

Artificial nails are set to top nail polish sales in 2023

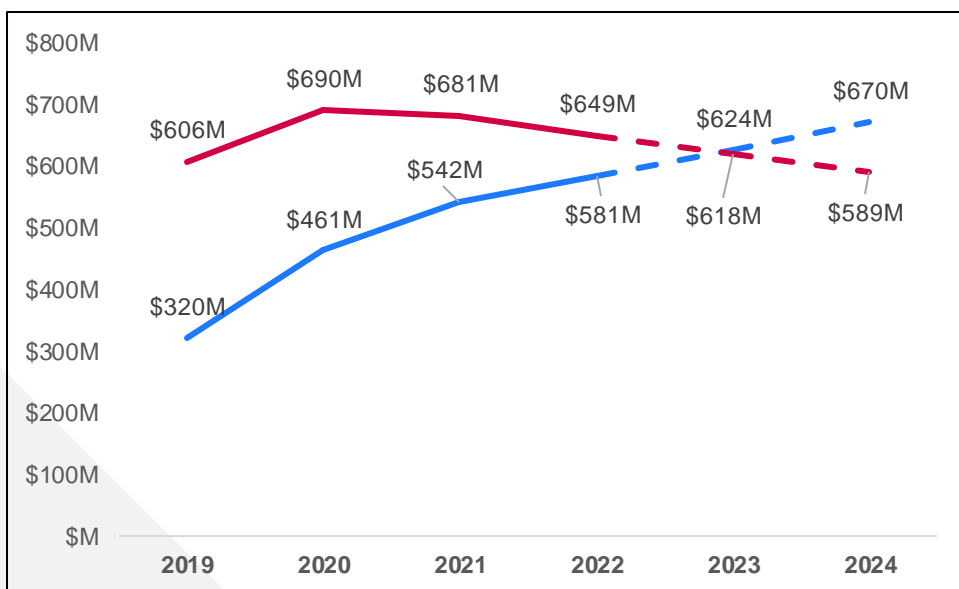
Higher growth in this category for the past 4 years pushed artificial nails past its long-dominant counterpart in quarterly sales in late 2022

The sales

In Q4 of 2022, artificial nails' quarterly sales (\$160M) surpassed nail polish's (\$154M). This is the culmination of years-long growth of artificial nails category and the slowing and decline of nail polish sales.

In 2022, artificial nails totaled \$581M compared to nail polish's \$649M instore sales. The consistency of this trend indicates that total annual sales of artificial nails will finally outpace nail polish in 2023 for the first time.

Annual nail polish vs. artificial nails instore mass sales

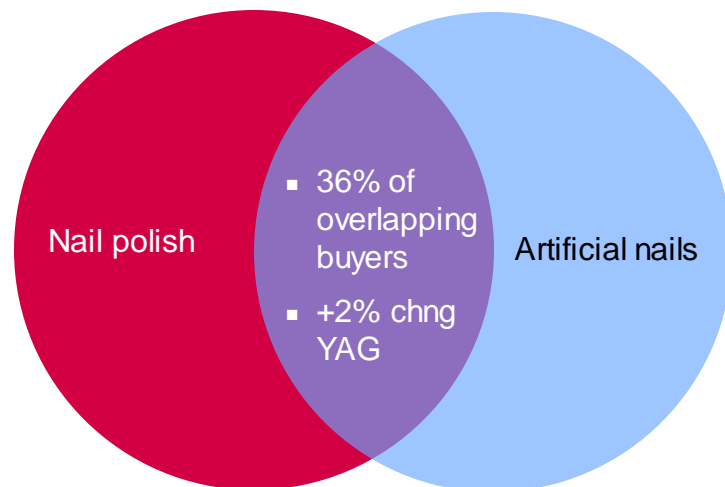


- Artificial nails
- Nail polish
- - - Projected artificial nails
- - - Projected nail polish

The consumer

Thirty six percent of nail polish buyers also purchase artificial nails.

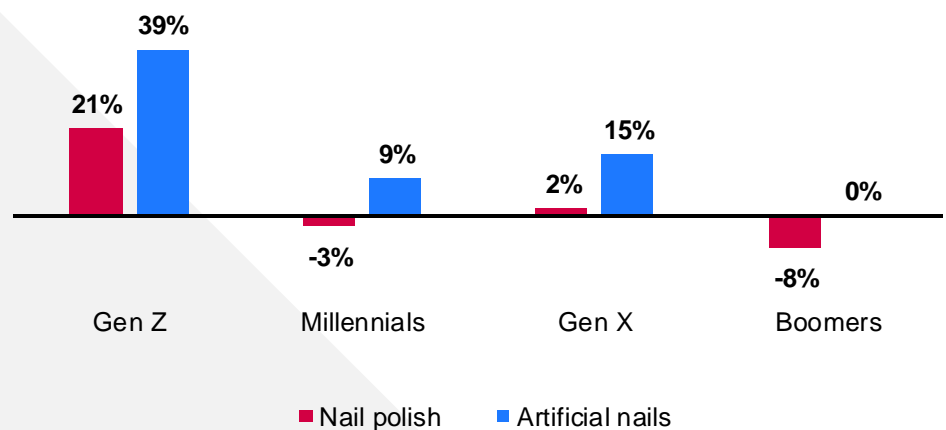
This is a +2% increase from last year. Overlapping nail polish buyers in the artificial nails buyer group have also decreased by 4%.



While Gen Z buyers are driving growth in both nail products, artificial nails are also growing among Gen Xers and Millennials.

Across instore + online, artificial nails gained buyers (+ 9%), while nail polish lost buyers (- 3%).

Buyers % chg vs YA



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Higher growth in this category for the past 4 years pushed artificial nails past its more popular counterpart in late 2022

The appeal

With innovation in this category, artificial nails have more design options available than ever before. One of the appeals of artificial nails is tied directly to Gen Z's movement of embracing **individuality**.

The **convenience** of press-ons also plays a role in the growth of the category. This option speaks to a major audience of DIY consumers looking for salon results without paying salon prices.



+8.9%

of buyers vs. YAG



+4.8%

more in value spent per buyer vs. YAG



27.3%

total penetration, up 2% from last year

The trends



Top influencers



Jenny bui
Artist

12.7K Posts 1.3M Followers 1,369 Following

@nailson7th



DALLASJ
Creative|Nail artist

6,151 Posts 206K Followers 3,574 Following

@dallasalexiaxo

With **+38B TikTok views**, nail art storytime has become “the new ASMR”



nail art storytime

38.2B views

Discover short videos related to nail art storytime on TikTok.



Top growing instore brands



KISS



Dashing Diva



Pretty Woman



Salon Perfect

NielsenIQ

Source: RMS xAOC Total US, Artificial Nails Sales, L52 vs YAG week ending 2/18/2023
Source: Instagram, TikTok, 2/6/2023

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