	58.2	19.5	4.5	1.2

Base: *values shown in this section encompass only sales through Circana's Multi-Outlet channels, while sales data shown in the Market Size and Market Segmentation sections of this Report cover the entire retail market; data may not equal totals due to rounding*

Source: *Circana InfoScan® Reviews/Mintel*

Essie makes headway in the nail treatment subcategory

US: multi-outlet sales of nail treatments, by leading companies and brands, rolling 52 weeks 2023 and 2024

Company	Brand	52 weeks ending May 21, 2023	Market share	52 weeks ending May 19, 2024	Market share	Sales change 2023-2024	Share change
		$ million	%	$ million	%	%	% point
Total		162.4	100.0	165.9	100.0	2.1	-
JAB Holding Company	Sally Hansen	66.5	41.0	67.3	40.6	1.2	-0.4
	Total	66.5	41.0	67.3	40.6	1.2	-0.4
L'Oréal USA	Essie	24.4	15.1	25.9	15.6	5.9	0.6
	Total	24.4	15.1	25.9	15.6	5.9	0.6
KKR & Co Inc	OPI	18.5	11.4	19.7	11.9	6.3	0.5
	Total	18.5	11.4	19.7	11.9	6.3	0.5
Olive & June	Olive & June	6.1	3.7	7.7	4.6	26.6	0.9
	Total	6.1	3.7	7.7	4.6	26.6	0.9
Dashing Diva	Dashing Diva	2.1	1.3	4.3	2.6	108.4	1.3
	Total	2.1	1.3	4.3	2.6	108.4	1.3
Anise Cosmetics LLC	Nail Aid	4.6	2.9	4.3	2.6	-7.8	-0.3
	Total	4.6	2.9	4.3	2.6	-7.8	-0.3
Beauty 21 Cosmetics Inc	LA Colors	3.8	2.4	3.2	1.9	-16.7	-0.4
	LA Girl	0.5	0.3	0.9	0.6	94.7	0.3
	Total	4.3	2.7	4.1	2.5	-4.2	-0.2
Private Label		3.6	2.2	4.1	2.5	14.7	0.3
Others		32.2	19.8	28.4	17.1	-11.7	-2.7

Base: *values shown in this section encompass only sales through Circana's Multi-Outlet channels, while sales data shown in the Market Size and Market Segmentation sections of this Report cover the entire retail market; data may not equal totals due to rounding*

Source: *Circana InfoScan® Reviews/Mintel*

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Olive & June nearly doubles with fresh press-on options

US: multi-outlet sales of artificial nails and accessories, by leading companies and brands, rolling 52 weeks 2023 and 2024

Company	Brand	52 weeks ending May 21, 2023	Market share	52 weeks ending May 19, 2024	Market share	Sales change 2023-2024	Share change
		$ million	%	$ million	%	%	% point
Total		535.7	100.0	563.0	100.0	5.1	-
KISS Products Inc	Kiss	443.6	82.8	444.7	79.0	0.3	-3.8
	Total	443.6	82.8	444.7	79.0	0.3	-3.8
Olive & June	Olive & June	22.9	4.3	43.7	7.8	90.6	3.5
	Total	22.9	4.3	43.7	7.8	90.6	3.5
Private Label		2.5	0.5	6.1	1.1	142.0	0.6
Others		66.7	12.4	68.5	12.2	2.7	-0.3

Base: *values shown in this section encompass only sales through Circana's Multi-Outlet channels, while sales data shown in the Market Size and Market Segmentation sections of this Report cover the entire retail market; data may not equal totals due to rounding*

Source: *Circana InfoScan® Reviews/Mintel*

Make nails worth it: reusables

As artificial nails continue to gain steam, reusable attributes pique consumer interest, especially among those using for specific occasions.

Keep removal techniques easy to entice further product usage

While most adults say they use proper at-home removal techniques, brands can showcase and bundle removal offerings to entice occasion-based users and preserve nail health.

Low-risk finishes and formats for experimental users

Younger nailcare users report elevated levels of nail art usage; brands should prioritize aesthetics and easy application attributes to gain market share.

Premiumization through simplicity and nail health

With 35% of polish users say nail health benefits are a trade-up motivator, premium brands focus on ingredient-led formulations and innovations to enhance natural color.

Time and cost-savings at the forefront of messaging

To influence at-home use, brands are directly advertising their time and cost-saving benefits to full-service kits at home.

Hand & cuticle care: a natural extension for nail brands

Global cuticle-care launches nearly doubled between 2022 and 2023, with facial skincare ingredients and concepts at the forefront of messaging.

AI makes headway in nail care: Nimble Beauty

Nimble Beauty has introduced its AI-powered nail polish device, showcased at CES 2024. This technology stands out as the "world's first at-home nail salon that offers salon-quality nails without stepping foot outside." Utilizing robotics and advanced AI, Nimble scans, paints, and dries nails with precision in just one seamless operation; it's 270° nail-scanning technology ensures that every inch of the nail is mapped accurately.

With the capability to accurately paint nails in 25 minutes, as reported by Mashable, the device offers two manicure options, allowing users to customize their experience according to their preferences. By reducing the need for salon visits, Nimble saves time but also promotes a more sustainable approach to beauty by minimizing the resources typically consumed during professional manicure services.

Source: *Nimble Beauty*

Consumer fast facts

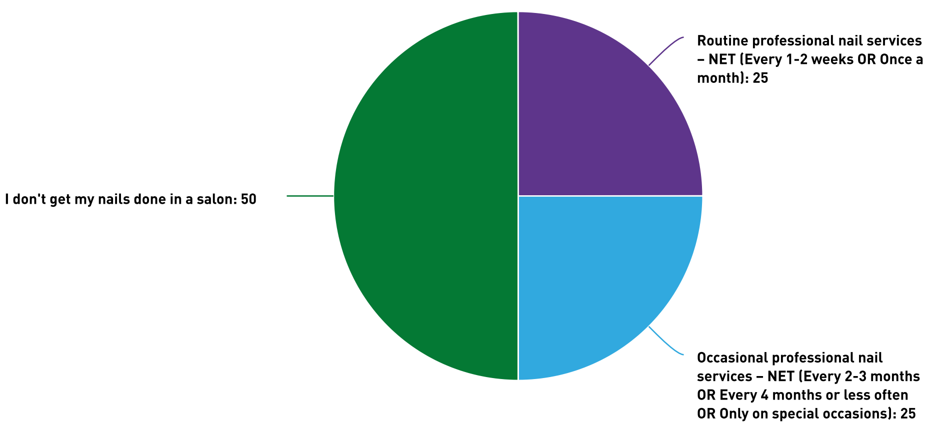
- Half of adults say they've received a professional nail service in the last 12 months, with a quarter saying it's a routine service they engage with.
- DIY enthusiasts appreciate the cost savings, the joy of self-nail care, and the need for quick solutions; salon clients often visit nail spas for relaxation, application assistance, and to avoid nail damage.
- Older adults are driving traditional nail color formats, with those aged 18-44 driving usage of gels, press-ons and nail art.
- Most adults are maintaining their nail care spending levels, however 30% of 18-34s report spending more in the last year; many young adults report looking to social media, researching inspiration and wearing press-ons and nail art more.
- Gen Zs and Millennials show desires for nail health and naturalness – a likely halo from the broader BPC market.

Professional nail services

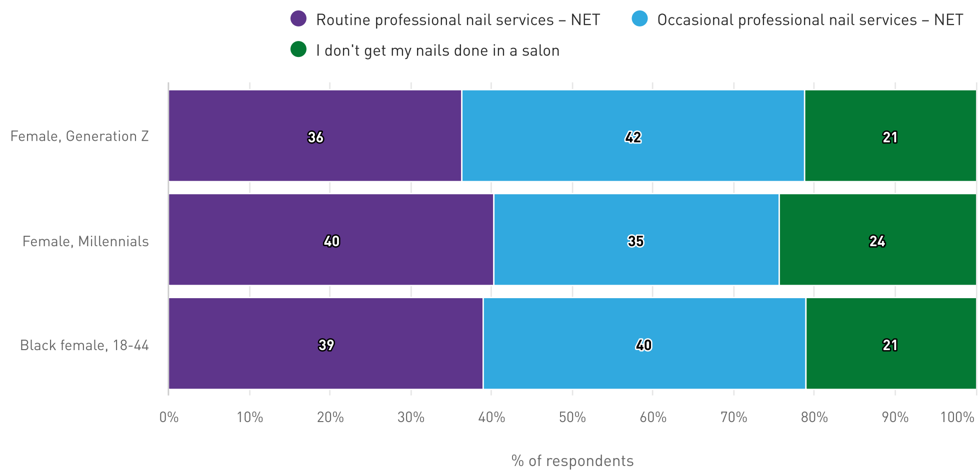
Just as many adults get routine nail services as occasional users

Only half of adults report a nail service in a salon in the last year, but over three-quarters of key female demographics report at least occasional nail salon services.

US: frequency of nail services in a salon, 2024



US: frequency of nail services in a salon (NET), by select demographics, 2024



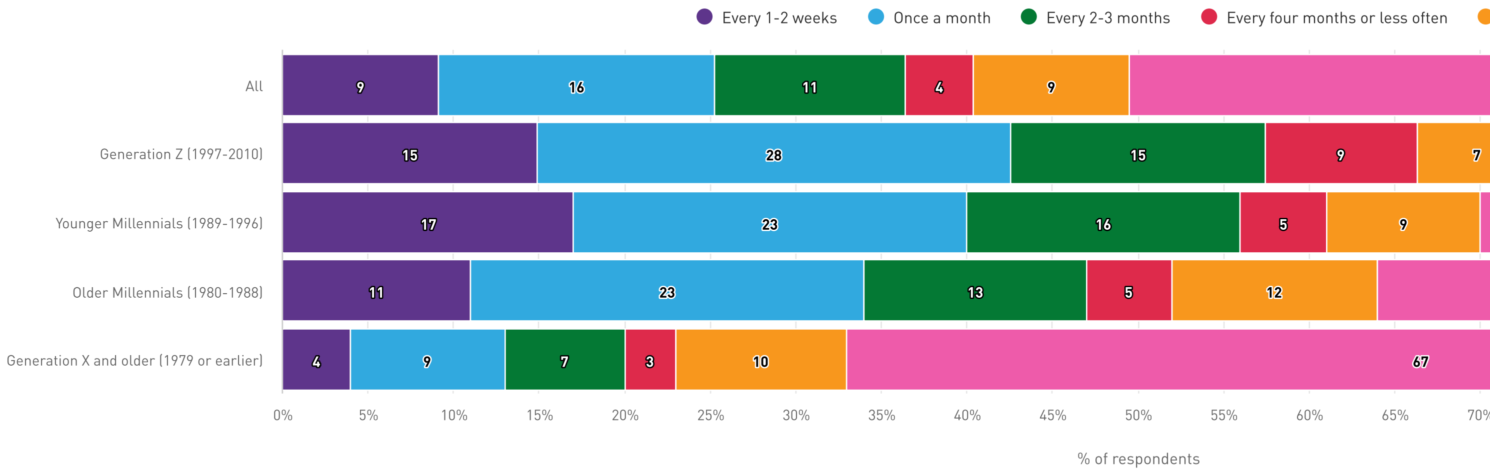
Base: *2,000 internet users aged 18+*

Source: *Kantar Profiles/Mintel, April 2024*

Provide at-home longevity products to support once-a-month professional routines

Professional nail services are typically sought once a month by Gen Zs and Millennials, showcasing potential for at-home innovations that support month-long routines.

US: frequency of nail services in a salon, by generation, 2024

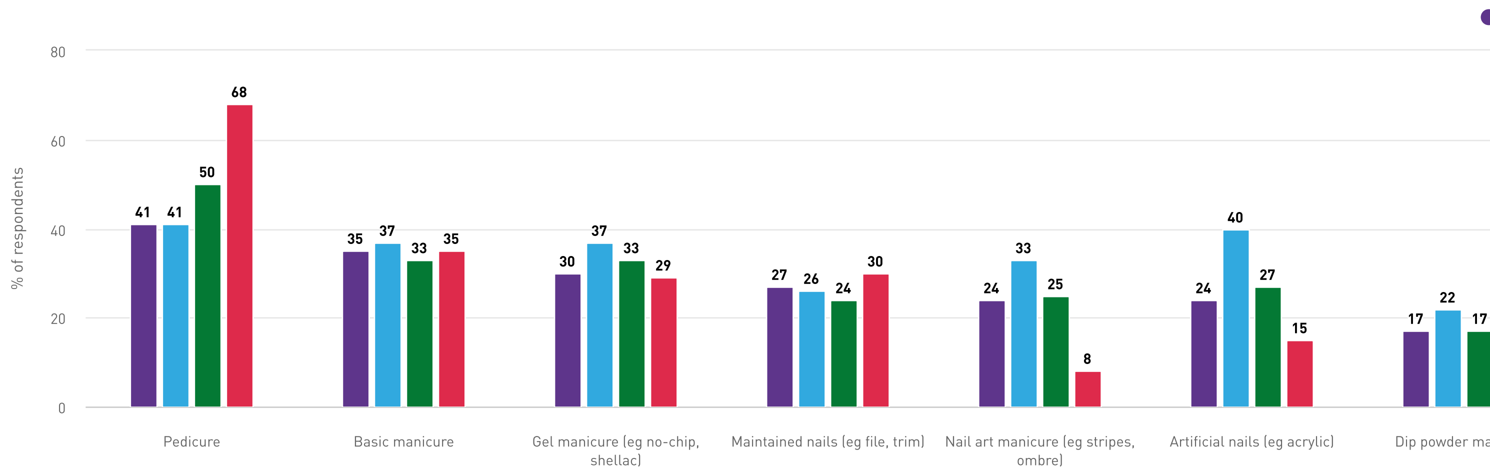


Base: *2,000 internet users aged 18+*
Source: *Kantar Profiles/Mintel, April 2024*

Young women opting for specialized nail services, older women go traditional

Women 55+ are more likely than younger women to have received a pedicure, and women 18-34 are more likely to have received artificial nails compared to older counterparts.

US: nail services in a salon in the past 12 months, by gender and age, 2024

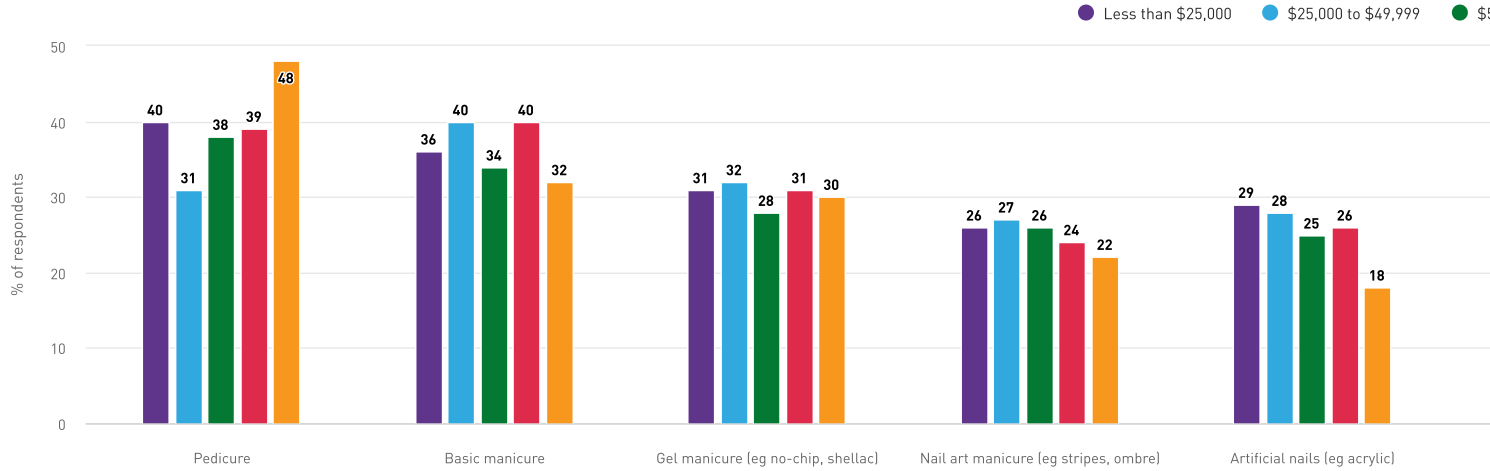


Base: *999 internet users aged 18+ who have received a professional nail service in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

Household income likely doesn't impacting service mix

Despite lower household incomes, similar engagement is seen across key nail services such as pedicures, manicures and artificial nails.

US: nail services in a salon in the last 12 months, by household income, 2024

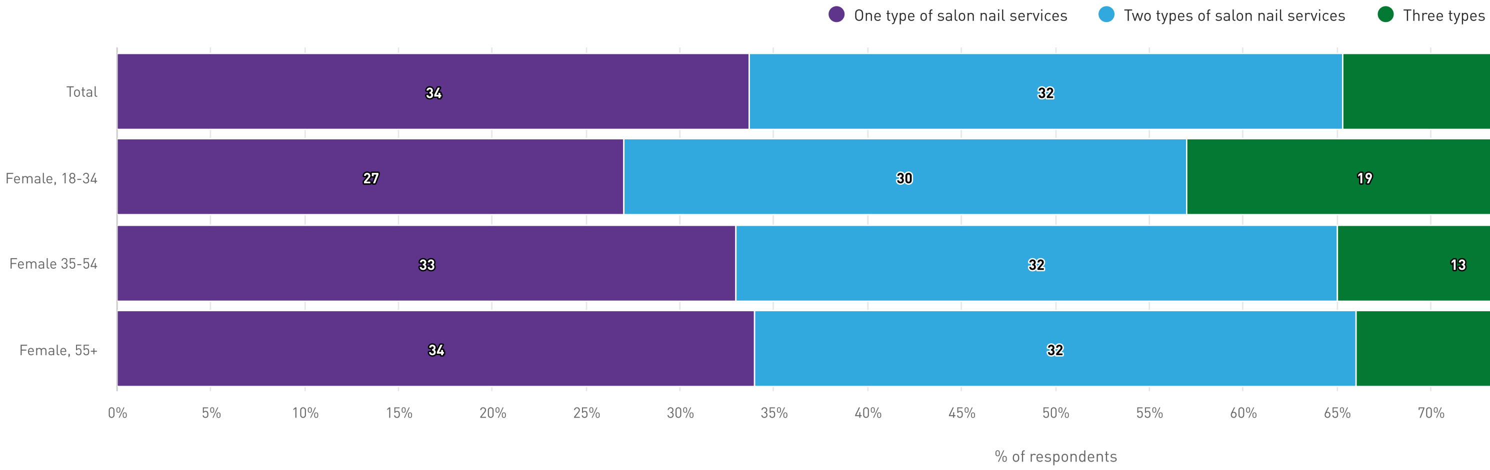


Base: *999 internet users aged 18+ who have received a professional nail service in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

Professional routines vastly individualized

While 1-2 types of nail services are most common, women 18-34 report higher instances of 3-4 types of nail services received (43%) vs all service users (35%).

US: number of nail services in a salon (Repertoire), by gender and age, 2024



Base: *913 internet users aged 18+ who have received a professional nail service in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

4+ types of service-goers experimenting across all options

While pedicures and basic manicures are prioritized, those engaging with 3 or more services start to experiment across all formats and options.

US: nail services in a salon in the past 12 months, by number of services received in the last 12 months, 2024

% of respondents	One type of salon nail services	Two types of salon nail services	Three types of salon nail services
Gel manicure removal	4	12	18
Dip powder manicure	8	11	25
Artificial nails (eg acrylic)	10	18	35
Nail art manicure (eg stripes, ombre)	10	23	38
Maintained nails (eg file, trim)	12	24	42
Gel manicure (eg no-chip, shellac)	11	26	46
Basic manicure	23	39	44
Pedicure	23	47	52

***Base:** 913 internet users aged 18+ who have received a professional nail service in the past 12 months*
***Source:** Kantar Profiles/Mintel, April 2024*

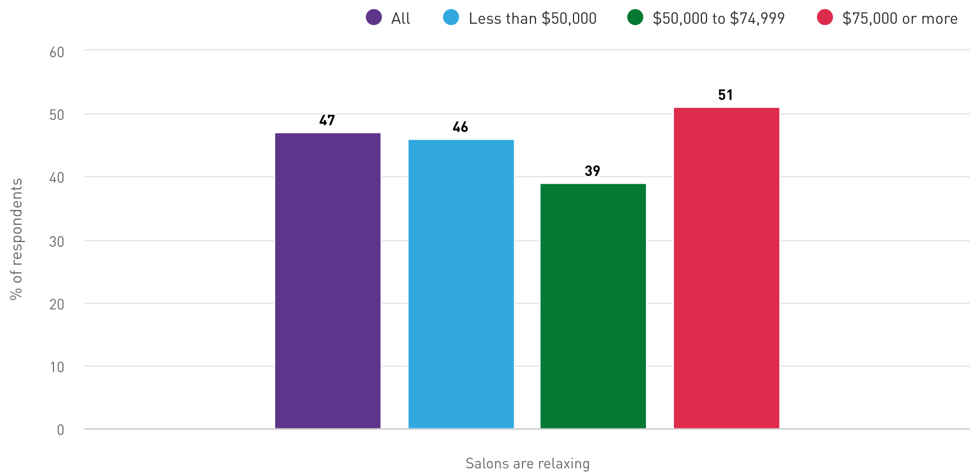
Reasons for salon services over DIY

Go beyond functional application with mental relaxation and self-care themes

No matter the household income, a relaxing environment is one of the top reasons adults are heading to salons instead of doing their nails at home. Even among those with HHIs less than $50k, going beyond functional service and opting for environments that provide mental wellness through relaxation indicates opportunities for at-home brands.

At-home nail brands should look to bring pampering home, going beyond functional need and including sensory attributes such as scent, texture and calm themes to promote self-care for wellbeing.

US: select reasons for nail services at a salon opposed to DIY, by household income, 2024

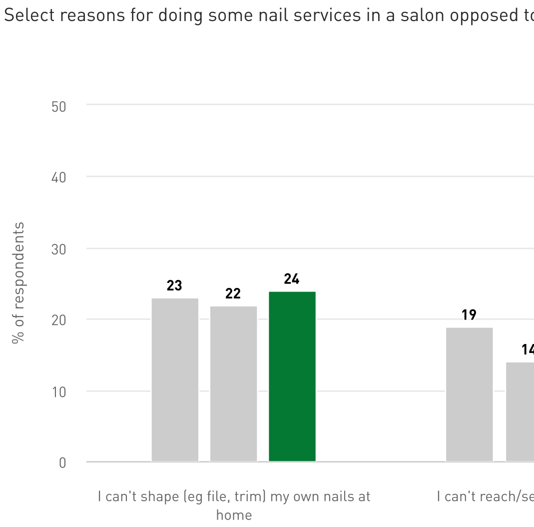


***Base:** 913 internet users aged 18+ who have had their nails done at a salon in the past 12 months*
***Source:** Kantar Profiles/Mintel, April 2024*

Support steady hands across all ages and abilities

While nearly a quarter of adults across all age groups head to salon due to struggles with shaping nails at home, adults aged 55+ are more likely to say they go to salons because they can't reach their toenails and don't like the results of doing their own nails. Even among adults under 55, elevated levels of dislike of at-home results is clear as nearly one-third of adults agree with this sentiment.

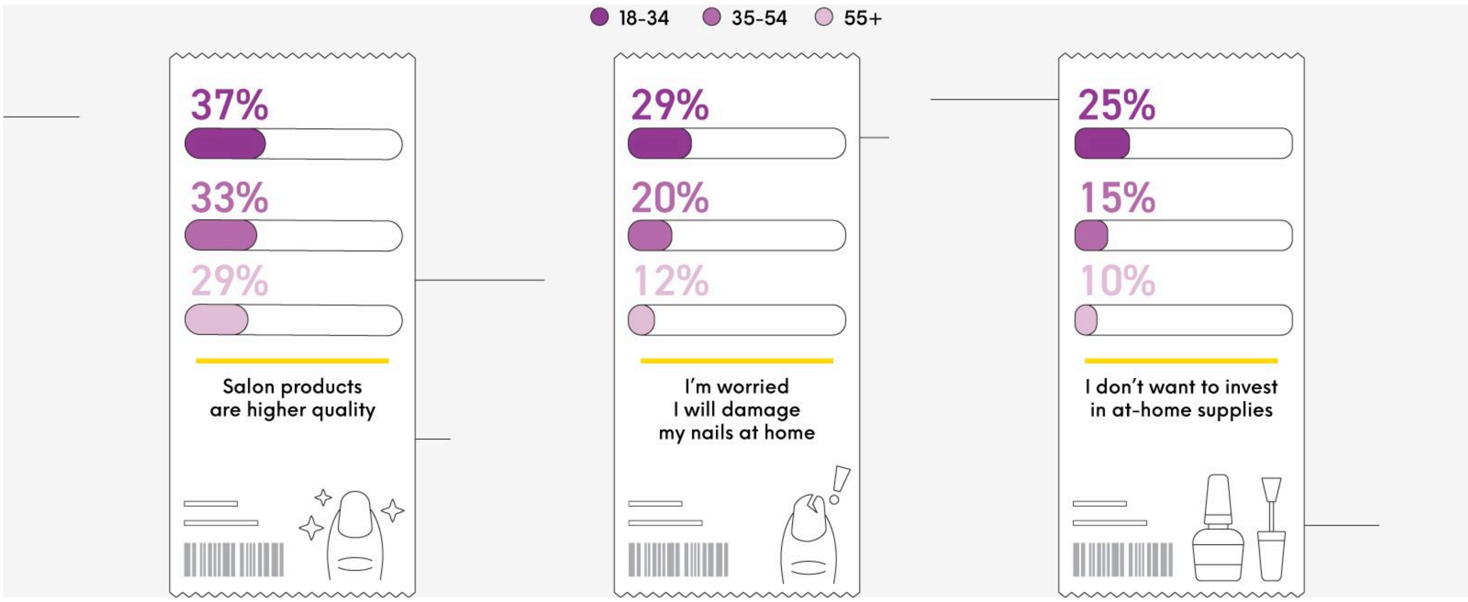
Brands must tailor innovation around functional support, helping not only those who struggle with application for mobility purposes, but for steady hands at all ages. Indeed, certain innovations exist like The Poppy from Olive & June and the 'Stedi Pedi', but accessible and understood application tools are niche, showcasing greater opportunity for brands to enter the space.



Base: *913 internet users aged 18+ who have had their nails done at a salon in the past 12 months; 410 internet users aged 18+ who have had pedicures done at a salon in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

Guide application through step-by-step support

US: select reasons for nail services at a salon opposed to DIY (doing it at home), by age, % of respondents, 2024



Base: *913 internet users aged 18+ who have had their nails done at a salon in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

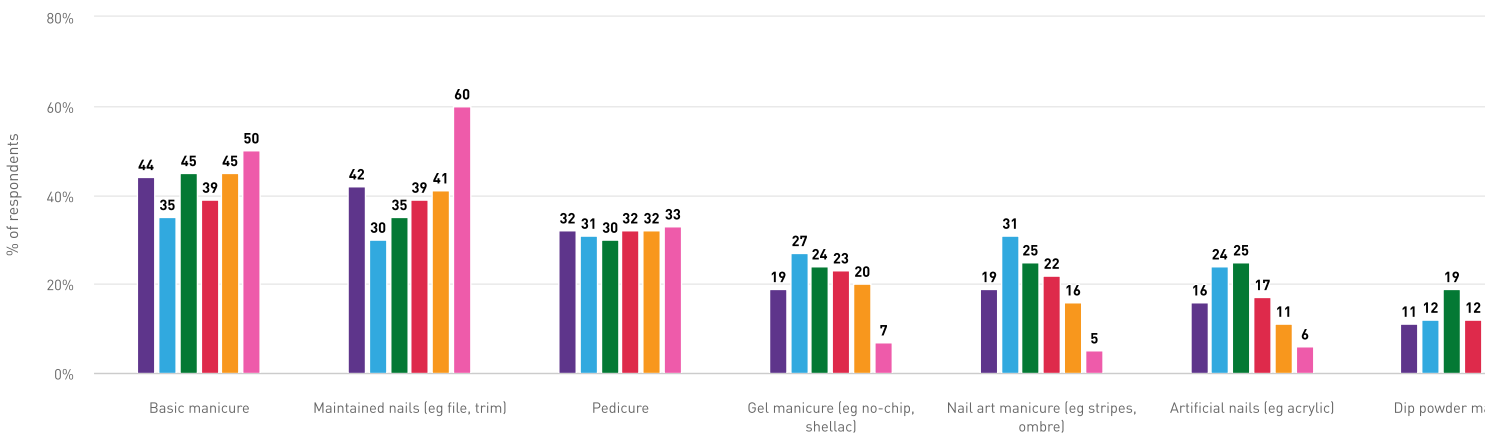
DIY "services" at home

01
02
03
04
05

Focus on the at-home pedicure space

Gel manicures, nail art, and artificial nails are popular with younger buyers. At-home pedicures appeal to a wide range of ages, showing potential for broader appeal.

US: nail "services" completed by self at home, by age, 2024



"Which of the following have you done yourself in the past 12 months? Please select all that apply."

***Base:** 1,176 internet users aged 18+ who have completed a nail service at home in the past 12 months*

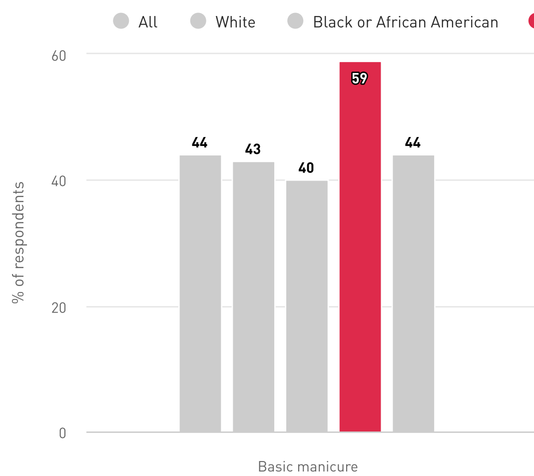
***Source:** Kantar Profiles/Mintel, April 2024*

Support Asian Americans with at-home routines

Asian American nail care users are more likely to have completed an at-home manicure or pedicure compared to all at-home users. Most Asian American BPC users are interested in improving their at-home BPC skills, creating comprehensive at-home nail routines that encompass high-quality, easy-to-use and fun may intrigue this important demographic, highlighted in Mintel's *Asian American Beauty Consumer – US – 2023*:

- 37% of Asian American Beauty Consumers choose to do certain services at home (over professionally) because they enjoy doing it themselves.
- 85% of Asian American Beauty Consumers only go to salons/spas for services they cannot do themselves.
- 67% of Asian American Beauty Consumers opt for DIY at-home services (over professionally) because it's more convenient.

US: select nail services done on self at home in the last 12 montl

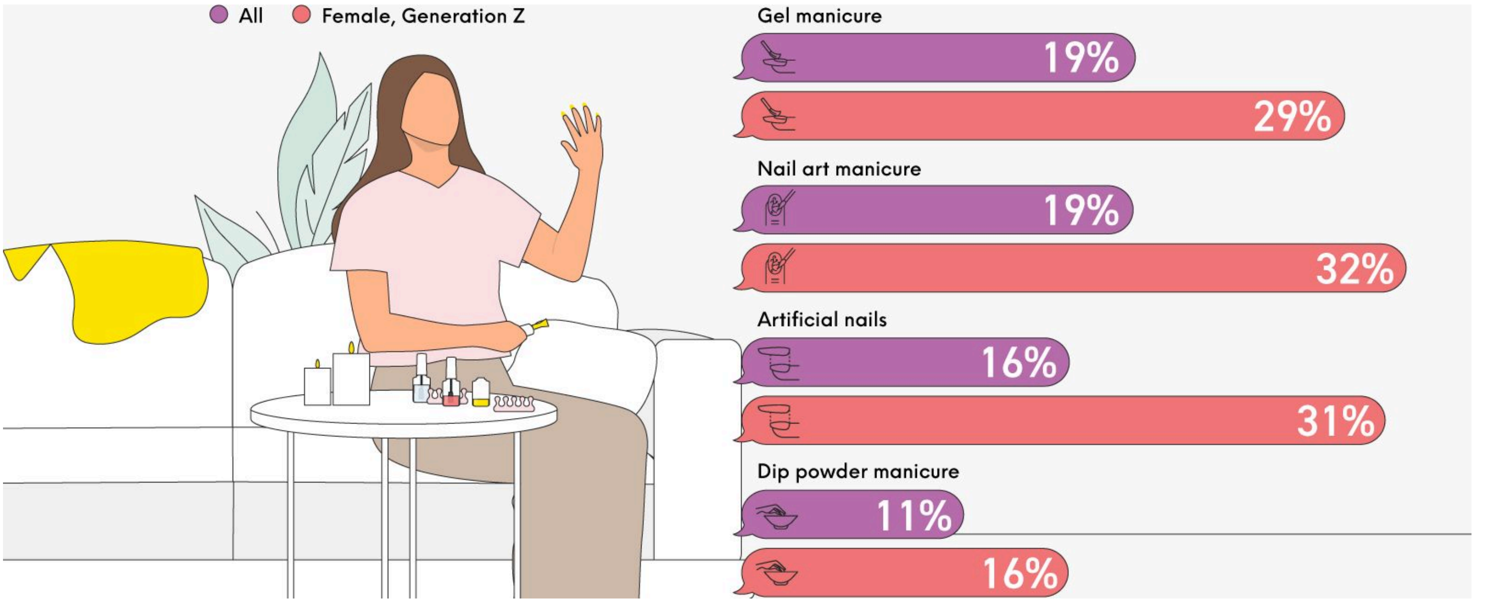


***Base:** 1,176 internet users aged 18+ who have completed a nail service at home in the past 12 months*

***Source:** Kantar Profiles/Mintel, April 2024*

Aesthetic-forward innovation primed for Gen Z women

US: nail “services” completed by self at home, Generation Z females, % of respondents, 2024



Base: *1,176 internet users aged 18+ who have completed a nail service at home in the past 12 months; 140 female Generation Z internet users aged 18+ who have completed a nail service at home in the past 12 months*

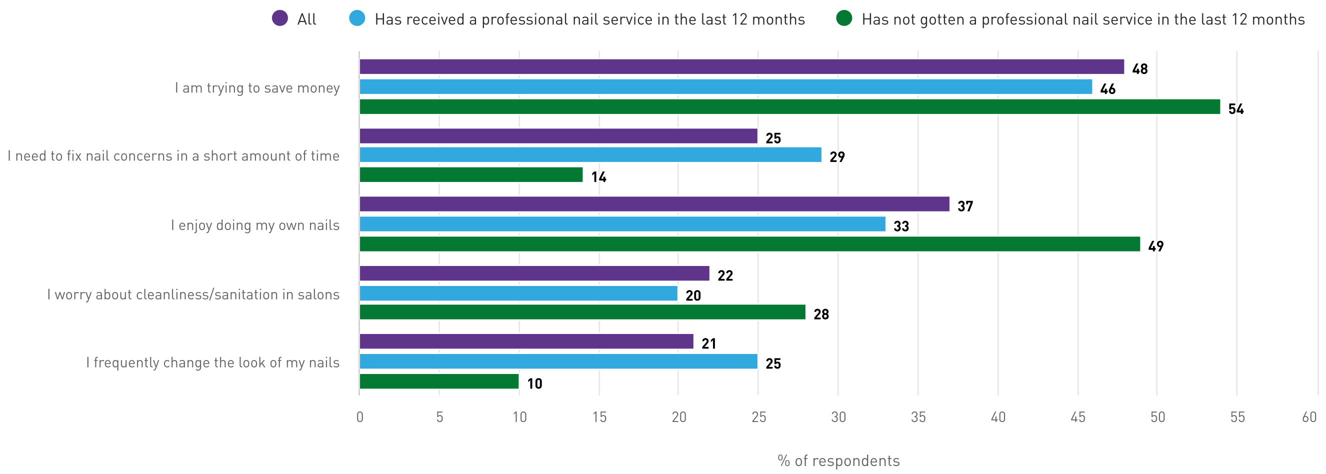
Source: *Kantar Profiles/Mintel, April 2024*

Bring joy to at-home routines

While the top-sought reason for at-home services focuses around money-saving behaviors, almost four in ten adults enjoy doing their own nails, with nearly half of those who do not get professional nail services agreeing with this statement.

Promoting joy and fun in at-home applications should be considered, mimicking a relaxing, stress-free environment.

US: reasons for DIY opposed to professional service, by nail salon goers, 2024



Base: *1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*

Source: *Kantar Profiles/Mintel, April 2024*

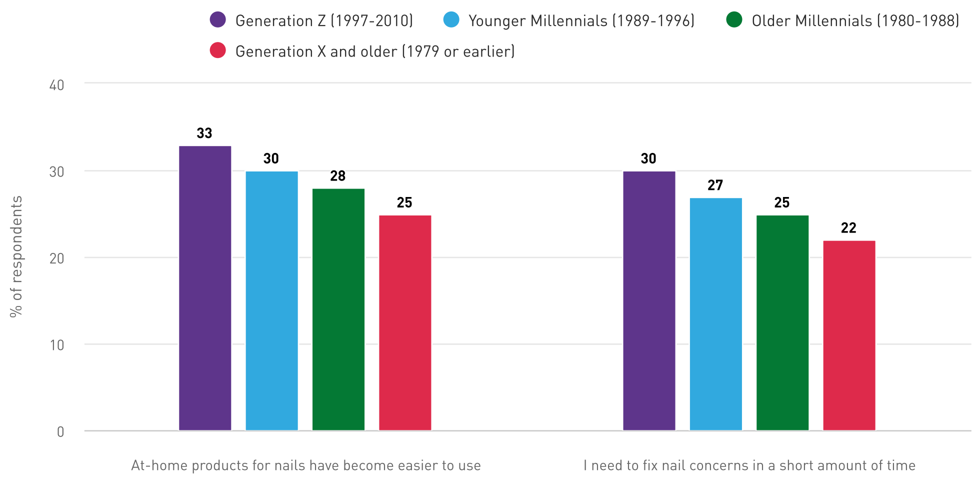
Quick-fix kits with digital tips can engage Gen Zs and Millennials

Gen Z and Millennial at-home users show a heightened appreciation for user-friendly products, indicating a recognition of the convenience and modern attributes of DIY applications.

Moreso, these key demographics exhibit a particular interest in DIY nail care as a speedy solution for nail-related concerns. By considering the importance of simplicity and time efficiency, nail care brands can develop quick-fix kits that tackle nail polish and artificial nail application issues, accompanied by clear instructions for maintenance.

Given the strong inclination of Gen Z and Millennial users towards online beauty tutorials and influencer content for at-home routines, providing digital platforms for nail inspiration, tips, and instructional guides can effectively engage this audience.

US: select reasons for DIY opposed to professional service, by generation, 2024



Base: *1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*

Source: *Kantar Profiles/Mintel, April 2024*

Quickies keeps it simple for on-the-go use

Quickies has carved a niche for itself in the beauty industry by specializing in high-quality, salon-level press-on nails. The brand stands out for its wide range of **easy-to-apply nail kits, catering to various preferences and styles**, including options for those who favor short nails. Notably, Quickies offers its products at an accessible price point, with nail kits available under $30, making it a cost-effective alternative to traditional salon manicures.

Quickies' convenient to-go kit

Quickies' 'How to apply' education

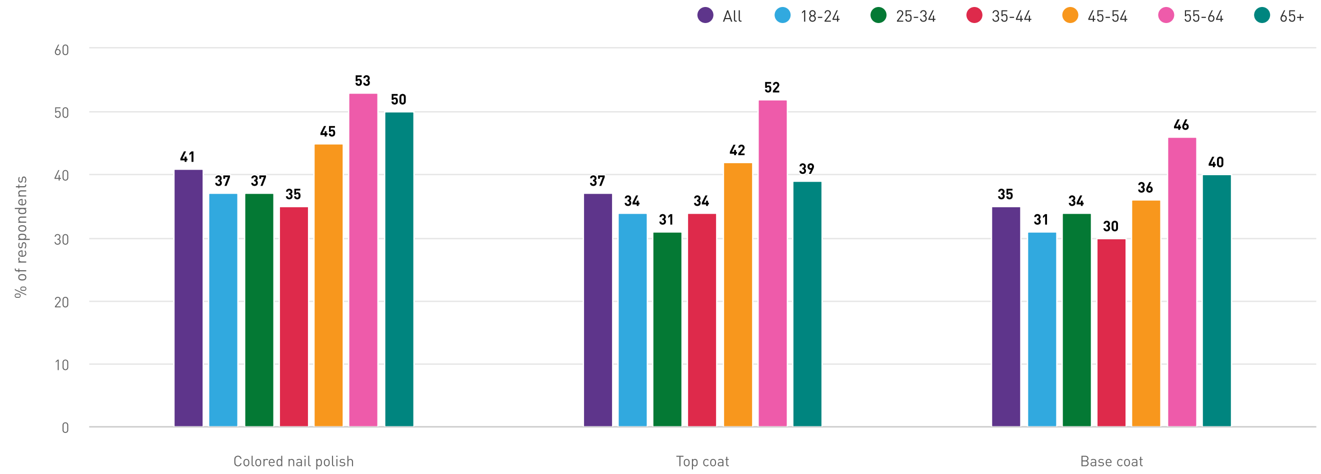
At-home nail polish/artificial nail product usage

Older adults drive traditional colored polish

Adults 55+ drive usage of color formats, top coats and base coats – leaning into traditional formats, where as adults under 55 lean as much into gel options as colored polish.

Innovative messaging that promotes quick-fix solutions for occasion-based wear may entice younger users.

US: nail color/artificial product usage at-home, by age, 2024



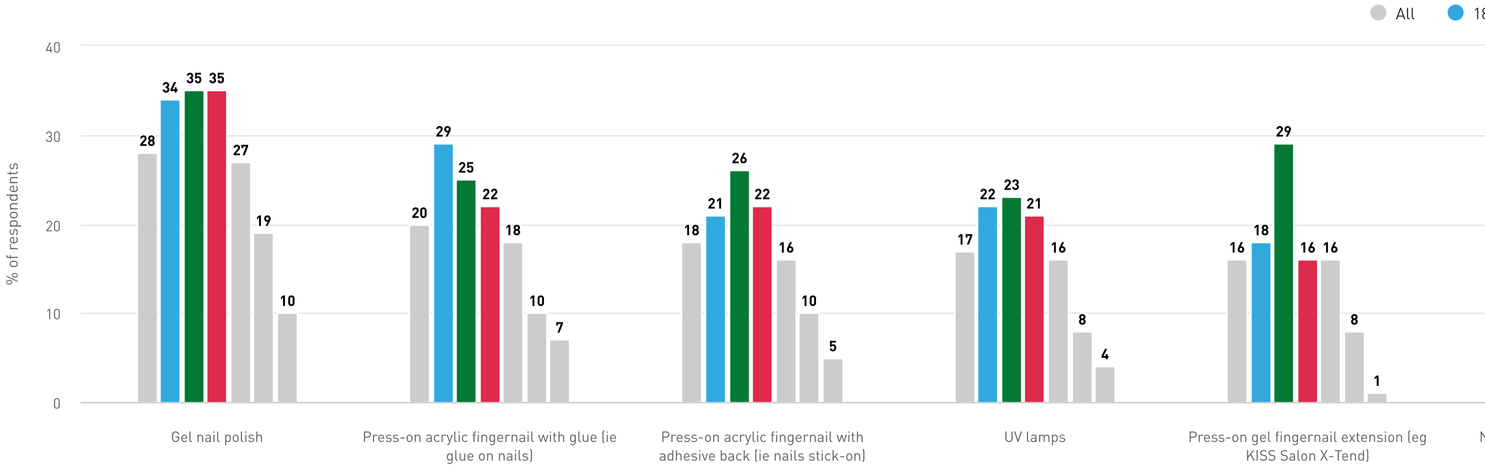
Base: *1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*

Source: *Kantar Profiles/Mintel, April 2024*

18-44s more apt to use modern innovations

Gel and press-on usage is driven by those aged 18-34; more specifically, adults aged 25-34 are more likely to be using press-on gel fingernail extensions.

US: nail color and artificial nail product usage, by age, 2024



Base: *1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*

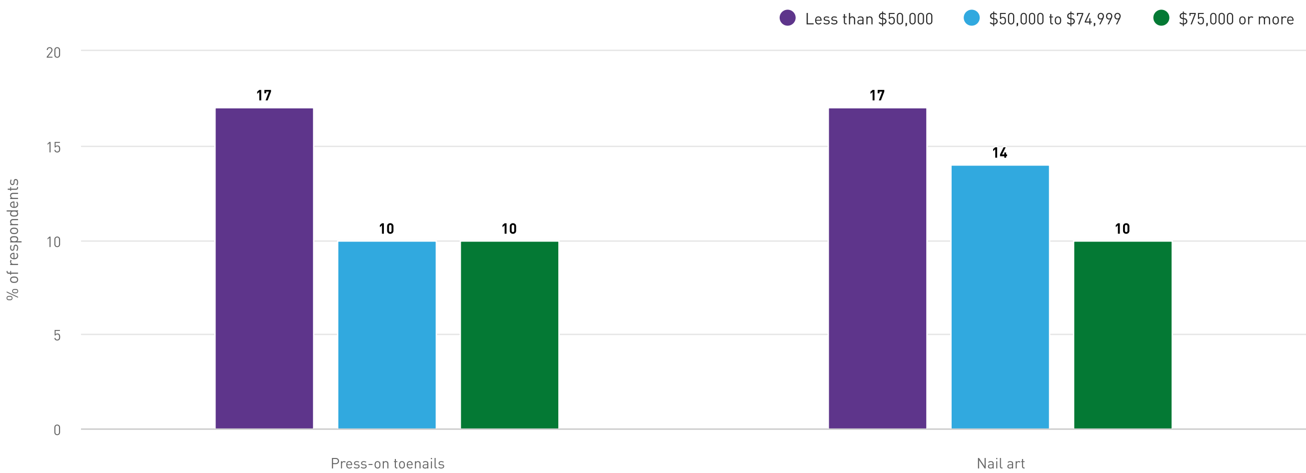
Source: *Kantar Profiles/Mintel, April 2024*

Build value savings in press-on toenails

While press-on finger nails have gained significant traction in the marketplace and professionally-done pedicures remain popular, press-on toe nails can be positioned as a cost-savings product, especially for those on a budget.

While launches in this space are not as widespread as hand-focused products, opportunities exist to market the same ease-of-use and convenience attributes seen across the category.

US: select colored polish/artificial nail product usage, by household income, 2024

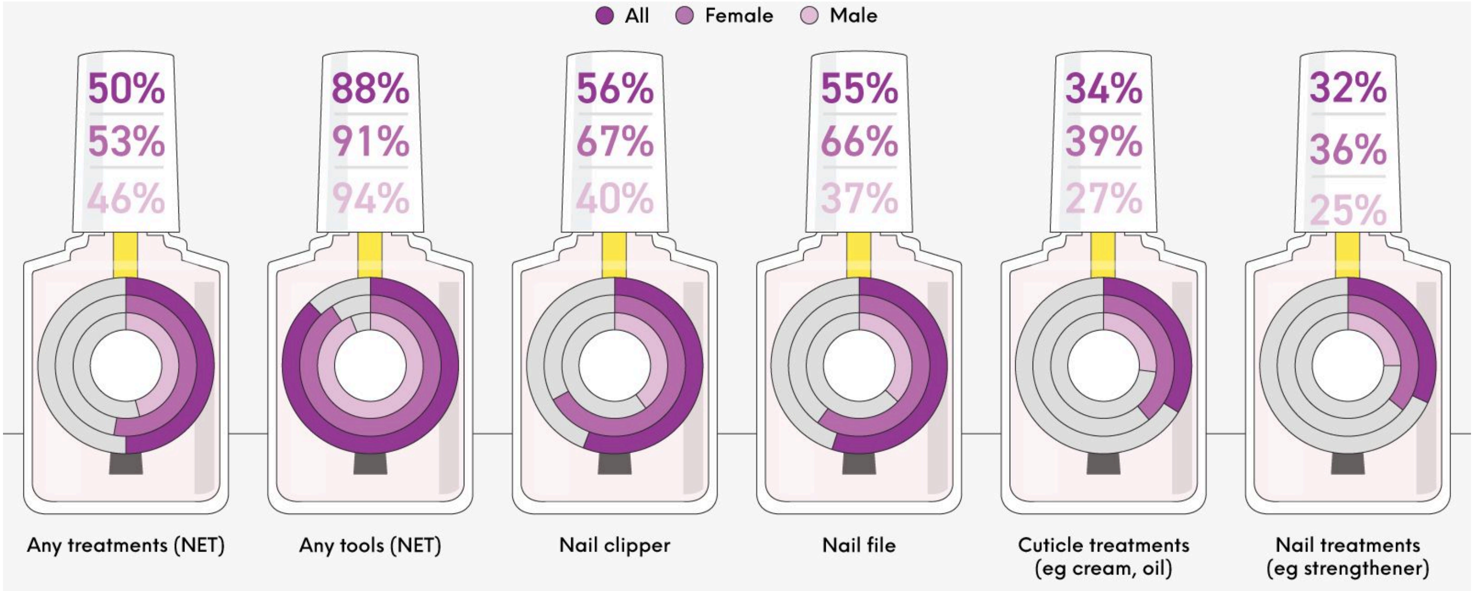


Base: *1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*

Source: *Kantar Profiles/Mintel, April 2024*

Take a skin/nail health approach to tools and treatments

US: nail care and maintenance product usage at home (NET), by gender, % of respondents, 2024



Nets: Any treatments – NET: Cuticle treatments (eg cream, oil) OR Nail treatments (eg strengthener); Any tools – NET: Nail file OR Nail buffer OR Cuticle pusher OR Nail clipper OR Nail glue remover OR Gel polish/artificial nail soak-off kit (eg KISS quick soak-off kit)

***Base:** 1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*

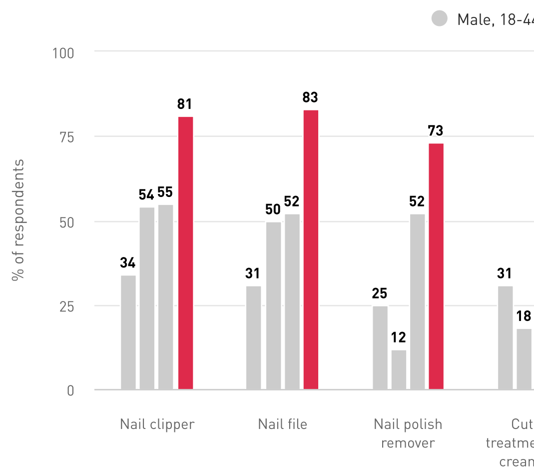
***Source:** Kantar Profiles/Mintel, April 2024*

Couple maintenance and aesthetic properties to push use

Older women 45+ are driving usage of nail care and maintenance products with below-average engagement among younger women. Bundling aesthetic products with nail care tools/accessories may be an accessible way to get in front of younger women, particularly those who are paying more attention to their nail health and those engaging with trending subcategories like artificial press-on nails.

Additionally, male participation remains limited similarly reported in *Nail Color and Care – US – 2022*. While many tools support functional needs, pushing cuticle health and appearance as a pillar of self-care may intrigue potential users, especially as over half of men report paying more attention to their cuticle/nail health compared to a year ago.

US nail care and maintenance product usage, by gender and age



Base: *1,080 internet users aged 18+ who have done their nails at-home in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

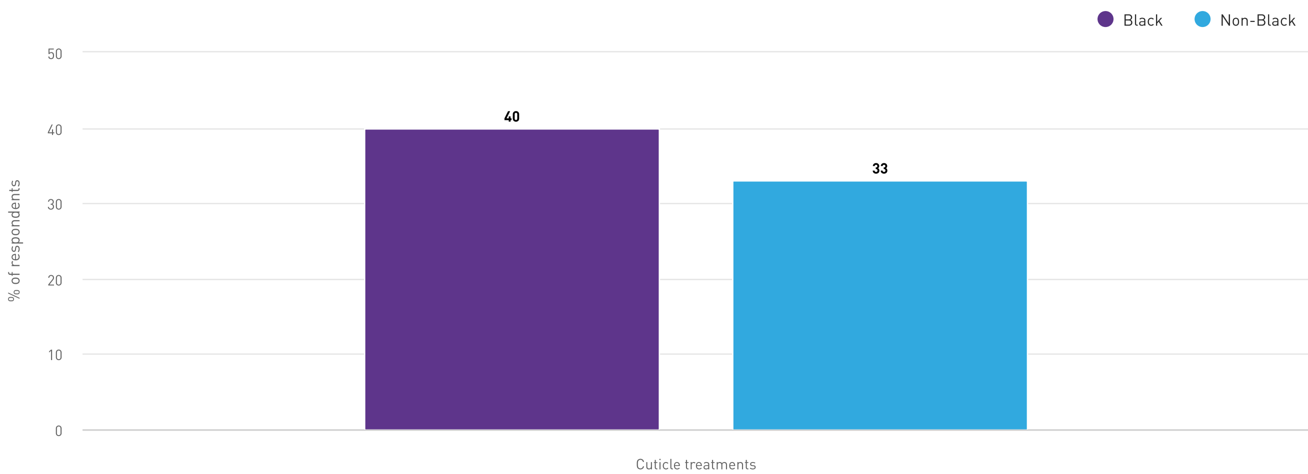
Olive & June elevates routines with premium steps

Through offering complimentary subcategories that round-out an entire at-home manicure or pedicure, the brand drives AOV and LTV through secondary, holistic steps.

Skincare-inspired ingredient messaging in cuticle support can entice Black users

Black adults are more likely to use cuticle treatment products at home than non-Black users, a connection that may be attributed to cultural grooming practices and a prioritization of nail/cuticle aesthetics. With over half of Black beauty consumers saying easy-to-use and natural ingredients attributes are important in their products, promoting ingredient-led cuticle support through skincare-inspired language can translate well to this demographic.

US: cuticle treatment product usage at home, by race or ethnicity, 2024



Base: *1,085 internet users aged 18+ who have done their nails at-home in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

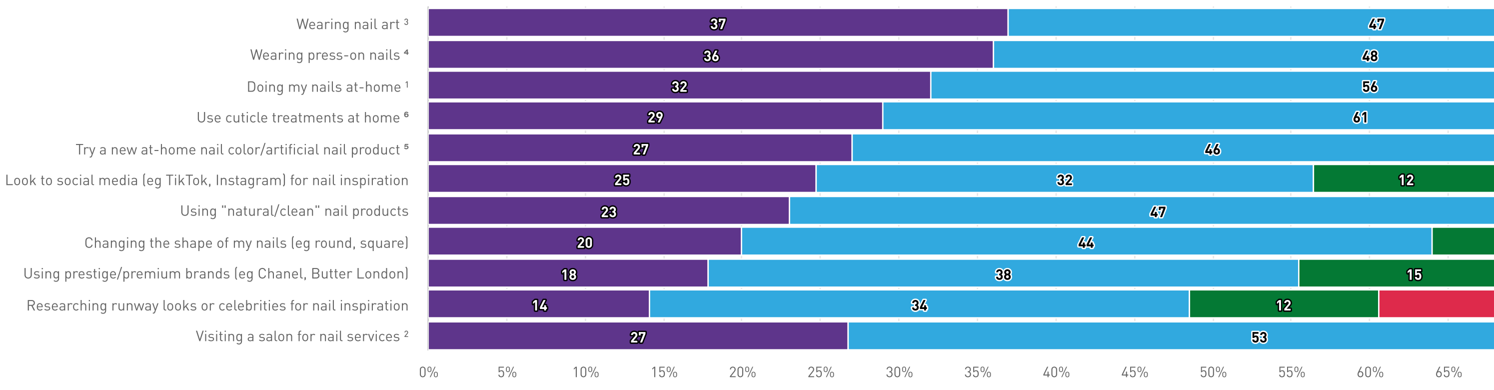
Nail behaviors and routine changes compared to a year ago

"How often are you doing the following compared to one year ago?"

Low-risk/cost products see most increased usage

Routines tend to remain consistent compared to a year ago, but there's a notable rise in nail art, press-ons, and DIY nail care, possibly driven by affordable, low-risk NPD.

US: nail routine behaviors compared to a year ago, 2024



Base: *[1] 1,102 internet users aged 18+ who have done their nails at-home in the past 12 months; [2] 942 internet users aged 18+ who have done their nails at-home and at a salon in the past 12 months; [3] 336 internet users aged 18+ who have used at-home nail art; [4] 456 internet users aged 18+ who have used at-home press-on nails; [5] 927 internet users aged 18+ who have used at-home nail color products; [6] 370 internet users aged 18+ who have used at-home cuticle treatments; 1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months*

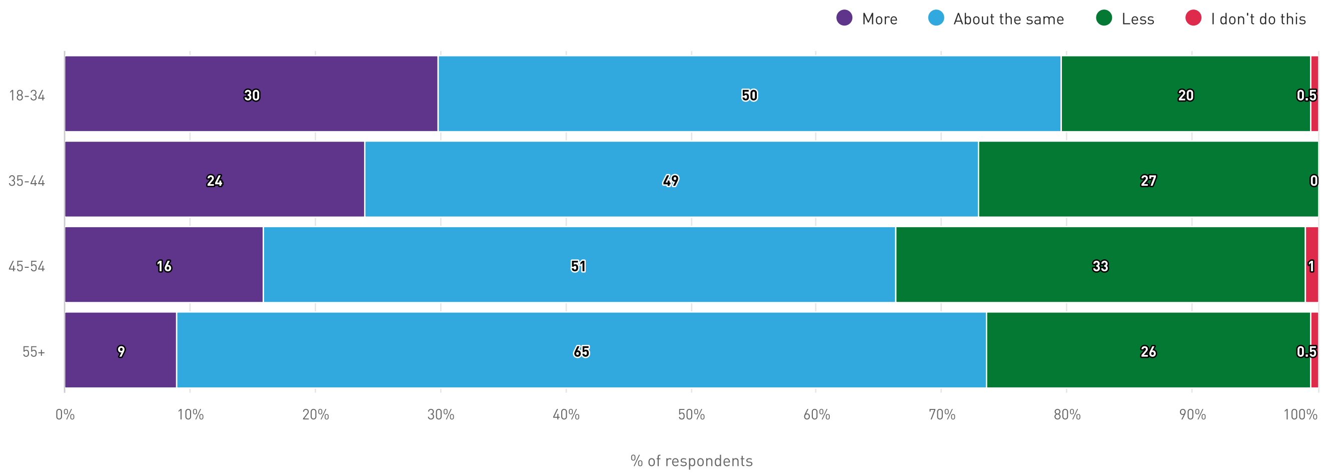
Source: *Kantar Profiles/Mintel, April 2024*

Most maintain spend levels, but 18-34s investing more

While most nail care users are established in their spend on nail care compared to last year, those aged 35+ report above-average behaviors of spending less.

As users become more experienced with the category, integrating newness in routines becomes more difficult. Brands must focus on creating innovative and practical products that highlight quick fixes that require minimal education, time and monetary investment.

US: spending money on nails (eg products, services) compared to a year ago, by age, 2024



Base: *1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months*

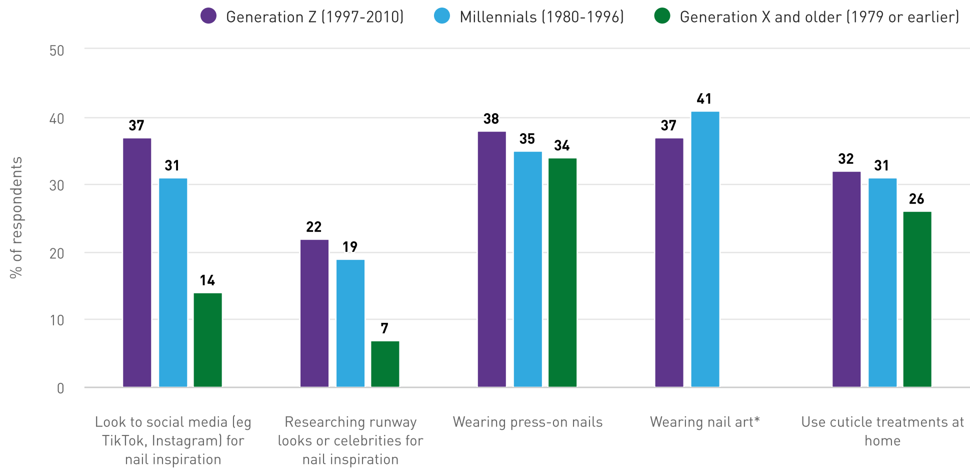
Source: *Kantar Profiles/Mintel, April 2024*

Press-ons and nail art can appeal to all

While Gen Zs and Millennials report increased social media behavior and research inspiration, all ages report similar increased usage of press-on nails and cuticle treatments. This indicates a larger awareness and acceptance of these products, likely due to increased product launches in the market.

Additionally, Gen Z and Millennials report similar levels of increased usage of nail art, a product that may be perceived for younger adults. Millennials should be a key target demographic for at-home nail brands as they have clear expectations of nail aesthetics, health and are willing to experiment in the category.

US: select routine behaviors doing MORE compared to a year ago (Selected more), by generation, 2024



** insufficient data on Generation X and older and wearing nail art*

***Base:** 1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months; 456 internet users aged 18+ who have used at-home press-on nails; 336 internet users aged 18+ who have used at-home nail art; 370 internet users aged 18+ who have used at-home cuticle treatments*

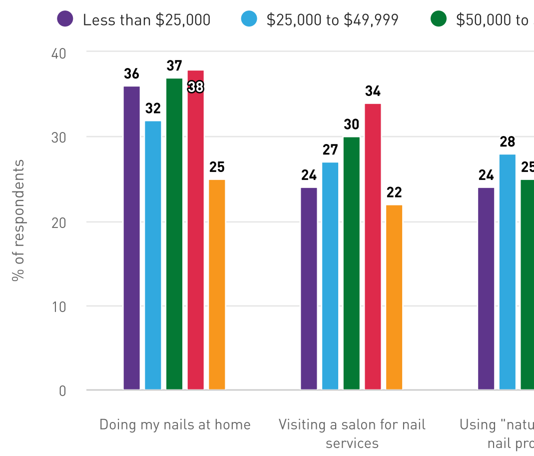
***Source:** Kantar Profiles/Mintel, April 2024*

Bring premium attributes to at-home routines

Over a third of consumers with household incomes below $100k are doing their nails at home more frequently. Interestingly, more than one in five of these individuals are gravitating towards natural, clean, and premium brands compared to a year ago. This trend presents a notable opportunity to enhance the at-home nail experience, particularly for lower-income households that are reducing expenditures on professional services.

The fact that lower-income households are embracing new at-home nail products at a rate similar to those with household incomes exceeding $100k is a positive sign. This cross-demographic experimentation augurs well for major players in the nail industry, including those aiming to promote premium offerings with higher price points.

US: select routine behaviors compared to a year ago (Selected M



***Base:** 1,102 internet users aged 18+ who have done their nails at-home in the past 12 months; 942 internet users aged 18+ who have done their nails at-home and at a salon in the past 12 months; 927 internet users aged 18+ who have used at-home nail color products*

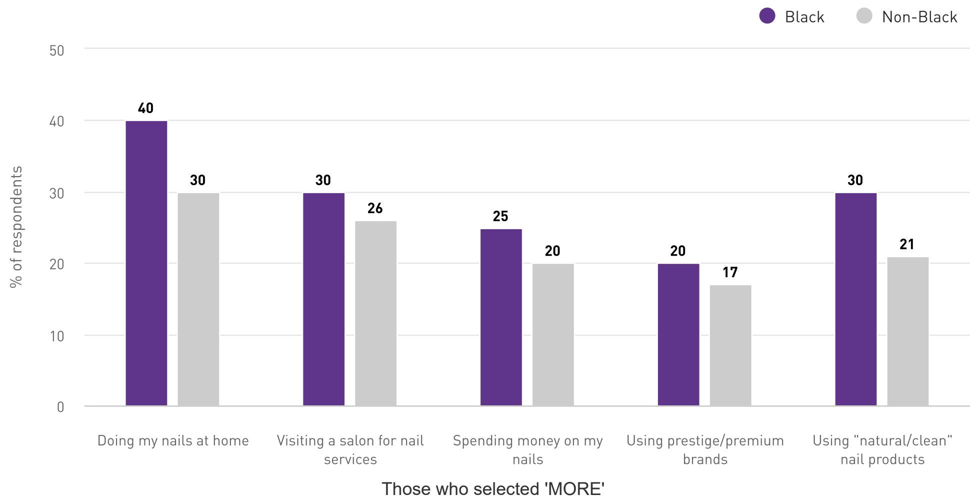
***Source:** Kantar Profiles/Mintel, April 2024*

Keep Black nail consumers engaged with natural attributes

Black nail consumers are more likely than non-Black nail users to be doing their nails at home more than they were a year ago, pointing toward an opportunity to appeal to this demographic.

With Black consumers reporting the importance of easy-to-use attributes, natural ingredients and familiar brands when purchasing BPC products, promoting convenient options that also speak to their total values (eg natural ingredients, environmentally friendly) could be a key selling point for Black nail consumers. This can include highlighting the ease of use of certain products, such as quick-drying formulas or simple application techniques.

US: select routine behaviors compared to a year ago (Selected MORE), by Race or ethnicity, 2024



Base: *[1] 1,102 internet users aged 18+ who have done their nails at-home in the past 12 months; [2] 942 internet users aged 18+ who have done their nails at-home and at a salon in the past 12 months; [5] 927 internet users aged 18+ who have used at-home nail color products*

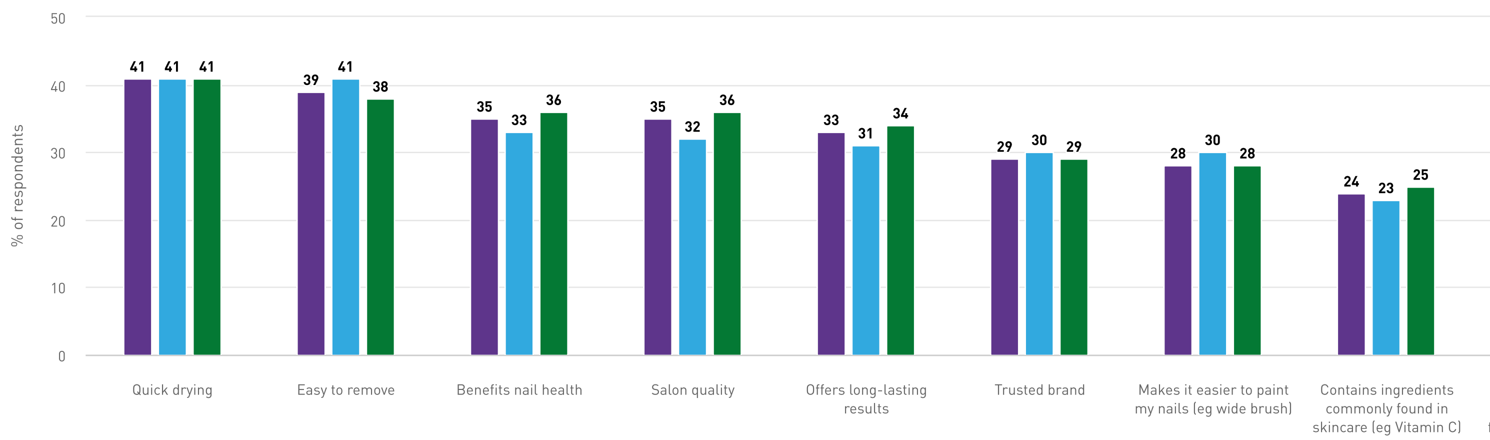
Source: *Kantar Profiles/Mintel, April 2024*

Nail color trade-up motivators

Trade-up motivators not impacted by HHI

Consistency in motivators across differencing HHIs signals broad reach for foundational attributes like quick-dry and nail health, but even more so for specialized inclusions.

US: nail color trade-up motivators, by HHI, 2024



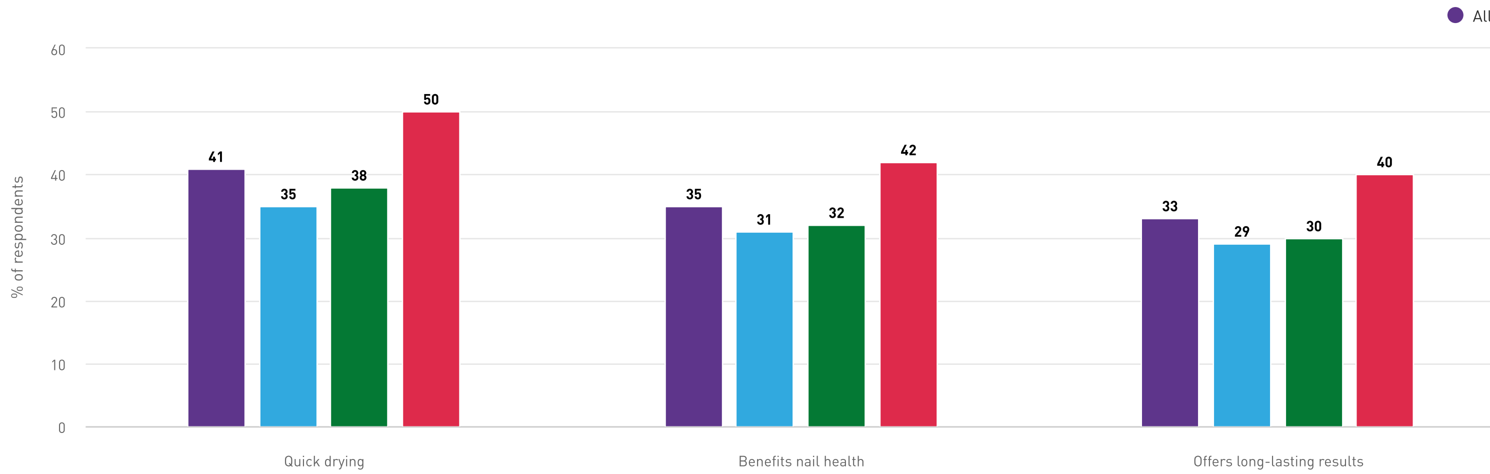
Base: *467 internet users aged 18+ who use who use nail color products*

Source: *Kantar Profiles/Mintel, April 2024*

Trendy claims may appeal, but don't forget foundational claims driving the category

With heavy usage of color products among Gen X+, don't overlook these foundational and traditional claims.

US: nail color trade-up motivators, by generation, 2024

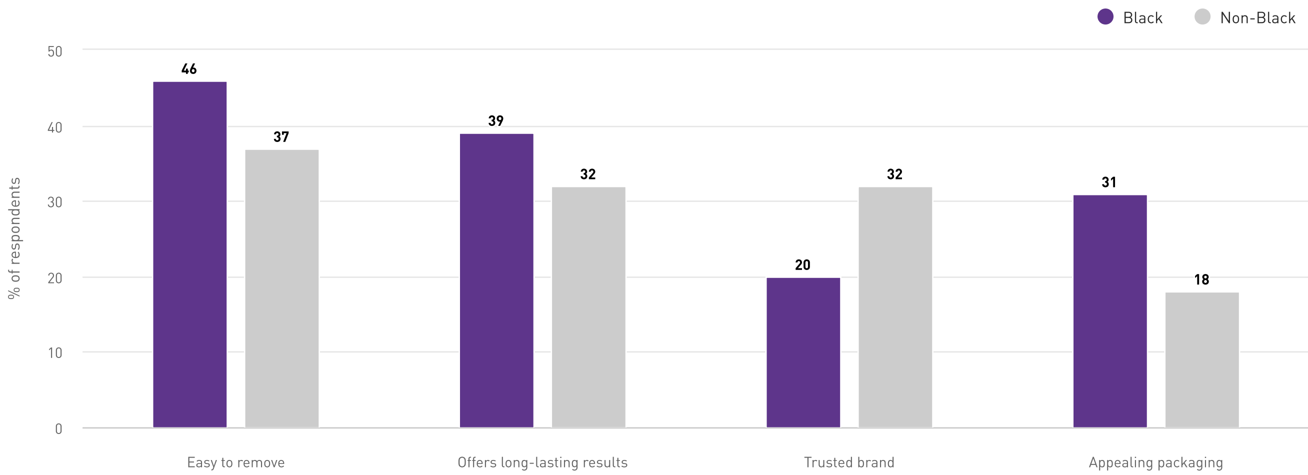


Base: *467 internet users aged 18+ who use who use nail color products*
Source: *Kantar Profiles/Mintel, April 2024*

Entice Black users to switch products through easy removal and appealing packaging

Black nail color users are more likely to denote trade-up motivation for easy removal and appealing packaging compared to non-Black users; additionally, they are less likely to trade up for a trusted brand, denoting an appetite for experimentation across brands.

US: nail color trade-up motivators, by race or ethnicity, 2024



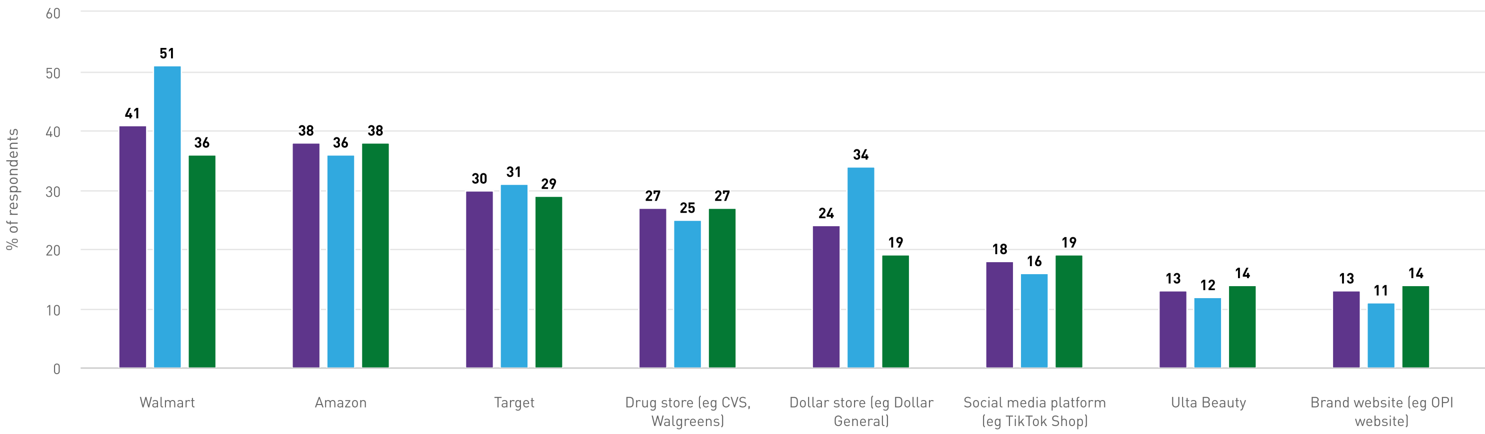
Base: *467 internet users aged 18+ who use who use nail color products*
Source: *Kantar Profiles/Mintel, April 2024*

At-home nail polish/artificial nail product purchase location

Gain maximum awareness through multiple retail channels

HHIs < $50K tend to prefer Walmart or dollar stores, but consistent purchase levels across HHIs at brand sites and beauty retailers show broad appeal regardless of budget.

US: most recent nail polish/artificial nail product purchase, 2024



Base: *467 internet users aged 18+ who use who use nail color products*

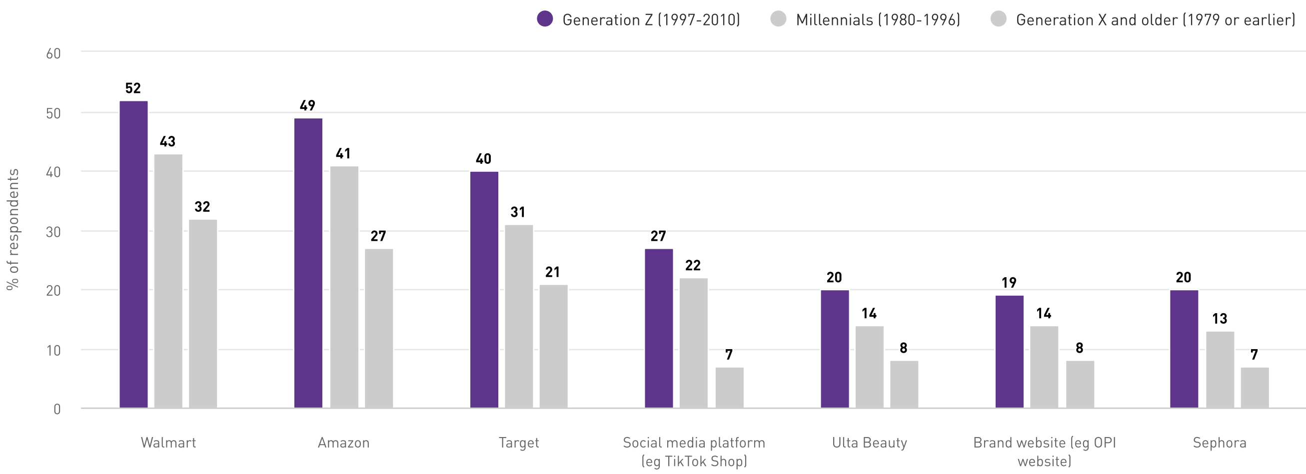
Source: *Kantar Profiles/Mintel, April 2024*

Make it easy from nail inspo to purchase

While Generation Z users are driving purchase across *all* retailers, their purchase behavior on social media and at beauty retailers should be noted.

Indeed, this generation is heading to social media platforms for nail inspiration more than any other generation, but specialty beauty stops have significantly spotlighted their wide array of product to be inclusive of easy-to-use artificial products, making it a go-to destination for beauty enthusiasts.

US: most recent nail polish/artificial nail product purchase, by generation, 2024



Base: *467 internet users aged 18+ who use who use nail color products*

Source: *Kantar Profiles/Mintel, April 2024*

Support adults on their quest to natural, healthy nails

Gen Zs and Millennials want nail health and naturalness – a likely halo from the broader BPC market.

EMBRACING NATURAL

68%

of adults say they are embracing their natural nails (ie using limited polish) more than they were a year ago

BEAUTY FROM WITHIN

60%

of adults say they take a consumable/supplement (eg vitamin) to support their nail health and growth

NAIL/CUTICLE HEALTH

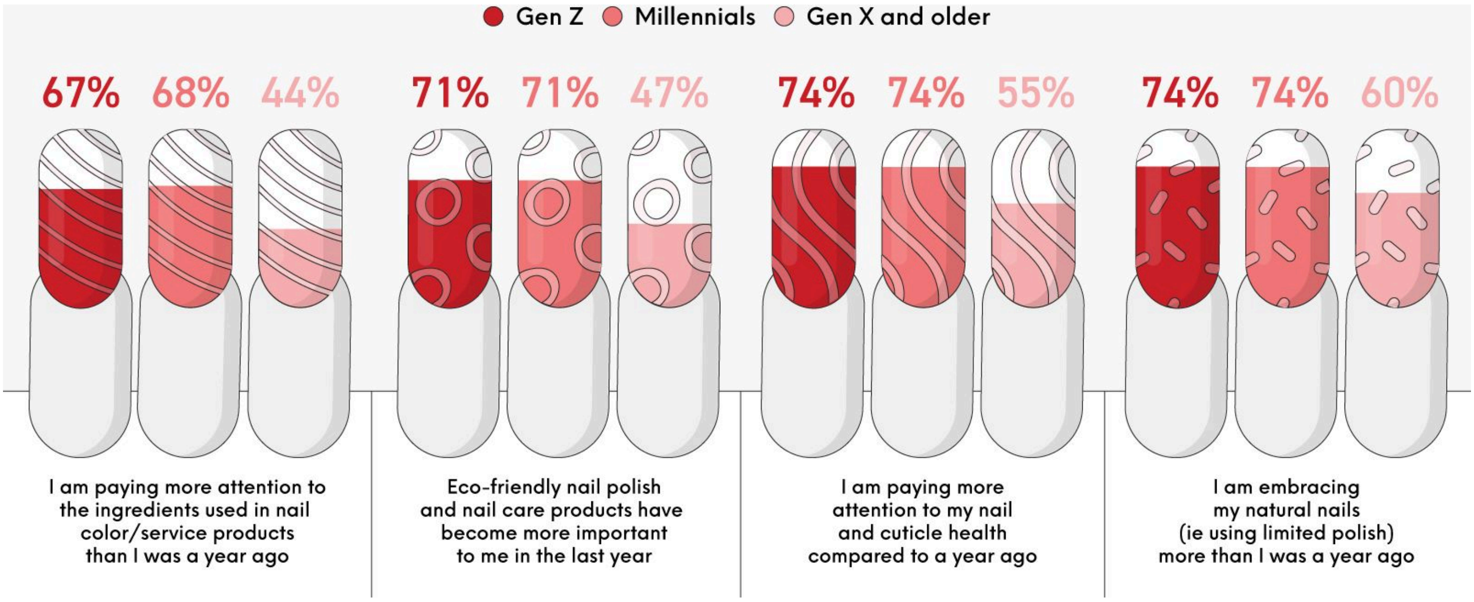
66%

of adults are paying more attention to their nail and cuticle health compared to a year ago

Base: 1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months
Source: Kantar Profiles/Mintel, April 2024

'Skinify' the nail segment

US: select attitudes and behaviors toward nail care, by generation, % of respondents, 2024

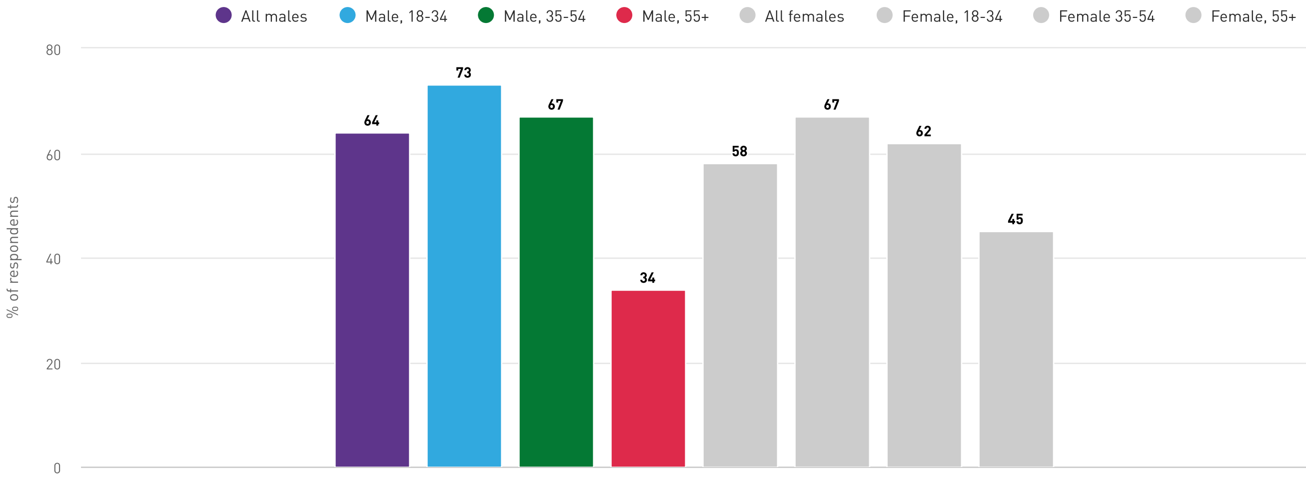


Base: 1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months
Source: Kantar Profiles/Mintel, April 2024

Support men through supplements

Men are more likely than women to say they take a supplement to support nail health, an opportunity for brands to engage men through ingestible solutions. Especially as users turn to solutions that showcase natural nail and nail health beyond topical color, supplements may be a prime segment for male consumers who are taking stock of their total self-care and wellness routines.

US: taking a consumable/supplement (eg vitamin) to support nail health and growth (Agree), by gender and age, 2024



Base: *1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

There's a market for special occasion-based use

While long-lasting and durable attributes are foundational to the nail color and care market, press-on nail users lean into short, occasion-based usage cycles.

FREQUENT CHANGES

78%

of press-on nail users use at-home press-on nails because they like to change their look frequently

ONE-NIGHT OCCASIONS

73%

of press-on nail users only use at-home artificial nail products for one-night wear on special occasions

EXPECTED RESULTS

71%

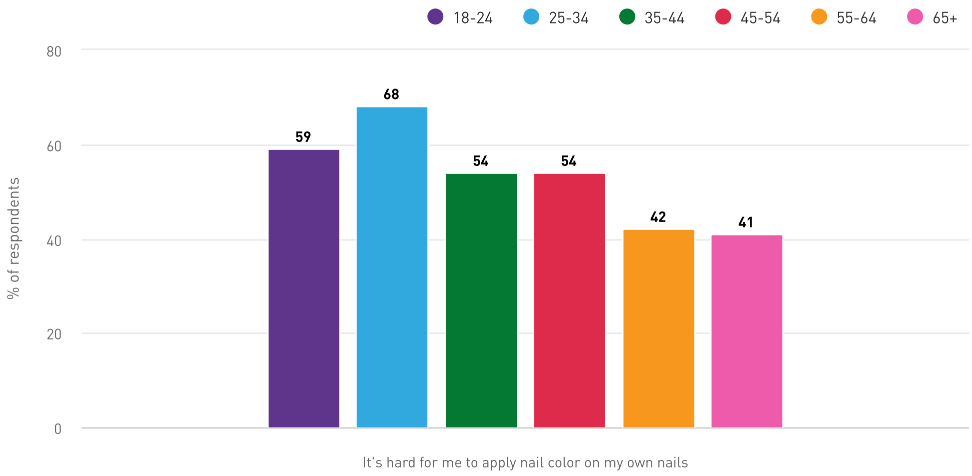
of nail care users don't expect at-home nail products to last longer than two weeks

Base: *456 internet users aged 18+ who have used at-home press-on nails; 1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

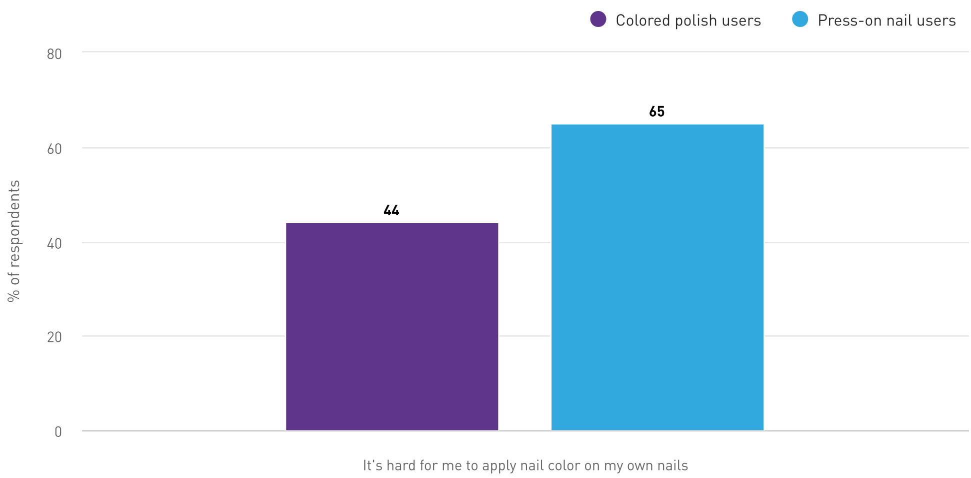
Color application obstacles may push consumers towards press-ons

18-34s struggle most with applying color, and press-on nail users are more likely to agree, likely a reason driving them towards the press-on category.

US: hard to self-apply nail color (Selected AGREE), by age, 2024



US: hard to self apply nail color, by select at-home product usage (Selected AGREE), 2024



Base: *1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months*

Source: *Kantar Profiles/Mintel, April 2024*

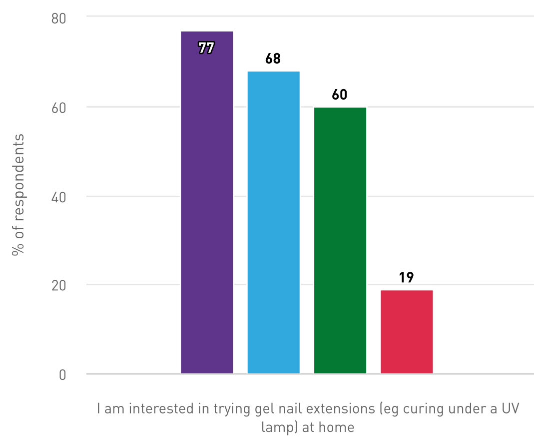
Ensure a seamless nail care routine from start to finish

Significant interest in gel nail extensions is clear, with a similar clip of consumers also taking the time to properly removal nail color or artificial nails to avoid damage.

Both of these sentiments are driven by younger consumers, particularly those between the ages of 18-34, but a majority of nail care users under 55 have similar attitudes.

Gel nail extensions have gained popularity in recent years due to their long-lasting and durable nature. Unlike traditional manicures, which can chip or fade after just a few days, gel nails can last for up to two weeks without any signs of wear and tear. However, barriers exist in engaging new users to UV lamps, for time and cost investment reasons, so brands must emphasize easy-use attributes to appeal.

US: select attitudes and behaviors toward nail care, by age, 2024



Base: *1,209 internet users aged 18+ who have done their nails at-home or at a salon in the past 12 months*
Source: *Kantar Profiles/Mintel, April 2024*

Market definition

This Report covers the US market for nail color and care products and includes products specifically intended for use on the nails, not the hands or other parts of the body. Mintel defines the nail color and care market as follows:

- Nail polish
- Nail accessories and implements (ie nail files, clippers, trimmers)
- Nail treatments (ie nail strengtheners, ridge fillers, top coats, base coats)
- Artificial nails and accessories (ie press-on nails, nail tips)
- Nail polish removers (includes both acetone and nonacetone polish removers)
- Salon nail services are excluded from the Market Size and Forecast, Segment Performance and brand sections of this Report but are covered in the consumer data.

The Market: Mintel's estimates of total retail sales. Mintel's methodology incorporates data from Circana InfoScan® Reviews, the US Census Bureau's Economic Census and other government data, Mintel's consumer research and desk research, as well as other sources appropriate to the category.

Companies and Brands: Company and brand sales data from Circana InfoScan® Reviews. Data shown covers only Multi-Outlet (MULO) sales. MULO is an aggregation of Circana InfoScan® Reviews data from Food, Drug, Mass, Walmart, Club, Dollar, Military, and Amazon Fresh and Prime Now.

Value figures throughout this Report are at retail selling prices (rsp) excluding sales tax unless otherwise stated

Consumer research methodology

For the purposes of this Report, Mintel commissioned exclusive consumer research* through Kantar Profiles to explore consumer consumption and attitudes toward nail color and care products as well as professional nail services. Mintel was responsible for the survey design, data analysis and reporting. Fieldwork was conducted in April 2024 among a sample of 2,000 adults aged 18+ with access to the internet.

Mintel selects survey respondents by gender, age, household income, region, race, ethnicity and parental status so they are proportionally representative of the US adult population using the internet. Mintel also slightly oversamples, relative to the population, respondents who are Hispanic or Black to ensure an adequate representation of these groups in our survey results and to allow for more precise parameter estimates from our reported findings. Please note that Mintel surveys are conducted online and in English only. Hispanic consumers who are not online and/or do not speak English are not included in our survey results.

While race and Hispanic origin are separate demographic characteristics, Mintel often compares them to each other. Please note that the responses for race (White, Black, Asian, Native American or other race) will overlap those that also are Hispanic, because Hispanic consumers can be of any race.

** for further details, see research methodology*

Generations

Generation	Overview
World War II/Swing Generation	Born 1928 or earlier (WWII) and 1929-45 (Swing), members of these generations are aged 79+ in 2024.
Baby Boomers	Born 1946-64. In 2024, Baby Boomers are between the ages of 60 and 78.
Generation X	Born 1965-79. In 2024, Gen Xers are between the ages of 45 and 59.
Millennials	Born 1980-96. In 2024, Millennials are between the ages of 28 and 44.
Generation Z	Born 1997-2010. In 2024, members of Gen Z are between the ages of 14 and 27.
Generation Alpha	The newest generation began in 2011. In 2024, members of Gen Alpha are younger than age 14.

In 2021, Mintel made minor adjustments to generational definitions; the size and age of each group may not match previous Reports

Abbreviations

AOV	Average order value: a metric used in eCommerce to measure the average amount a customer spends per order over a given period of time
AI	Artificial Intelligence
BPC	Beauty & Personal Care
DIY	Do it yourself
HHI	Household Income
LTV	Lifetime Value: a metric that projects how profitable a customer relationship could be over time
MULO	MULO (Multi-outlet) is an aggregation of Circana InfoScan® Reviews data from Food, Drug, Mass, Walmart, Club, Dollar, Military, and Amazon Fresh and Prime Now.

Forecast methodology

Mintel has produced this forecast based on a regression model with ARIMA errors using the software R.

The model, based on historical market size data taken from Mintel's own market size database and supplemented by macro- and socioeconomic data sourced from credible organizations (eg the Economist Intelligence Unit, the US Census Bureau), produces a central forecast using the relationships between actual market size and a selection of key economic and demographic determinants (independent exogenous variables) as well as lagged values (independent endogenous variables).

For the forecast of nail color and care products, the total market value is made up of 5 segments. The following variables were used to forecast each individual segment:

- Nail polish & accessories: Consumer prices (% change pa; av) + Growth of real GDP per head (% pa) + Private consumption per head (US$)
- Nail accessories & implements: Consumer expenditure: Household goods & services (US$) + GDP per head (US$) + Private consumption (real % change pa)
- Nail treatments: Consumer expenditure: Household goods & services (US$) + Personal disposable income (per head US$)
- Artificial nails & accessories: Retail sales growth (% pa) + USC Female population 18-24
- Nail polish removers: Real personal disposable income (% change pa) + Soaps and cleaners: Market demand (% real change pa)

Meet the expert

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Carson joined Mintel in 2022 and currently focuses on beauty and personal care Reports. Prior to Mintel, she worked in various product development and consumer insights roles focused on CPG and personal care within specialty retail, DTC, and contract manufacturing.

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