NielsenIQ

Global Beauty Views 2026

20

Expert perspectives, from Mexico to Saudi Arabia

K-Beauty, beyond Korea

Discover the evolving beauty preferences around the world

When Inflation Reshapes Routine

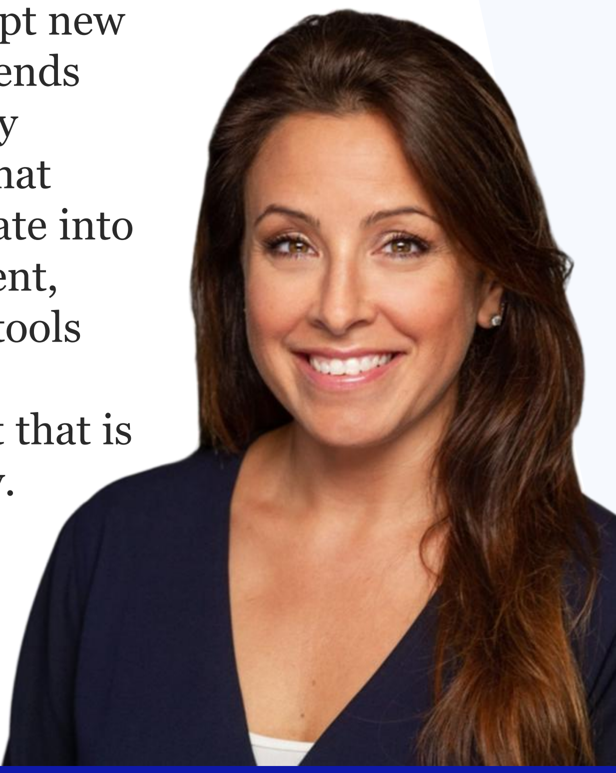
The forces driving a new approach to beauty in 2026

Inside An Evolving Beauty Market

Beauty and personal care in 2026 are shaped by forces that are at once global and deeply local. Across markets, consumers are navigating economic uncertainty, cultural change, and rapidly evolving expectations of what beauty should deliver.

What stands out most is not a single trend, but a pattern of consistency beneath the variation. From Seoul to São Paulo, we see a shared shift toward higher efficacy, greater ingredient awareness, and more intentional routines. Digital platforms continue to redefine how people discover and evaluate products, while wellness, simplification, and self-expression are becoming universal lenses through which beauty is experienced.

Yet these themes do not unfold in the same way everywhere. Inflation, demographics, regulation, and cultural context shape how consumers prioritise, trade off, and adopt new ideas. In this environment, success depends less on chasing trends and more on truly understanding people, how they live, what they value, and how those values translate into purchase decisions. Insight, measurement, and local perspective become essential tools for navigating complexity and making confident, informed choices in a market that is moving quickly and often unpredictably.



Tara James Taylor

Global Beauty Vertical Lead, NielsenIQ

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20 of the key markets shaping the global landscape in beauty in 2026

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Australia

Value-Driven Beauty in Uncertain Times

Caution is the new normal for Australians. Whilst global conflict is a rising concern, Australians continue to face a higher cost of living (food prices, housing, utility bills). Value-seeking shoppers drive growth in discounter channels including Aldi, Chemist Warehouse and Costco, and private label gains momentum in Pacific. However, beauty maintains the same rate of growth as FMCG in the past 12 months at +5.2%.

$ Value % Growth vs YA

+0.2% *Premium Brands*

+6.1% *Mass Brands*

K-Beauty Craze

Where performance meets affordability, K-Beauty continues to resonate strongly with Australian shoppers. Known for delivering **visible results at accessible price points**, Korean beauty is gaining traction as consumers look for budget-friendly products that still feel innovative and effective. In FY25, the category grew **26%,** supported by its reputation for nature-inspired ingredients, skin-first formulations and fast-moving trends that translate well to everyday routines.

Beauty Buys go Digital

E-commerce continues to gain momentum, led by **Amazon** as more shoppers move online and increase purchase frequency. Major retailers including Chemist Warehouse, Woolworths and Coles are also thriving digitally, particularly across skincare, haircare and deodorants. Affordability and convenience remain central, with online shopping increasingly seen as an efficient way to compare prices, replenish essentials and access a broader range of brands.

Pharmacy Power

Highly discounted pharmacy retail remains a dominant force in Australian beauty. **Chemist Warehouse** continues to outperform, supported by aggressive pricing and strong range breadth, with supermarkets following closely behind. At the same time, consumers are drawn into a growing mix of alternative channels, including online platforms and large beauty specialists such as Mecca, reflecting a market where value, access and experience coexist rather than compete.

Discovery at a Crossroad

In December 2025, Australia became one of the first countries to enforce a **social media ban** for under 16, including TikTok and Instagram. Among the aims of the ban is to reduce exposure to harmful beauty standards that result in negative impacts to mental and physical health. Eyes both locally and overseas- with other countries considering a similar measure - will be watching how this new legislation impacts beauty discovery and sales.

Tia Daryatmo

Senior Manager Analytics and Insights

Source: NielsenIQ Omnishopper FY2025 – Total Outlets Omni

Brazil

Sunscreens, Scents, and Skincare

In 2026, Brazil's beauty market is navigating a dynamic environment shaped by both political and economic factors. As the country enters an election year, government policies aimed at boosting consumer spending are supporting demand, though concerns over the fiscal deficit may discourage private sector investment. Despite these uncertainties, several clear trends are emerging.

Skincare Meets Makeup

The line between skincare and makeup continues to blur, with **hybrid formats** driving growth across mass and premium. Tinted sunscreens, complexion sticks and multifunctional lip products are gaining traction, **designed specifically for Brazilian skin tones** and everyday use. Brands like Ollie and L'Oréal are expanding sunscreen innovation, while lip care increasingly combines hydration and colour through accessible, fast-moving formats.

Ingredients with Purpose

Ingredient cues reinforce this shift. **Niacinamide** is extending beyond facial skincare into body lotions and deodorants to target hyperpigmentation, while plant-based oils — including avocado, argan, coconut and sunflower — shape haircare, shower products and facial cleansers focused on nourishment, shine and frizz control. Even treatment categories such as hair loss are becoming more mainstream, with minoxidil gaining visibility and acceptance. Crucially, these benefits are **no longer confined to high price points**. Brands like Principia are expanding access to effective skincare, while mass players such as Dove and The Ordinary are introducing ingredient-led propositions that signal quality and efficacy at more affordable prices. In makeup, SHEGLAM stands out by pairing novelty, trend speed and influencer-led discovery to reach younger consumers.

Scent as a Daily Ritual

A "fragrance renaissance" is underway, with consumers **layering multiple products**, such as deodorants, scented lotions, perfumes, and especially body splashes, to maintain a pleasant scent throughout the day. **Body splashes** are thriving due to their affordability, frequent innovation, and accessibility in drugstores, which traditionally did not carry higher-priced fragrances.

+6% Pharmacy Volume Growth vs YA

(vs -1% total market)

Where Brazilians Buy Beauty

Pharmacies have emerged as a major growth driver, sustaining momentum through in-store advertising, sampling, CRM-based promotions and increasingly sophisticated retail media networks, supported by strong ecommerce capabilities. At the same time, Brazil's channel mix continues to evolve. As **door-to-door models soften**, leaders such as Natura and Boticário are accelerating investment in ecommerce and branded retail, while digital-native brands expand into physical stores or partnerships. With **TikTok Shop** now live in Brazil, 2026 is set to further broaden access, intensify competition, and accelerate discovery across channels, reflecting a market where 49% of consumers learn about new products online daily or more than once a week.

Victoria Colonnese Piffer

Associate Manager

Canada

Value driven, but not value-led

Canada's beauty market is operating under high interest rates and ongoing cost-of-living pressure, keeping consumers cautious and value-focused. While inflation is easing, household budgets remain stretched, driving a shift toward discount and value-oriented banners for everyday purchases. At the same time, beauty growth continues to outpace the FMCG market, representing a key opportunity.

$ Value % Growth vs YA

+12% *Premium Brands* **+8%** *Mass Brands*

Prestige Power

In a challenging economy where consumers are cutting back on discretionary spending, prestige beauty continues to defy the trend. Over the past year, **prestige has outpaced mass brands** across hair care, cosmetics, sun care and fragrance, underlining a clear willingness among shoppers to trade up for premium benefits.

This growth is being driven by **increased household penetration**, particularly in prestige skincare and fragrance, alongside more frequent shopping occasions. Channel dynamics are also shifting. Beyond traditional beauty and drugstores, mass merchants and online marketplaces — led by Amazon — are emerging as important growth engines for prestige, expanding both reach and visibility.

Rather than converging, **mass and prestige are increasingly coexisting** through differentiated strategies: prestige brands amplifying exclusivity and experience, while mass brands focus on affordability. The result is a market where value beyond price is becoming the primary driver of accelerated growth.

Young Adult Impact

Young adults are an increasingly powerful force in Canada's beauty market. By 2036, **7.8 million** Canadians will be between the ages of 20 and 35, expanding a cohort that already accounts for **$1.7B** in beauty spending and continues to grow faster than the total market.

This group also spends more per year than the average buyer, reflecting a clear willingness **to trade up for premium products**. Compared with older consumers, young adults allocate a greater share of their beauty budgets to fragrance and skincare, making these categories especially important for brands seeking to build long-term loyalty.

Their path to purchase is equally distinctive. Young adults are more likely to shop beyond traditional beauty retailers, turning to Amazon, warehouse clubs, and dollar stores for both discovery and value, reinforcing the **importance of being present and visible across multiple channels**.

Samantha Doyle
Director, Insights

Sources: NielsenIQ Omnishopper Panel | Latest 52 Weeks ending 18/10/25

China

Inside China's next-generation beauty market

China's beauty market is operating amid slower economic growth and cautious consumer sentiment. To stimulate domestic demand, the government has introduced a range of consumption focused measures, including state-backed shopping vouchers, trade-in subsidies and incentives targeting everyday consumer categories, aimed at encouraging household spending and supporting domestic circulation.

Clinical Innovation Goes Mainstream

China's beauty market is seeing a shift toward high-performance everyday products, as ingredients traditionally associated with medical aesthetics move into the mass market. **Human-like collagen** and **PDRN** are gaining traction in skincare, while **hydroxyapatite** is elevating oral care through a clinical, science-led lens.

This ingredient upgrade supports a growing focus on **skin barrier repair** and cellular-level efficacy, alongside rising demand for **multifunctional products**, from shampoos that combine oil control and damage repair to suncare formats that double as makeup.

Douyin and the New Face of Social Commerce

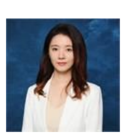
Douyin has become a major growth engine for beauty in China, driven by **livestreaming, short-form video, and creator-led selling**. While big KOLs still matter, momentum is shifting toward KOCs — everyday users whose content feels more authentic and persuasive. Store-run livestreams and knowledge-based beauty creators continue to anchor trust, turning Douyin into both a discovery platform and a direct path to purchase.

抖音

+47% *Douyin Livestream sales vs YA*

Lifestyle Stores as Community Hubs

Lifestyle beauty stores are emerging as a powerful new retail format, combining cosmetics with everyday essentials in highly curated, social spaces. Players such as Harmay attract niche, premium-oriented consumers through exclusive ranges and strong membership models, while formats like The Colorist use AR try-on technology and student-focused promotions to engage younger shoppers. **These stores blend shopping, identity, and community**, turning beauty retail into a lifestyle experience.



Amber Yu
Manager

Sources: NielsenIQ Ecommerce Measurement MAT Q3 2025 | Beauty = Hair Care & Skin Care

Colombia

Premium ambition meets everyday pragmatism

Colombia's beauty market is expanding despite economic pressure. High inflation, interest rates, and currency volatility are constraining purchasing power, while tighter regulations increase costs for brands. At the same time, a growing middle class, strong digital adoption, and rapidly expanding e-commerce are accelerating demand for premium and personalized beauty, particularly online. Convenience formats, discounters, and chain drugstores are reshaping access, balancing democratization with growing premium visibility.

Clean, Local, Credible

Colombian consumers increasingly favour **natural, locally sourced ingredients**, reinforcing clean beauty not just as an aesthetic but as a signal of authenticity and trust. Indigenous botanicals are gaining renewed relevance as part of regional pride and transparency, helping brands stand out in a crowded, globalised market.

Ingredient literacy continues to rise across categories. In skincare, PDRN, exosomes, niacinamide, and hyaluronic acid are driving demand for repair and hydration. Haircare is shifting toward sulphate-free formulas, peptides, and microbiome actives, while makeup increasingly blends coverage with care through plant oils, bio-retinol, and tranexamic acid.

AI-Powered Personalization

High social media usage and rapid e-commerce growth are fuelling demand for AI-powered beauty tools, from virtual try-ons to personalised skincare and makeup recommendations. For Colombian consumers, digital is not just about convenience — it is becoming the primary way to discover, compare, and validate products before purchase. This is accelerating premiumisation online, where shoppers are more willing to trade up when recommendations feel tailored and credible.

61% of Colombians look for products that are sustainable

e.g. less plastic, recyclable, lower carbon footprint

(vs 51% global)

Sustainability as Expectation

Eco-consciousness is no longer niche. Refillable packaging, recyclable materials, and circular economy cues are becoming baseline expectations rather than brand differentiators. Consumers increasingly see sustainability as part of product quality, particularly in skincare and haircare, pushing brands to rethink packaging, sourcing, and lifecycle impact.

Juan Zafra

Senior Analytic Consultant

Sources: NielsenIQ Consumer Outlook 2026

NielsenIQ

Ecommerce beauty value sales grew **+18%** globally in 2025

(vs 4% offline)

Source: NielsenIQ Omnishopper Panel (US, CA, AU), Omnisales (FR, DE, IT, ES, GB, AT, BE, CH, NL), NIQ ecommerce measurement (CN, KR), SPG Weekly (BA, HR, DK, EE, GR, HU, LV, LT, NO, PL, PT, RO, SI, SE, UA, AR, BR, DO, EG, HK, IN, ID, KZ, MY, MX, MM, NZ, PE, PH, PR, SA, SG, ZA, TW, TH, TR, AE, VN)

Key exclusions: China & South Korea excludes cosmetics & fragrances, UK excludes fragrances. Beauty specialist offline channel only captured in US, ES, CH, CA, AT

Egypt

A Reshaped Market

Egypt's beauty market has been reshaped by recent socio-economic and political developments. From October 2023, regional political campaigns accelerated a shift toward domestic and new players, allowing local brands to rapidly gain market share. Over two years, domestic players' value growth reached nearly triple that of international brands, before levelling off by 2025 as growth across both local and foreign brands stabilised at around 20% year-on-year. This shift is reinforced by macroeconomic pressure, with inflation peaking at 36.5% in July 2023 and currency depreciation reducing purchasing power. Import restrictions and foreign currency shortages further disrupted supply for global brands, driving price increases. Entering 2026, the market has become polarised: affordability dominates everyday purchasing, while premium continues to attract consumers when value and results are tangible.

Skincare at the Intersection of Value and Aspiration

Egypt's skincare market is increasingly driven by **performance and ingredient literacy** as consumers balance affordability with aspiration. Local brands remain key, led by Eva and fast-growing challengers such as Dermactive, while premium brands continue to gain traction when results are clear, with La Roche-Posay and Korean skincare reinforcing efficacy-led routines with heightened ingredient awareness. **Niacinamide** has become one of the most talked about ingredients in 2025, valued for its visible benefits across brightening, dark spot reduction, and texture improvement, and amplified by strong influencer and dermatologist visibility. Alongside this, panthenol, cicaplast, and seropipe are gaining momentum, reflecting a preference for functional, results-driven skincare across price points.

3.3% *ecommerce share*

+63% *Skincare value sales online*

E-commerce as a Catalyst

E-commerce is reshaping Egypt's beauty market at speed as **online sales continue to outpace traditional channels**. Despite its small share, its role in discovery, education, and price comparison is critical. Dedicated beauty sections and increased visibility across local platforms are accelerating a shift toward a click-and-deliver beauty mindset.

Beauty Meets Wellness

Alongside topical beauty, Egypt is experiencing a rapid expansion of health and wellness consumption. **Dietary supplements** have grown into a multibillion-pound category, with vitamins, immunity boosters, collagen, protein, and beauty-from-within products becoming everyday essentials. Social media plays a central role, with fitness and beauty influencers driving awareness and normalising supplement use as part of daily routines.

Ann Salib & Nour Gouda

Egypt Customer Success

Sources: NielsenIQ Retail Measurement 2025

France

Cautious Wallets, Considered Indulgence

French consumers remain cautious about the economic outlook, with around 80% expressing concern about the future, and deflation weighing on value growth. When adjusting budgets, French consumers tend to protect what feels essential. Personal care is not the first category they cut, but spending is rebalanced toward products that are deeply embedded in daily routines. More discretionary categories, such as make-up or even sunscreen, are often the first to be reduced, while core care remains resilient.

Value Through Indulgence

Despite financial pressure, indulgence continues to play a meaningful role. Two out of three French consumers say that self-care is a source of joy, and this is reflected in strong demand for small luxuries and at-home beauty tech. **LED masks** and compact skincare devices are seeing triple-digit growth, showing that consumers are still willing to invest when products deliver visible results and a sense of personal reward.

2/3 French consumers say that **self-care is a source of joy**

Beauty and Wellness

French consumers increasingly see beauty as something that comes from **self-confidence, sport, and nutrition** as much as from products. Supplements are becoming part of this broader view of beauty, reflecting a shift toward caring for the body from the inside out.

Gen Z stands out as more likely to believe that beauty starts with the products they apply and dedicating more time on their daily care routines than older generations.

Retail Shifts and the Rise of Dupes

Hypermarkets and supermarkets remain the most common place to buy personal care in France, but their dominance is increasingly being challenged. As well as ecommerce and pharmacies, momentum is coming from **discount and bargain retailers**, particularly Action, which have built strong loyalty by offering "dupes" (products inspired by leading brands at a fraction of the price). Social media has amplified this behaviour, with millions of views on dupe content from retailers such as Normal, Aldi, and Action, turning bargain-hunting into a form of beauty discovery.

Local Pride & Multicultural Influence

More than half of French consumers pay attention to whether personal care products are of **French origin**, reinforcing the importance of local brands and manufacturing. At the same time, multiculturalism is becoming a key growth driver, particularly in haircare. Textured hair continues to outperform the wider market, supported by brands such as Les Secrets de Loly, which reflect the **increasing diversity of French beauty needs.**

Cyrielle Bienvenue
Analytics Consultant

Source: NielsenIQ Homescan I Typologie Hygiène Beauté : Etude Panel View – 8 318 répondants online en avril 2025

Germany

Cost of living concerns shape spending caution

Germany's beauty market is navigating a period of persistent subdued growth, shaped by ongoing political uncertainty and cautious consumer sentiment following successive cost-of-living pressures. Government support measures and slowing inflation have eased some pressure, but households remain value-conscious, shaping a sharpened focus on price and performance.

Challengers, Coupons & Shifting Loyalty

Germany's beauty market is becoming more competitive and fragmented as **challenger brands** increasingly secure distribution and begin to challenge established manufacturers. This is closely linked to the increased importance of e-commerce in the past years, where new brands are often discovered first before expanding into physical retail.

At the same time, consumer behaviour reflects a tension between affordability and premiumisation. **Private label** has maintained an increased share after strong growth in 2024, and promotional sales are rising, yet premium products are also performing well, particularly online, where shoppers are more willing to invest when value and differentiation are clear. In store value sales growth is now outpacing online, as consumers are increasingly promotion-aware, actively comparing offers and visiting multiple retailers. **Drugstores**, the country's most important beauty channel, now using app-based couponing as a key promotional lever to capture this demand.

K-Beauty Sets the Tone

K-Beauty is gaining momentum in Germany, moving beyond specialist online retailers and into mainstream drugstores, where it is increasingly reshaping the face care category. As these brands reach a wider audience, they are also driving greater awareness of ingredient-led skincare, helping to elevate actives such as niacinamide and hydrocolloid patches as visible, on-trend signals of efficacy and care.

Trending Ingredients

Hair Care

Rosemary
+34%

Shea Butter
+28%

Skin Care

Niacinamide
+33%

Hydrocolloid
NEW STAR

Madlen Gerleit
Analytic Consultant

Source: NielsenIQ Product Insights Germany | LEH+DM+C&C+E-Commerce | Latest 52 weeks ending 25/01/26

India

Growth powered by digital and self-expression

India's beauty market remains resilient in 2026, growing through currency headwinds, post-GST shifts and global uncertainty. Polarization is accelerating, with both Mass and Premium scaling. E-commerce, driven by ONDC and quick commerce continue to pose a faster growth, mirroring a digitally fluent, confident and value conscious consumers

Value % Growth vs YA – YEC'25

+11.3% *FMCG* **+11.1%** *Beauty*

Clinical & Efficacy Led Beauty

Performance-led claims & treatment formats will define future category growth. Indian consumers are moving from basic care to results-driven routines. Sunscreen (+22%), cleansing milk & lotions are expanding in skin care as consumers adopt structured routines. Similarly, ingredients like chocolate, cherry, turmeric, & charcoal are elevating deep clean. Haircare is also shifting toward treatment, with conditioners growing +15% driven by repair, scalp health & frizz-control solutions.

Global Ideas, Localised for India

Winning brands blend global science with culturally familiar ingredients. Global beauty cues, particularly K-Beauty's hydration and barrier repair philosophy are gaining traction but are being adapted for Indian skin, climate and textures. Actives like Vit-C, niacinamide, hyaluronic acid and ceramides are increasingly paired with trusted Indian botanicals like neem & shikakai.

Accessible Indulgence

Low-ticket indulgence categories remain powerful volume drivers in beauty. Colour cosmetics and fragrances continue to serve as affordable luxuries and tools for self-expression. High growth in lipsticks, nail enamel and fragrances (+16%) reflects rising experimentation and identity-led consumption. Also, men's grooming continues growing (+11%) as male self-care routines evolve.

Channels Rebalancing Around Expertise & Convenience

Future beauty growth will be shaped by consultation and instant availability as growth consolidates in expert-led channels. Cosmetic specialists (+16%) & chemists (+12%) are outperforming as consumers seek trusted guidance and regimen clarity. Simultaneously, Quick Commerce is reshaping convenience.

Beauty's New Funnel: Digital First & Data Driven

Digital influence now drives the entire beauty purchase journey. Discovery is now digital-first, powered by AI led colour matching, skin diagnostics, personalized recommendations search, creators and ingredient education. Consumers fluidly move between online discovery and offline purchase, demanding transparency and clinically credible claims.

Sanojaa Thiyagarajah

Senior Manager

Source: NielsenIQ Retail Measurement YEC25 | NielsenIQ Consumer Outlook

Italy

Practical Luxury in a Cautious Climate

Italian consumers remain cautious about the economic outlook, with ongoing uncertainty and subdued growth shaping household sentiment. Private consumption is still expanding, but only moderately (+0.7% forecast for 2026), supported by rising wages and employment while constrained by a higher tendency to save. Domestic demand continues to drive growth, but external factors such as global trade tensions and tariffs limit confidence. As a result, consumers prioritise essential spending, with discretionary purchases reduced first. In personal care, categories tied to everyday routines—like basic hygiene and skincare—continue to show steady demand

Beauty Meets Ease

Routines are getting shorter, but effectiveness and well-being remain central. Lightweight textures, smart formulas, and products designed to fit seamlessly into the day are gaining ground. This shift extends beyond cosmetics into personal care, with **smarter solutions** such as leave-on masks, oils, and serums in spray formats that simplify routines while delivering hydration, protection, and a healthy glow. Another clear example is the new generation of face creams with built-in sun protection, combining daily hydration and broad-spectrum defence in a single step.

Value % Growth vs YA

Fragrances: **+4%** Cosmetics: **-5%**

Beauty's Scent Revolution

Body fragrances are enjoying renewed growth, moving beyond traditional perfumery to become everyday gestures of well-being. Lightweight, hydrating formulas that mist easily onto the skin offer a natural, feel-good scent without the intensity of classic perfumes. Consumers are seeking **immediate, versatile rituals** they can use throughout the day, driving growth of body mists, scented waters, and multifunctional sprays as accessible solutions bringing fragrance into everyday life.

Growth of "Dupes"

The rise of "dupes" has become one of the most notable shifts in Italian beauty shopping habits. These affordable products—created to replicate the texture, finish, or performance of premium brands—are no longer seen as second-best solutions. Instead, Italian consumers increasingly view them as smart choices: options that **deliver comparable results without the price tag of luxury cosmetics**. Consumers are not simply chasing the lowest price, but they are actively looking for products that prove their performance Social media plays a major role in this trend. Platforms like TikTok and Instagram are filled with side-by-side comparisons, wear tests, and honest reviews that make it easy for shoppers to identify high-quality alternatives. As a result, dupes gain credibility quickly and spread through word of mouth.

Anita Rocco
CS Consultant

Source: NielsenIQ Omnisales MAT 28.12.25 – HM+SM+Conv+Drug+Discounter+Pharmacy+Ecom

21% of Gen Z are less interested in achieving certain life milestones

(e.g. owning a home, getting married, having a child, retiring as a senior, etc.)

“I don’t have enough money for these bigger investments, so *why don’t I just be gorgeous?*”

33-year-old interviewee from Chicago - Bustle.com

Source: NielsenIQ Consumer Outlook 2026

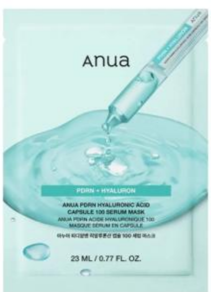
Japan

Global Influences, Local Innovations

*Japan is facing significant economic challenges, with **inflation** running high and the yen dropping to its lowest value in five years—moving from 103 yen to the dollar in 2020 to 157 yen in 2025. Rising food prices are now the top concern for Japanese consumers, with more than half expressing worry about their grocery bills. At the same time, the country's population crisis is fuelling a rise in anti-foreigner sentiment and conservative attitudes, influencing both political discourse and everyday behaviour. As a result, people are approaching spending and lifestyle choices with greater caution and restraint.*

K-Beauty Power

K-Beauty is rapidly gaining ground in Japan, powered by the influence of K-pop and K-drama and by Korean brands' reputation for advanced formulations. These brands often offer **exclusive colours and formats tailored specifically to Japanese shoppers**. Top rankings increasingly include Korean brands such as Anua, whose PDRN hyaluronic mask has become a standout example of how ingredient-led innovation is driving excitement and trial.



Technology-led Self-care

Alongside this retail reinvention, in-home beauty technology is booming. Japanese and Korean brands alike are racing to bring **salon-grade devices into consumers' homes**, with tools from brands such as Panasonic, Yaman, and SalonIA gaining popularity. From facial devices to scalp and hair tools, beauty routines are becoming more technical, more personalised, and more anchored in everyday self-care.

Retail That Does More

Japanese **drugstores** are redefining their role, expanding far beyond beauty and health into neighbourhood convenience hubs that sell everything from skincare and haircare to refrigerated food and household essentials. This shift reflects the need to capture everyday footfall and remain relevant in a more cautious spending environment. **Private labels** are playing a growing role in this transformation. Chains such as Matsumoto Kiyoshi are rolling out an expanding portfolio of own-brand products, spanning skincare, haircare, cosmetics, and even daily necessities, allowing retailers to compete on both value and innovation.

Meanwhile, **TikTok Shop's** entry into Japan in mid-2025 adds another layer of digital momentum, even if Japanese consumers remain loyal to platforms such as X, YouTube, and Instagram for discovery.

Evelyn Chuang
Senior Executive

Source: Product images sourced from internet

Mexico

Simpler Routines, Sharper Expectations

Cost-of-living pressure is reshaping beauty routines in Mexico. Consumers are spending more cautiously, but higher socio-economic segments remain willing to invest when added value is clear. This has accelerated demand for **multifunctional products** that simplify routines and cut costs, while delivering strong efficacy

Beauty That Works Harder

Mexican consumers are gravitating toward products that work harder, embracing **multifunctional formulas** that blend skincare benefits with makeup to streamline routines and manage costs. At the same time, interest in highly specialised solutions is growing, as shoppers look for targeted answers to specific skin and beauty needs. **Clean, cruelty-free, and sustainable brands** are gaining visibility, though they remain a niche for now. Functional cosmetics, such as creams with colour or makeup infused with SPF, are appearing everywhere, signalling a clear shift toward beauty products that deliver more in every step.

Retail Revolution

Major brands are doubling down on omnichannel strategies as e-commerce continues to rise, reshaping how beauty is discovered and bought. **Hard discounters** are gaining traction with sharp pricing and smaller pack sizes tailored to budget-conscious routines, while **drugstores** are expanding aggressively, reinforcing their role as accessible, everyday beauty destinations amid growing demand.

Hard Discounters – Beauty

+34%	+5pts
Value Sales vs YA	*Penetration vs YA*

Ingredient Spotlight

Ingredient-led beauty is shaping routines in Mexico, with **hyaluronic acid** gaining traction in facial serums and hair care, and glycolic acid trending in hair products. Familiar actives like vitamin C, niacinamide, peptides, and bakuchiol remain front and centre, appearing across formats from creams and serums to makeup, masks, and night treatments.

Carina Aguilar
Director de Cuenta Select

Sources: NielsenIQ Homescan Panel | Latest 52 Weeks ending 25/01/26

Saudi Arabia

Performance, Purpose and a New Premium

As Saudi Arabia undergoes a significant economic and social transition under Vision 2030, beauty consumption in the Kingdom is being fundamentally reshaped. Economic diversification, rising female workforce participation, and local manufacturing initiatives are supporting confidence and spending. At the same time, inflation and geopolitical uncertainty are driving more deliberate purchasing behaviour, while others are willing to pay a premium for quality, reinforcing a polarized market where shoppers are engaging at both ends of the price spectrum.

Dermatologist-Endorsed Products

There is growing demand for **clinically proven, dermatologist-recommended products**—such as Nizoral—driving the expansion of pharmaceutical-led beauty brands. While consumers remain price-conscious when it comes to essentials, they are increasingly willing to invest in beauty and personal care products perceived to offer higher efficacy and quality. Barrier support and skin moisturizing ingredients such as Hyaluronic acid, Vitamin C, Collagen and Niacinamide gain popularity perform well along with Anti-Dandruff shampoos

Clean & Conscious Beauty

Consumers are showing a strong preference for **vegan, cruelty-free, and sustainable** beauty products, with heightened attention to transparent formulations and reduced chemical content. increasing adoption of natural and organic ingredients such as honey, rice water and rosemary oil, driven by consumer preference for clean-label products.

Fit for Purpose

Brands are increasingly celebrating the modern Arab woman through **inclusive messaging and representations** that reflect local identities and aspirations. Beauty brands are innovating with long-lasting, high-performance formulations designed to withstand extreme desert heat and humidity, addressing **region-specific consumer needs**.

+59% Beauty Ecommerce value growth vs YA

Retail Battleground

While **E-commerce** continues to gain momentum, particularly with the rapid expansion of **quick commerce** players, consumers are becoming more selective, actively seeking promotions and switching brands or channels to manage costs. This has driven the expansion of **discounter** channels and a noticeable shift toward retailers offering frequent deals and discounts.

The market is also seeing continued growth and greater competition among specialized beauty retailers. While **global leaders** such as Sephora maintain a strong presence and **regional players** like FACES and Nice One continue to expand, new entrants—including Ulta Beauty—are entering the market, further intensifying competition and broadening consumer choice

Shanzeh Sheikh

Client Manager

Source: NielsenIQ Retail Measurement ECOMM NDH | Latest 52 weeks ending 25/01/26 | Beauty = Cosmetics, Fragrances, Skin Care & Hair Care

South Africa

The Beauty Story of a Smart, Expressive & Value-Savvy Nation

South African beauty is having a moment where *savvy meets self-expression*. Consumers are navigating rising costs, but they aren't stepping back—they're stepping **smarter**. Beauty is now about results, identity, clever spending, and the joy of everyday indulgence. E-commerce, TikTok culture, and ingredient literacy are rewriting the rules, while homegrown brands and local botanicals give the market a unique soul.

The "Smart Skin" Era

Consumers want *proof*, not promises. Ingredient literacy has surged—with niacinamide, ceramides, retinol, glycolic acid and PDRN now part of everyday vocabularies. Shoppers are simplifying routines with **SPF hybrids**, **tinted sunscreens**, and **multi-tasking serums,** products that work harder in fewer steps. Local science-forward heroes like **Lamelle** and **Skin Functional** are thriving, alongside clean-leaning brands such as Standard Beauty and Down to Earth.

+10% Value per Buyer during Black Friday vs YA

+3% Units per Buyer during Black Friday vs YA

Clever Glam: Beauty that Balances Treat & Thrift

Consumers are stretching budgets *without* sacrificing quality. Black Friday remains the **biggest beauty buying moment** of the year—especially for premium staples and big-ticket tools like the Dyson Airwrap.

Minis and travel sizes have become a **culture,** particularly among Gen Z, making high-end beauty more accessible, trialable, and handbag-friendly.

Digital convenience is booming; beauty e-commerce is rising in a wider market. Younger shoppers increasingly buy from **We Are Egg, Amazon, and indie online stores**, not just Clicks/Dis-Chem.

Beauty that Looks Like Us

South African beauty celebrates shades, textures, stories and identity.

- Inclusivity is non-negotiable. Shade ranges, melanin-safe formulas, and textured-hair solutions are expected.
- TikTok shapes beauty purchases and fuels weekly Gen Z experimentation. **Swiitch Beauty** is a local icon for affordable, high-quality lip liners and glosses.
- Everyday fragrance expression fuels demand for body mists — **Oh So Heavenly** and **Sol de Janeiro** are handbag staples.Men's grooming is rising fast, with men aged 25–44 driving **growth** in grooming.

Global Glamour, Local Soul

SA shoppers blend global trends with homegrown rituals. **K-Beauty** influence is huge; Viral Korean-inspired formats (toner pads, skin essences, treatment serums) are gaining shelf space online and in-store. But consumers equally love local botanicals: **rooibos, marula, baobab, buchu, Kalahari melon seed oil,** celebrated for anti-inflammatory and antioxidant benefits. Everyday essentials like **Heliocare Tinted Sunscreen** are now "no-foundation glow" heroes. South Africans don't chase trends, they remix them.

Ala Zia

Industry Insights Senior Manager

Source: NielsenIQ Homescan – RA Syndicated – Latest 52 Weeks ending 25/01/26 – Beauty = Cosmetics, fragrances, hair care & skin care

South Korea

Where Beauty Moves First

Korea remains one of the world's most advanced beauty ecosystems, shaped by high digital adoption, fast trend cycles and intense competition. While economic uncertainty and cost-of-living pressure are making consumers more selective, beauty remains deeply embedded in everyday life. Online continues to dominate discovery and purchase, making Korea a real-time laboratory for how beauty is researched, evaluated and bought. Notably, Korean cosmetics reached an all-time high in export performance in 2025, elevating the category into Korea's top export groups for the first time and further solidifying K-Beauty's global standing.

Sun's Everyday Innovation

Sun care remains one of the most dynamic categories in Korea, with format innovation continuing to drive growth. Sun sticks have firmly established themselves as the leading hero format, with brands such as Cure and A.H.C. at the forefront. More recently, **outdoor-oriented sun patches** have emerged as a notable follow-up format, rapidly gaining traction after the success of sticks. On the functional side, the expansion of tone-up lines—led by d'Alba—continues to accelerate premium sun care growth. Meanwhile, SPF products are increasingly perceived not just as protection, but as an essential part of everyday skincare.

+13% *Online Value* **-10%** *Offline Value*

Platforms That Make Trends

Korea's beauty market is driven by powerful digital platforms, with Coupang, Naver, and Olive Young shaping how consumers discover and purchase products. Among them, Olive Young plays an especially influential role, leveraging its extensive offline-to-online ecosystem and strong focus on dermo-cosmetics and ingredient-driven curation. Together, these platforms enable trends to move from niche to mainstream at remarkable speed.

Skincare Becomes Smarter

A new wave of highly informed "know-metics" consumers is reshaping Korea's skincare landscape. Ingredient literacy has risen sharply, with shoppers A new cohort of highly informed "know-metics" consumers is reshaping Korea's skincare landscape. Ingredient literacy has accelerated markedly, with consumers seeking formulations aligned to their specific skin concerns and selecting products based on targeted active ingredients. Derma brands continue to demonstrate strong momentum—three of the ten fastest-growing skincare brands, including the top three, fall within the derma segment, with five derma labels represented overall—underscoring the broader shift toward clinically oriented, ingredient-driven routines.




Concurrently, innovation is increasingly centered on slow-aging, propelled by rising demand for science-anchored actives such as PDRN, EGF, and retinol, which are driving substantial growth within the anti-aging category. As a result, Korea's skincare market is transitioning decisively toward efficacy, dermatological credibility, and personalized ingredient-based solutions, moving beyond short-term or cosmetic-only benefits.

KyungSun Hong
Associate Director

Source: NielsenIQ Retail Measurement NDD Omni | Latest 52 weeks ending 31/12/25 vs YA | Beauty = cosmetics (ecom only), hair care, skin care

NielsenIQ

K-Beauty value sales grew **+53%** globally in the past 12 months

Source: NielsenIQ – Omnishopper Panel (MAT 24th Jan [illegible]), Omnisales (MAT 22nd Feb 2026), Retail Measurement (MAT 25th Jan [illegible]), BPC Monthly– 37 markets (US, CA, AU, IN, GB, FR, DE, ES, IT, A[illegible], CH, BE, MX, BR, UAE, KSA, TR, [illegible], [illegible], LV, KZ, EE, PH, ID, MY, TH, H[illegible], [illegible]G, CZ, HU, UA, VN, MM, PE, RO, PL, [illegible])

Spain

Cautious Spending, Bold Beauty Choices

The beauty market in Spain manages to grow in an uncertain economic environment, marked by concerns over the cost of living and global tensions. This context is prompting consumers to adopt more cautious spending habits. Still, rather than giving up on wellbeing, shoppers are raising expectations and choosing products, and channels that offer clear value and tangible benefits.

Where Beauty is Bought

Perfumeries stay the backbone of Spain's beauty retail, keeping strong leadership. At the same time, e-commerce continues to gain ground, driven by assortment, comparison, digital influence, and **convenience**. With Online sales growing for a third consecutive year, the need for robust **Omnichannel strategies** is clearer than ever to capture shoppers both In and Off stores.

Ecommerce Merchant Rank

- #1 amazon
- #2 PRIMOR
- #3 DRUNI
- #7 TikTok Shop

In this rapidly evolving digital landscape, **Primor** and **Druni** continue to power online growth, while **TikTok Shop** - launched in Spain in December 2024 - has already climbed to seventh place among online beauty retailers. Its swift rise highlights the speed at which social commerce is reshaping beauty shopping habits in Spain.

Evolving Routines & Expectations

Beauty in Spain is evolving within a **polarized market** where the pursuit of affordable luxury coexists with a rising demand for functional, wellbeing-driven products. **Treatment and Conditioners** are gaining strong momentum, driven by younger consumers investing in powerful formulas and visible results, reinforcing the home-salon trend. At the same time, the desire to no longer only look good, but also "feel good" fuels self-care among a more home-oriented and selective shopper who prioritizes **essential products**, **simplified routines**, and clean, transparent, accessible ingredients. This shift is accelerating the rise of **K-Beauty and other non-local brands**, supported by its global appeal and strong e-commerce presence, while **body care** gains dynamism as the perfect complement to a holistic, everyday **wellbeing routine.**

Ingredients Shaping The Market

Hyaluronic Acid, Ceramides, and Niacinamide remain highly popular across skincare and in hair care products. In makeup, Hyaluronic Acid and Antioxidants are increasingly common, along with clean and natural ingredient profiles. Additionally, SPF has become more important than ever in both skin care and make up formulations.

Milagros Galvez

Client Service Executive

Source: NielsenIQ Digital Purchases Spain | Latest 52 weeks ending 22nd Feb 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care

Türkiye

Value pressure, digital discovery & “know-metrics”

High inflation and rising living costs continue to reshape consumer purchasing behaviour in Turkiye. The recurring mid-year adjustments to the minimum wage have been repealed by the government in mid-2024, and this decision has intensified pressure on household budgets each year, leading to a noticeable contraction in volumetric demand across Personal Care categories starting from Q3 2025, even in mature categories such as shampoo, with consumer decision making guided by the total out-of-pocket price rather than gr/ml unit economics.

Trading Down, Not Trading Out

Across categories, shoppers are **adjusting how they buy rather than abandoning beauty altogether**. In haircare, volume is being sustained by a shift from salon services to at-home solutions such as dyes, conditioners and treatment oils. Deodorants are also seeing a notable uplift, increasingly used as a lower-cost alternative to fragrance as perfume prices rise.

The Rise of “Know-metrics”

Ingredient literacy is rapidly reshaping Turkey’s beauty market. 69% believe products should contain collagen, 50% prefer keratin, and 41% actively look for hyaluronic acid. Transparency, actives and visible results now matter as much as price. This is powering the rise of local brands in both skincare and haircare, supported by premium-looking packaging, clean formulations and modern active ingredients.

Global players are adapting too. One global player has launched new lines enriched with rose water, biotin, coconut oil, caffeine and lipids, while local brands are winning in fragrance-led haircare with contemporary packaging and active blends including monoi, hibiscus, shea butter and caffeine.

76%

of Turkish consumers check ingredient lists

Omnichannel Becomes The Decision Engine

Offline still drives value growth in personal care (+33%), but online is accelerating faster (+52%), with two of Turkey’s Top-10 fastest-growing online FMCG categories now in beauty. The Turkish Online Shoppers Pulse shows **59% of consumers use both online and offline channels to compare prices**, read reviews and hunt promotions. Digital has become the research hub — even when the final purchase happens in store.

Fragrance illustrates this shift most clearly. Once reliant on in-store testers, the category is now seeing 68% online value growth, driven by rising consumer confidence in digital discovery and colour-cosmetics-style shopping behaviour.

Selma Bozkurt

Analytics Lead - Turkiye

Sources: NielsenIQ Consumer Outlook Türkiye 2025 | NielsenIQ VO-Shopper Beauty & Personal Care Syndicated Report, 2024

United Arab Emirates

International Influence, Regional Identity

The UAE's expatriate-friendly policies have shaped one of the world's most diverse beauty markets, with nearly 80% of the population made up of expatriates. This diversity has created a highly varied consumer base, spanning cultures, income levels, and purchasing behaviours. High urbanisation, fast-paced lifestyles, and strong government support for a digital-first economy have enabled rapid adoption of international beauty trends, with brands able to integrate and scale quickly. At the same time, inflationary pressures and broader geopolitical uncertainty continue to influence consumer sentiment. While the market remains highly adaptive and digitally engaged, consumers are increasingly value-aware, prioritising performance, convenience, and relevance rather than excess.

Skin-first Innovation

K-Beauty continues to gain momentum in the UAE, driven by its reputation for advanced formulations, functional actives, and preventive skincare approaches. A **highly knowledgeable consumer base** is drawn to ingredient-led routines, with Niacinamide, Peptides, Collagen, Vitamin C, Retinol, and increasingly PDRN gaining popularity as markers of efficacy and science-led beauty. This focus on ingredients aligns with a broader skin-first mindset, where barrier repair, gentle actives, and long-term skin health take precedence over short-term cosmetic fixes. The UAE's openness to innovation allows these trends to scale quickly across both premium and mass segments.

Regional Identity & Scent

Alongside global influence, the UAE is seeing the rise of a confident **Middle Eastern beauty identity** rooted in cultural heritage and self-expression. Local champions such as Huda Beauty and Kayali exemplify this shift, blending regional storytelling with modern aesthetics and global reach. Fragrance plays a central role in this identity. Consumers show a strong preference for **rich, intense scent profiles**, gravitating toward oud, amber, and musk-based compositions that signal luxury, individuality, and emotional depth. These scent traditions continue to influence not only fine fragrance, but also body care and wellness formats, highlighting the enduring impact of local taste on broader beauty trends.

+25% Beauty Ecommerce value growth vs YA

Digital Fluency

E-commerce already plays a significant role in the UAE beauty market, supported by **high levels of digital adoption**. However, beauty remains inherently experiential. Brands continue to complement online channels with influencer collaborations, immersive pop-ups, and in-store activations designed to generate excitement, deepen engagement, and create shareable moments that fuel digital discovery. Value-seeking behaviour is becoming more pronounced, with consumers increasingly comparing prices, seeking promotions, and delaying purchases until value expectations are met. Discounting has become a consistent feature online, shaping how and when consumers engage with brands.

Shanzeh Sheikh
Client Manager

Source: NielsenIQ Retail Measurement AE ECOMM NDH – BEAUTY = Cosmetics, Skin Care, Sun Care & Hair Care | MAT 26/01/25

United Kingdom

Caution, Convenience, and Credibility

The UK beauty market is operating against a backdrop of economic uncertainty, with cost-of-living and inflation concerns prompting consumers to spend more cautiously across categories. Rather than disengaging, shoppers are becoming more selective — prioritising products, brands, and channels that clearly justify their place in the routine.

Online Evolution

This caution has not slowed innovation. Omnichannel strategies remain central, with digital and physical experiences increasingly working in tandem. **In-store remains important** for engagement and reassurance, while online continues to drive discovery, comparison, and convenience. **TikTok Shop has emerged as a major force** in this landscape, ranking as the second-largest e-commerce platform for Beauty & Personal Care in Q3 2025, reshaping how products are found, evaluated, and purchased.

#2 ecommerce merchant for beauty in 2025

(vs #3 in 2024)

Brands are using TikTok Shop as a launchpad for success in the wider market, with **Made by Mitchell** and **P.Louise** two notable examples of brands accelerated into the spotlight from viral favourite to record-breaking sales and major retail listings, highlighting the potential rewards of embracing new channels and understanding where today's consumer is turning to for value.

Shifting Behaviours

Behavioural change is most visible in two areas. **Male beauty** continues to see notable growth, particularly in everyday categories such as deodorant, as brands actively develop strategies to capture male shoppers. At the same time, the **"less is more"** mindset is gaining traction across demographics, with consumers increasingly favouring multifunctional products that streamline routines and reduce complexity. These shifts reflect a broader desire for efficiency and clarity — fewer steps, clearer benefits, and products that earn their place.

Ingredients, K-Beauty, and functional haircare

Ingredient awareness continues to influence purchasing decisions in the UK. **K-Beauty remains a key reference point**, with ingredients such as **PDRN** gaining attention alongside established actives like retinol, vitamin C, and hydration-focused components such as hyaluronic acid. This ingredient-led mindset extends beyond skincare. In haircare, products designed for curly hair are gaining visibility, supported by recent launches from brands such as Garnier. **Keratin** is also expected to trend further, with new keratin-focused ranges launching in the market this year. Together, these developments reinforce demand for efficacy-led formulations that deliver tangible benefits rather than novelty.

Kevin Chen

Senior Analytics Executive

Source: NielsenIQ Digital Purchases FY2025 – Hair Care, Cosmetics, Fragrances & Skin Care

United States

The New Engines of Beauty Growth

The US is operating in a K-shaped economy, where higher-income consumers continue to trade up and spend confidently, while lower-income households face ongoing pressure from inflation and rising living costs. This divergence is reinforcing polarized beauty behaviours, amplified further by an increasingly volatile political backdrop.

Indie Beauty Trends

Growth is no longer led by established conglomerates. Instead, indie brands are seeing explosive momentum, far outpacing larger players thanks to their **agility, trend-driven innovation, and ability to connect quickly** with emerging consumer preferences. Indies are now a force across nearly every beauty category, reaching $40.0B in annual sales, with particularly strong growth in fragrance, facial skincare, and cosmetics and nail. Their success reflects strengths in **storytelling, ingredient transparency, and rapid responses to cultural and aesthetic shifts**. Indies now account for 32% of total beauty and personal care dollar share. As indie brands drive growth through higher trip frequency and deeper engagement, conglomerates are relying more on pricing to deliver value growth, highlighting a clear power shift toward brands that offer novelty, authenticity, and discovery.

Indies: **+22%** Conglomerates: **+6%**

K-Beauty

K- Beauty is one of the fastest growing segments, with sales surpassing $2.5B in 2025, which is a growth rate of +46% over last year. Most of those sales are happening in facial skin care, but there is significant growth in hair care, cosmetics, and even fragrance. K-Beauty has brought **high quality, effective, and ingredient-led** products to the US market. Layer on top smart marketing with TikTok Shop, and you have a booming segment of growth. Popular K-Beauty brands including **Medicube, Anua** & **Dr Groot** were among some of the top growth brands in 2025, while major retailers like Ulta, Sephora, and Amazon, are bringing in large sets of K-Beauty brands to fulfil consumer requests. The question now is, can K-Beauty maintain this momentum as it becomes more mainstream?

Fragrance Essentials

Fragrance remains a top growth category for a 3rd year in a row, with value growth exceeding +25% in successive years. This impressive growth is driven by an expansion in usage, with consumers adopting **'fragrance wardrobe**s' and using different scents for different moods or occasions. **TikTok** has also been a surprising accelerant of fragrance growth, with shoppers learning about new brands and scents from their favourite influencers. We also can't ignore the role of **dupes** in increasing consumption, allowing buyers to try new scents at affordable price points. Now we are also watching the appetite for scent move to other segments including from scented body care, and new innovations such as hair scents are entering the market to fulfil even more scent-forward occasions.

Anna Mayo
VP, Beauty

Source: NielsenIQ Omnishopper Panel US | NielsenIQ Defines an indie beauty brand as: Brand with under $300M in annual revenue that is independently owned and operated, Not part of a multi-brand conglomerate, Can be a recipient of private equity or venture capital investment

Efficacy Over Excess

Across regions, consumers are prioritising products that work harder within simplified routines. Multifunctional formats, treatment-led make-up, and clear ingredient claims reflect a shift away from accumulation toward optimisation. Ingredient knowledge has become a proxy for trust, enabling consumers to justify spend and navigate value pressures without disengaging from beauty altogether.

K-Beauty as a Global Reference

K-Beauty continues to shape expectations across markets, functioning less as a trend and more as a benchmark for performance, routine, and formulation. Its influence is evident in multi-step routines and ingredient-led consumer literacy. While the search to crown the "next K-Beauty" has already begun, Korean beauty remains the clear reference point for now.

Ecommerce Acceleration

E-commerce continues to expand beyond a transactional role, acting as a primary driver of discovery, education, and validation. Online platforms are accelerating access to global trends, supporting comparison and learning, and reshaping how consumers evaluate value. While conversion dynamics differ by market, digital channels consistently underpin how beauty is explored and understood.

NielsenIQ

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