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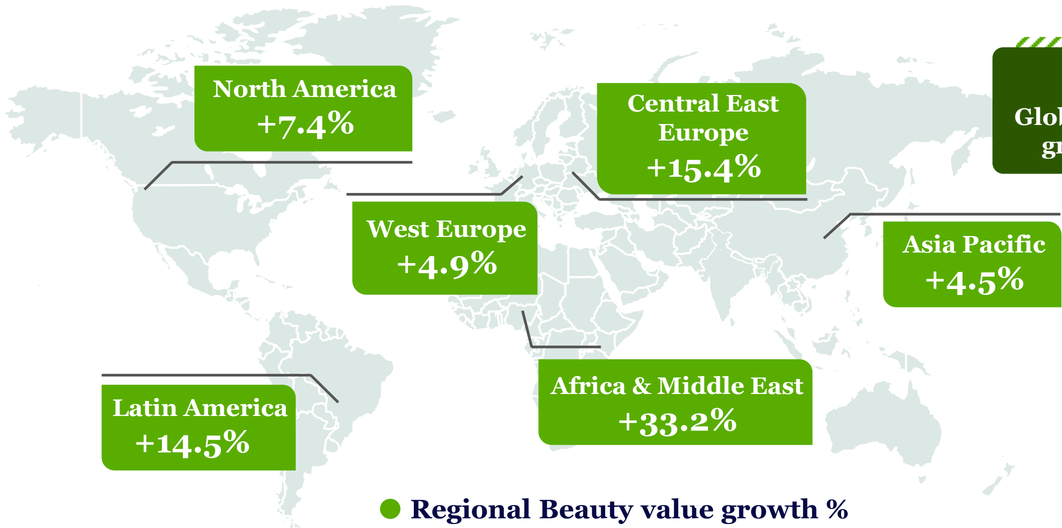
A sample sized edit of *The Global Beauty Retail Roadmap*

Global Growth & Shopper Behavior Overview

Global Beauty Growth



Insight: Emerging markets are driving outsized growth, signaling major opportunities for beauty brands willing to expand globally.

Source: NielsenIQ QBN RMS Beauty Full Year 2024, 69 countries
*Fact: Value % growth vs YA (unweighted) | Beauty = Hair, Skin, Fragrance, Cosmetic & Nail
Additional sourcing: Omnisales (FR, DE, IT, ES), Omnishopper (US), incl TikTok (CN), incl ecom (KR)

Shopper Resilience

Despite economic pressures, consumers are:

Shopping more often
(+0.8% trips vs. YA)

Spending more
(+5.2% spend per buyer vs. YA)

Buying more units
(+1.9% units per buyer vs. YA)

Insight: Beauty's emotional and functional relevance remains strong across demographics — brands and retailers must continue to elevate the consumer experience.

Source: NIQ Consumer Panel – France, Spain, Germany, Italy, Great Britain, Portugal, Switzerland, Finland, United States, Canada, Puerto Rico, Brazil, Mexico, Colombia, Chile, South Africa, Indonesia, Hong Kong Philippines, Singapore, Thailand, New Zealand & Australia – Latest 12 months endings Feb 2025

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Fragmented Shopper Journeys

Average of ***5.3*** *beauty retailers shopped annually*

Loyalty declined at ***6 of top 10*** *beauty retailers*

Insight: Shoppers are more variety-driven and mission-led — beauty must earn and re-earn loyalty through omnichannel innovation and engagement.

Source: NIQ Consumer Panel & Omnishopper Panel Latest 52 weeks Feb 2025 – total country excl online

Ecommerce Evolution & Actionable Strategies

Ecommerce Surges Across Beauty

Ecommerce behaviors are reshaping shopping:

Higher buying frequency in 16 of 19 tracked markets

Smaller online baskets but more regular purchases

Prestige beauty leads online: 55% of India's beauty ecommerce is premium; >50% of Saudi Arabia and UAE's online beauty market is premium.

Insight: Ecommerce is no longer an alternative — it is a core battleground for beauty brands.

Source: NIQ Omnishopper Panel, NIQ Consumer Panel – Latest 12 months endings Feb 2025

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Regional Ecommerce Hotspots

Key emerging growth areas:

India

39% beauty online value growth YOY with **55%** of sales from premium price tiers **(vs 24% offline)**

Source: Nielsen IQ Retail Measurement Service Data, NIQ's E-commerce Measurement Solution (EMS) - (Skincare + Shampoo + Hair conditioners) NIQ Digital Purchases India | Full Year 2024 | Luxury Brand share defined by custom group of brands

UAE

29% beauty online value growth YOY. Global brands are holding their ground, yet there's a growing fascination with diversified products, particularly Korean brands.

Source: NielsenIQ Retail and E-Commerce Panels – FY2024

Brazil

53% of online FMCG value sales are Beauty & Hygiene and growing YOY **+18%.**

Source: NieslsenIQ Retail Measurement & Ecommerce Value 2024 | Mass Beauty Channels | Sun care, hair dye, skin care, hair care, and shaving

South Korea & China

Ecommerce dominance continues **(75% and 92% share of value sales respectively)** and continue to gain share.

Source: Data source: NielsenIQ RMS 2412R

Insight: Tailoring digital strategies to market maturity will be crucial for competitive advantage.

Strategic Priorities for 2025

Omnichannel Mastery: Deliver seamless luxury experiences everywhere

Localized Expansion: Adapt Ecommerce strategies to capitalise on local market opportunities and trends.

Digital Moments Activation: Leverage Prime Day, Black Friday, festive seasons

Data-Driven Precision: Invest in shopper journey analytics to personalize, optimize, and predict

This is a sample sized edition of the full Global Beauty Retail Roadmap Report to find out more, contact a member of our team or complete the form HERE and we will be in touch