

# Global Beauty Radar: Décrypter les tendances, activer la croissance

DNC Beauty Day – June 2025  
Claire Marty

## NielsenIQ



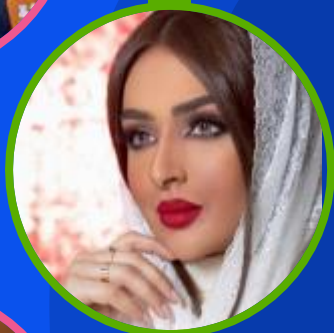
# NIQ delivers the *Full View* of beauty buying behavior

- The industry's most trusted consumer data—more channels, sources, consumers, and regions
- Validated with point of sales data directly from retailers



# 2025

## *Seeking Balance*

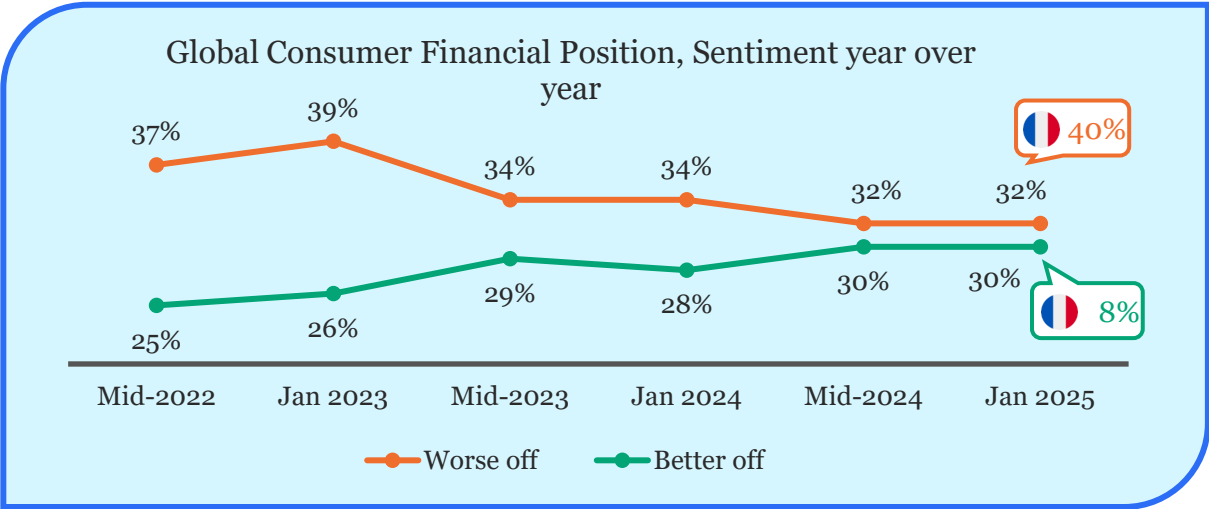


# Global Beauty Performance





# Consumers have a cautiously optimistic mindset entering 2025, but much on the horizon is unknown

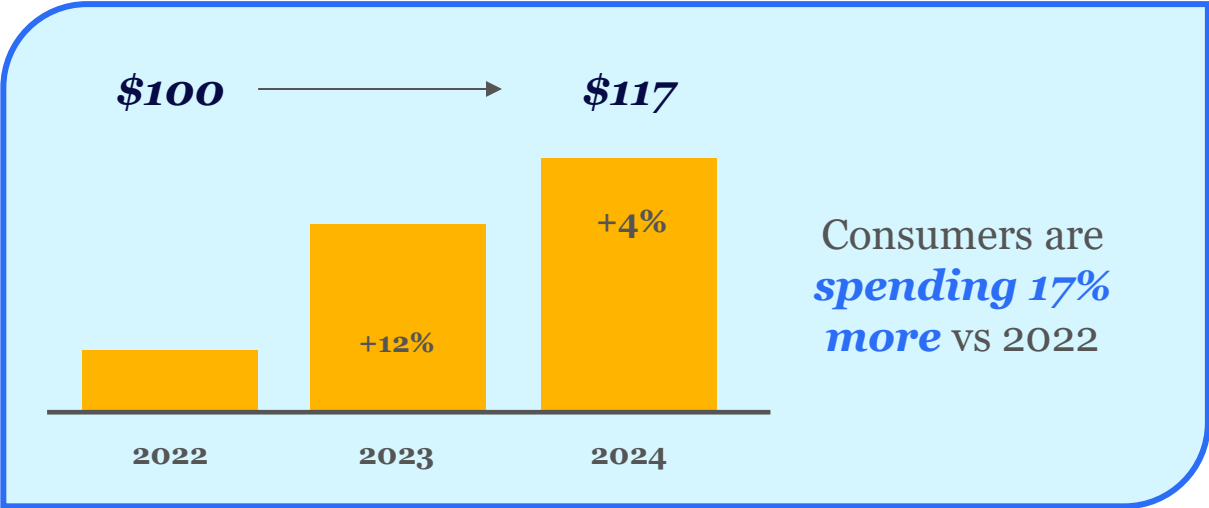




2023 Survive

2024 Revive

2025 Thrive?





#4 biggest concern

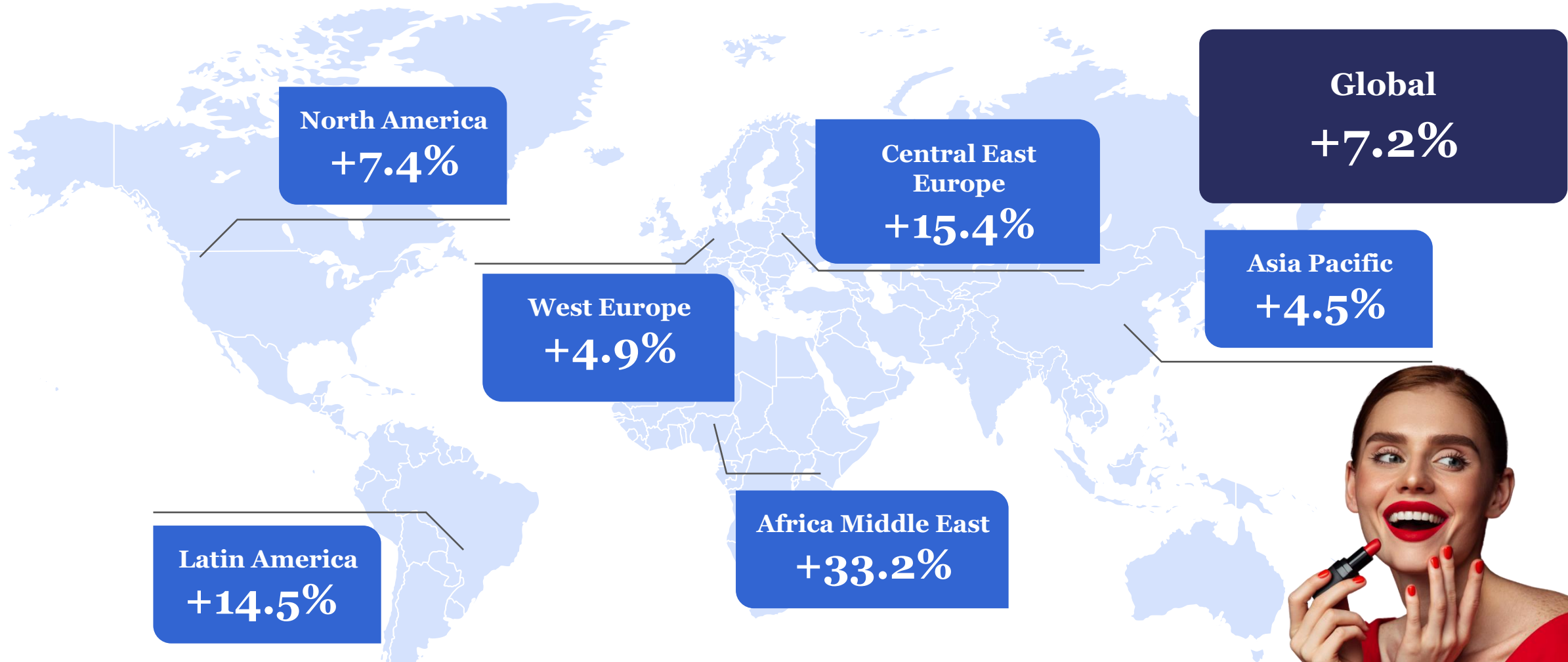
**Global Warming/ Environment**

Up from #5 in Jan 2024

Source: NIQ 2024 Mid-Year Consumer Outlook, Global, Q: Compared to a year ago, is your household better off or worse off financially?  
Source: NIQ, Global Strategic Planner, 54 markets, Eq Vol Price % Change, L52we 6/16/2024 vs prior



# Solid but Softening: Beauty's Growth Path in 2024



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

Regional Beauty value growth %

# Fragrances top global growth while cosmetics lag behind

Cosmetics are performing ahead of the global benchmark in West Europe

Category value growth %

Full Year 2024



Source: NielsenIQ Global QBN Q3 2024, 66 countries  
\*Fact: Value % growth vs YA (unweighted)  
Additional sourcing: Omnisales (FR, DE, IT, ES), Omnishopper (US), incl TikTok (CN), incl ecom (KR)

# Global innovation themes

## Sustained Trends

(Most developed & globally consistent trends)

Clean & Sustainable

Formulation  
Packaging  
Supply Chain



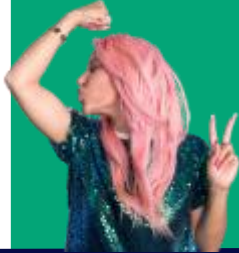
Ingredient Focus

Hyaluronic Acid  
Niacinamide  
Retinol



Trusted Advisor

Celebrities  
Influencers  
Dermatologists



## Emerging Trends

(Strong trends - at different stages of cycle regionally)

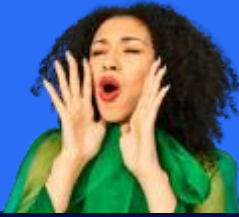
Personalization & Inclusivity

Individual Needs  
Taboo Topics



Format Evolution

Fuss-Free Formulas  
Easy Application



Wellness Focused

Functional Drinks  
Stress Relief



## Region Specific Trends

(Key trends in some markets but less relevant in others)

Convenience & Accessibility

Home treatments  
Direct to Consumer



Luxury For All

Dupes  
Quiet Luxury



## Point in Time Trend

(Peak has passed but aftereffects continue)

Immunity & Health Support

COVID-19 legacy  
Vitamin C



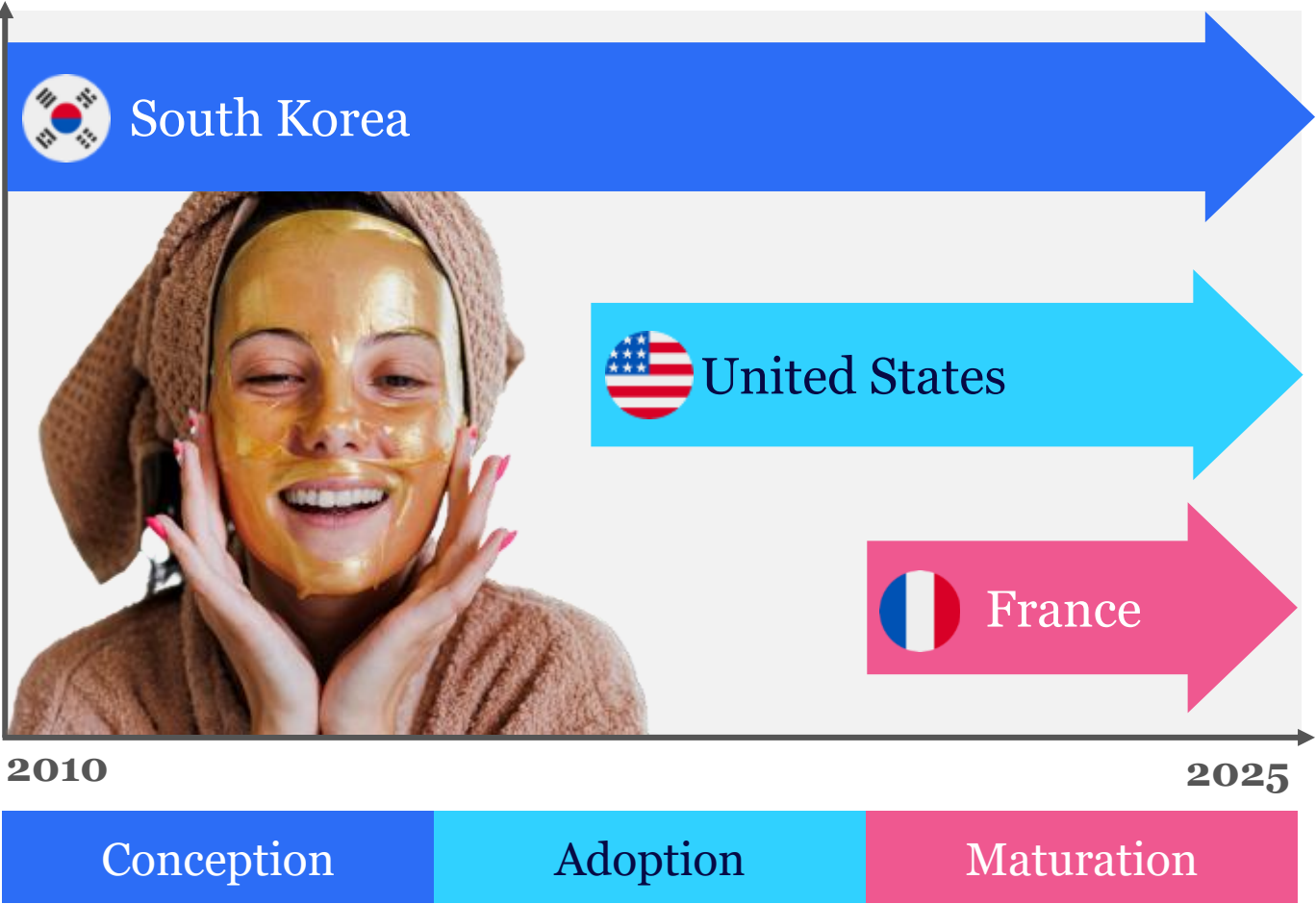
Source: Trend classifications are adjudged based on the expertise of local NIQ associates in highlighted markets. Based on 14 global markets.



# South Korea as a beauty trend launch pad

Acne Patches and Snail Slime followed the East to West innovation pipeline

## Acne Patches – Global Innovation Pipeline



### What's Next?



- **Bio-silk** for strengthening the skin barrier
- **CBG** for anti-inflammatory, antimicrobial, and antioxidant functions
- **Lactobionic acid** for exfoliating properties
- Clean beauty ingredients such as **skullcap**
- **Soil-based ingredients**
- **SPF sheet masks**

# Retail (R)Evolution

## *2025 Trends to Watch*

**Ecommerce  
Acceleration**



**Amazon's  
Rise**



**Social  
Selling**



**Future  
of AI**

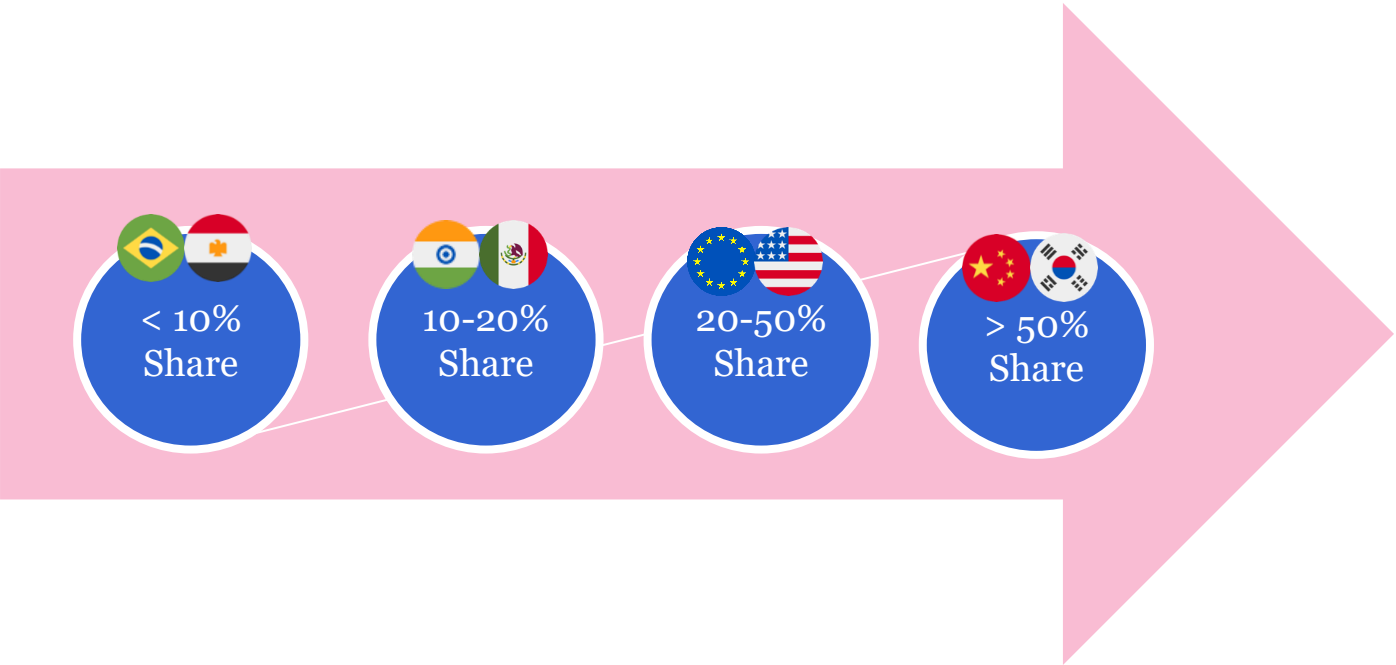


**Evolving  
In Store  
Experience**



# Online sales drive global growth

Across the spectrum of emerging to advanced ecommerce, online continues to outpace store growth



Source: NIQ Omnishopper Panel, NIQ Omnisales & Consumer Panel Data – Latest 12 months Feb 2025 – 27 Global Markets

# Amazon's Global Beauty Empire

## Amazon - Beauty



## Behind Amazon's Beauty Success



### 1. Male Beauty Buyers

% of male buyers (beauty)



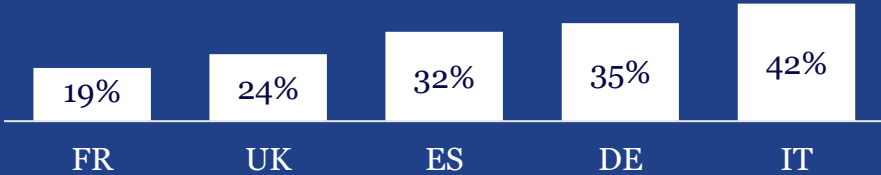
### 2. Dermo Cosmetics

Amazon Merchant Rank for Dermo Cosmetic Brands  
(+/- share vs YA)



### 3. Exclusivity

Exclusive Beauty e-shoppers at Amazon



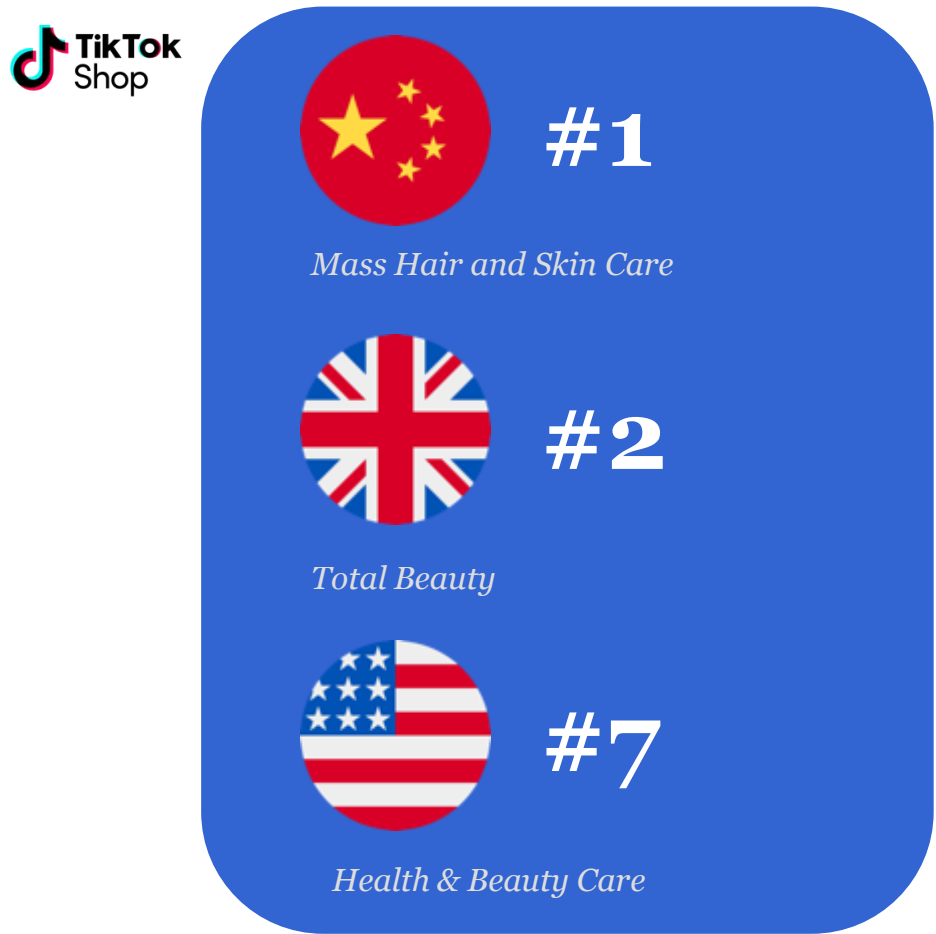
Source: NIQ Omnishopper Panel US, CA | NIQ Digital Purchases IN, GB, FR, DE, IT, ES, AT, IE – Latest 52 weeks 13<sup>th</sup> April 2025 | Skin conditioning and Moisturizing. Pharmacy brands: A Derma, Aveeno, Bioderma, Biotherm, Caudalie, Cerave, Cosrx, Ducray, Eau Thermale, Embryolisse, Erborian, Eubiothemedikcerin, Isdin, Klorane, La Roche Posay, Medik8, Nuxe, Skinceuticals, Svr, Uriage, Vichy, Weleda, Cetaphil, Dr Sheths, Sebamed.



# Get Ready As Social Commerce Goes Global

Consumers across the world are embracing social commerce as TikTok Shop leads the charge to a new way of selling

## Ecommerce Merchant Rank



## NEW IN 2025



## Where Could be Next?



Source: NielsenIQ Personal Care Online Total (Traditional EC+TikTok) - ChinaQ3 2024  
Source: NielsenIQ Digital Shelf E-receipt Consumer Panel, Full Year 2024 (Personal Care) - TikTok Shop Customer base ending Latest 12 months ending 09/02/25  
Source: NielsenIQ Total US E-commerce Measurement Powered by Rakuten Intelligence | 52wks ending 11/30/24 vs LY Health & Beauty Care

# TikTok Shop Consumers are Heavy Beauty Shoppers

Who is the TikTok Shop beauty buyer? 



**Spent £80 more on beauty**

than the average ecommerce beauty buyer in the past year



**Made 4.1 more orders**

than the average ecommerce beauty buyer in the past year



**36.5% are Millennials**

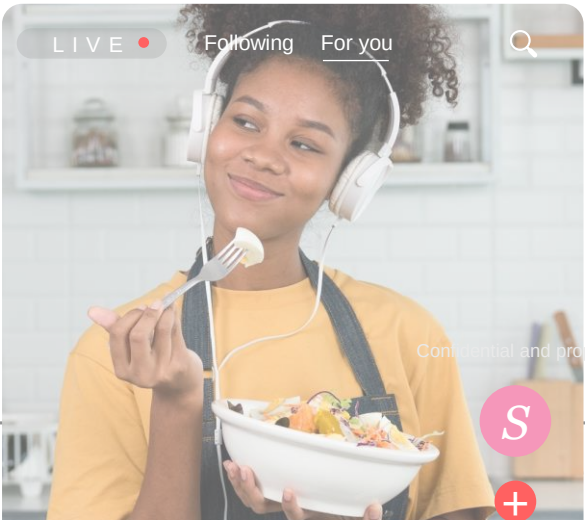
(Contributing 42% of beauty spending)

Are *your* customers purchasing on TikTok Shop? 



**29%** of online Beauty Specialist consumers have purchased Beauty on TikTok Shop in the past year

Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding hair styling and accessories, Body & Face cleansing, Skin conditioning and Sun care. Data ending 30 March 2025.

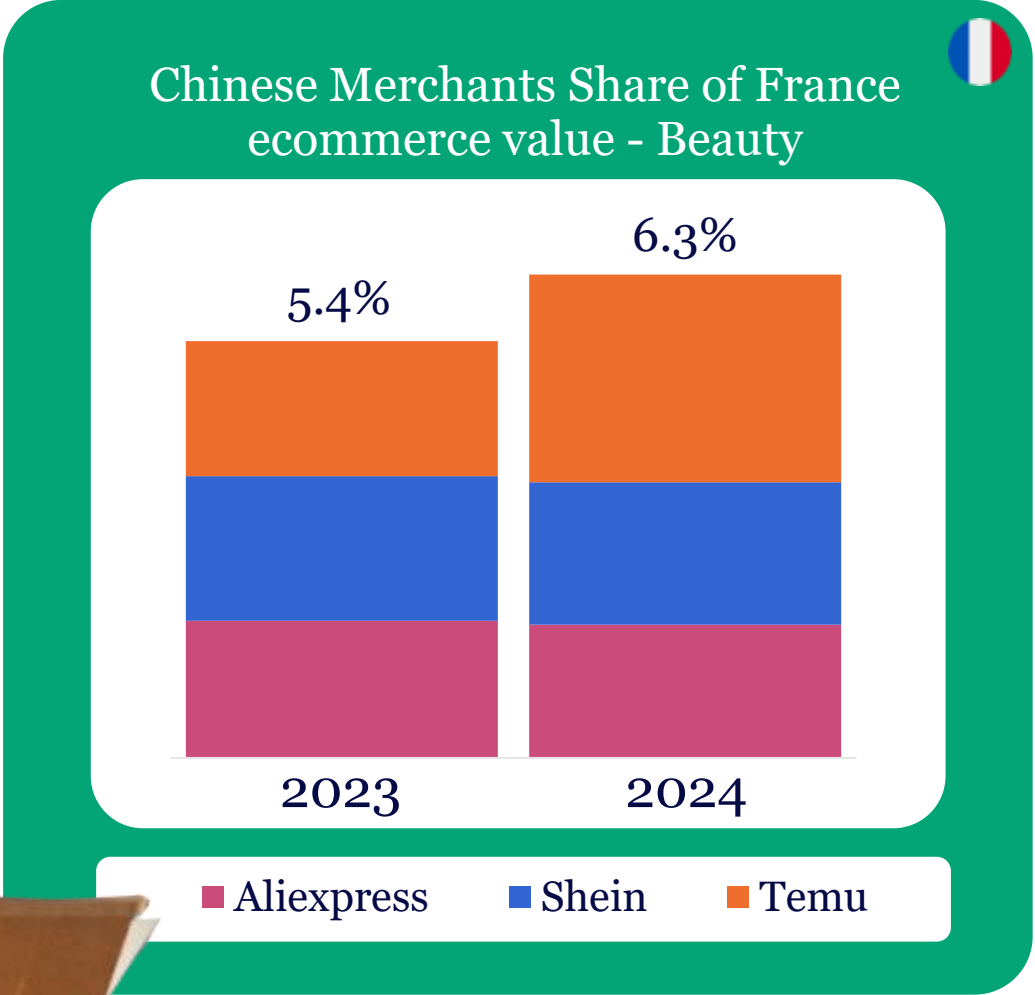


# The Global Expansion of Chinese Ecommerce Merchants Continues at Pace

TikTok and TEMU lead the charge for the new model of ecommerce merchants – and Amazon have taken note

*Ecommerce merchant rank – Beauty / Cosmetics – Latest 12 months*

|                                                                                     |                                                                                     |     |   |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-----|---|
|    |    | #2  | ↑ |
|    |    | #3  | ↑ |
|    |    | #4  | ↑ |
|   |   | #7  | ↓ |
|  |  | NEW | ↑ |



Source: NIQ Digital Shelf – Latest 12 months ending 23<sup>rd</sup> Feb 2025

# AR and AI is Poised to Reshape in the Beauty Retail Space

Adoption may be slower in the UK with consumer excitement about AI lower compared to consumers in the East

40% of consumers are likely to accept a product recommendation from your own AI assistant

➡ 49% APAC

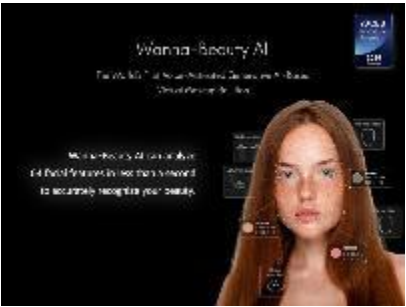
➡ 24% France 🇫🇷

## Virtual Try on Services

Sephora Virtual Artist



Amorepacific Wanna-Beauty AI



## AI Beauty Tech

Samsung MICRO LED Beauty Mirror



L'Oreal Mood Mirror



## AI Skin Analysis

MySkin by Cetaphil



PerfectGPT



Source: NIQ Mid Year Consumer Outlook 2024



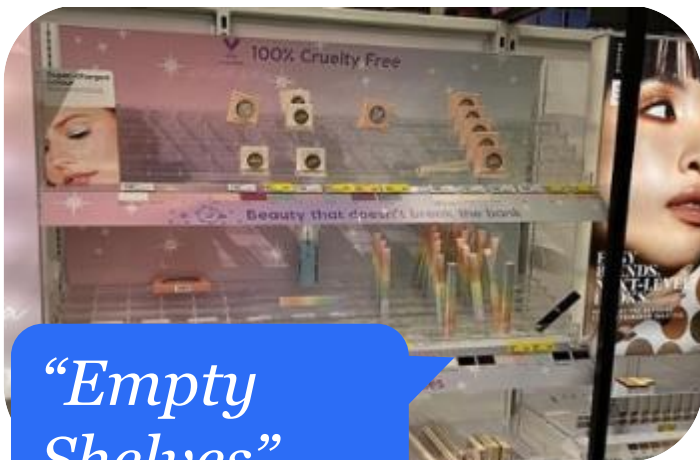


# Could the in-store experience be tainted?

Anti-theft measures, out of stocks and messy product testers have featured in customer complains of the instore experience – pushing them online



“Product Lockups”



“Empty Shelves”



“Messy Testers”

## How to theft prevention measures impact sales?



Source: NIQ BASES Theft Prevention Study, November 2024, n=1000



# Consumer Mindset Shift

*2025 Trends to Watch*

**Mental  
Health**



**Poly-  
culturalism**



**Gen Z and  
Gen Alpha**



**New View  
on Aging**



**Brand  
Loyalty**



**Affordability  
vs Luxury**

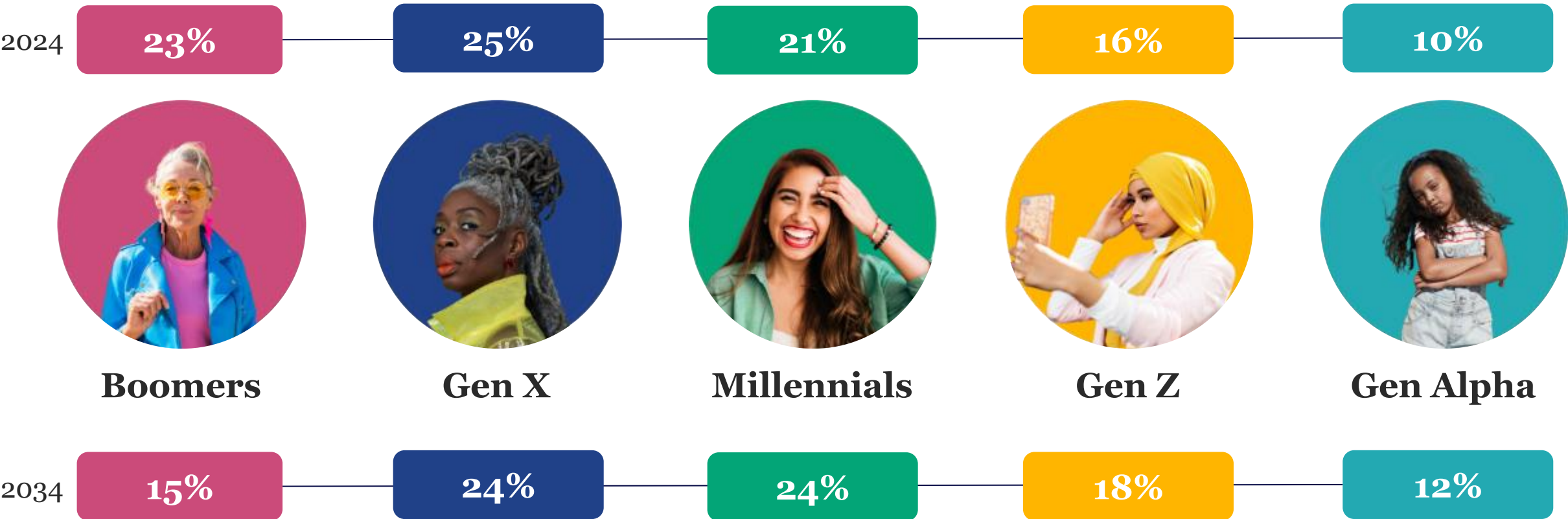


**GLP1s**



# Catering to the full generational puzzle- what do we need to do to attract these generations?

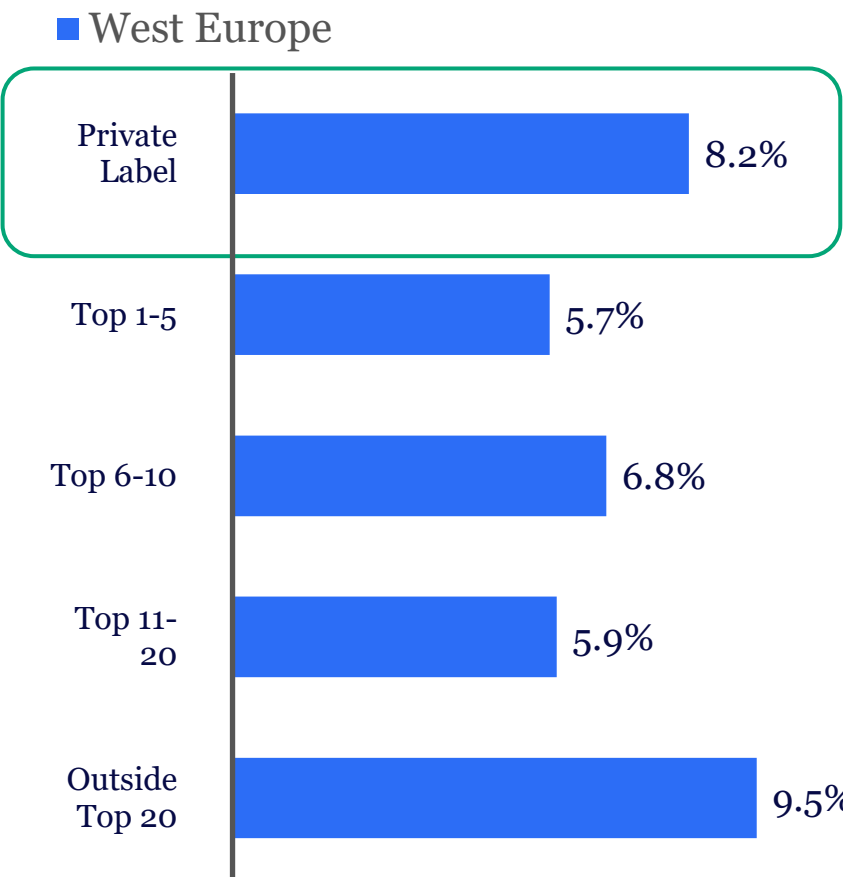
Contribution to Global Beauty Spending – 2024 vs 2034



Source: World Data Lab – Spending Contribution to Total Beauty Spending 2024 (Products & Services)

# Brand Loyalty at Risk? Consumers Turn to Indies for Innovation & PL for Value

## Global Growth by Brand Size - Beauty



In the last two years, average beauty brand loyalty has reduced 20%.

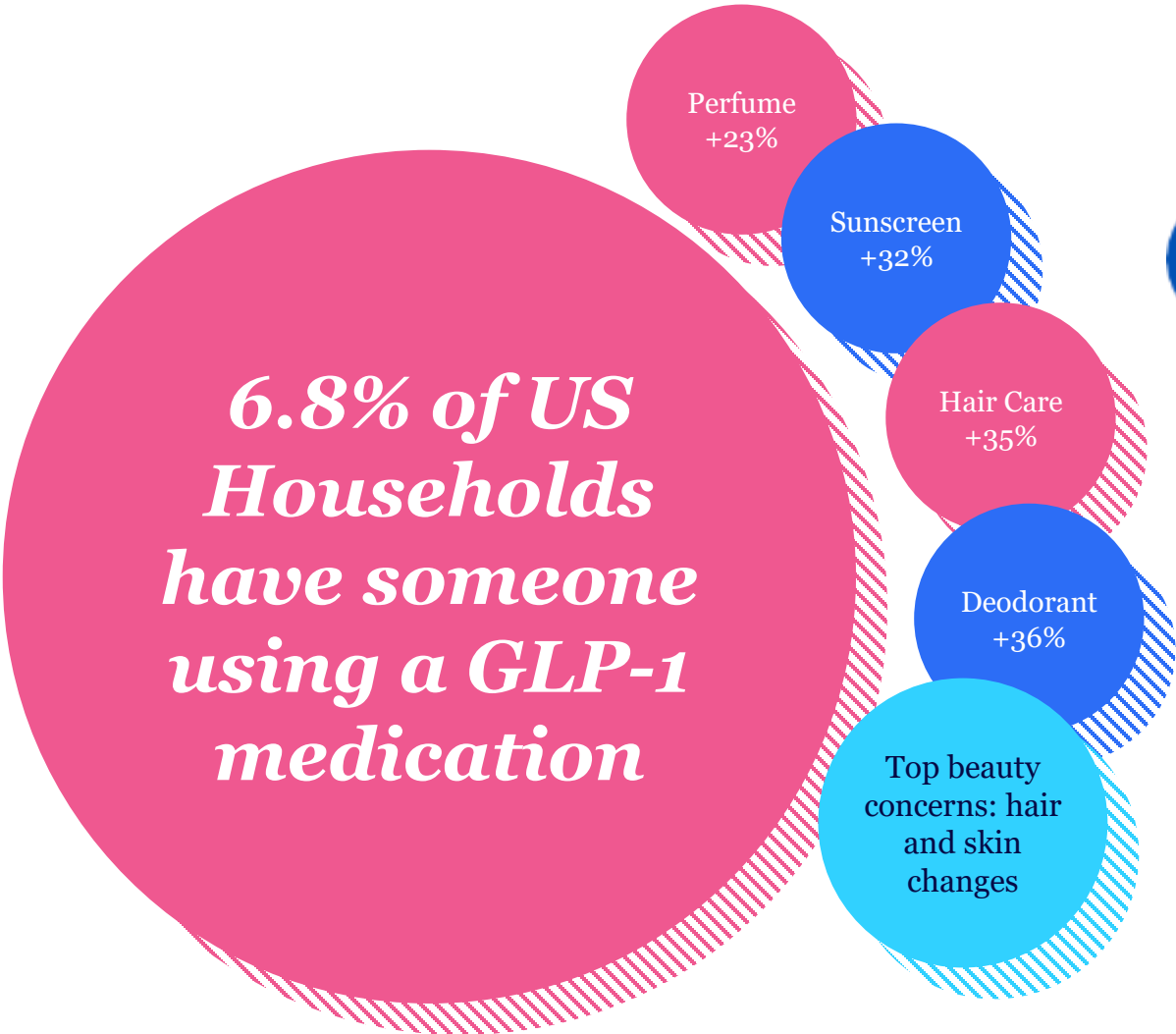
Indie Brands: +15%

9/10 searches on amazon are unbranded – Digital Shelf management is critical

Source: NielsenIQ Omnisaales Germany, France, Spain, Italy, Great Britain – Latest MAT – Beauty

NIQ Omnishopper Panel US | Source: NielsenIQ Omnishopper, Trip Projected, Syndicated Database  
POD 444, L52 WE 05/18/2024 chg vs 2 YA, Total Outlets (Omni), Beauty & Personal Care Categories

# GLP-1 Medications could impact shopping habits across the entire store



**22% of French consumers say they would be likely to use a medication or drug to support my weight loss (e.g. GLP-1 agonists like Ozempic)**



Source: NielsenIQ GLP-1 Homescan Panel Survey, Total US, 52 we 09/28/2024  
Image: www.tctmd.com

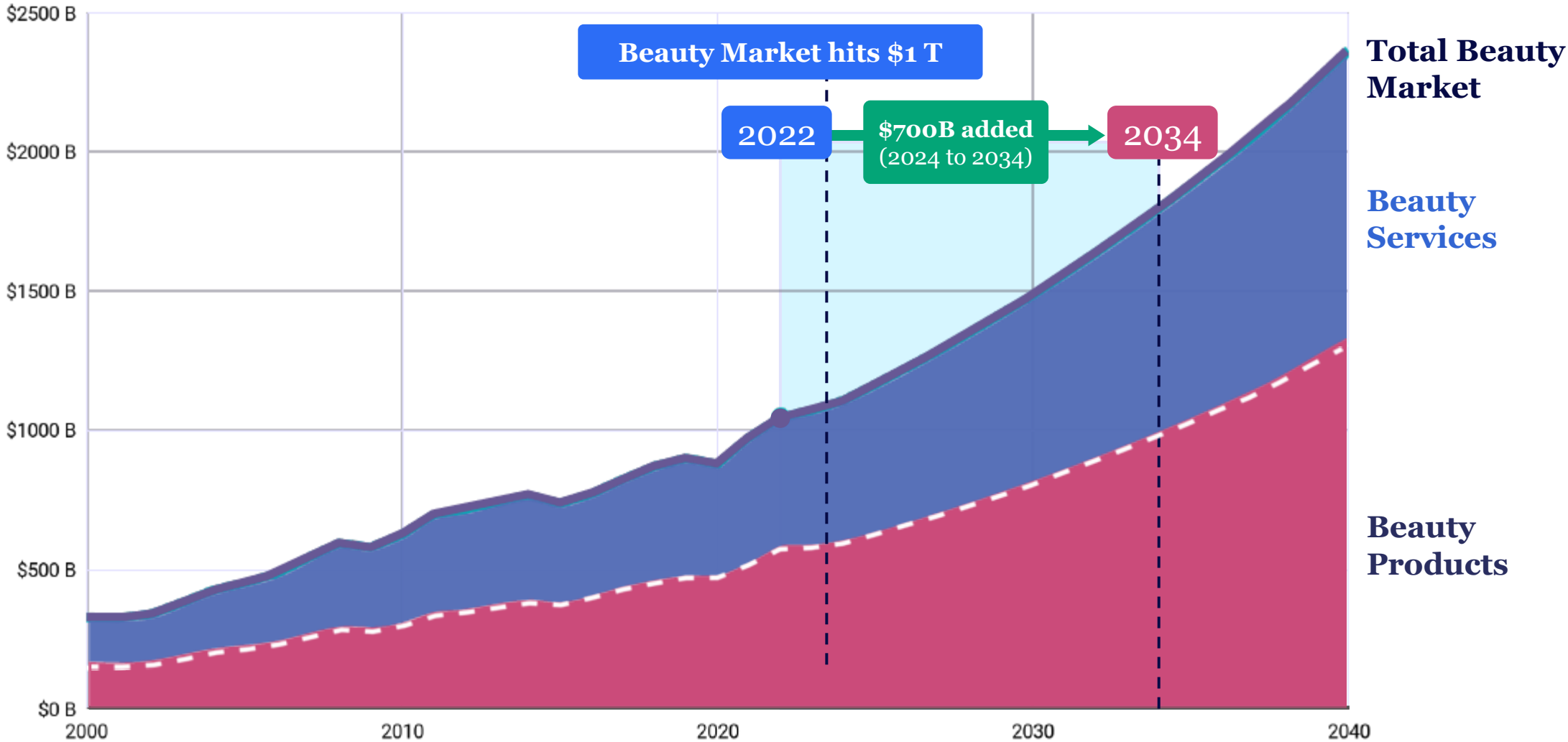


**What's Next?**



# Global Future Forecast

The beauty market has grown to more than a trillion and continues to accelerate



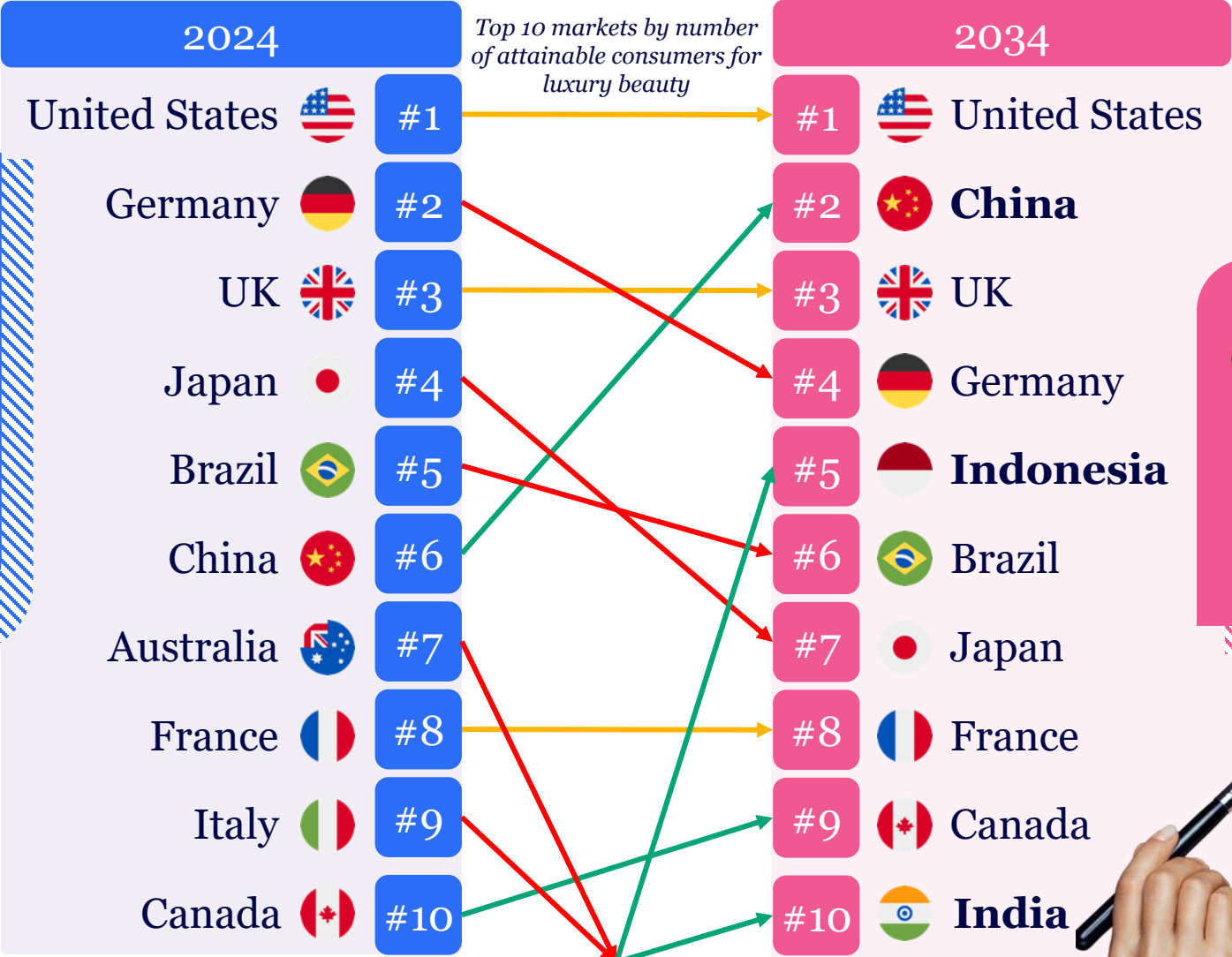
Source: World Data Lab (Nominal USD)

# Luxury Beauty's Opportunities: Today and Tomorrow

Two countries will join the Top 20 in the next 10 years: India and Saudi Arabia

Total 2024  
Luxury Beauty's  
'Attainable  
Consumer'  
Spending

\$522B



🇸🇦 Saudi Arabia

↑ #20



Source: World Data Lab -(Nominal USD) - Attainable Consumers = individuals spend at least \$120/day in in these markets (2034)

# *Unlock the Full View of the Consumer*



## *Mastering the art of balance to thrive and shape the future of beauty*

- ❑ The in-store experience is at risk, but when done right, it becomes a powerful asset—**blend digital and physical retail to create seamless, impactful shopping journeys.**
- ❑ **Master the digital shelf** across assortment, managing supply to searchability
- ❑ Growth thrives on innovation - **draw inspiration from the global beauty landscape** to spark the next breakthrough while maintaining what sets your business apart.
- ❑ **Cater to generational preferences** while ensuring **inclusivity and representation**
- ❑ Be **bold**, innovate rooted in **authenticity** and **trust**



**Claire  
Marty**



**VP NielsenIQ  
Global Beauty Vertical**

[claire.marty@nielseniq.Com](mailto:claire.marty@nielseniq.Com)

[www.linkedin.com/in/claire-martyniqbeauty](https://www.linkedin.com/in/claire-martyniqbeauty)

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