

The Global Beauty Edit

Executive Brief

April 2026

Data for FY2025

Align Performance, Consumer Expectations and Seamless Commerce

Beauty in 2026 is being shaped by a convergence of global pressures and local realities. Consumers across markets are navigating economic uncertainty, cultural change and rising expectations of what products should deliver—placing greater emphasis on value, efficacy and relevance at every point in the journey.

While behaviours manifest differently by market, a clear set of shared priorities is emerging. Shoppers are becoming more ingredient-literate, more intentional in their routines, and increasingly influenced by digital platforms that compress choice and accelerate decision-making. At the same time, wellness, simplification and self-expression are reshaping how beauty is evaluated and experienced.

In this environment, competitive advantage is less about chasing individual trends and more about executing with clarity and discipline. Simplifying propositions, proving performance and winning visibility in a market where discovery, consideration and conversion are increasingly mediated by digital platforms and algorithms will define the next era of winners.

Tara James Taylor

SVP, Global Beauty



Themes Shaping our Conversations so far in 2026

Affordability



Consumers everywhere are prioritizing value, seeking affordable products and channels without sacrificing quality or efficacy.

Premiumisation



Despite economic pressures, many markets see consumers trading up for prestige brands and products that offer tangible benefits.

Efficacy & Ingredient-Led



Shoppers are increasingly knowledgeable about ingredients, demanding transparency and efficacy-led formulations.

Multifunctionalism



Consumers are streamlining routines with multifunctional products that deliver many benefits, optimizing for both cost and convenience.

Ecommerce & Social



Online platforms are reshaping beauty discovery, comparison, and purchase, accelerating access to trends and education.

Personalization



Despite economic pressures, many markets see consumers trading up for prestige brands and products that offer tangible benefits.

K-Beauty



Korean beauty is a global benchmark, inspiring multi-step routines, ingredient-led innovation, and accessible performance.

AI & Beauty Tech



AI-powered personalization and beauty tech, like virtual try-ons and salon-grade devices, are mainstreaming smarter, tailored routines.

Pharmacies & Dermo



Pharmacies and dermo cosmetic brands are rising globally, offering trusted efficacy-led products through expert-led channels.

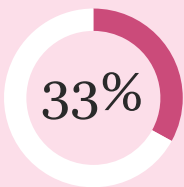
Wellness



Beauty is increasingly intertwined with wellness, as supplements, nutrition, and holistic self-care become part of everyday routines.

Simplicity & Ease

Complexity is becoming a barrier to conversion, with consumers gravitating toward streamlined routines and products that save time and reduce decision fatigue. With 39% of U.S. consumers reporting that they feel more time-crunched than six months ago, shoppers are actively looking to cut unnecessary steps from their daily routines.



33% of global consumers say that the last few years have made them realize “less is more”

This shift is fuelling demand for products that do more with less, whether through multifunctional formulas or tightly edited ranges that simplify choice and usage. Brands that design propositions around real-world moments and practical needs, such as makeup with skincare benefits or minimal routines that deliver multiple outcomes, are best positioned to resonate with today’s time-poor, stressed consumers.

52% of global consumers are willing to pay more for products that make tasks easier / less time consuming



Efficacy & Credibility

Consumers are increasingly willing to pay for products that deliver visible results and are backed by credible, science-led claims, elevating clinical proof, ingredient authority and trust signals from marketing differentiators to core growth drivers. Since Covid, scrutiny around what goes into products and what brands stand for has only intensified, with no sign of slowing.



This is reflected in the fact that half of global consumers say they are willing to pay more for products claiming a local country or community origin, while tools such as ingredient-scanning apps are becoming embedded in the path to purchase. In France, 21% of consumers cite Yuka as a key source of beauty information, with Gen Z in particular unwilling to buy without first checking ingredient credibility, underscoring how transparency and proof now directly shape consideration, trust and willingness to pay.



49% of global consumers are willing to pay more for products with elevated ingredients / formulations

Digital Execution

Globally, online sales are growing 5x faster than in store sales, making digital commerce and AI essential in determining the winners in the next wave of beauty.

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- 1** Effective Influencer Partnerships
 - 2** Availability and supply chain management
 - 3** Visibility in media and search
 - 4** Attractiveness through competitive price & promo
 - 5** Optimizing for AI Search

As beauty continues to shift online, growth is increasingly determined by the quality of digital execution across the consumer journey. Influencer-led content remains central to discovery, with simple, authentic formats proven to resonate more strongly than overly complex or stylized messaging. That momentum only converts when products are available: online out-of-stocks quickly undermine performance, with a 20% OOS rate equating to around one-fifth of demand lost and knock-on impacts to search ranking and media efficiency.

When availability is secured, visibility becomes the accelerator. Products ranking in the top 1–10 search positions can deliver up to 9x higher click-through, reinforcing the importance of optimized content and pricing. At the point of choice, digital shelf attractiveness and SEO discipline are increasingly decisive, particularly as AI compresses assortments and surfaces just one or two products, making a clear, legible product story critical to winning consideration.

Why K-Beauty is Meeting the Moment

K-Beauty has long set global standards in formulation innovation, ingredient storytelling, speed-to-market and consumer education. What's different now is that these strengths are colliding with the right market conditions. Korean brands are winning because they meet today's consumer needs with precision: products are easy to understand and adopt, priced accessibly without sacrificing credibility, and built around visible efficacy rather than abstract promises. This is amplified by best-in-class digital execution, where social commerce, creator-led education and rapid trend translation turn innovation into scale almost instantly. In a value-conscious, digitally native beauty market, K-Beauty's operating model feels purpose-built for the moment.

+53%

*K-Beauty Global Value
Sales Growth vs YA*

At home, Korea is already moving beyond the categories it is best known for globally, pushing into higher-performance skincare and more advanced formats that prioritise visible results and fuel the next phase of growth.

The lesson for global players is not to copy Korean brands, but to learn from how they work. K-Beauty shows the power of designing products around real consumer pain points, communicating benefits with clarity, and using digital platforms as demand engines, not just marketing channels.



Design for Simplicity, Execute for Scale

Growth in today's beauty market is less about chasing individual trends and more about designing propositions that work seamlessly across how consumers discover, choose and buy. Winning brands are simplifying routines, proving performance through credible signals, and executing with discipline across digital touchpoint, ensuring products are easy to find, easy to understand and consistently available. As choice becomes increasingly filtered by platforms and algorithms, clarity, relevance and executional excellence are emerging as the most reliable drivers of conversion and long-term growth.

*Simplify the
value
proposition*

*Build trust
through
proof, not
promises*

*Win the
digital shelf
and the
algorithm*



Insights to Grow Your Business



NIQ data shows that most categories are growing less than 1% annually. While many brands continue to chase competition for market share growth, even strong share gains can't offset falling demand. Real growth comes from outside your category - on average 35% of net revenue brand growth is attributable to category growth.

Our latest report on creating demand growth explains how brands are identifying new occasions, entry points and reasons to buy to drive consumer penetration and expansive category growth. There are four universal growth levers that can be applied to unlock category demand. We would welcome the opportunity to share these insights, including case study successes, in a lunch 'n learn session with your team.

Our latest global Beauty reports are out!

Reach out to your NIQ contact to find out more about the Global Outlook for Beauty 2026 and find more Beauty intelligence through the **Beauty Inner Circle**



Have you heard the news?

NielsenIQ Digital Purchases is Expanding



NielsenIQ is launching eCommerce panels in Brazil, Mexico, Argentina, and Chile



These panels will be the first foundational Digital Purchases datasets in the region, and we will plan to expand the specifications over time as adoption grows.



The datasets will each consist of ~40k panelists, ~10 key retailers, and high-level category coding. Brand-level coding and calibration will not be available in these foundational datasets. This will serve as a powerful total store read with breakouts for key high-level categories.



What is Digital Purchases?

Digital Purchases is NIQ's eCommerce intelligence solution, powered by harmonized e-receipt data from a large, consumer-permissioned email panel. It helps clients understand online purchase behavior across merchants and categories, with weekly visibility into digital market trends, merchant/seller dynamics, and shopper behavior. The solution is purpose-built for digital commerce and e-shopper insights.

When will these panels be available?

The Mexico panel is available today and the remaining panels are planned for a July 2026 release

What other markets have Digital Purchases?

US, FR, UK, DE, ES, IT, NL, BE, CH, IE, AT, IN



We'd love to hear your feedback!

Please help us shape future versions of *The Global Beauty Edit* by letting us know your thoughts and feedback via this quick survey



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About NIQ

NIQ, the world's leading consumer intelligence company, reveals new pathways to growth for retailers and consumer goods manufacturers. With operations in more than 100 countries, NIQ delivers the most complete and clear understanding of consumer buying behavior through an advanced business intelligence platform with integrated predictive analytics. NIQ delivers the Full View.

NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit [NIQ.com](https://www.niq.com)

