

The Online Beauty Retail (R)Evolution

24th September 2025

NielsenIQ



The **Outlook** Of The Online Beauty Market In Europe



Today, NIQ Digital Purchases
is the largest GDPR
compliant panel in Europe

Panel Size

+2M

online shoppers

NIQ *Digital Purchases*

Scope of Analysis & Number of Active Online Shoppers

Europe



354k



360k



338k



285k



297k



187k



164k



77k



70k



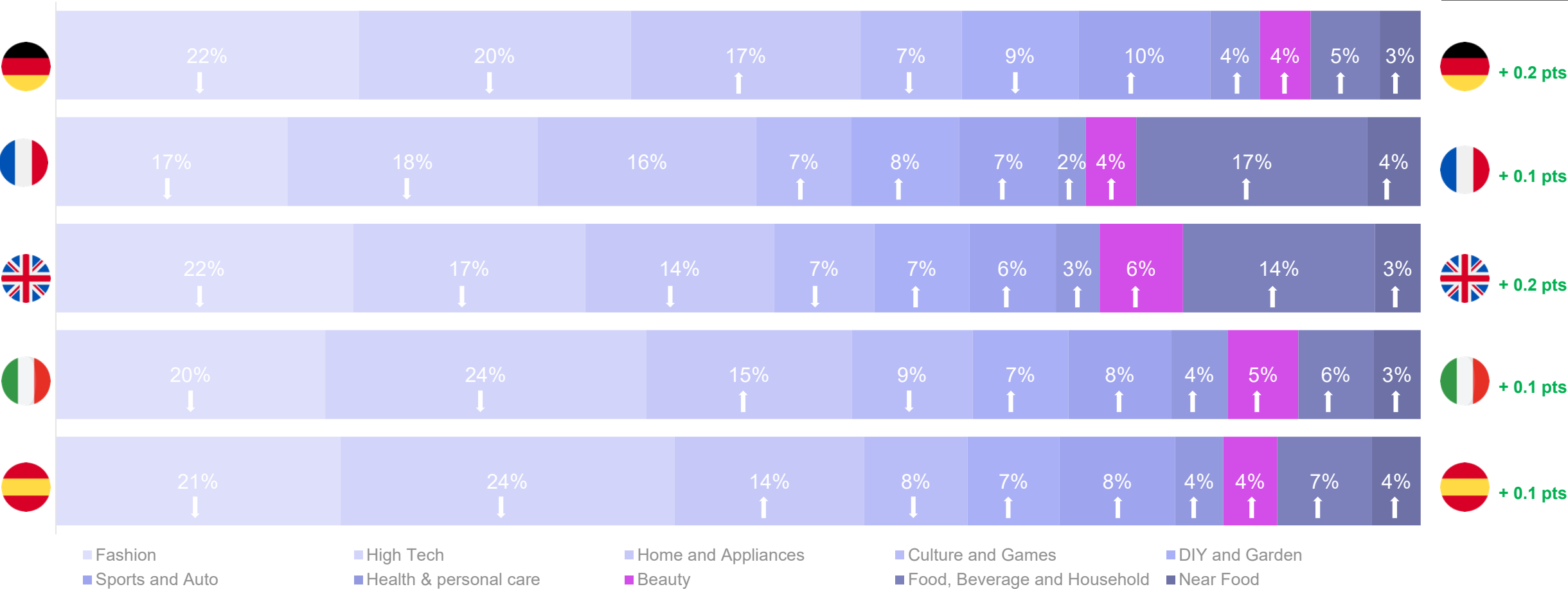
55k

Shoppers across Europe are dedicating an increasing share of their online spend towards Beauty

Weight of Beauty online purchases in total e-commerce (services excluded) – in value

Total Ecommerce – MAT 2025

Beauty
MAT 2025 vs 2024



Source: NIQ Digital Purchase e-commerce consumer panel. Data ending 07 September 2025.

Beauty consumers are *spending more* and *shopping more often* online, with the UK leading the trend

Consumer KPIs per country

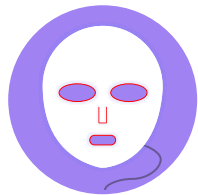
Online Beauty – MAT 2025

					
Average online spend per e-shopper	150.7 € ↑	113.9 € ↑	213.7 € ↑	107.0 € ↑	97.6 € ↑
Purchase frequency	4.7 ↑	4.2 ↑	9.0 ↑	4.3 ↑	4.0 ↑
Average basket	31.9 € ↑	27.2 € ↓	23.8 € ↑	24.7 € ↓	24.8 € ↑
Penetration among e-shoppers	57% ↑	55% ↑	72% ↑	56% ↑	53% ↑

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. Penetration vsTotal E-commerce. Data ending 07 September 2025.

Tech Devices *Expanding* Beauty Rituals

New devices seek to compliment and expand – not replace - existing beauty routines and products



\$834m USD

Electric Cosmetics Market Size

10%

of consumers have **already purchased** light technology devices (e.g., electrical face masks, natural light lightbulbs, therapy lamps)

13%

plan to purchase light technology devices in future

Source: NIQ 2025 Global health and wellness survey, Wired for Wellness : Tech & Durables Health categories – 2025- | Q. Have you purchased or plan to purchase any of the following health-focused technology products in the last 12 months?

Gfk market intelligence sales | tracking period: Apr 23 – Mar 25 | Countries: Global excl North America, Russia



Panasonic

Mask-type ionic facial device Ion Boost EH-SM50



A wearable mask-style ion therapy device that **enhances absorption for sheet masks and serums** using Panasonic’s IonBoost technology. It offers multiple modes - Sheet Mask, Daily Care, Quick Care - with embedded warmth and cooling zones for eye and cheek areas.

Steamer Nanocare EH-SA70



Panasonic’s steam-based devices use nano-ionic moisture sprays to open pores, soften skin, and **enhance absorption of subsequent skincare layers**. Used at the start of cleansing routines or before treatment masks, they set a ritual tone for hydration and sensory prep and **can be used with favourite essential oils**.

Lift Care Facial Beauty Device Vitalift Kassa EH-SP86



Merging Japanese gua sha technique with electronic warmth, this handheld device encourages lymphatic drainage and circulation. The heated massage provides product absorption benefits and relaxation, creating a self-care ritual that merges ancient beauty techniques with modern facial tech. **Recommended in routines for serum absorption** and complexion radiance, it can be used with the included water clear gel or **your usual serum, milky lotion, eye cream, etc.**

Source: <https://panasonic.jp/face/products.html>

How Dyson Haircare Shoppers Spend Online on Beauty Products



Average Beauty Shopper Annual Online Spend:

185£

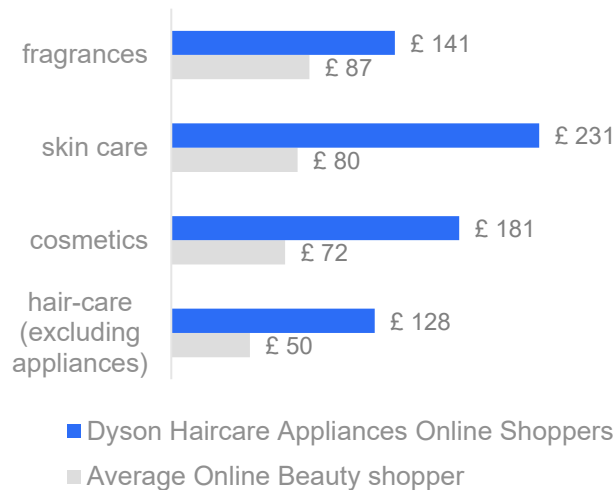
Average **Dyson** Shopper Annual Online Spend:

574£

Heavy online beauty spenders



Average online spending per category



Spend more on all categories



Top Beauty Brands over-indexing among Dyson shoppers

KÉRASTASE
PARIS

ELEMIS

ESTÉE LAUDER

Over-index on prestige brands

Amazon leads the beauty market in EU5

Top merchants per country – in value
Online Beauty– MAT 2025

					
#1	 ↓	 ↑	 ↓	 ↓	 ↑
#2	 ↑	 ↓	 ↑	 ↑	 ↑
#3	 ↑	 ↑	 ↑	 ↑	 ↑
#4	 ↑	 ↑	 ↓	 ↓	 ↓
#5	 ↑	 ↓	 ↑	 ↑	 ↑
Highest growth L12M	 +0.9pts	 +1.9 pts	 +3.5 pts	 +0.9 pts	 +1.5 pts

Amazon is Leading Beauty Online



Men account for 1/3 of online beauty sales, and Amazon have tapped into this market

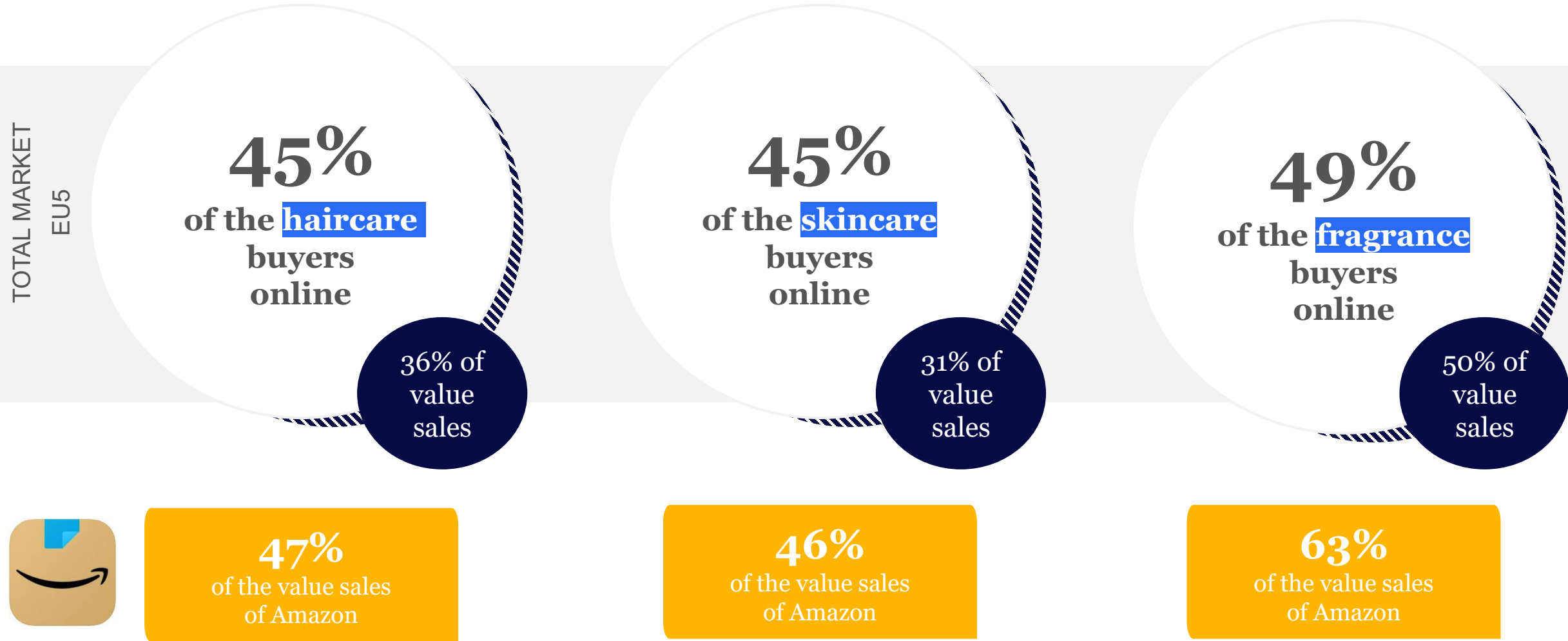
Gender Penetration EU 5
Online Beauty– MAT 2025



51% of online beauty buyers
35% of the total beauty sales

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 7 September 2025.

Men over index in many beauty categories within Amazon



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 7 September 2025.

Amazon is accelerating within dermo cosmetics



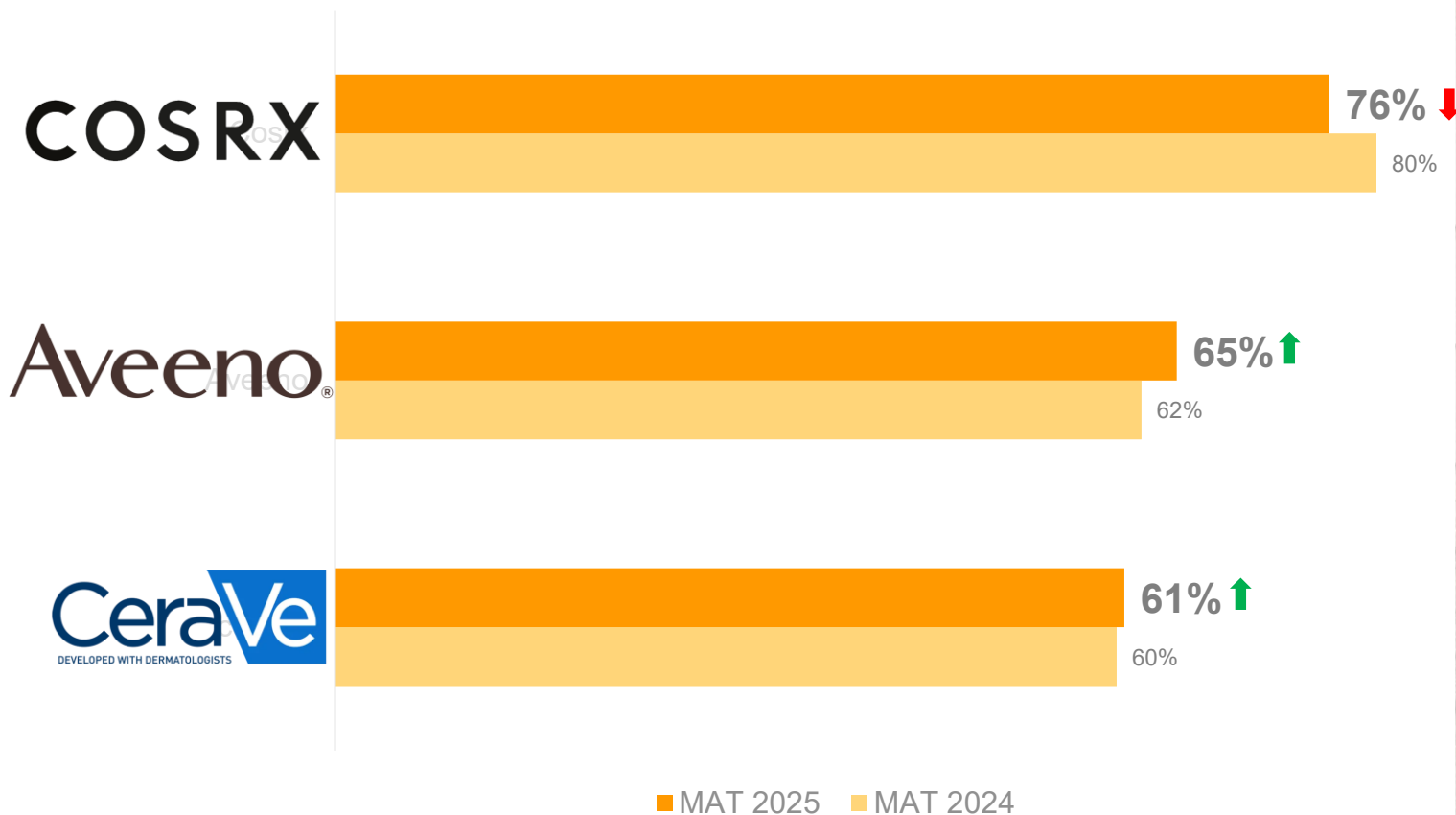
Dermo Cosmetics Brands



Consumer panel NIQ Digital Purchases. Skin conditioning and Moisturizing. Pharmacy brands: A Derma, Aveeno, Bioderma, Biotherm, Caudalie, Cerave, Cosrx, Ducray, Eau Thermale, Embryolisse, Erborian, Eucerin, Isdin, Klorane, La Roche Posay, Medik8, Nuxe, Skinceuticals, Svr, Uriage, Vichy, Weleda, Cetaphil. Last 12 months ending on September 7th 2025

Amazon is accelerating within dermo cosmetics

Amazon market share per brand – in value
Online Beauty– MAT 2025

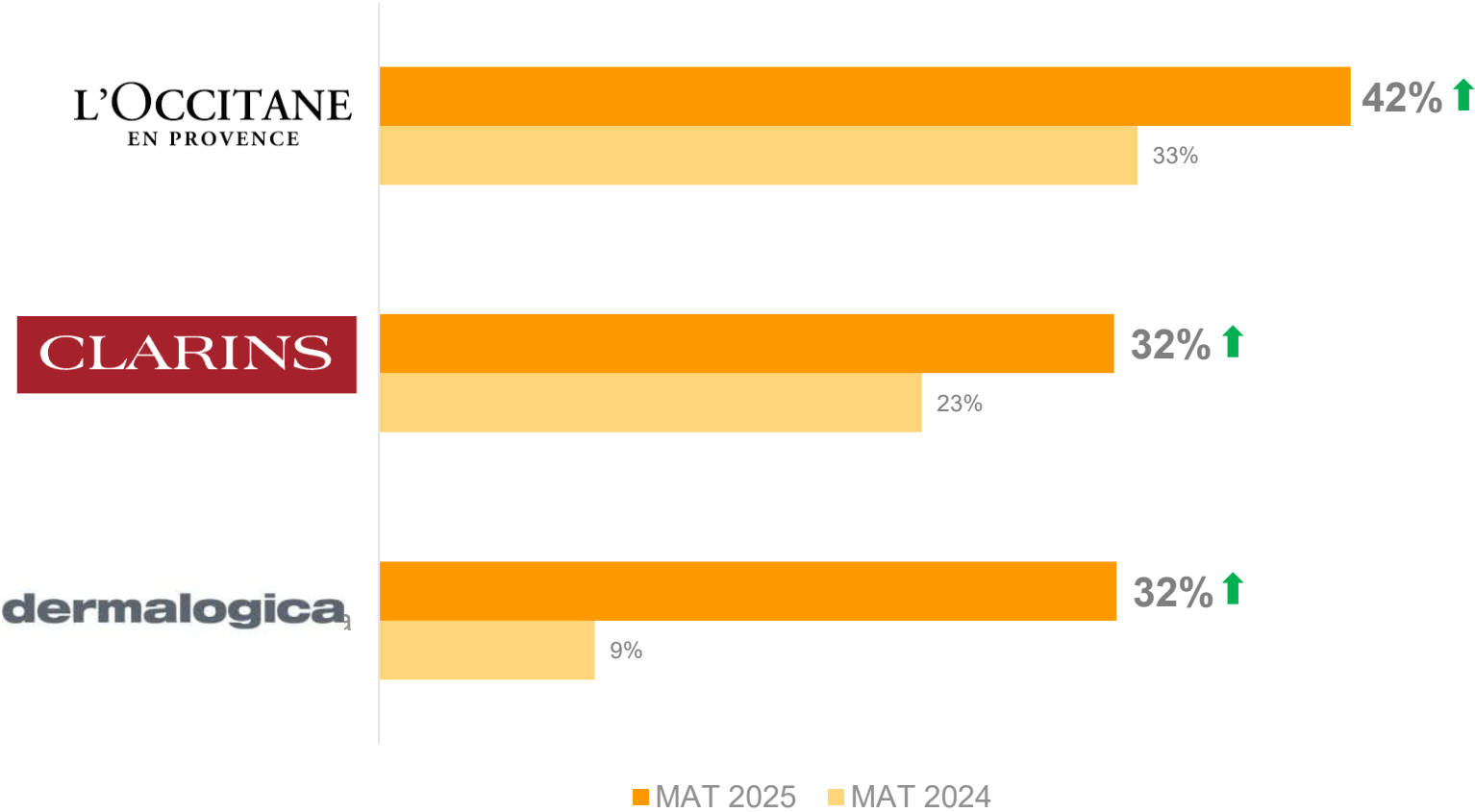


amazon is the leading online retailer for Aveeno, CeraVe, COSRX in the UK

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 7 September 2025.

Amazon is now targeting premium brands

Amazon market share per brand – in value
Online Skincare – MAT 2025



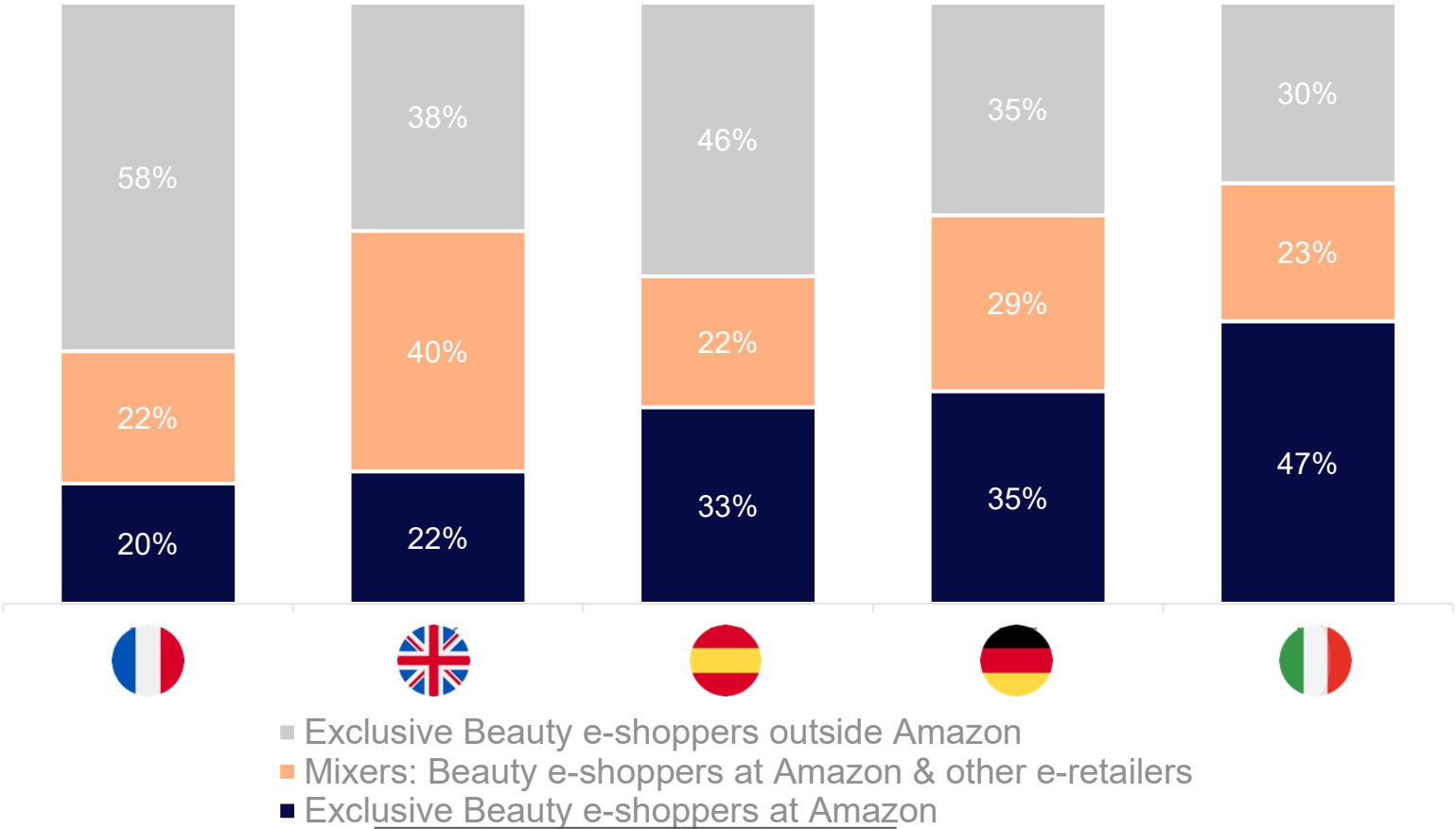
amazon is the leading online retailer for
L'OCCITANE EN PROVENCE **CLARINS** **dermalogica**
in the UK

Source: NIQ Digital Purchase e-commerce consumer panel. Skincare : Body & Face cleansing, Skin conditioning and Sun care. Data ending 7 September 2025.

A significant share of Beauty e-shoppers buy exclusively at Amazon

Breakdown of Beauty e-shoppers between Amazon and other e-merchants

Online Beauty – MAT 2025



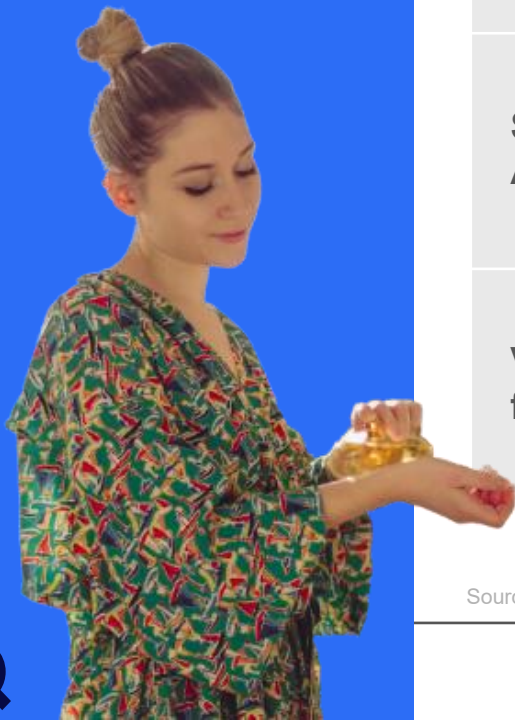
47% of beauty shoppers in Italy made their purchases exclusively on Amazon

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 07 September 2025.

Beauty on a Budget: Second-Hand



More and more shoppers are buying second-hand fragrances



Second-hand KPIs Online Fragrances– MAT 2025

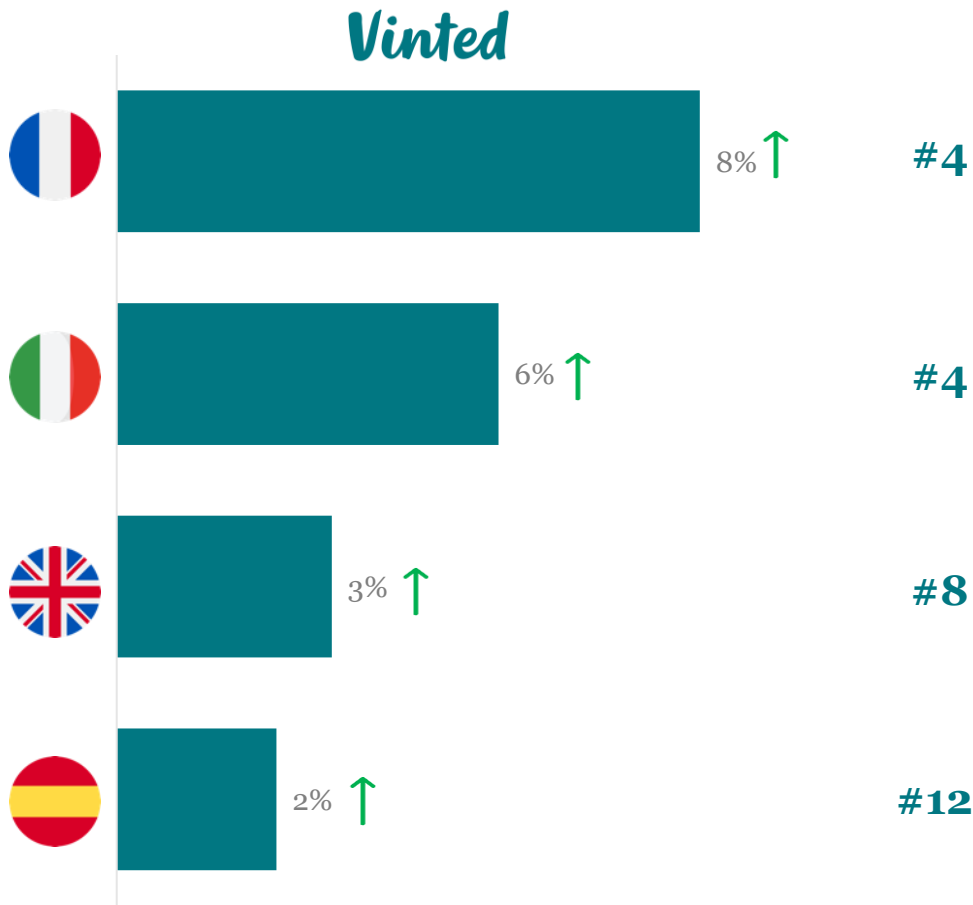
				
Second-hand penetration among fragrances e-shoppers	14% ↑	8 % ↑	7% ↑	5% ↑
Second-hand fragrances AOV	32€ ↓	30€ ↓	29€ ↑	30€ ↓
Value share of online fragrances	9% =	2 % ↑	3% ↑	2% ↑

Source: NIQ Digital Purchase e-commerce consumer panel. Fragrances. Data ending 07 September 2025.

Vinted ranks in the top 5 e-merchants for Fragrances in France, Belgium and Italy

Vinted value market share and ranking

Online Fragrances – MAT 2025



Top 3 brands at Vinted

Online Fragrances – MAT 2025

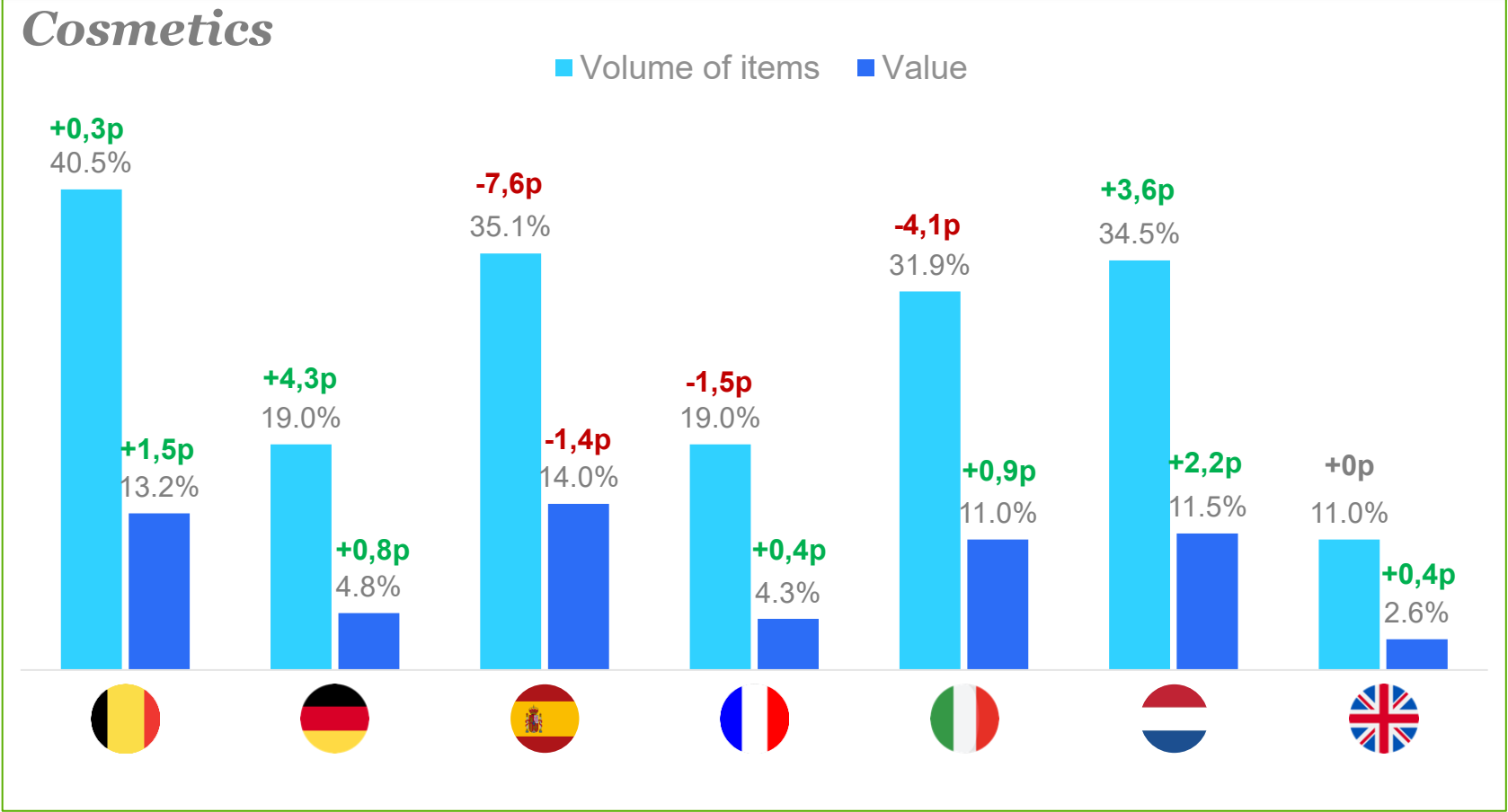


Source: NIQ Digital Purchase e-commerce consumer panel. Fragrances. Data ending 07 September 2025.

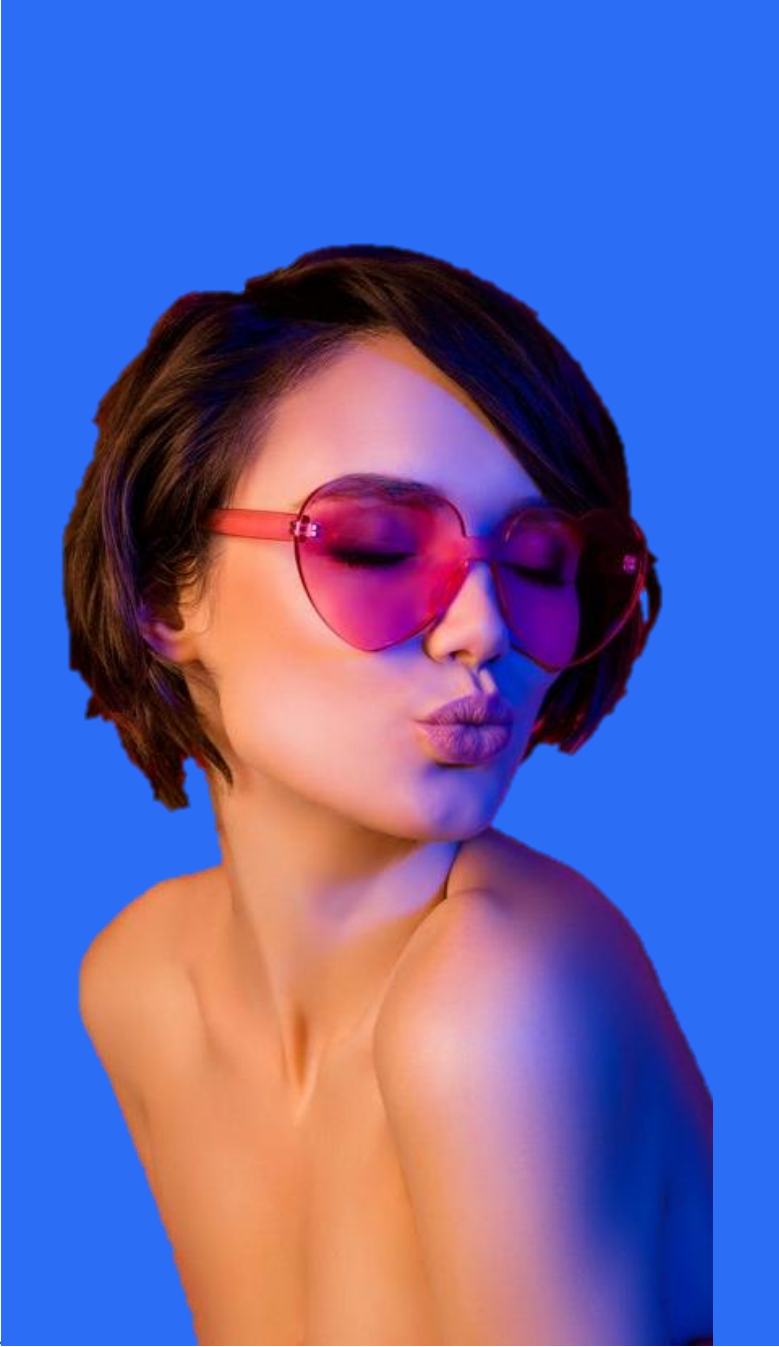
Shein in Cosmetics



Shein market shares evolutions in value and in volume of items

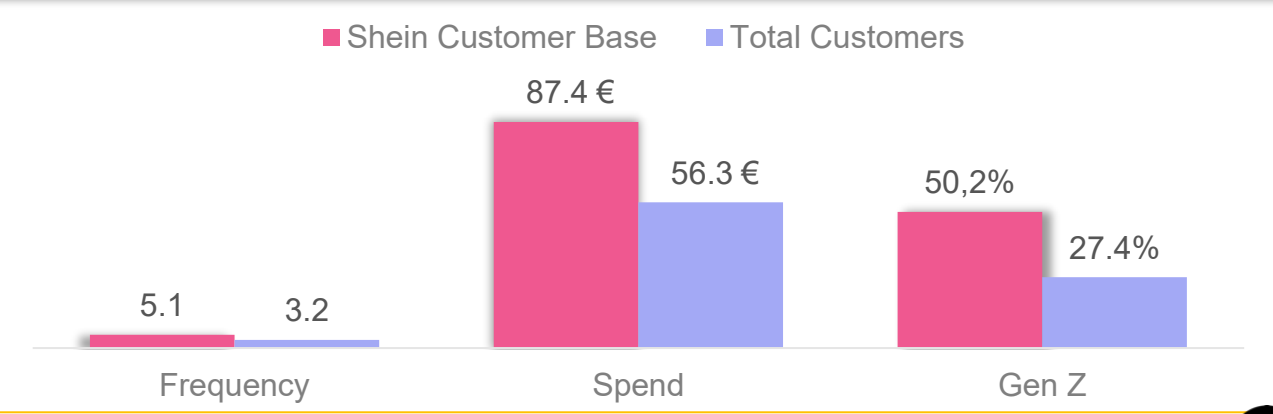


Source: NIQ Digital Purchase e-commerce consumer panel. Cosmetics: Eye, Lip, Face, Nail. Data ending 30 June 2025.

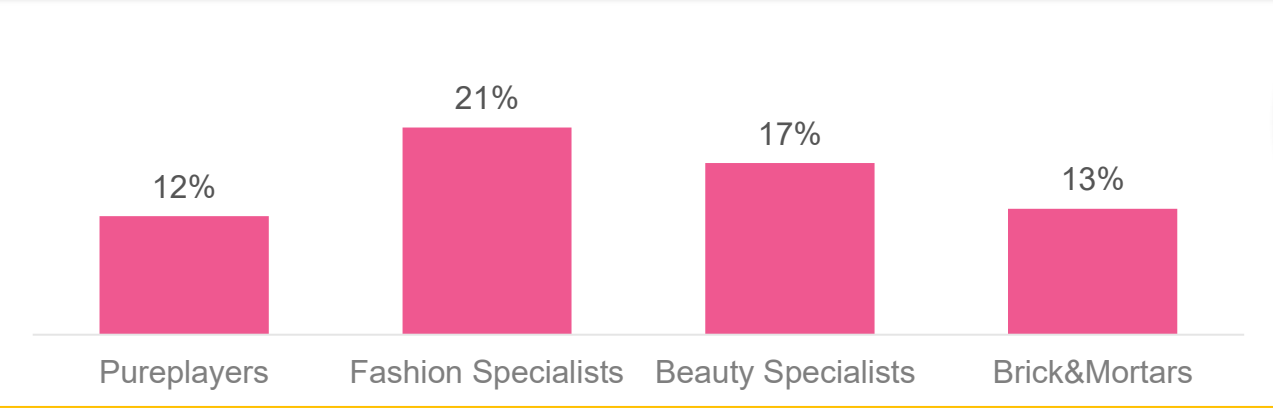


Shein Consumers are **Heavy** Shoppers in Cosmetics

Who is the Shein cosmetics buyer?



Are *your* customers purchasing Cosmetics on Shein?



17%
of Beauty Specialists
customers purchased
cosmetics
on Shein

Source: NIQ Digital Purchase e-commerce consumer panel. Cosmetics: Eye, Lip, Face, Nail. Data ending 30 June 2025. DE



Shein customers also buy prestige brands like Charlotte Tilbury or Huda Beauty

Brands purchased by Shein Customers outside Shein

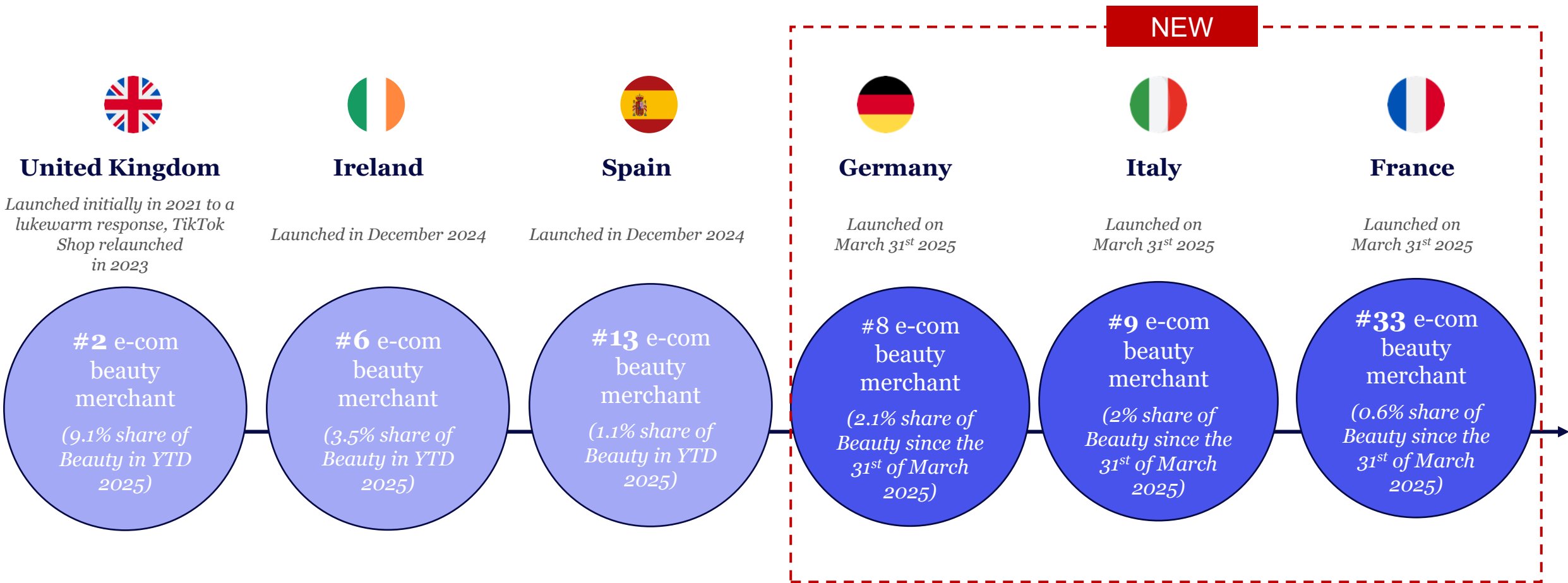
							
#1							
#2							
#3							

Source: NIQ Digital Purchase e-commerce consumer panel. Ranking in value. Cosmetics: Eye, Lip, Face, Nail. Data ending 30 June 2025.

Social Selling Is Shaking Up The Beauty Market



TikTok Shop continues its expansion to Europe by crossing the Channel



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 07 September 2025.

TikTok Shop consumers are heavy beauty shoppers

Who is the TikTok Shop beauty buyer?



Spent £56 more on beauty

than the average ecommerce beauty buyer in the past year



Made 2.9 more orders

than the average ecommerce beauty buyer in the past year



36.6% are Millennials

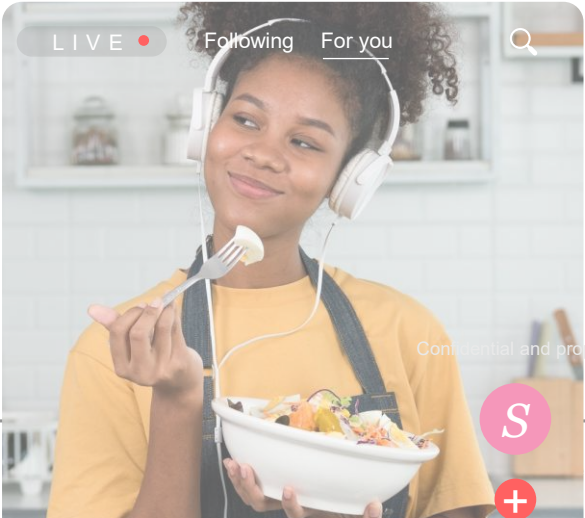
(Contributing 40% of beauty spending)

Are *your* customers purchasing on TikTok Shop?



27% 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 07 September 2025.



TikTok Shop is a new playground for retailers too..

Top Sellers in TikTok Shop Beauty – MAT 2025

#	Seller Name	Market Share
1	Plmakeupacademy	9.77%
2	Made-By-Mitchell	4.85%
3	The-Beauty-Crop	2.97%
4	Naturespell	2.23%
5	Bperfect-Cosmetics	2.07%

#	Seller Name	Market Share
6	L-Oreal-Consumer-L-Ore...	1.85%
7	Wonderskin-Uk	1.57%
8	Givemecosmetics	1.43%
9	Tatti-Lashes	1.25%
10	Lookfantastic	1.12%

Order confirmed

Hi [redacted]
Great news – your order has been confirmed. We will send you a delivery confirmation with your tracking details as soon as it's on the way.
Your TikTok Shop Team

Order ID: 576[redacted]

Delivery Nov 29 - Dec 4

 LOOKFANTASTIC



Sol de Janeiro Jet Set
Gift Set

£30.00

×2

[View order details](#)

[Return or cancel your order](#)

Shipping address

John Doe
1 Rue de Metz
75010 Paris
FRANCE

Order summary

Subtotal	£60.00
Delivery	£0.00
Vouchers	- £3.00
Total (2 items)	£57.00

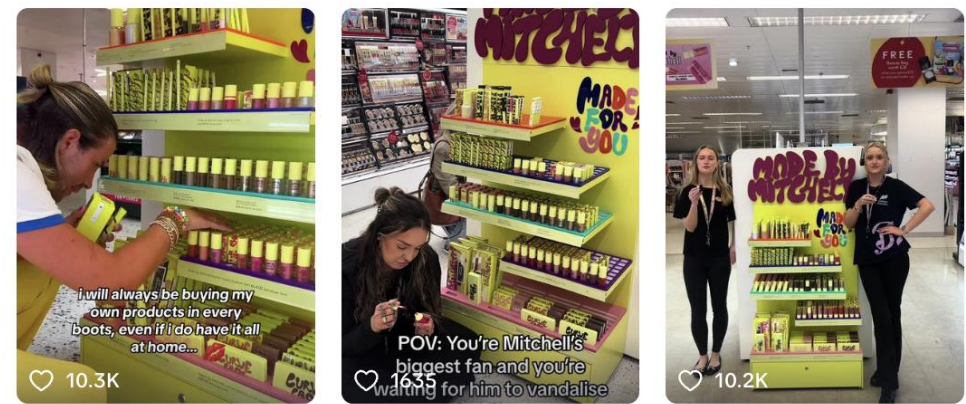
Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding hair styling and accessories, Body & Face cleansing, Skin conditioning and Sun care. Data ending 07 September 2025.

Opening new opportunities for spotting rising trends and future best-selling brands

Top Brands in TikTok Shop
Beauty – MAT 2025

1		6	
2		7	
3		8	
4		9	
5		10	

Made By Mitchell launched in Boots
in July 2024



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 07 September 2025.

The Online Beauty Retail (R)Evolution

Trends to Keep Watching

Amazon's
Rise



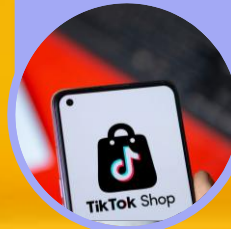
Second
Hand &
Dupes

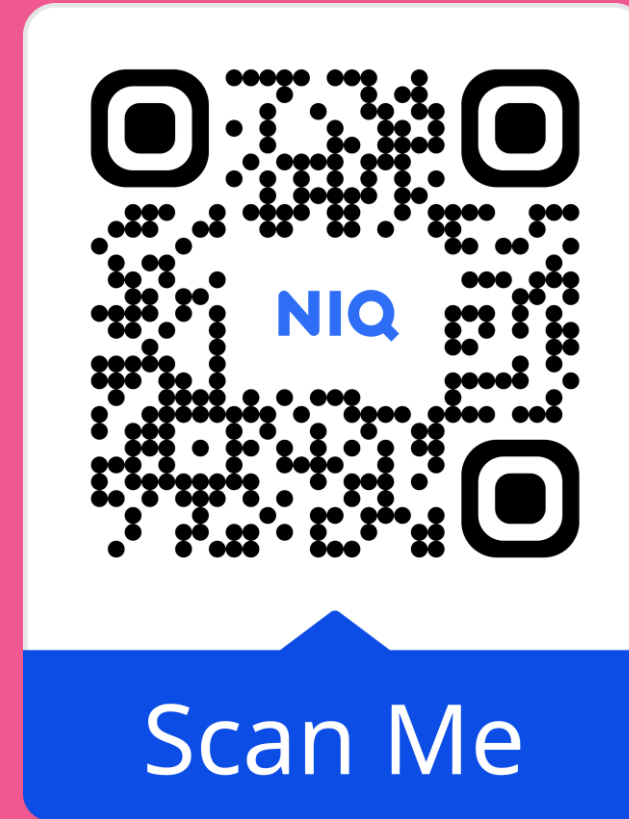


Shein



TikTok
Shop





Or come say hello at our NielsenIQ booth!