Beauty E-commerce 2026 : *The new rules of growth*

Who's winning, who's disrupting, what's next ?

NIQ

Today's Topics

#1 Consumer Context

#2 Market Overview

#3 Market Disruptors

#4 Market Trends

#5 Prestige Implications

Your Speakers

Claire Marty

VP Global Beauty Vertical

NielsenIQ

Agathe Apollin

Beauty Sales Lead Western Europe
NielsenIQ Digital Purchases

Testimony

L'ORÉAL

Economic Concerns are Still Top of Mind; Political Discontent Adds to Uncertainties

	Top Concerns - Global		West Europe
1	Increasing food prices	29%	#2
2	Global conflict/Escalation of crisis/War	23%	#1
3	Economic downturn	20%	#4
4	Increasing utility bills	17%	#3
5	Self/Family welfare/happiness	12%	#8
6	Job security	11%	#10
7	Political unrest	11%	#5
8	Increased housing costs	10%	#9
9	Global warming/Climate change/ Environment	10%	#7
10	Ability to provide basics (food/ shelter) for myself/family	10%	#12

33% of consumers say their household is **worse off financially** than a year ago

Source: NIQ 2026 Consumer Outlook survey | NielsenIQ QBN Q3 2025

Momentum Continues for Beauty Sales Growth

Regional Beauty value % growth MAT Q1 2026

Developing markets drive global growth, while West Europe's slow momentum signals cautious outlook

Global: +8%

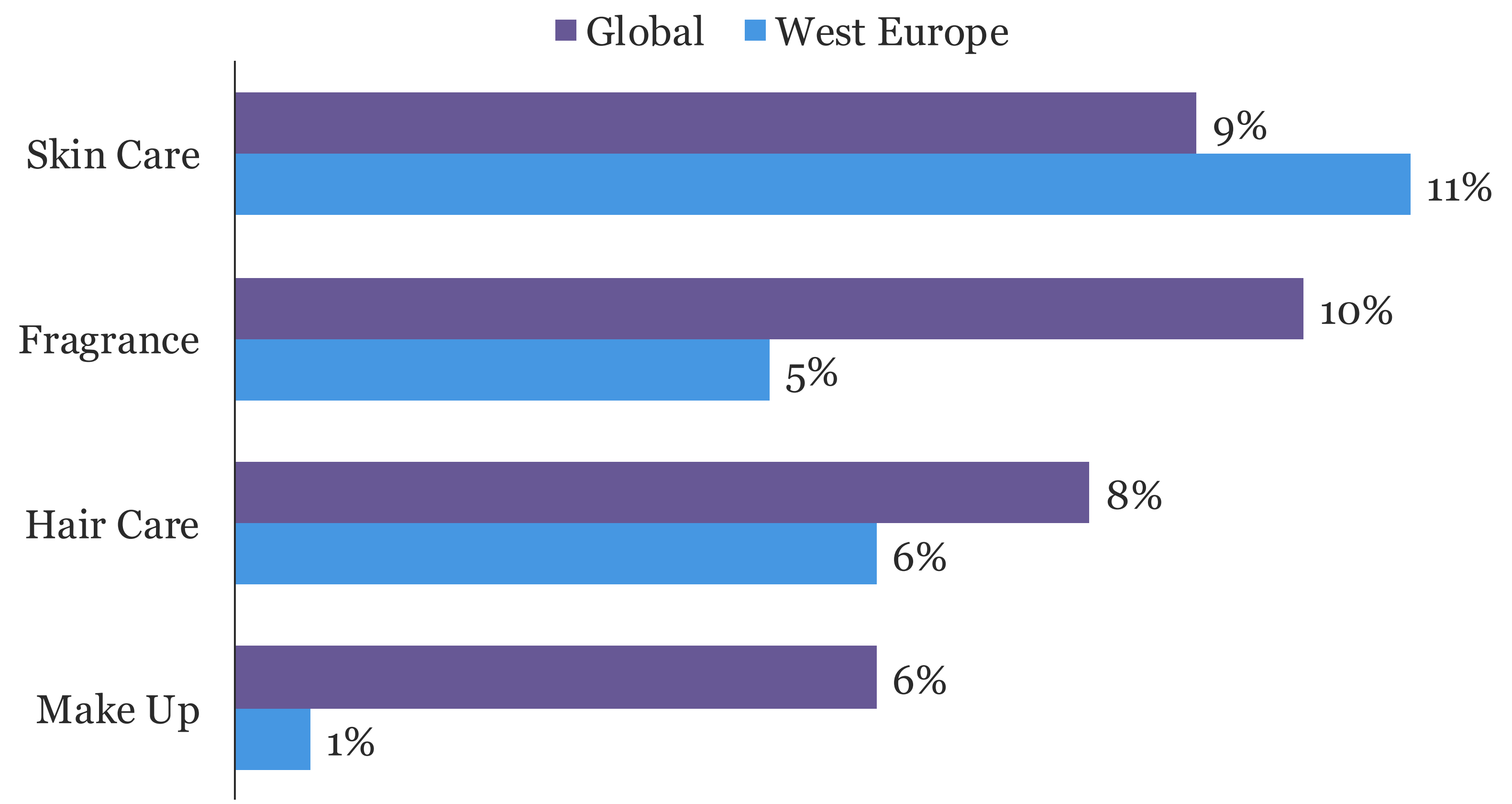
North America	+11%
West Europe	+4%
Central East Europe	+8%
Latin America	+9%
Africa Middle East	+13%
Asia Pacific	+8%

Fact: Value % growth vs YA (unweighted)
Beauty = Hair, Skin, Fragrance, Cosmetic & Nail (per available coverage by market)
Sourcing: 52 markets - Omnisales (FR, DE, IT, ES, GB, AT, BE, CH, NL), Omnishopper (US, CA, AU), incl TikTok (CN), incl ecom (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)

Skin & Scent Drive Industry Growth

Momentum shifts to skin care as consumer prioritise efficacy in their daily routine

Value % Change vs YA – Global – Q1 2026

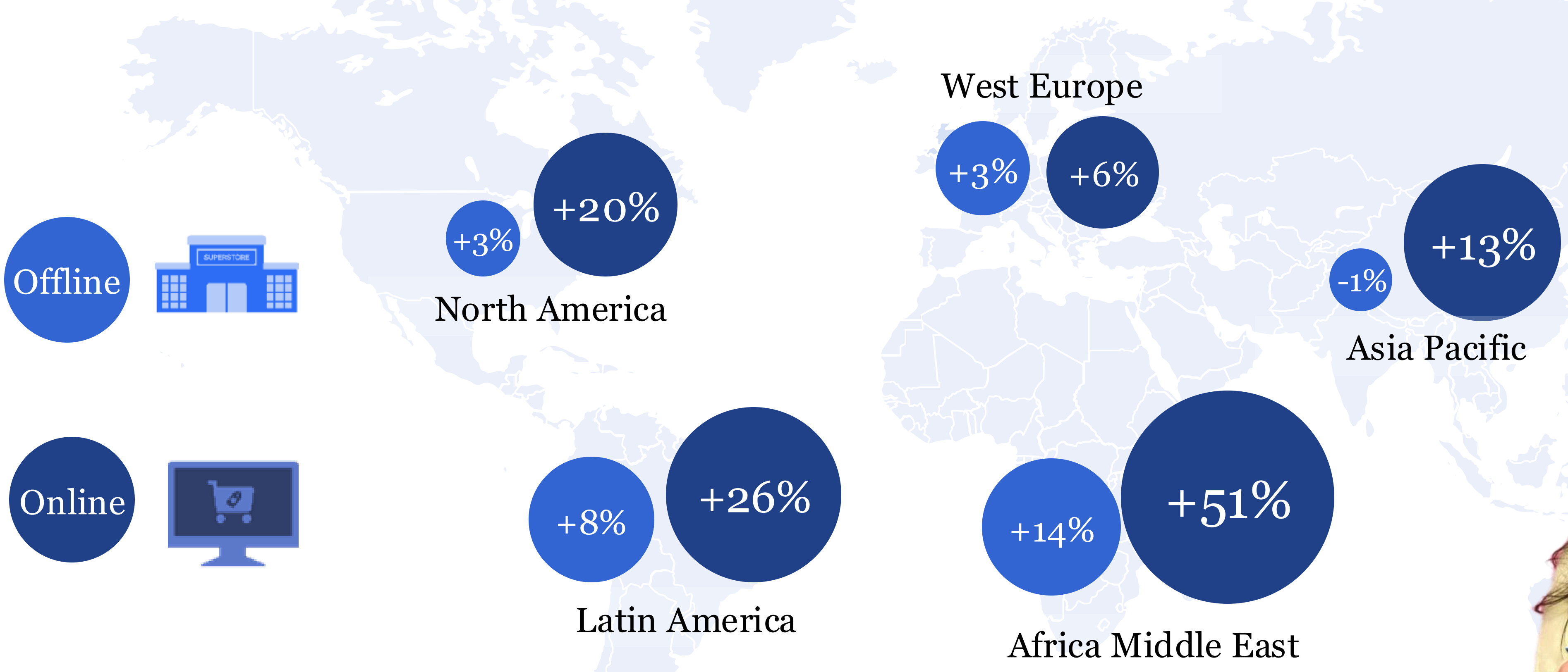


*Fact: Value % growth vs YA (unweighted)
Sourcing: 52 markets - Omnisales (FR, DE, IT, ES, GB, AT, BE, CH, NL), Omnishopper (US, CA, AU), incl TikTok (CN), incl ecom (KR), NIQ QBN BA, HR, DK, EE, GR, HU, LV, LT, NO, PL, PT, RO, SI, SE, UA, AR, BR, DO, EG, HK, IN, ID, KZ, MY, MX, MM, NZ, PE, PH, PR, SA, 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, AU

Online Wins Across Every Market

Regardless of maturity, digital channels outperform instore in all regions

Beauty - % Change vs YA – Latest 52 Weeks *(Q1 2026)*



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, AU

The Outlook Of The Online Beauty Market In Europe

NIQ

Understand the Online Beauty Market with NielsenIQ Digital Purchases

Get a 360 view of the online market to understand shares, trends, product performance and consumer behaviours

NIQ *Digital Purchases*

amazon

TikTok Shop

yesstyle

DIOR.com

zalando

NOTINO

The most advanced and the most reliable consumer panel for e-commerce in Europe

+2M E-SHOPPERS	**GDPR** COMPLIANT	**+2K** ONLINE MERCHANTS	**3 YEARS** BACK DATA

THE MOST ACCURATE DATA
PASSIVELY ACQUIRED

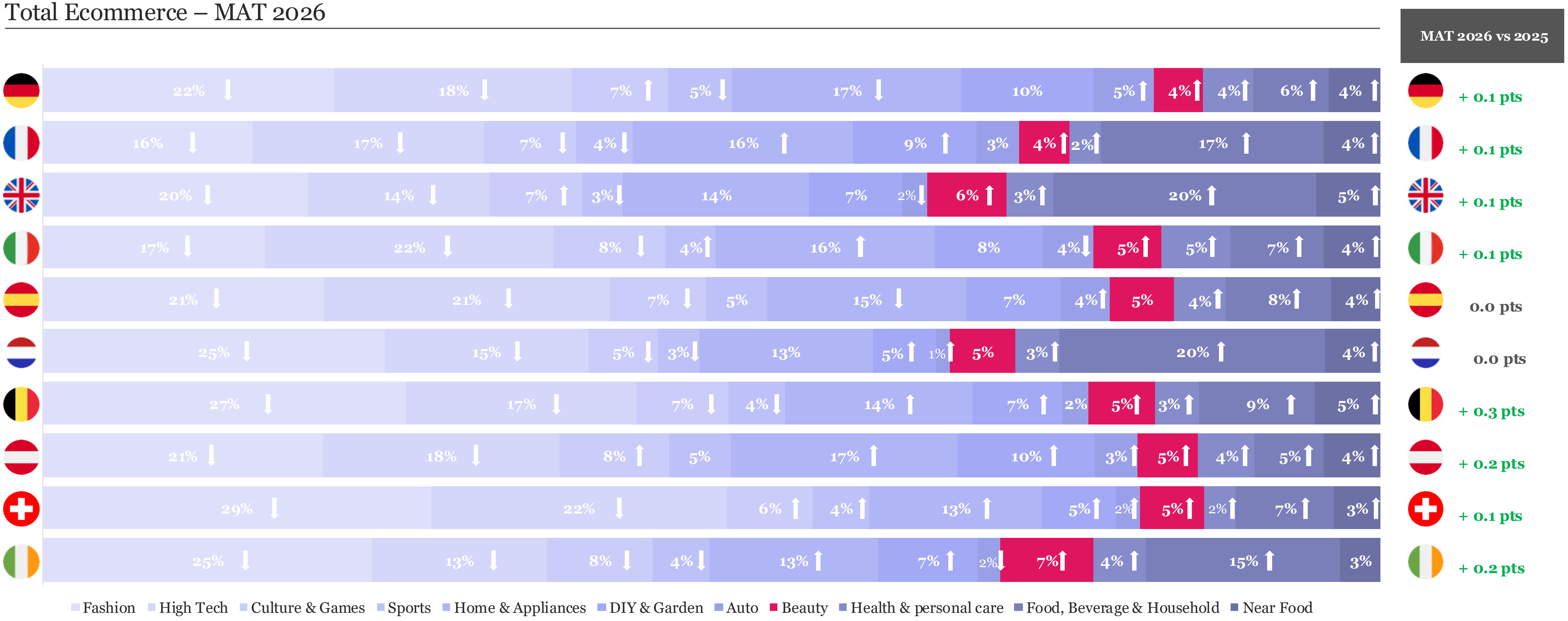
WEEKLY UPDATES

Market Overview

Shoppers across Europe are dedicating 4 to 7% of their online spending to Beauty across Europe

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

Total Ecommerce – MAT 2026

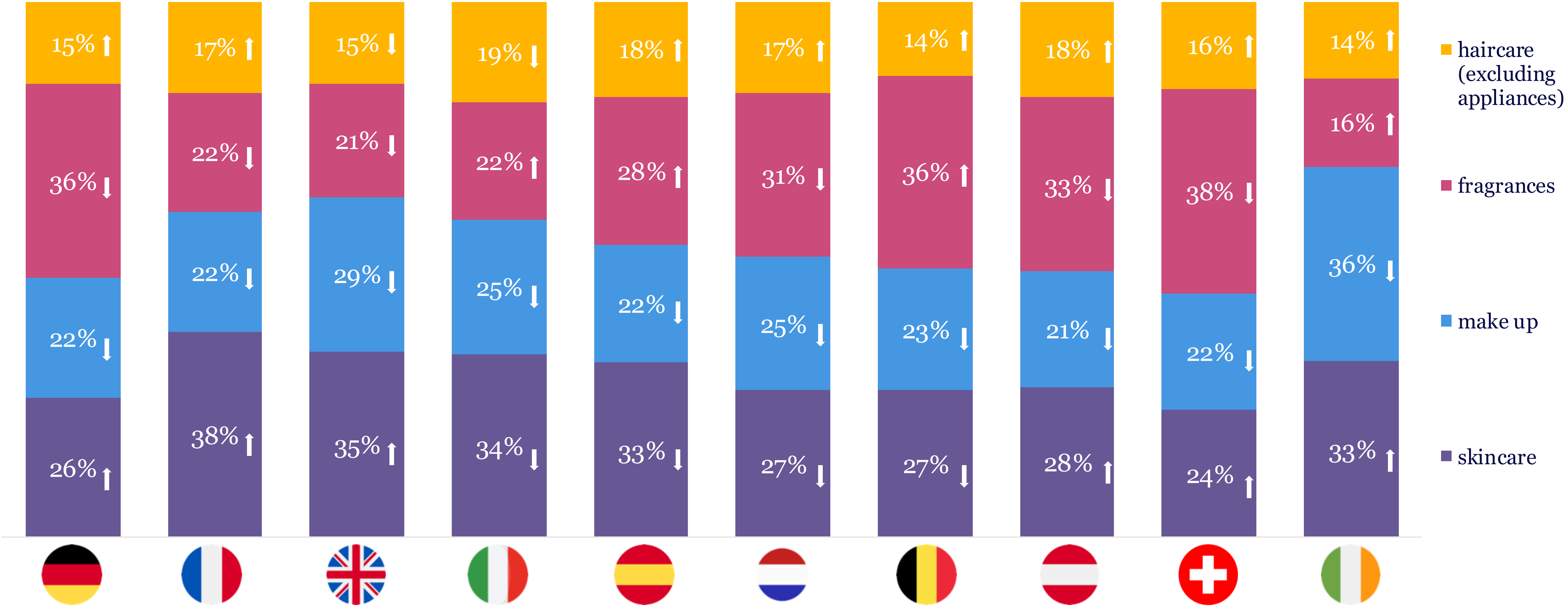


Source: NIQ Digital Purchase e-commerce consumer panel. Data ending 19 April 2026

Make-up is losing share across all European markets

Category mix – in value

Online Beauty – MAT 2026



Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding accessories & appliances, Body & Face cleansing, Skin conditioning and Sun care. Data ending 19 April 2026.

Beauty consumers are spending more online driven by more frequent but smaller purchases

Consumer KPIs per country

Online Beauty – MAT 2026

Average online spend per e-shopper	139 € ↑	114 € ↑	224 € ↑	108 € ↑	101€ ↑	114 € ↑	106 € ↑	134 € ↑	142 € ↑	122 € ↑
Purchase frequency	5.1 ↑	4.5 ↑	9.9 ↑	4.9 ↑	4.6 ↑	4.3 ↑	3.9 ↑	4.9 ↑	3.9 ↑	5.6 ↑
Average basket	27.3 € ↓	25.4 € ↓	22.5 € ↓	22.2 € ↓	22.1 € ↓	26.8 € ↓	27.3 € ↓	27.2 € ↓	35.8 € ↓	21.7 € ↓

"Monitoring the cost of my overall basket of goods" is the #1 saving strategy among Western European consumers

Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding accessories & appliances, Body & Face cleansing, Skin conditioning and Sun care. Data ending 19 April 2026. | NielsenIQ Consumer Outlook 2026

Amazon remains dominant in online beauty, with new challengers emerging fast

Top merchants per country – in value

Online Beauty– MAT 2026

1	amazon ↓	amazon ↑	amazon ↑	amazon ↑	amazon ↑	DOUGLAS ↓	amazon ↑	amazon ↑	GALAXUS ↑	amazon ↓
2	DOUGLAS ↓	SEPHORA ↓	TikTok Shop ↑	NOTINO ↓	PRIMOR ↑	bol. ↓	bol. ↓	NOTINO ↓	NOTINO ↑	Boots ↑
3	flaconi ↓	NOCIBÉ LA BEAUTÉ PARTAGÉE	Boots	SEPHORA ↓	DRUNI ↓	ICI PARIS XL ↑	ICI PARIS XL ↓	DOUGLAS ↓	zalando ↑	LOOKFANTASTIC ↑
4	dm ↑	Vinted ↑	LOOKFANTASTIC ↑	DOUGLAS ↓	SEPHORA ↑	Kruidvat ↑	deloox. ↑	flaconi ↑	DOUGLAS ↓	TikTok Shop ↑
5	TikTok Shop ↑	AZ AROMA-ZONE.COM ↑	ebay ↓	TikTok Shop ↑	El Corte Inglés ↓	deloox. ↑	NOTINO ↓	dm ↑	amazon ↑	SHEIN ↓
Highest growth L12M	TikTok Shop	TikTok Shop	amazon	TikTok Shop	TikTok Shop	deloox.	amazon	amazon	GALAXUS	TikTok Shop

Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding accessories & appliances, Body & Face cleansing, Skin conditioning and Sun care. Data ending 19 April 2026.

What's behind Amazon's Beauty Success ?

1. Male Beauty Buyers

Men's Value share (beauty)

Amazon EU5	Online Beauty EU5
46%	35%

2. Amazon Share of Beauty Specialists' Wallet

Amazon Merchant Rank among Beauty Specialists Customers
(+/- share vs YA)

#1 ⬆ #2 ⬆ #2 ⬆ #1 ⬆ #2 ⬆

3. Exclusivity

Exclusive Beauty e-shoppers at Amazon

FR	UK	ES	DE	IT
18%	18%	25%	33%	37%

Source: Beauty : Cosmetics, Fragrances, Hair-care excluding accessories & appliances, Body & Face cleansing, Skin conditioning and Sun care. GB, FR, DE, IT, ES – Data ending 10 May 2026

Amazon leads in all beauty categories across the EU5, except fragrances, and is pulling ahead in skincare across all markets

Amazon Ranking and Trend per category

Online Beauty – MAT 2026

						
Skincare	# 1 ↑	# 1 ↑	# 1 ↑	# 1 ↑	# 1 ↑	# 1 ↑
Make up	# 1 ↓	# 1 ↓	# 1 ↑	# 1 ↓	# 1 ↑	# 1 ↑
Haircare	# 1 ↓	# 1 ↓	# 1 ↑	# 1 ↓	# 1 ↑	# 1 ↑
Fragrances	#3 ↓	#5 ↓	#1 ↓	#1 ↓	#3 ↓	#6 ↑

Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding accessories & appliances, Body & Face cleansing, Skin conditioning and Sun care. Data ending 19 April 2026.

Amazon has secured leadership in dermo-cosmetics in EU5 and continues to gain share

Amazon Market Share in value
Dermo-cosmetic Skincare

amazon

BIODERMA
CAUDALÍE
CeraVe
NUXE
LA ROCHE-POSAY
FIRST AID BEAUTY
Cetaphil
WELEDA
URIAGE
Avène
Neutrogena
Medik8
Aveeno
VICHY
EMBRYOLISSE
SKINCEUTICALS
Eucerin
dermalogica

+40 more…

+8.8pts

+7.9pts

+4.9pts

+10.0pts

+1.1pts

Source: NIQ Digital Purchase e-commerce consumer panel. Skincare :Body & Face cleansing, Skin conditioning and Suncare. Dermo-cosmetic brands list in appendix.
Data ending 05 April 2026.

After conquering dermo-cosmetics, Amazon is now the fastest-growing merchant in Prestige Skincare in Germany, the UK and France

Amazon Ranking and gain of market share in value

Prestige Skincare

amazon		#3	+4.9 pts
amazon		#4	+1.8 pts
amazon		#1	+4.3 pts
amazon		#1	+0.7 pts
amazon		#3	+2.8 pts

Skincare Prestige Brands

CLARINS
GUERLAIN
PAULA'S CHOICE SKINCARE
CHANEL
Kiehl's SINCE 1851
Dr.Jart+
CLINIQUE
LANCÔME PARIS
SHISEIDO
ESTĒE LAUDER
LANEIGE
sisley PARIS
DIOR
BY TERRY
SOL DE JANEIRO
ElizabethArden
DRUNK ELEPHANT™
LANCASTER

+78 more

Source: NIQ Digital Purchase e-commerce consumer panel. Skincare (Body & Face cleansing, Skin conditioning and Sun care). Prestige brands list in appendix. Second-hand excluded. Data ending 19 April 2026.

Who are the market disruptors ?

TikTok Shop is establishing itself as a top online beauty retail destination

Western expansions have been met with considerable success at TikTok Shop continues to climb the retail ranks

TikTok Shop Ecommerce Merchant Rank - Beauty

	United Kingdom	Spain	Ireland	Germany	Italy	France
2024	#3	#76	#31	-	-	
2025	#2	#8	#6	#9	#10	
Q1 2026	#2	#6	#5	#5	#3	

Discover more on NIQ Digital Purchases

Source: NielsenIQ Digital Purchases Latest 52 weeks ending 31st March 2026 – Cosmetics, Hair Care, Fragrances, Skin Conditioning & Moisturising, Facial Cleansing and Sun Care

TikTok Shop has *attracted new buyers* and *increased category spend*

Almost one third of the platform's beauty customers in year one had not purchased beauty online in the previous year

1) Attracted **new category buyers**

31% **31%** **29%**

Of TikTok Shop's beauty buyers in year 1 did not purchase beauty online in the previous 12 months

2) Customers converted from the competition **spent more overall on beauty**

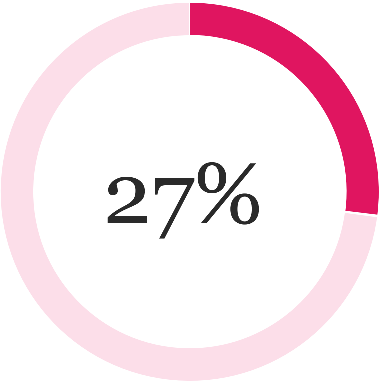
€37 **€41** **€47**

Additional spend on the total beauty category by converted buyers compared to the previous 12 months

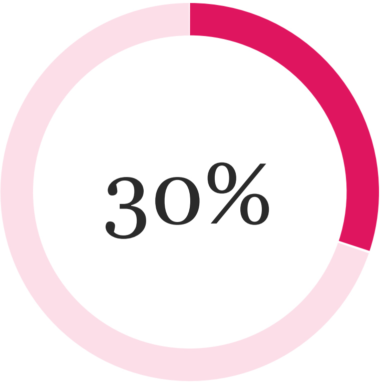
Source: NielsenIQ Digital Purchases– Latest 52 weeks to 29th March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care

Prestige buyers are shopping on TikTok Shop

Consumers are not bound to one method of shopping, regularly shopping across the price spectrum for different needs & occasions



Of prestige beauty brand buyers also purchased beauty on TikTok Shop in the past 12 months



Of beauty specialist shoppers also purchased beauty on TikTok Shop in the past 12 months

Your consumer may regularly buy luxury brands at beauty specialists ….

Avg price: **£118.21**

Avg price: **£8.80**

… and also buy everyday beauty items on TikTok Shop

Source: NielsenIQ Digital Purchases United Kingdom, Spain, Germany, Italy & France – Latest 52 weeks to 29th March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care | Prestige Buyers based on a cohort of buyers based on 101 luxury beauty brands | *product image examples based on popular products purchased by luxury buyer cohort

A platform for both established and emerging brands

TikTok Shop has created a pathway to success for many new players, whilst recognisable names have also embraced the platform

Top Brands on TikTok Shop by Value

United Kingdom	Spain	Ireland	Germany	Italy	France
PLOUISE	Lattafa	BPERFECT COSMETICS	Lattafa	Lattafa	Lattafa
WONDERSKIN	L'ORÉAL PARiS	made by Mitchell	SVENJA WALBERG	allycore hair	QINGLIN
Dr.Melaxin	ARMAF	ALFAPARF MILANO	XERJOFF ITALIAN LUXURY PERFUME	AFNAN PERFUMES	L'ORÉAL

Source: NielsenIQ Digital Purchases – Latest 52 weeks to 29th March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care

Lattafa's TikTok success story

The fragrance brand from the UAE has seen breakaway success on the platform, being an early adopter of social commerce

+245% values sales vs 2 years ago*

Lattafa's TikTok Shop Success Story

Early adoption of TikTok Shop in Western markets, capitalising on the rapid growth of the platform.

Third-party sellers drive sales, contrasting the highly controlled approach of established brands.

Value proposition with many of the brand's products touted as "dupes" of luxury scents

Engaging content leveraging micro-creators, product reviews and TikTok native content formats

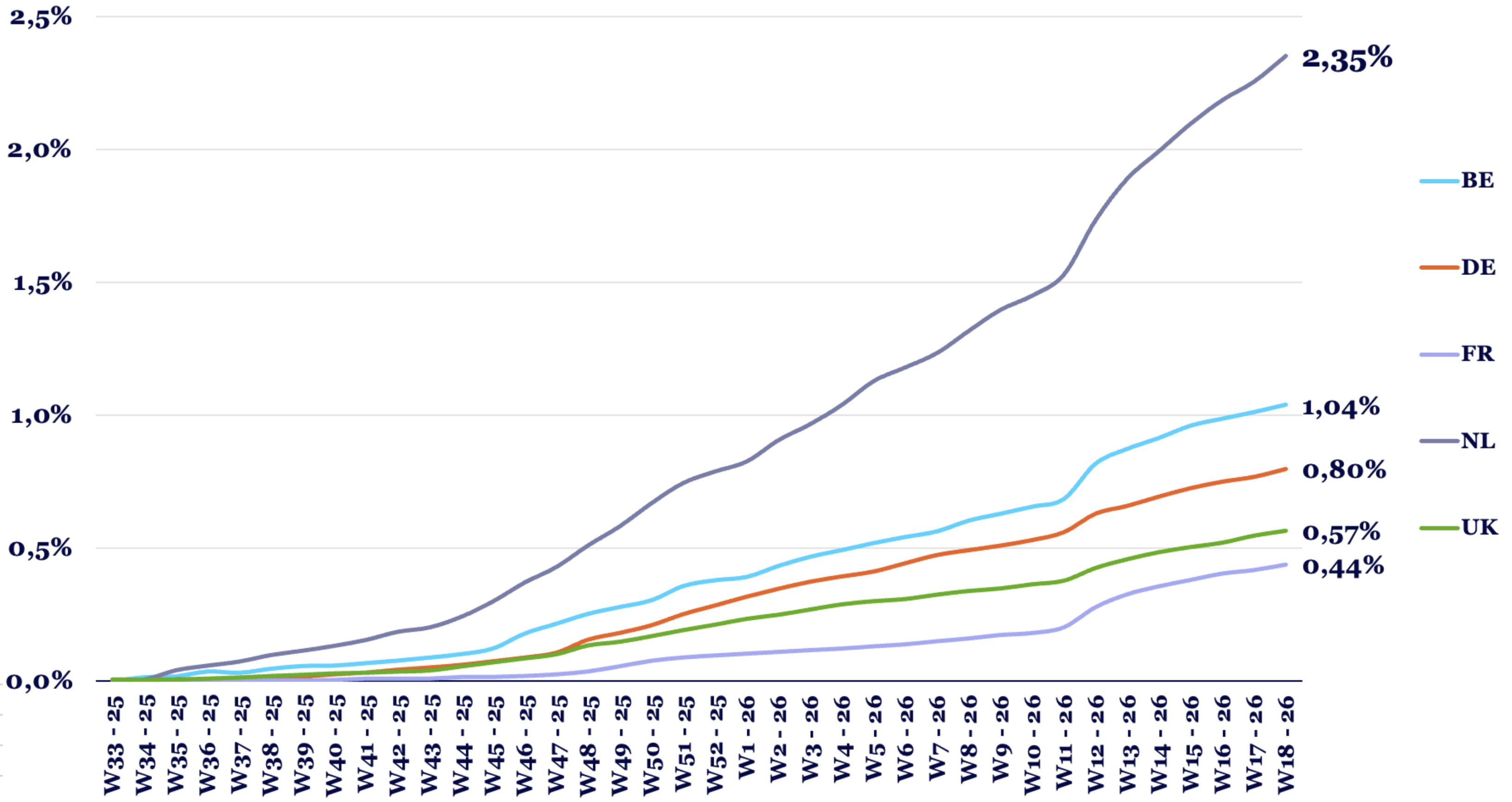
#1 Beauty Brand on TikTok Shop in Europe

Sources: NielsenIQ Digital Purchases – Latest 52 weeks to 31st March 2026 | Beauty = Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing & Sun Care | NielsenIQ Omnisales & Omnishopper US, GB, ES, IT, FR, DE, BE, CH, AT *9 country aggregation, total market incl TikTok Shop

Eight months post launch, Joybuy reached 2.3% of Dutch and 1% of Belgian e-shoppers.

Joybuy

Joybuy's Cumulated Penetration since first sales appeared*
Total eCommerce of goods (services excluded)



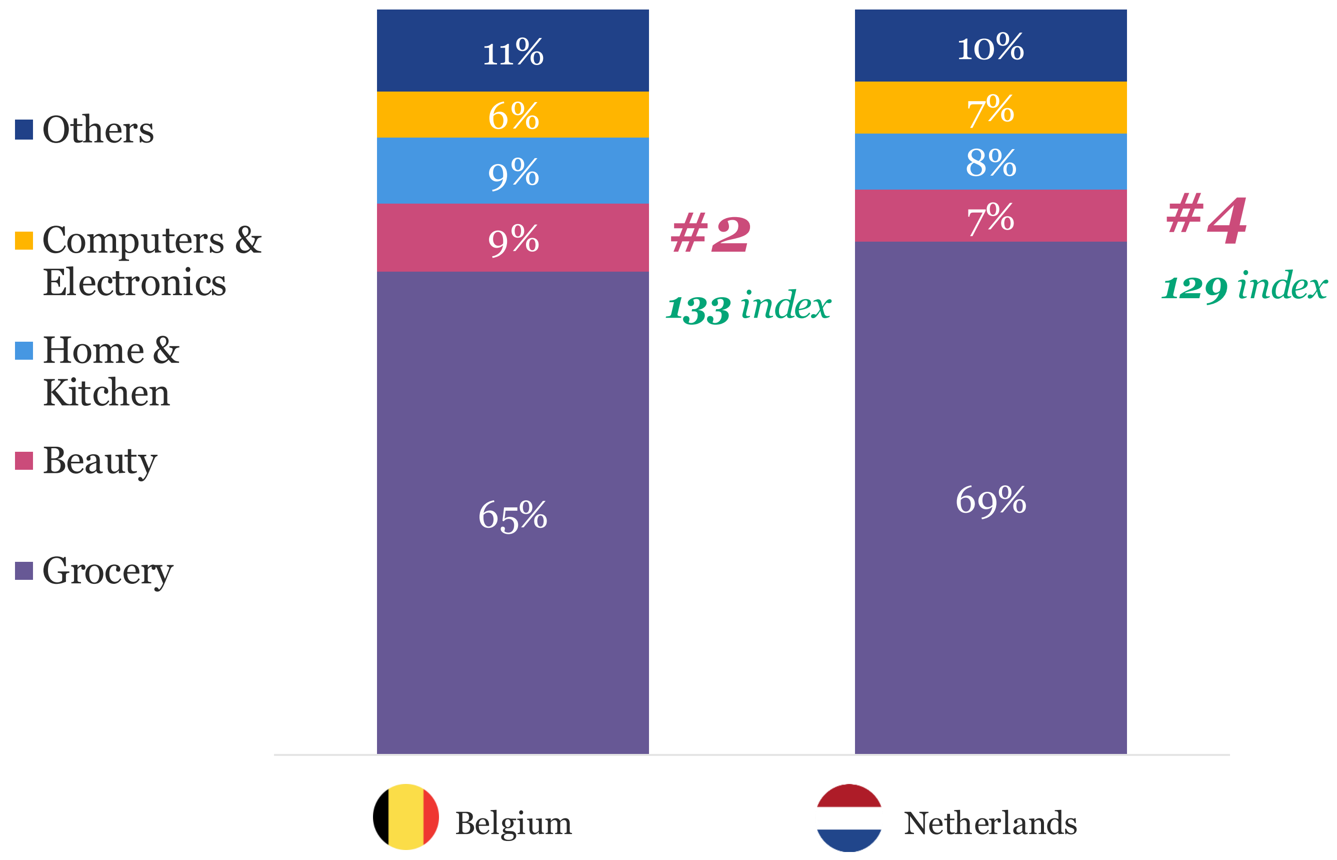
* Since : BE : W34 2025, DE : W35 2025, FR : W33 2025, NL : W34 2025, UK : W31 2025

Source: NIQ Digital Purchase e-commerce consumer panel. BE, NL. From 25.08.2025 to 03.05.2026. Total Ecommerce of goods (services excluded)

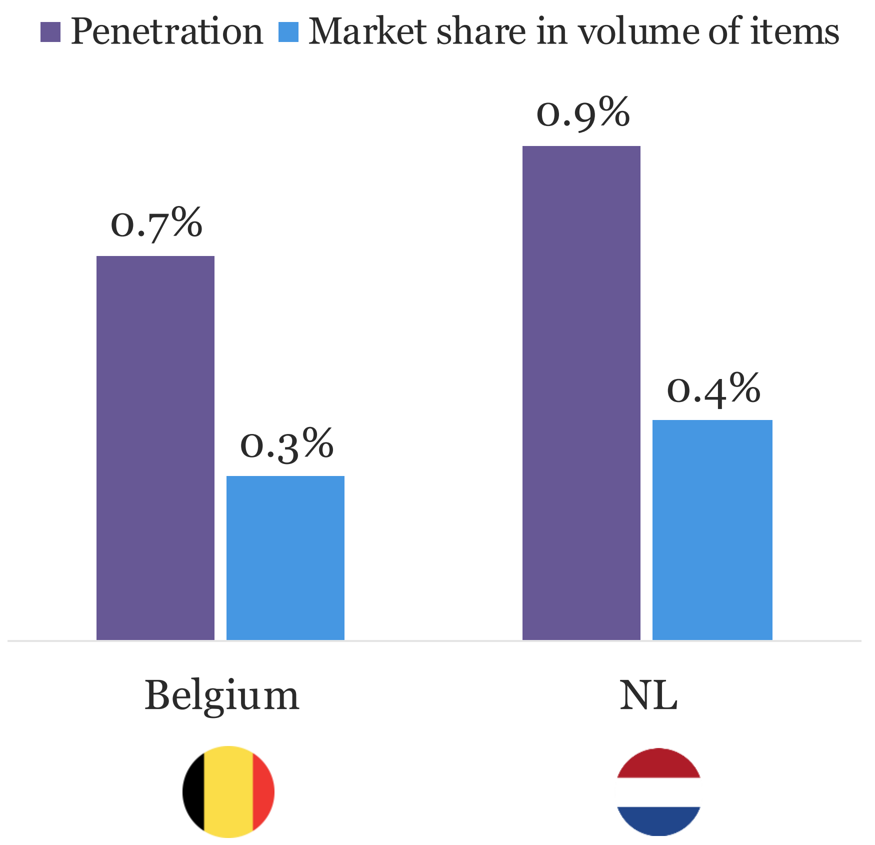
Groceries dominate Joybuy sales in Benelux. Beauty ranks #2 in Belgium and #4 in the Netherlands, over-indexing vs. total online.

Joybuy

Weight of the top 5 categories sold by Joybuy - in volume of items
Total Ecommerce of goods (services excluded) – From 25.08.2025 to 03.05.2026



Joybuy penetration and market share in volume of items
Online Beauty – From 25.08.2025 to 03.05.2026



Source: NIQ Digital Purchase e-commerce consumer panel. BE, NL. From 25.08.2025 to 03.05.2026. Total Ecommerce of goods (services excluded)

In France: Primor launch has disrupted the online fragrances market

Primor in Fragrances

Primor Ranking
Online

PRIMOR

#7

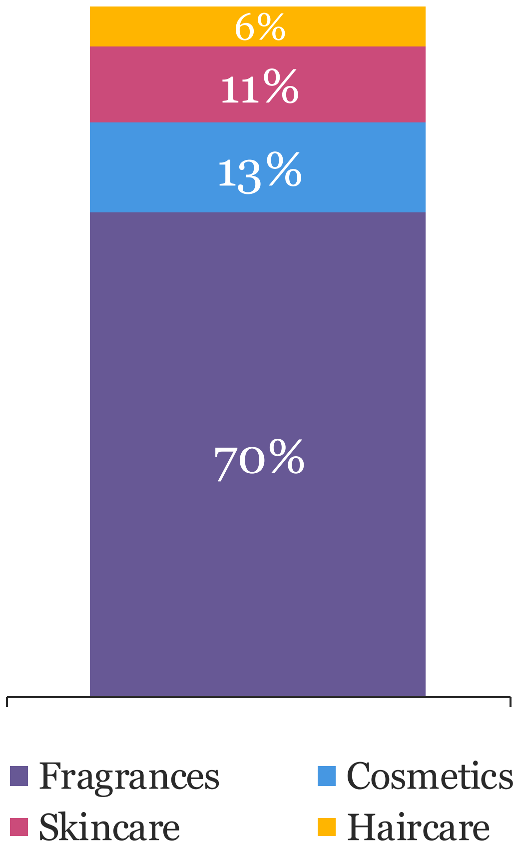
x2 Primor **doubled their customer base** over the latest 52w

61%

of new shoppers being **incremental** to Fragrances

Most impacted competitors

Primor Category Mix

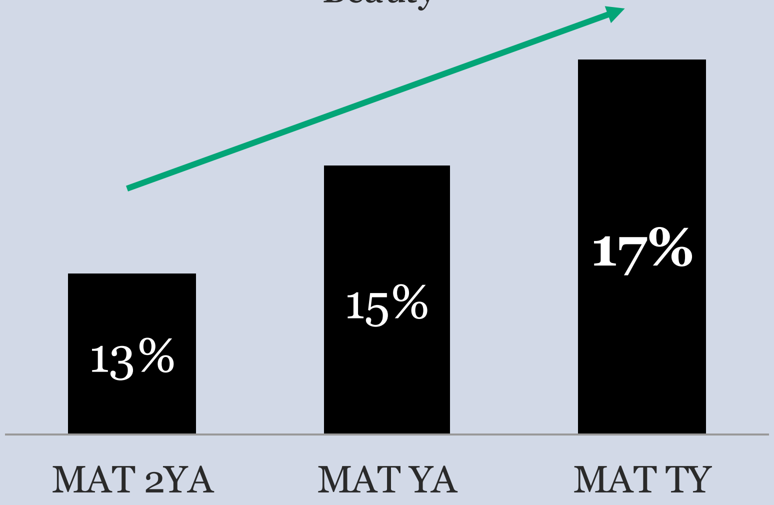


Source: NIQ Digital Purchases. France. Data ending 08.03.026.

In Spain, Primor is the second beauty retailer with a diversified mix

PRIMOR

Market Share in Value
Beauty



Value category distribution		Ranking in Spain
42%	Fragrances	#1
28%	Skincare	#2
14%	Make-up	#4
16%	Hair Care without appliances	#2

Source: NIQ Digital Purchases. Spain. Data ending 08.03.026.

Clean and holistic beauty is gaining ground and crossing the Channel

AROMA-ZONE.COM

Aroma-Zone appeals to consumers seeking clean beauty products without premium price tags

#2

*In **France** in Skincare*

& 1st fastest-growing retailer

#6

*in **Belgium** vs #12 last year*

& 2nd fastest-growing merchant in skincare after Amazon

Vitamins, minerals and supplements

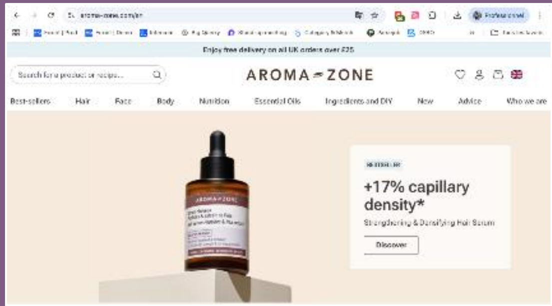
is the

#2

category in value

after skin conditionning and moisturizing in France

The retailer is now available in the UK

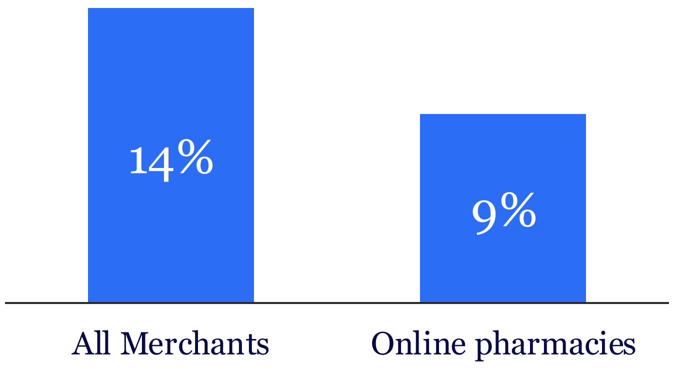


Source: NIQ Digital Purchase e-commerce consumer panel. Beauty : Cosmetics, Fragrances, Hair-care excluding accessories & appliances, Body & Face cleansing, Skin conditioning and Sun care. Data ending 12 April 2026.

Online pharmacies are losing momentum in skincare, with shoppers shifting away

Online pharmacy churners mainly switched to Amazon, Clean Beauty and K-Beauty players

Skincare customer base growth



42%

of MAT 2025 online pharmacy skincare shoppers **switched to competition** in MAT 2026

Top 3 merchants by value market share gain among online pharmacies churners

amazon | Aroma-Zone | Typology. Paris

Top 3 fastest-growing **brands bought at Amazon** by online pharmacies' churners

Nuxe | Biotherm | Eucerin

Top 3 brands by value market share gain among online pharmacies churners

Aroma-Zone | Typology. Paris | yepoda

Top 3 **Aromazone products** in value bought by online pharmacies' churners

Hyaluronic Acid Serum **7.00€**

Collagen & Spilanthes Rich Cream **7.78€**

Spilanthes & Hyaluronic Acid Serum **8.90€**

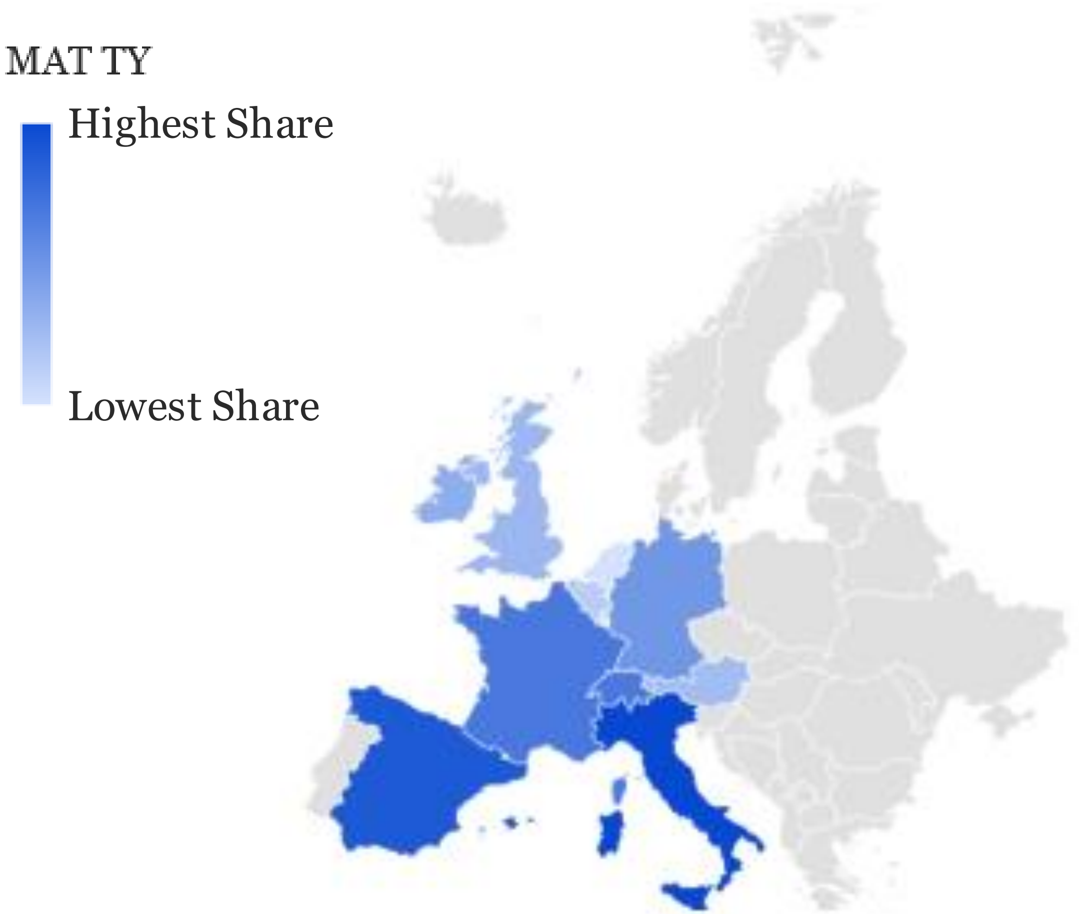
Source: NIQ Digital Purchase e-commerce consumer panel. France. Skincare (Body & Face cleansing, Skin conditioning and Sun care). Data ending 19 April 2026.

What’s trending in beauty online ?

K-Beauty share online takes a leap forward

Share of Korean brands online in skincare has grown **2-3x** in the past two years

K-Beauty Value Share of Skin Care - Ecommerce



Index vs 2YA

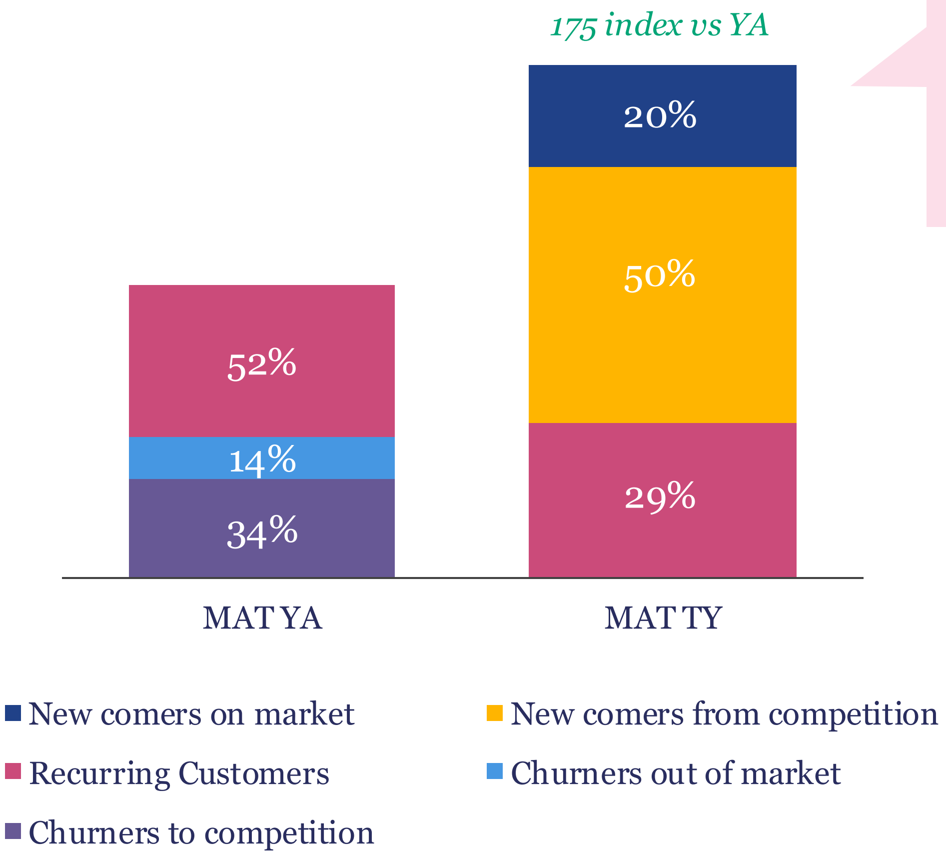
- 230
- 219
- 293
- 211
- 445
- 219
- 250
- 244

Source: NielsenIQ Digital Purchases Latest 52 Weeks 3rd March 2026 | Skin Conditioning & Moisturizing, Face Cleansing & Sun Care – Based on 121 K-Beauty brands

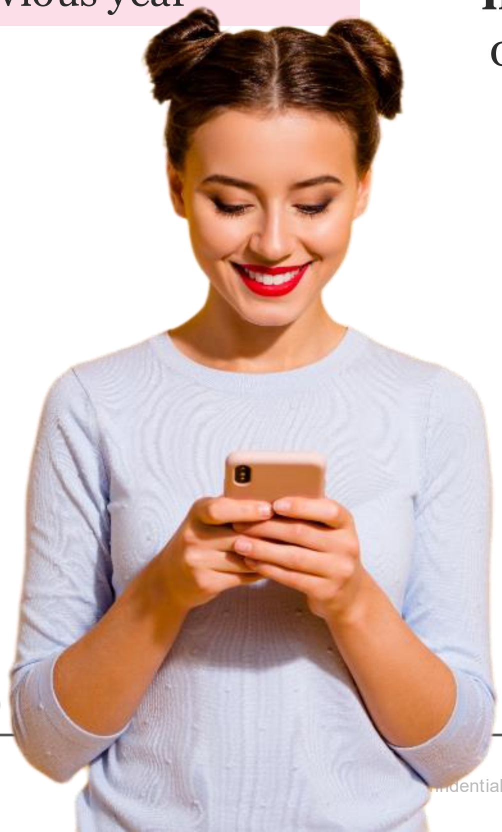
K-Beauty is expanding the online skincare market

K-Beauty is bringing new buyers to the online skincare category, and expanding their spending

K-Beauty - Customer Switch

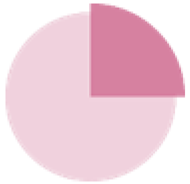


20% of K-Beauty skincare buyers did not purchase skincare online in the previous year



K-Beauty buyers spent **£109 more** on skincare than the average online buyer in the past 12 months

(230 index)



26% of total skincare spending on K-Beauty brands

Source: NielsenIQ Digital Purchases Latest 52 weeks ending 22nd Feb 2026 – United Kingdom – K-Beauty buyers (87 brands)

The platforms accelerating K-Beauty in Europe

Beauty powerhouses including Amazon and Sephora compete alongside specialist Asian beauty merchants

Top 5 Beauty merchants by K-Beauty Value

United Kingdom	*Germany*	*France*	*Spain*	*Italy*
amazon	amazon	yepoda 예쁘다	yepoda 예쁘다	yepoda 예쁘다
LOOKFANTASTIC	DOUGLAS	yesstyle	amazon	amazon
TikTok Shop	STYLEVANA	amazon	STYLEVANA	STYLEVANA
Boots	flaconi	SEPHORA	yesstyle	yesstyle
STYLEVANA	yesstyle	STYLEVANA	SEPHORA	SEPHORA

Source: NielsenIQ Digital Purchases – Latest 52 Weeks ending 18th Jan 2026 – Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing, Sun Care and Medicated Skin Care - based on 118 K-Beauty brands

The K-Beauty Brands Shaping the European Landscape

Brands including Yepoda, Erborian and Beauty of Joseon are at the forefront of shaping European K-Beauty trends

Top 3 K-Beauty Brands by Value – E-Commerce

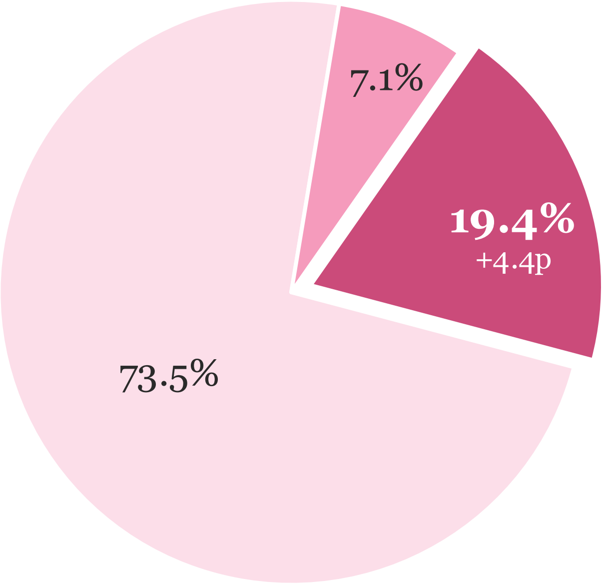
United Kingdom	Ireland	Spain	Italy
medicube	조선미녀 Beauty of Joseon	yepoda 예쁘다	yepoda 예쁘다
조선미녀 Beauty of Joseon	LANEIGE	erborian KOREAN SKIN THERAPY	SKIN1004
COSRX	Anua	조선미녀 Beauty of Joseon	조선미녀 Beauty of Joseon

Source: NielsenIQ Digital Purchases – Latest 52 Weeks ending 22nd Feb 2026 – Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Face Cleansing, Sun Care and Medicated Skin Care - based on 118 K-Beauty brands

How K-Beauty Brands Actively Shape Categories

Yepoda is at the centre of driving a shift towards toning pads in France

Category weight in value
Face cleansing | FY 2025



■ Skin toners ■ Face wash ■ Facial Wipes

#1 Merchant by share of Toners value

yesstyle

#1 Brand by share of Toners value

yepoda
예쁘다

#1 Toner product by share of value

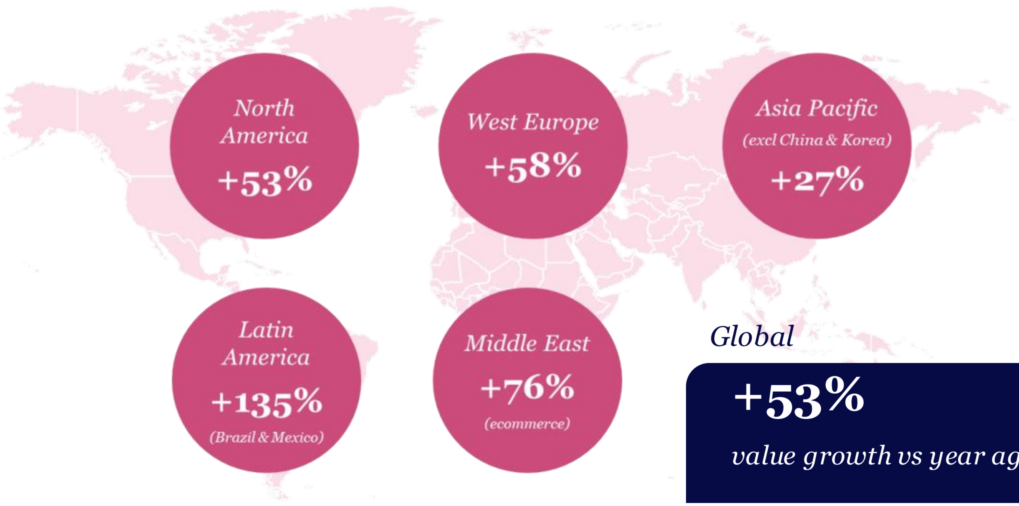
Yepoda
The Porefect Pad, 22,3 €

Source: NIQ Digital Purchase e-commerce consumer panel. Face cleansing: Skin Toners; Face Wash and Facial Wipes. Last 12 months, data ending 31 Dec 2025.

K-Beauty Goes Global

How Korean Beauty Moved from Local Leadership to Global Influence

K-Beauty's Surge on the Global Stage



Global

+53%

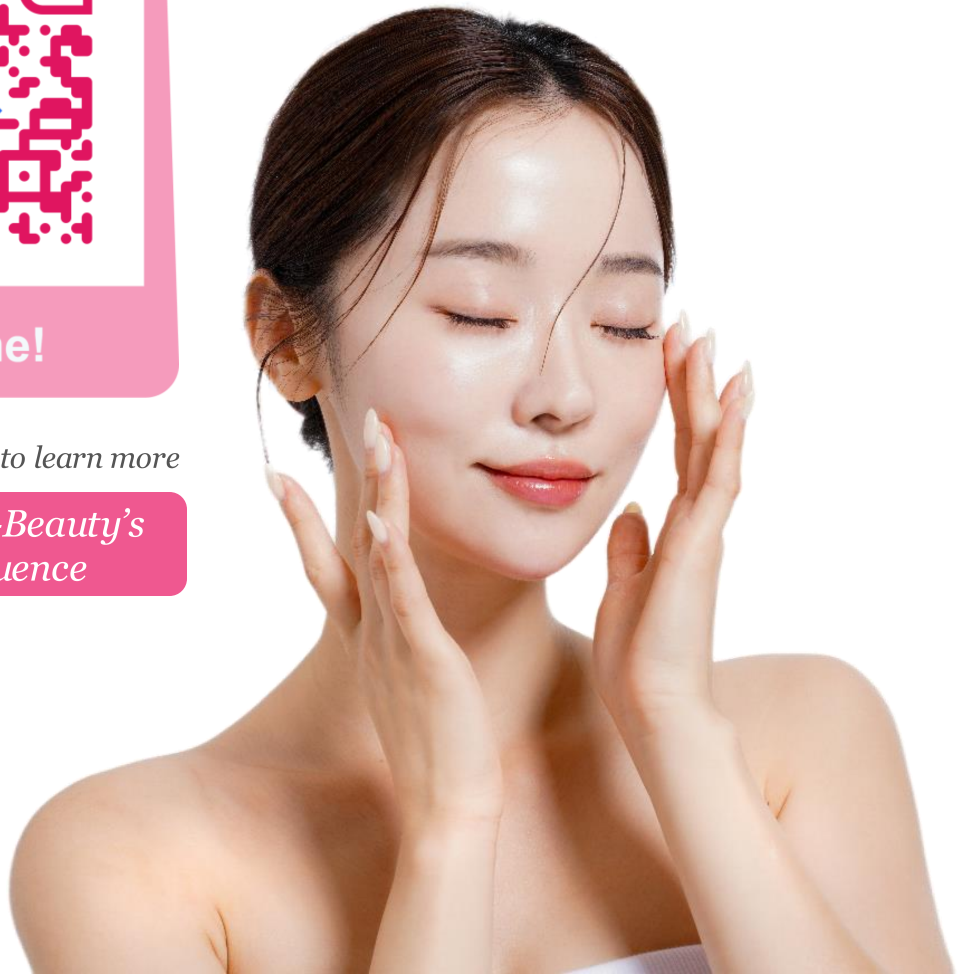
value growth vs year ago

Acne Patches *– Global Innovation Pipeline*

Scan me!

Access the full report to learn more

Understand K-Beauty's Global Influence



NIQ *Digital Purchases*

The dupe phenomenon spans a wide range of brands

Arabic Rooted

AFNAN · AL HARAMAIN SINCE 1970 · ARABIYAT · ARD AL ZAAFARAN · ARMAF · KHADLAJ · Lattafa · SalSabeeL est.2017

Fashion Brands

ZARA · SHEIN · VICTORIA'S SECRET · stradivarius

Private Beauty

adopt' PARFUMS FRANÇAIS · Bath & Body Works · divain. · dossier · LPDO · NOTED. AROMAS · LONKOOM

Fragrance Dupes Are Gaining Momentum Online

Number of dupes brands in the top 10 best-selling fragrances by volume per country

Source: NIQ Digital Purchase e-commerce consumer panel – Latest 52 Weeks ending 12th April 2026 – Fragrances

6 out of the 10 best selling perfumes in Italy are dupes

Top selling Online Fragrance in volume

La nuit Blanche
LPDO

100ml : 22.33 €
Amazon

Bianco Latte
Giardini Di Toscana

100ml : 125 €
giardiniditoscana.com

Best-selling Online Fragrances in volume

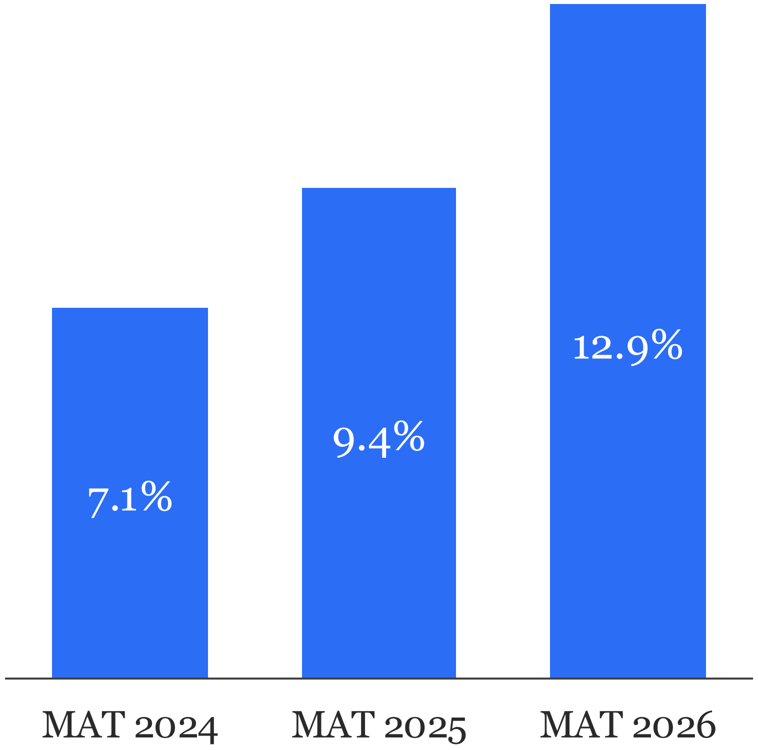
#	Product Name	Market Share	Brands	Merchant	Average Item Price
1	Lpdo La Nuit Blanche 100...	0.51%	Lpdo Brands	Amazon Merchant	€22.33
2	Khamrah Per Lattafa, Eau ...	0.36%	Lattafa Brands	Amazon Merchant	€29.96
3	Calvin Klein Ck One Eau D...	0.35%	Calvin Klein Brands	Amazon Merchant	€22.89
4	Lattafa Yara For Women E...	0.28%	Lattafa Brands	Amazon Merchant	€22.24
5	Iceberg Twice Man - Eau ...	0.25%	Iceberg Brands	Amazon Merchant	€14.01
6	Armaf Club De Nuit Intens...	0.24%	Armaf Brands	Amazon Merchant	€30.39
7	Eau De Toilette - Profumo ...	0.21%	Yves Rocher Brands	Yves Rocher Merchant	€14.16
8	Atralia Absolute Noir Eau ...	0.21%	Absolute Brands	Tiktok Merchant	€28.98
9	Lattafa Eclaire Eau De Parf...	0.2%	Lattafa Brands	Amazon Merchant	€30.31
10	Acqua Profum.Corpo & C...	0.19%	Yves Rocher Brands	Yves Rocher Merchant	€6.85

Source: NIQ Digital Purchase e-commerce consumer panel – Latest 52 Weeks ending 12th April 2026 – Fragrances

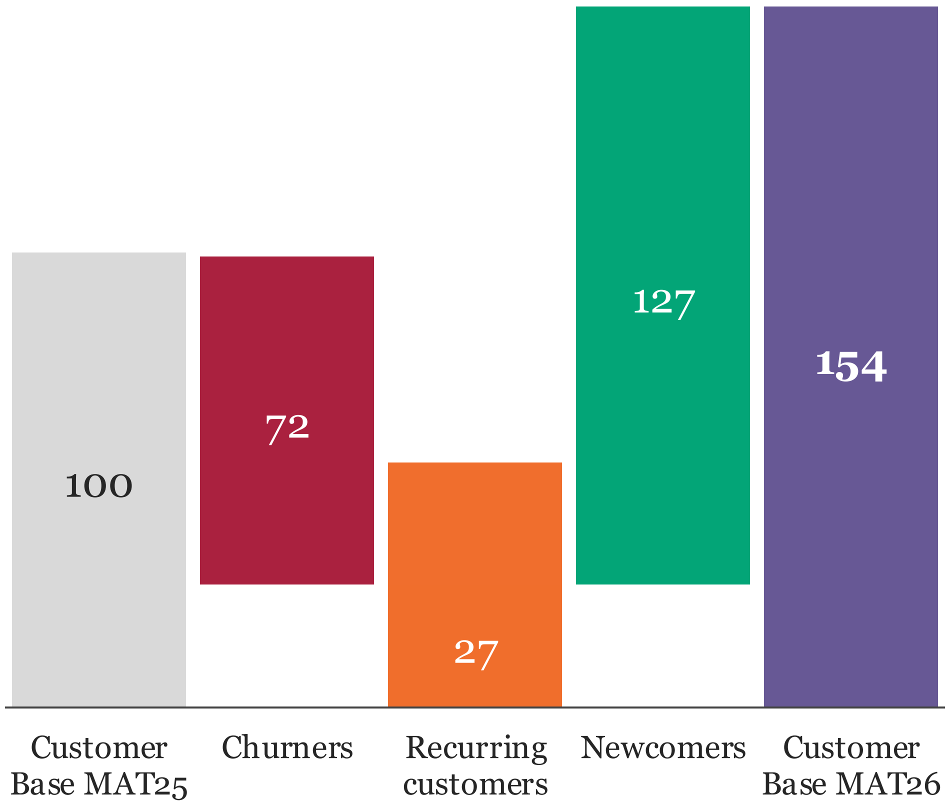
Amazon is driving dupe shopper acquisition in Italy

In Italy, dupe fragrances growth is fueled by newcomer acquisition, with Amazon as the leading entry point

Dupes – value share of online fragrances



Dupes – Customer Switch



Among newcomers:

37% bought dupes on **Amazon**

Source: NIQ Digital Purchase e-commerce consumer panel – Latest 52 Weeks ending 12th April 2026 – Fragrances – based on 21 Dupes brands

Dupes are an affordable way to extend fragrances wardrobe

Dupe customers show stronger engagement and a younger profile:

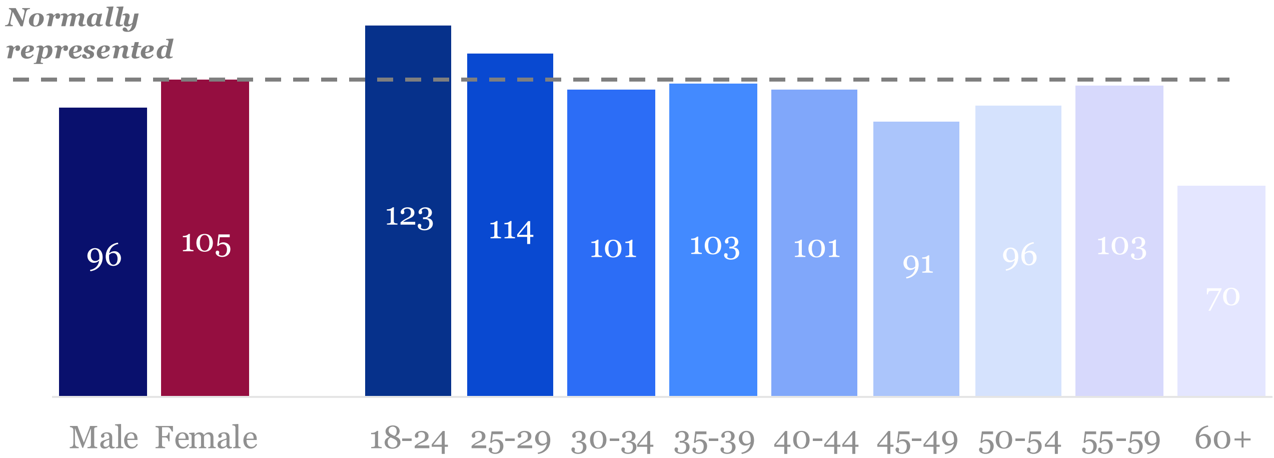
+14% higher **spend**

+28% higher purchase **frequency**

+23% higher likelihood to be aged **18–24**

Index of over/under-representation per and Gender Age

(In Penetration) Dupes buyers VS Fragrances shoppers - IT



Source: NIQ Digital Purchase e-commerce consumer panel – Latest 52 Weeks ending 12th April 2026 – Fragrances – based on 21 Dupes brands

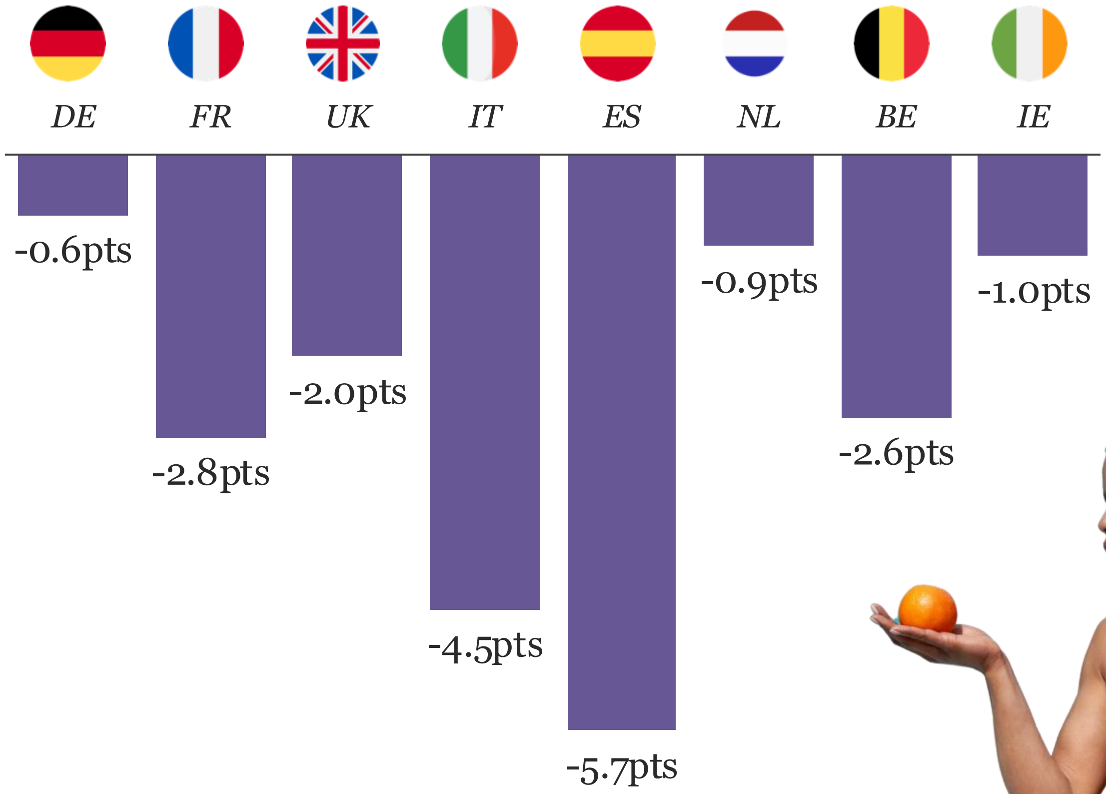
What's the impact on Prestige Beauty ?

Prestige Under Pressure

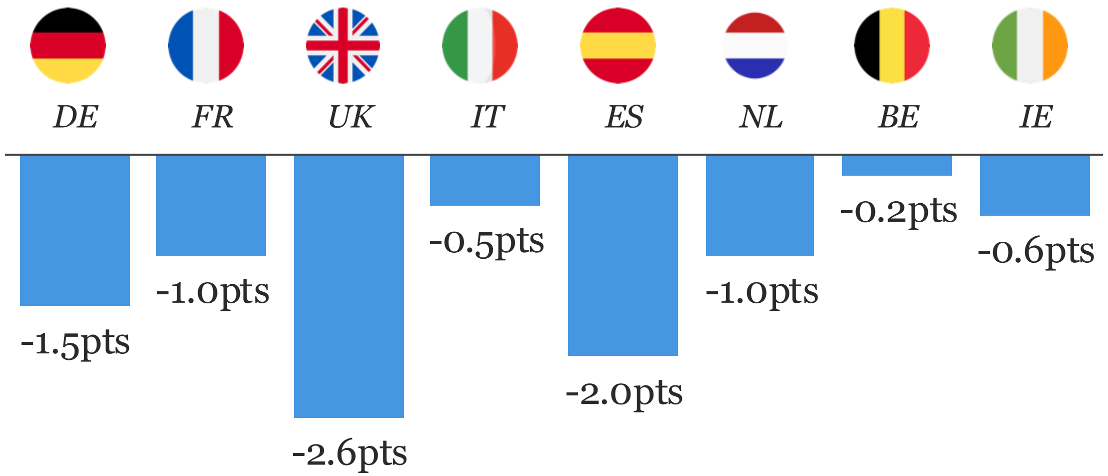
Prestige brands are losing share of the ecommerce market as challengers accelerate growth

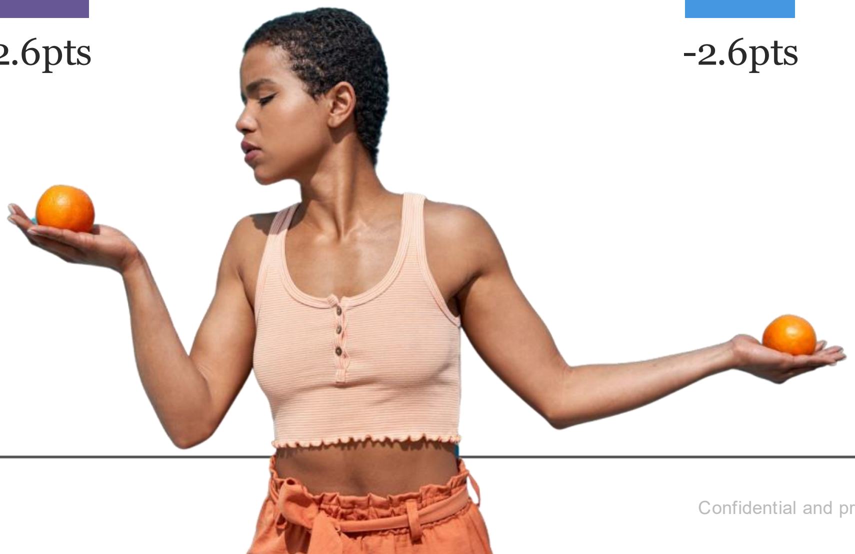
Prestige Share of total category | change vs previous year

Fragrances



Skin Care



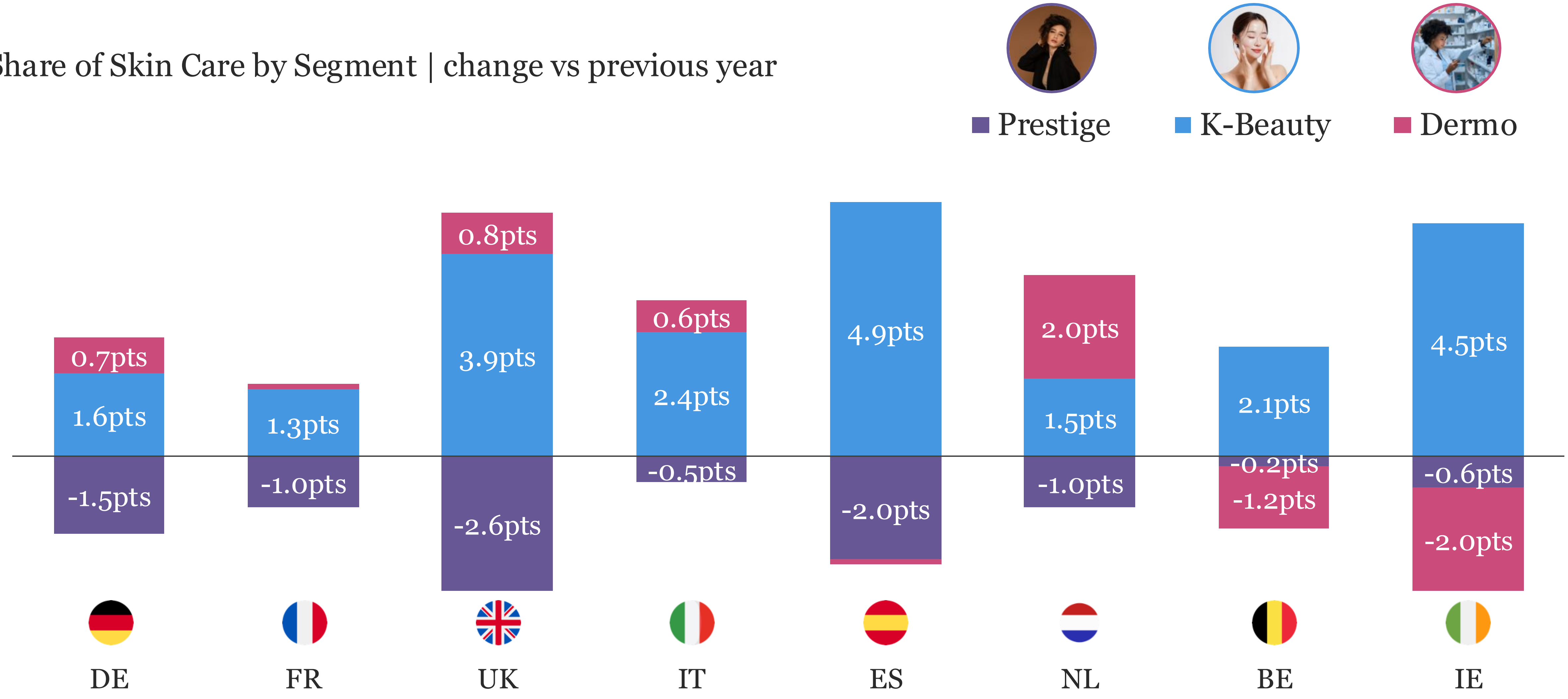


Source: NielsenIQ Digital Purchases Latest 52 weeks ending 19th April 2026

Prestige Skin Care Pressure from K-Beauty & Dermo

Rapid growth from K-Beauty and continued interest in dermo cosmetics brands has squeezed the share for prestige in skin care

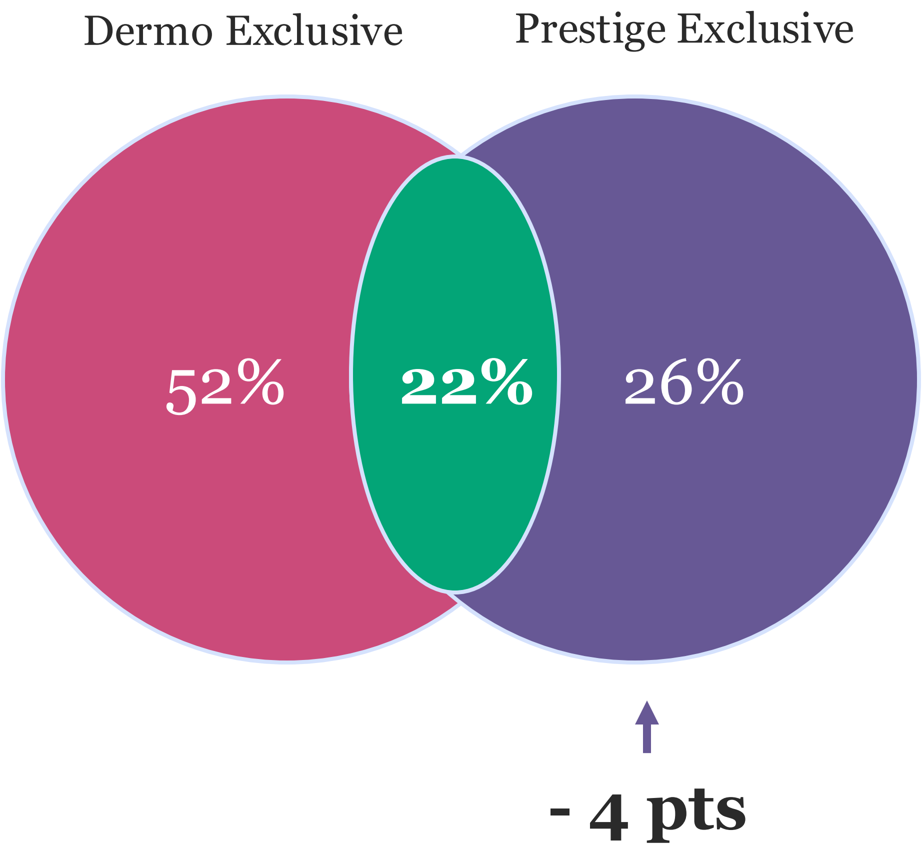
Share of Skin Care by Segment | change vs previous year

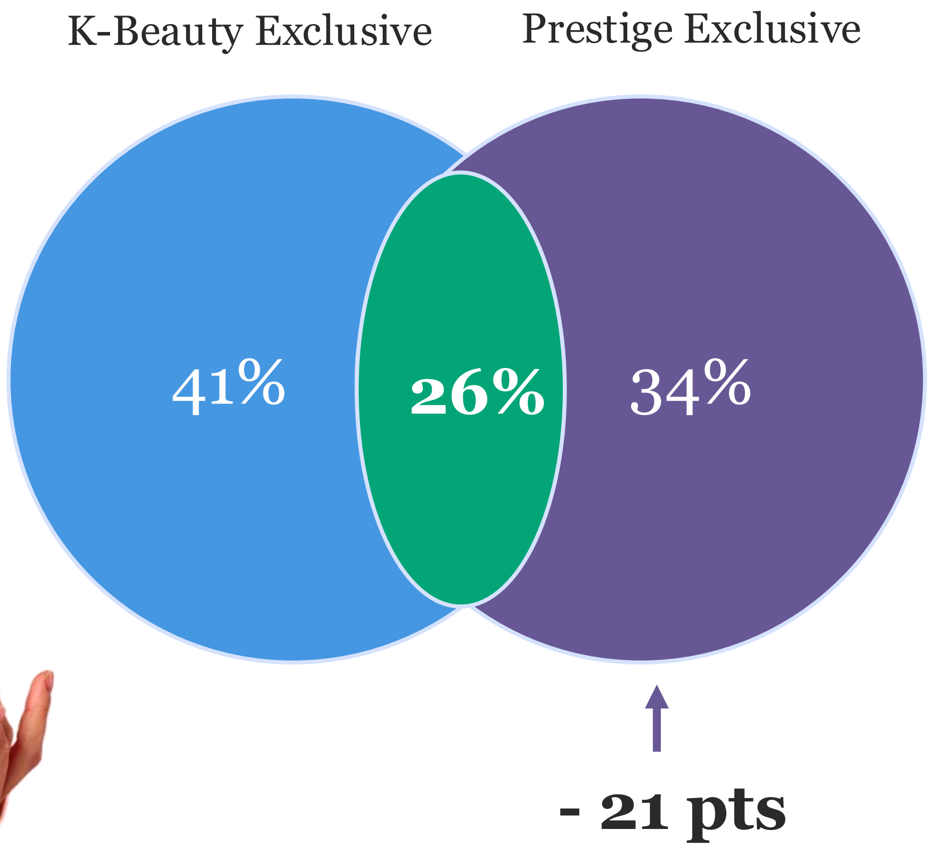


Source: NielsenIQ Digital Purchases Latest 52 weeks ending 19th April 2026

Prestige's Buyers are Not Exclusive to Prestige Brands

Buyers of prestige brands are increasingly mixing Dermo & K-Beauty brands into their brand mix, or switching out



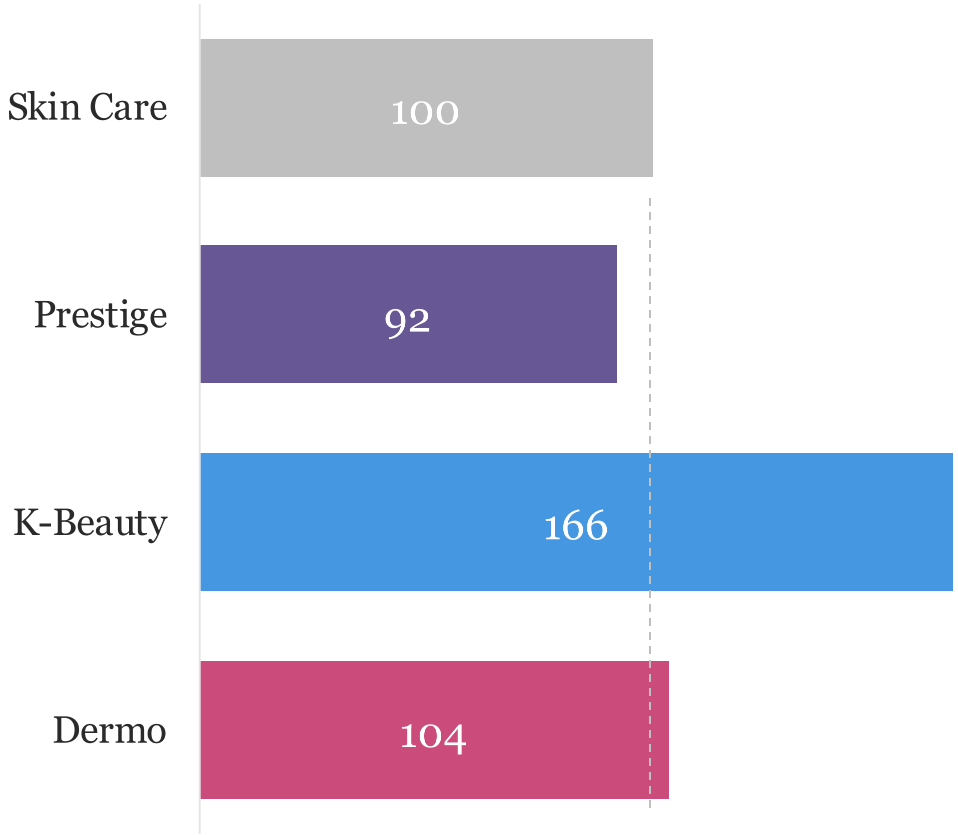


Source: NielsenIQ Digital Purchases Latest 52 weeks ending 19th April 2026 | Skin Care

Prestige Customer Recruitment Lags Behind the Category

K-Beauty brands are accelerating through customer recruitment, while prestige brands are behind the category recruitment rate

Index customer base growth vs total skin care



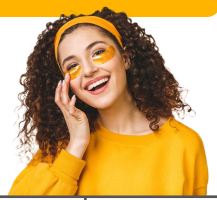
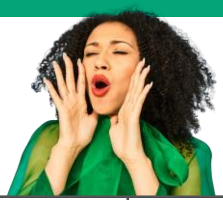
*of prestige brands **lost penetration** in the past 12 months*

Source: NielsenIQ Digital Purchases Latest 52 weeks ending 19th April 2026

Polarised Customer Bases

K-beauty is bringing in gen Z to the skincare category online, while dermo brand appeal to young men

Index customer base demographic contribution to value vs total skin care

	Gen Z		Millennials		Gen X		Boomers	
	Men	Women	Men	Women	Men	Women	Men	Women
Prestige	76	94	75	106	93	**113**	**126**	**111**
K-Beauty	**118**	**169**	74	108	47	75	26	49
Dermo	**111**	105	**132**	106	81	91	67	45

Source: NielsenIQ Digital Purchases Latest 52 weeks ending 19th April 2026

Beauty (R)evolution

1. *Amazon further consolidates its leadership*
2. *New disruptors are reshaping the market :*
   TikTok Shop, Primor, Aroma-Zone
3. *Key trends are redefining beauty market dynamics*
   K-Beauty, Dupes
4. *Prestige is under pressure online across Europe*
5. *Success online requires a consolidated view & data driven approach*

Austria's First Prestige Beauty Retail Intelligence

NIQ

For more information, please reach out to your NIQ representative

One Source. In-Store & Online. Faster Moves.

What is it?

NIQ launches Austria's first syndicated Omni Retail Coverage, delivering **granular POS-based insights** across value, volume, price, and distribution—down to GTIN/EAN, retailer, and online/offline channel level.

How it works?

Built on POS data from Douglas, Marionnaud, and Müller—including their online shops with separate retailer splits—the coverage spans all major prestige categories: Fragrance, Make-up, Face Care, Body Care, Hair Care, and Sun Care. The data is supported by monthly reporting and three years of historical back insights.

Key benefits

Track performance vs. key competitors across the total market and each retailer.

Identify retailer-specific **gaps and high-value white spaces** to unlock brand visibility.

Compare **online and in-store** dynamics to refine merchandising and media.

Leverage **top-brand rankings**, and **category momentum** to power retailer discussions and negotiate better terms.

Exclusive partnership with

DOUGLAS

Marionnaud PARIS

Müller

Expand online visibility beyond collaborating retailers

NOTINO

flaconi

amazon

zalando

easy cosmetic™

20+ E-Merchants

NIQ *Digital Purchases* x L'ORÉAL

Mariangela Figlia

CMI Business Partner
L'Oreal Italy

How L'Oréal uses data to strengthen its e-commerce strategy ?

NIQ *Digital Purchases* x L'ORÉAL

How do we leverage NIQ Digital Purchases in the Customer Market Intelligence Team ?

1

IDENTIFY & SIZE BLIND SPOTS

2

SPOT & TRACK NEW TRENDS

3

MONITOR STRATEGIC LAUNCHES

4

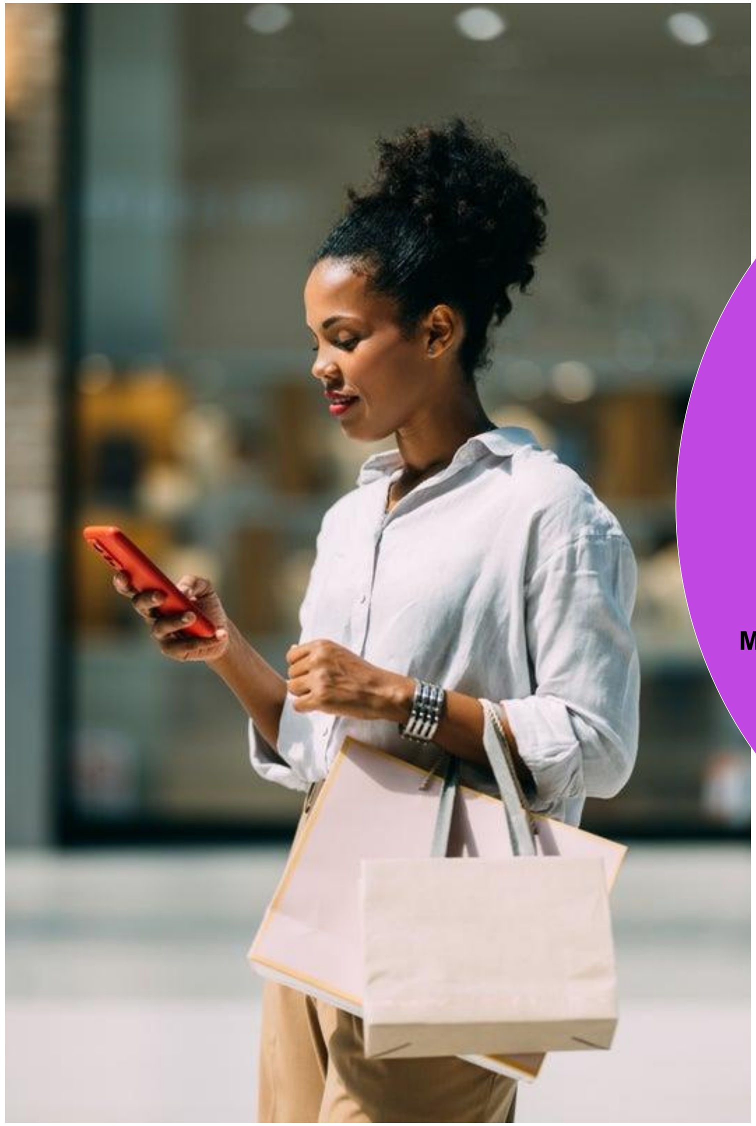
ADDRESS KEY SEGMENT

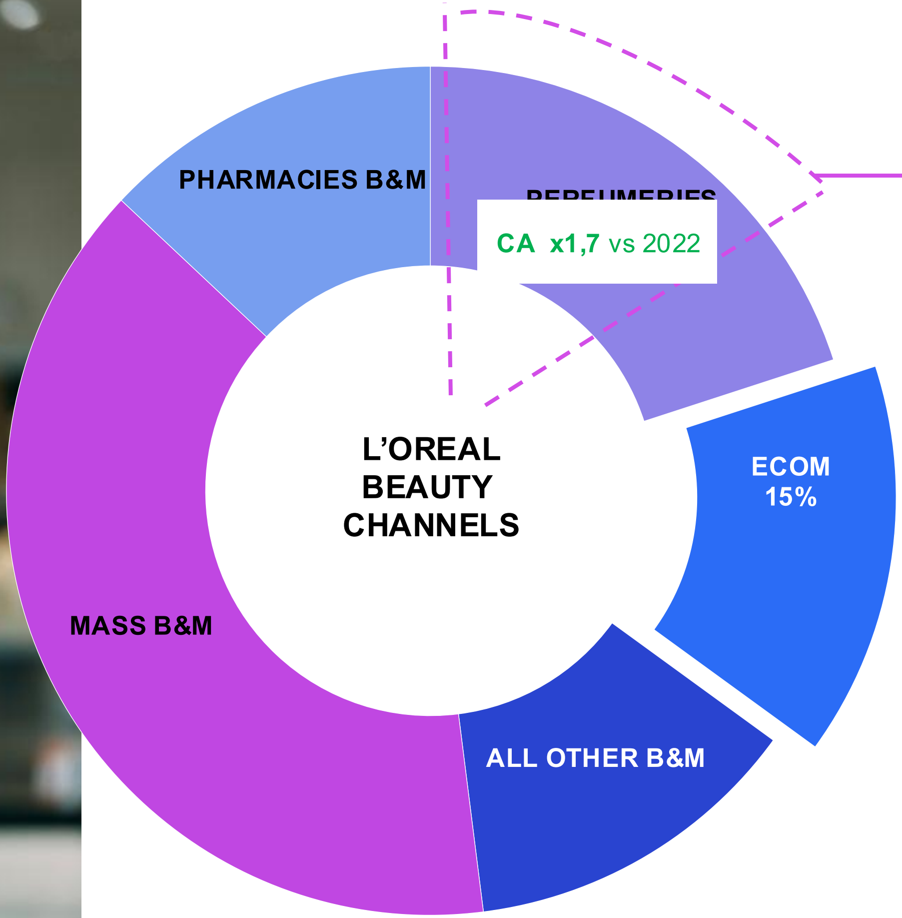
NIQ *Digital Purchases*

x

L'ORÉAL

1. We use NIQ Digital Purchases to get a 360 view of the online beauty market





BLIND SPOTS

PURE PLAYERS

amazon 3P · TikTok Shop

DTC

MIAMO Healthy Skin System · VERALAB WE BELIEVE IN YOUR SKIN · KIKO MILANO · yepoda · ZARA

SECOND HAND & PRIVATE SALES

Vinted · ebay

FASHION & BEAUTY SPECIALIST

SHEIN · zalando

E PHARMACIES *(full transparency)*

FARMASAVE · Dr.Max · efarma by atida

NEW BEAUTY PLATFORMS

STYLEVANA K-Beauty Store · yesstyle

2. We leverage NIQ Digital Purchases to follow key online trends

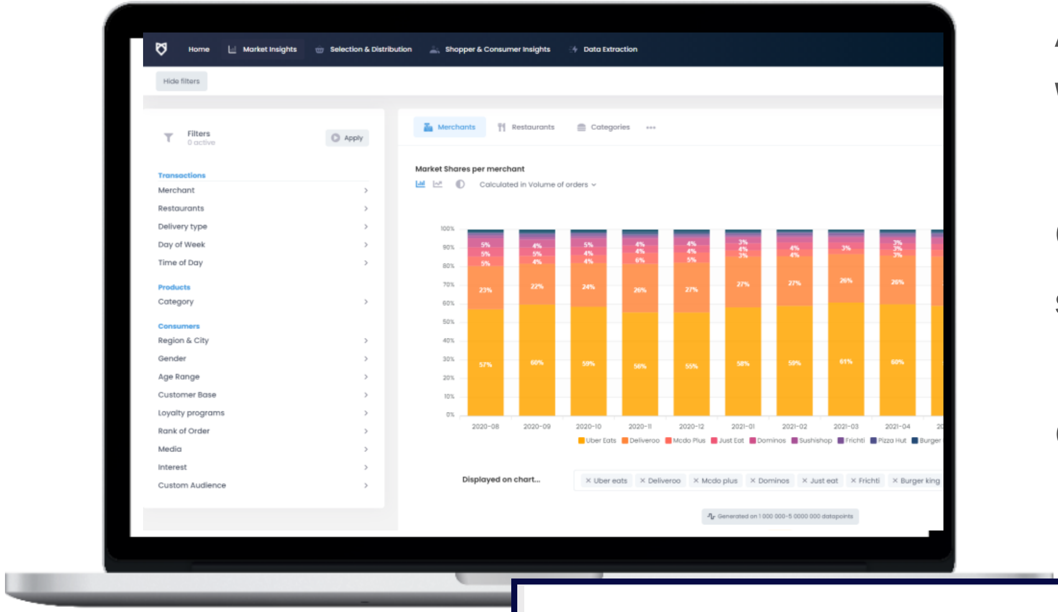
We create our own market

K-Beauty Market

erborian PARIS · SEOUL
skin79
Dr.Jart+
TONYMOLY
LANEIGE
VT COSMETICS
yepoda 예뻐다
too cool for school
AMORE PACIFIC

More than 80 brands

NIQ DIGITAL PURCHASES SAAS PLATFORM



My favorite filters

Korean Brands

Automated Dashboards

Weekly updates

Consolidated view across selective & nonselective market

Granular data at retailer level

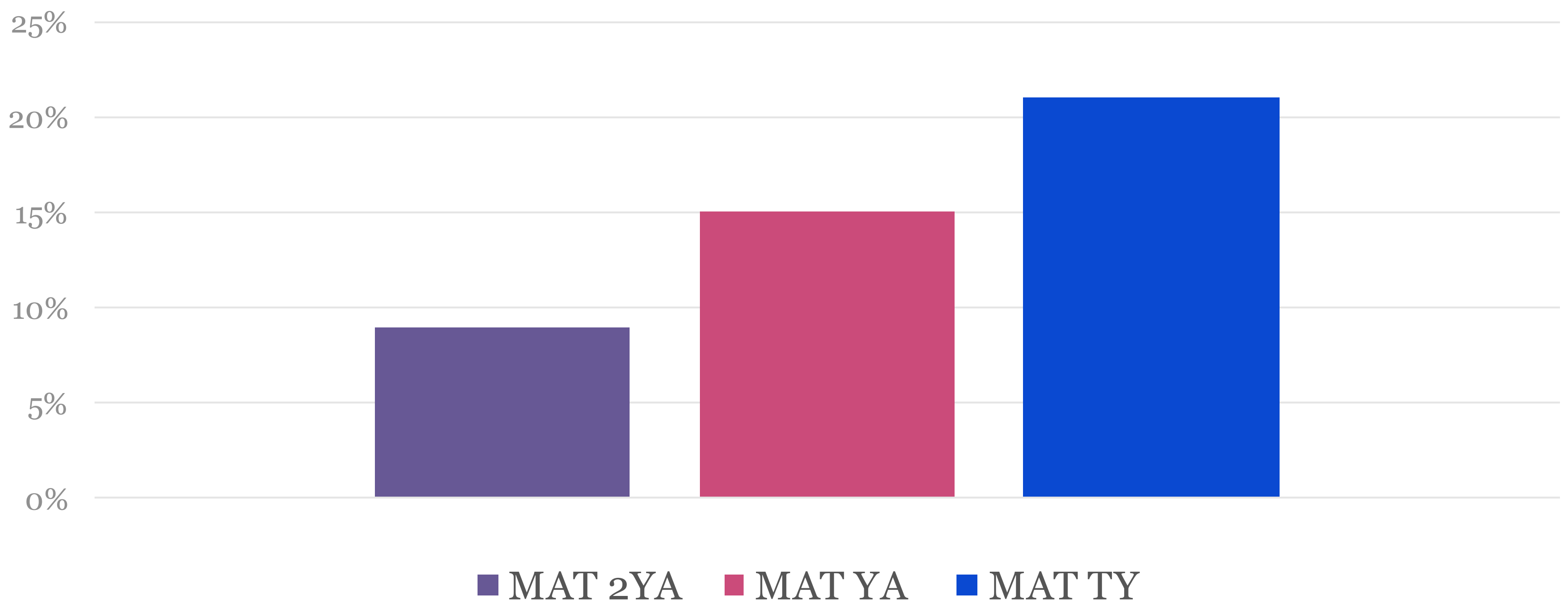
2. We leverage NIQ Digital Purchases to follow key online trends

We create our own market

K-Beauty Market

More than 80 brands

SIZE THIS NEW MARKET IN VALUE



Source: NielsenIQ Digital Purchases Latest 52 Weeks 3rd March 2026 | Skin Conditioning & Moisturizing, Face Cleansing & Sun Care – Based on 121 K-Beauty brands

2. We leverage NIQ Digital Purchases to follow key online trends

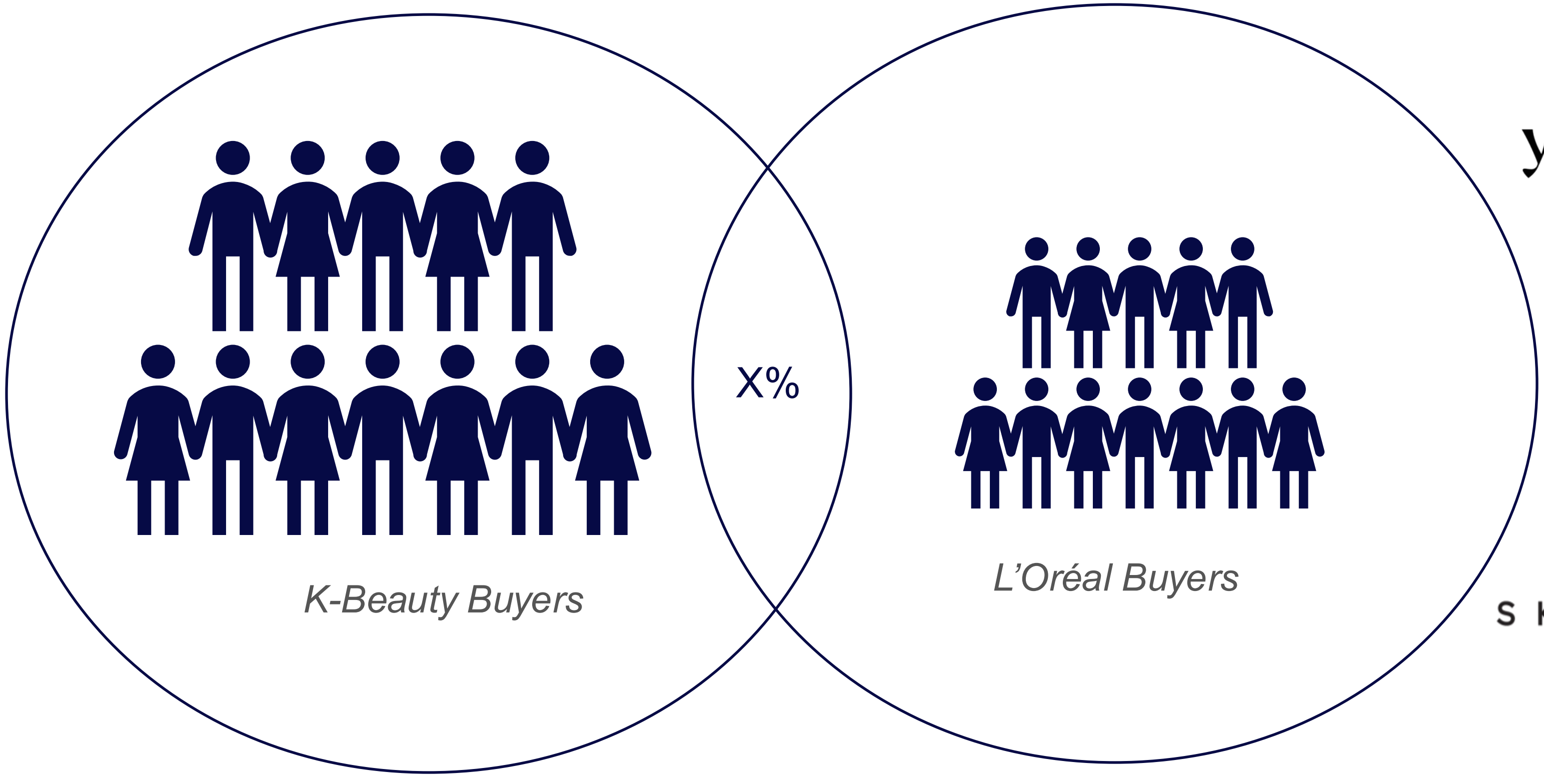
We create our own market

K-Beauty Market

erborian PARIS · SEOUL
skin79
Dr.Jart+
TONY MOLY
LANEIGE
too cool for school
VT COSMETICS
yepoda 예쁘다
AMORE PACIFIC

More than 80 brands

DOES L'OREAL BUYERS BUY K-BEAUTY ?



yepoda 예쁘다
medicube
SKIN1004

2. We leverage NIQ Digital Purchases to follow key online trends

GET STRATEGIC & DYNAMIC DATA TO MONITOR THOSE NEW TRENDS

K-Beauty Market

erborian PARIS · SEOUL
skin79
TONY MOLY
Dr.Jart+
LANEIGE
too cool for school
VT COSMETICS
yepoda 예쁘다
AMORE PACIFIC

More than 80 brands

CATEGORY

CATEG	MS	Evol pts
	X%	-2.3pts
	X%	+0.2pts
	X%	+1.7pts
	X%	+1.5pts

TOP MERCHANTS

MERCHANTS	MS	Evol pts
amazon	X%	-0,6pts
yepoda 예쁘다	X%	+0,2pts
STYLEVANA	X%	+0,1pts
yesstyle	X%	+0,3pts

TOP BRANDS

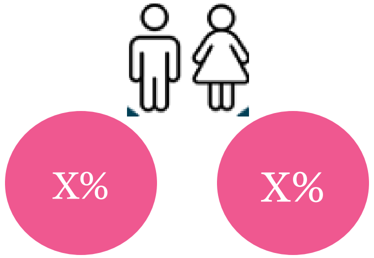
BRANDS	MS	Evol pts
yepoda 예쁘다	X%	-0,6pts
BEAUTY OF JOSEON	X%	+0,2pts
medicube	X%	+0,1pts
SKIN1004	X%	+0,3pts

#1 K-Beauty Online Product

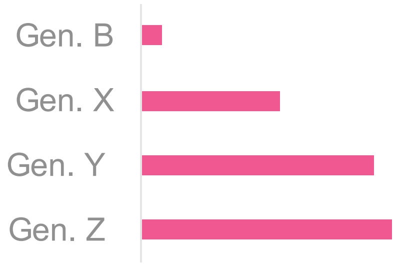
In value

SHOPPER INSIGHTS

PENETRATION BY GENDER



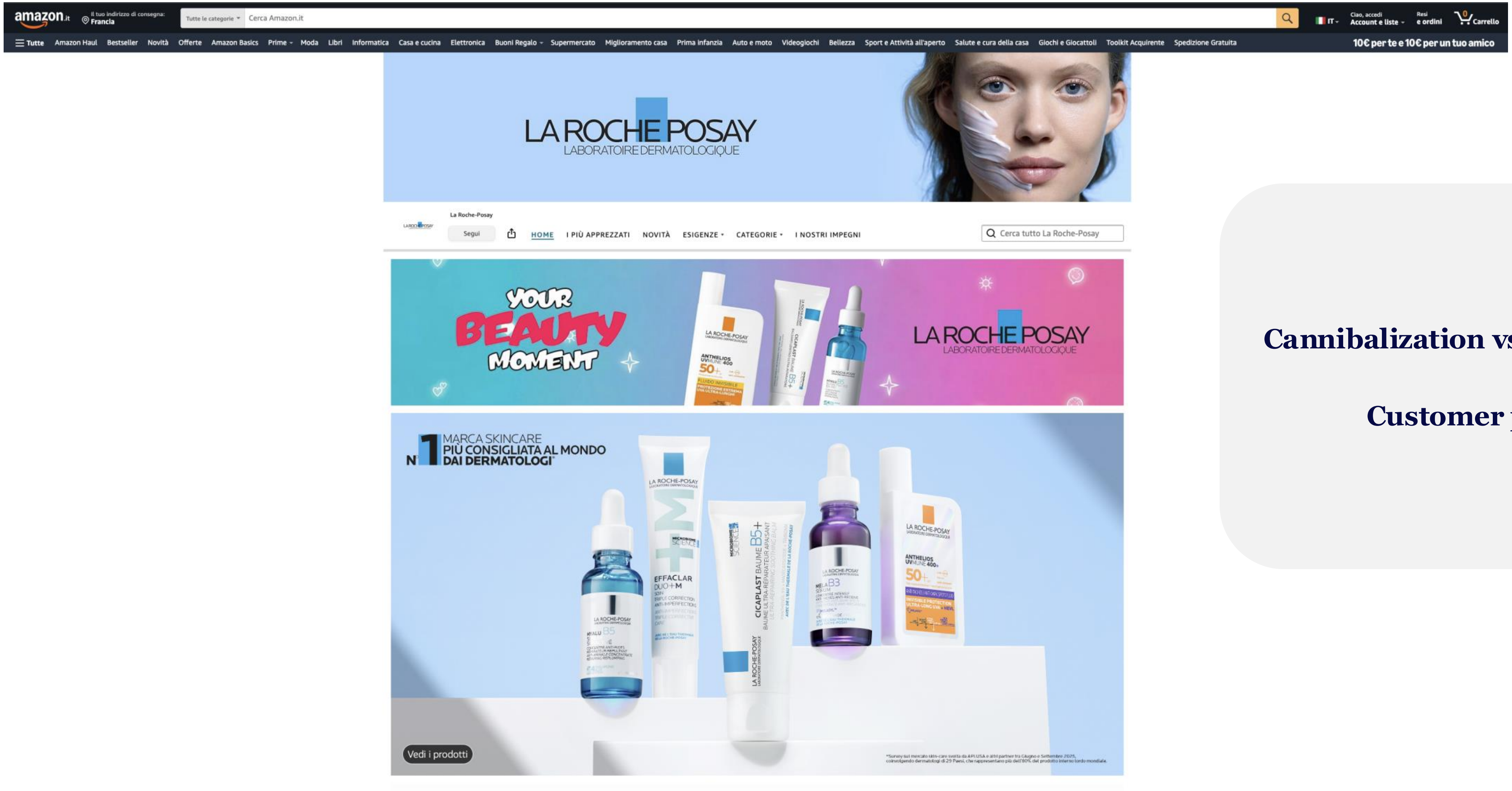
PENETRATION BY AGE



AOV

	K Beauty Buyers	Average Beauty Buyers
Average online spend per e-shopper	314 €	117 €
Purchase frequency	10	5
Average basket	31 €	25 €

3. Monitor post-launch on new platform



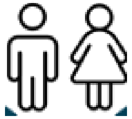
Cannibalization vs. incremental ?

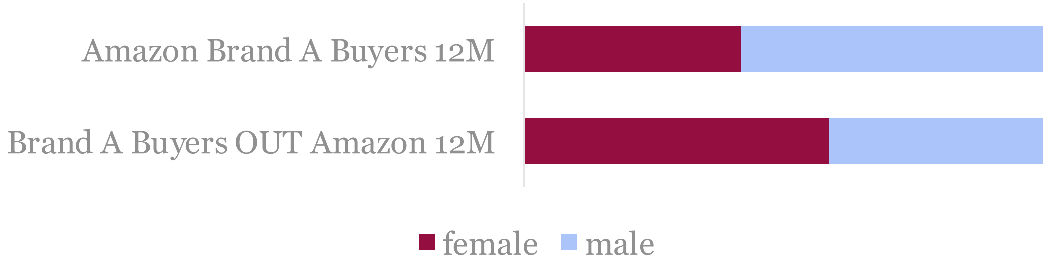
Customer profile ?

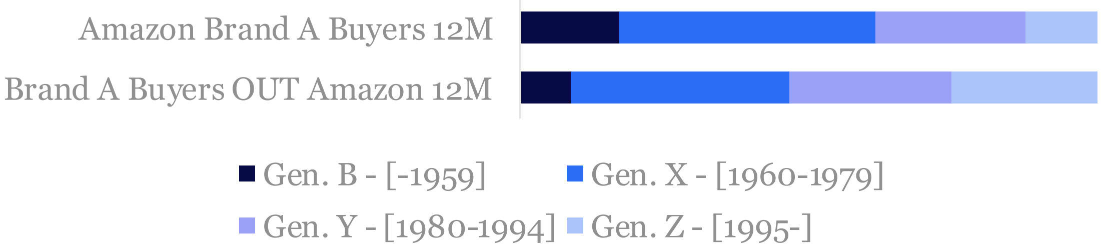
3. Monitor post-launch on new platform

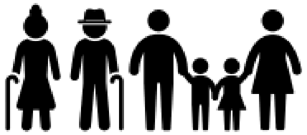
CUSTOMER PROFILE BY PLATFORM

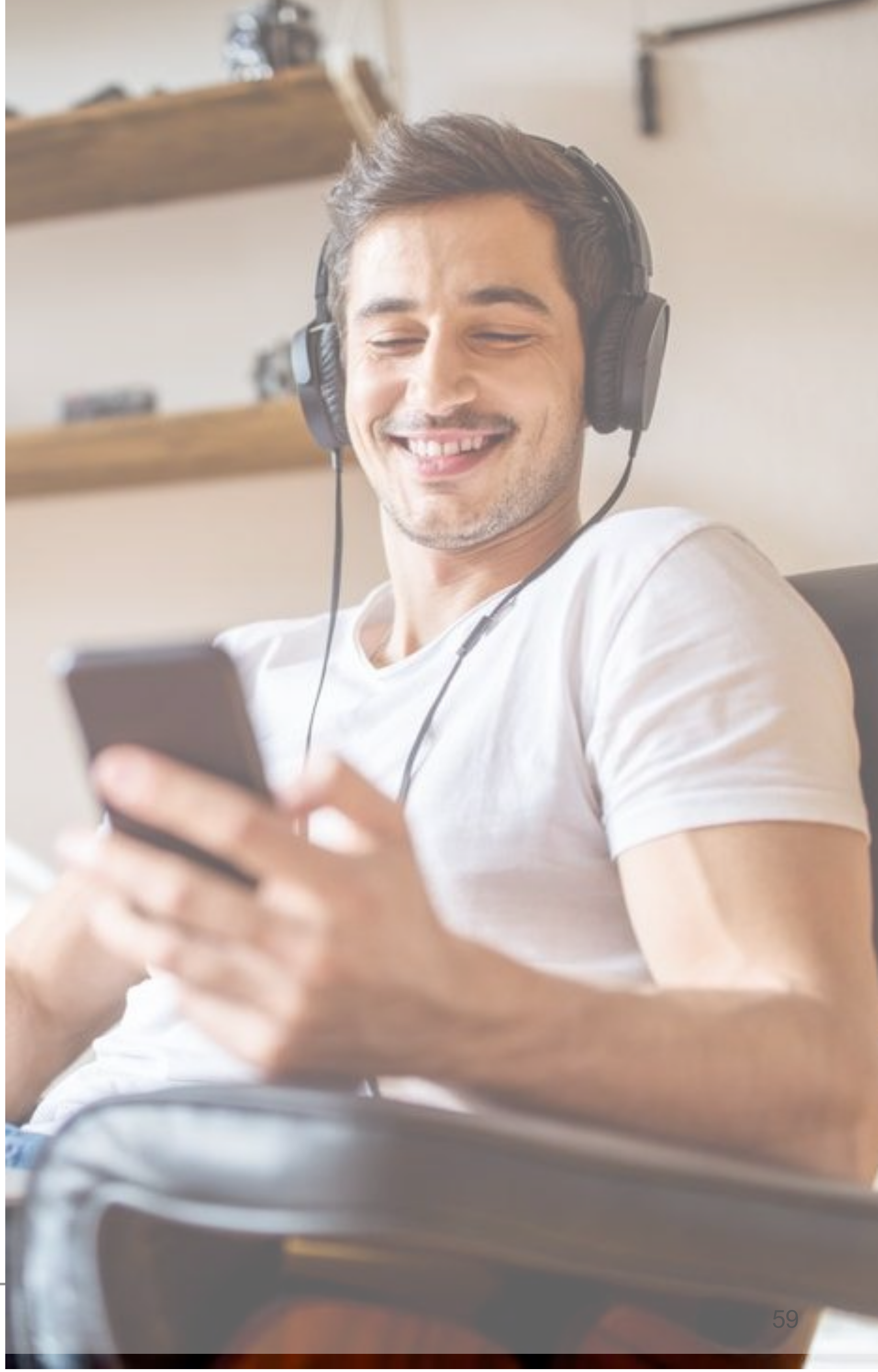
Did the launch attract a new consumer profile?









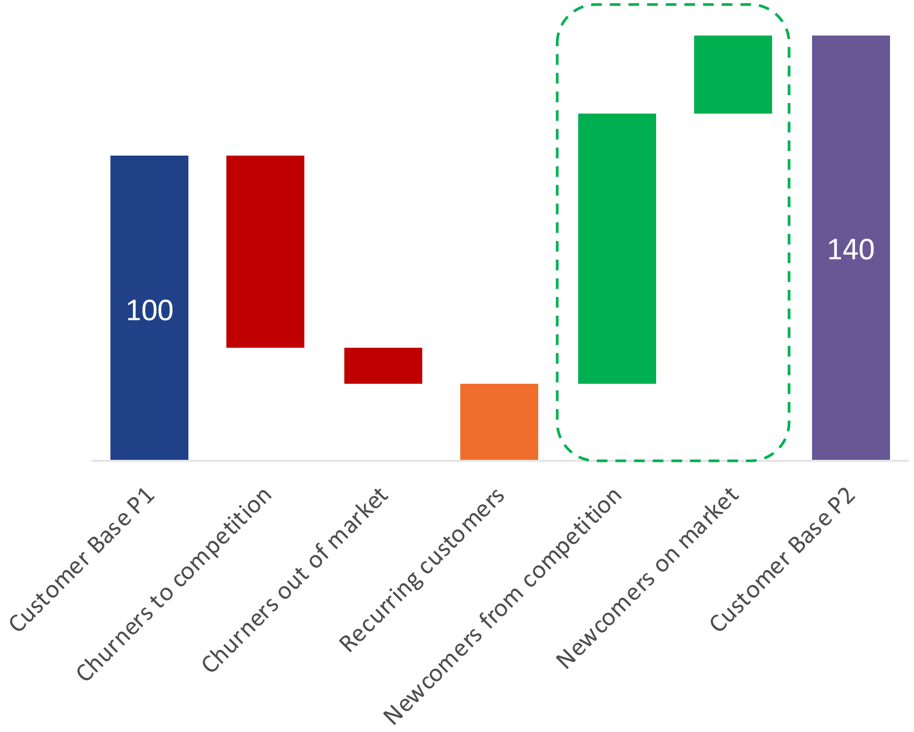


3. Monitor post-launch on new platform

CANNIBALIZATION vs. RECRUITMENT ?

Is this launch bringing new buyers to my brand ?

Brand A Customer Churn & Acquisition
P1 : 12 months before the launch on Amazon – P2: 12 months after the launch on Amazon

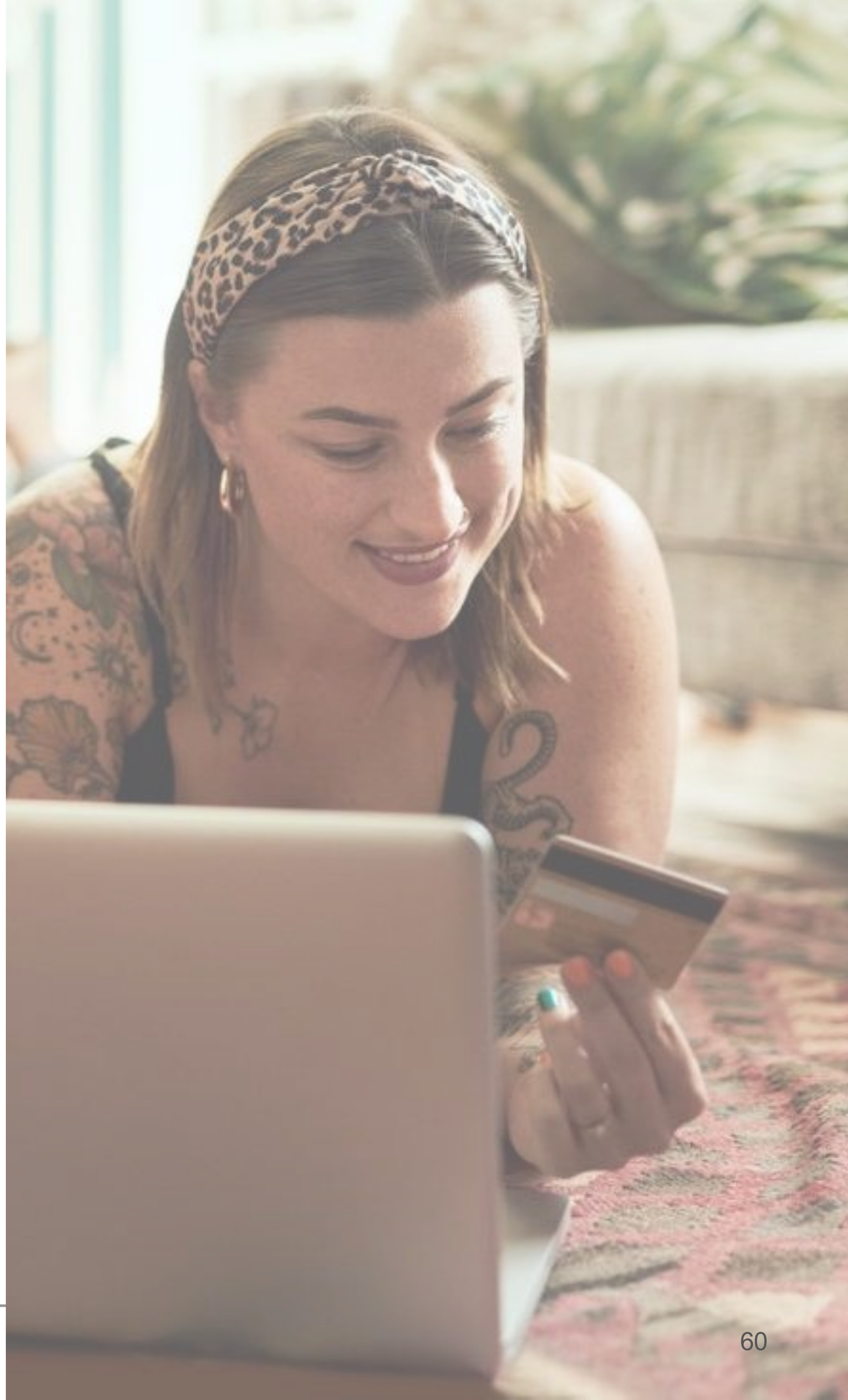


X%

of new buyers of Brand A purchased Brand A on **Amazon**

X%

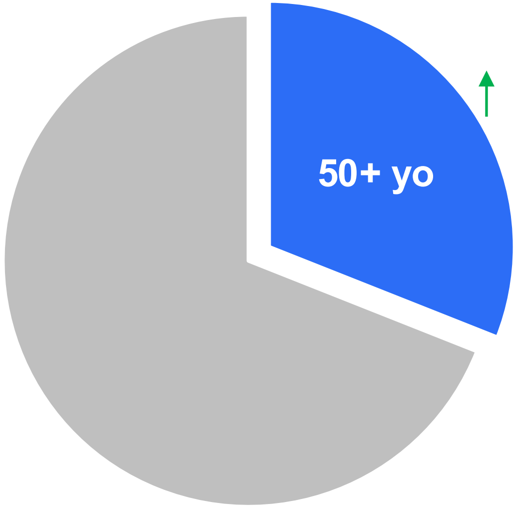
of Amazon buyers did not purchase Brand A previously



4. Address key consumer segments

SPOT SEGMENT SPECIFICITIES & OPPORTUNTIES FOR OUR BRANDS

Skin conditioning & moisturizing



FASTEST GROWING MERCHANTS

amazon · TikTok Shop · STYLEVANA · yesstyle · Vinted · FARMASAVE

FASTEST GROWING BRANDS

medicube · CeraVe · LA ROCHE-POSAY

#1 Product Online Among 50+

Crema viso antirughe acido ialuronico con retinolo e collagene KLEEM - 50ml
€24.05
Amazon

Source: NielsenIQ Digital Purchases – 12 months ending on 19th April 2026 — Skin conditioning and moisturizing – Female customers +50

Thanks for attending our Beauty Webinar

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NIQ *Digital Purchases*

Our Guest Speaker

Mariangela Figlia

CMI Business Partner

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Mariangela Figlia | LinkedIn

L'ORÉAL

Thank you for your time! ☺

Please scan the code for feedback