

H&BA

The Health & Beauty Association

A/W 2026

Webinar Series

Starting shortly

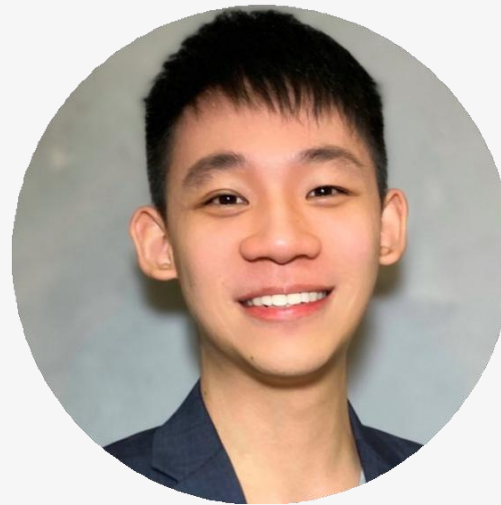


01.10.26



10:00 AM GMT

Winning in Today's Health & Beauty Retail Landscape from NielsenIQ



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NielsenIQ



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Winning in Today's Health & Beauty Retail Landscape

How Shopper Missions, Digital Discovery and Retail Channels Are Reshaping Growth

October 2026

UK Thought Leadership



Today's Agenda

1

Retail Landscape reimagined

2

Rising Online Channels

3

Offline channel remains relevant

4

How to win within wider categories



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NIQ

Senior Insights Analyst



Silvia Ghosh

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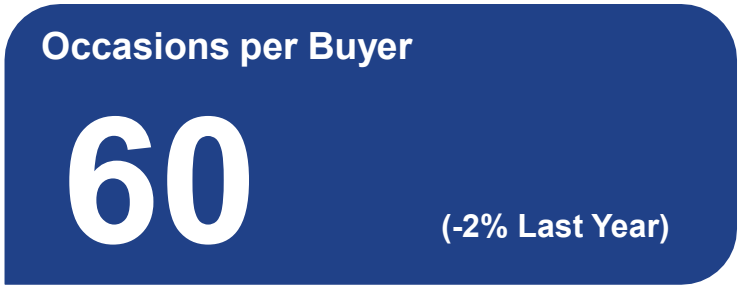
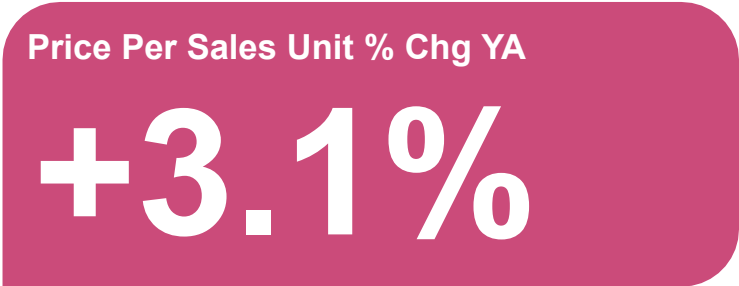
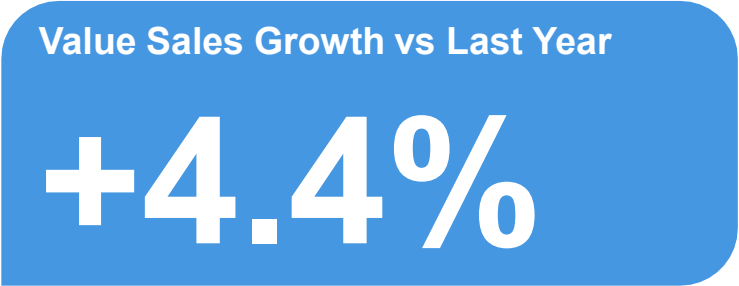
As the market evolves, various touch points have been present to influence consumers purchase decision throughout their shopping journey.

Retail Landscape Reimagined

1

H&B

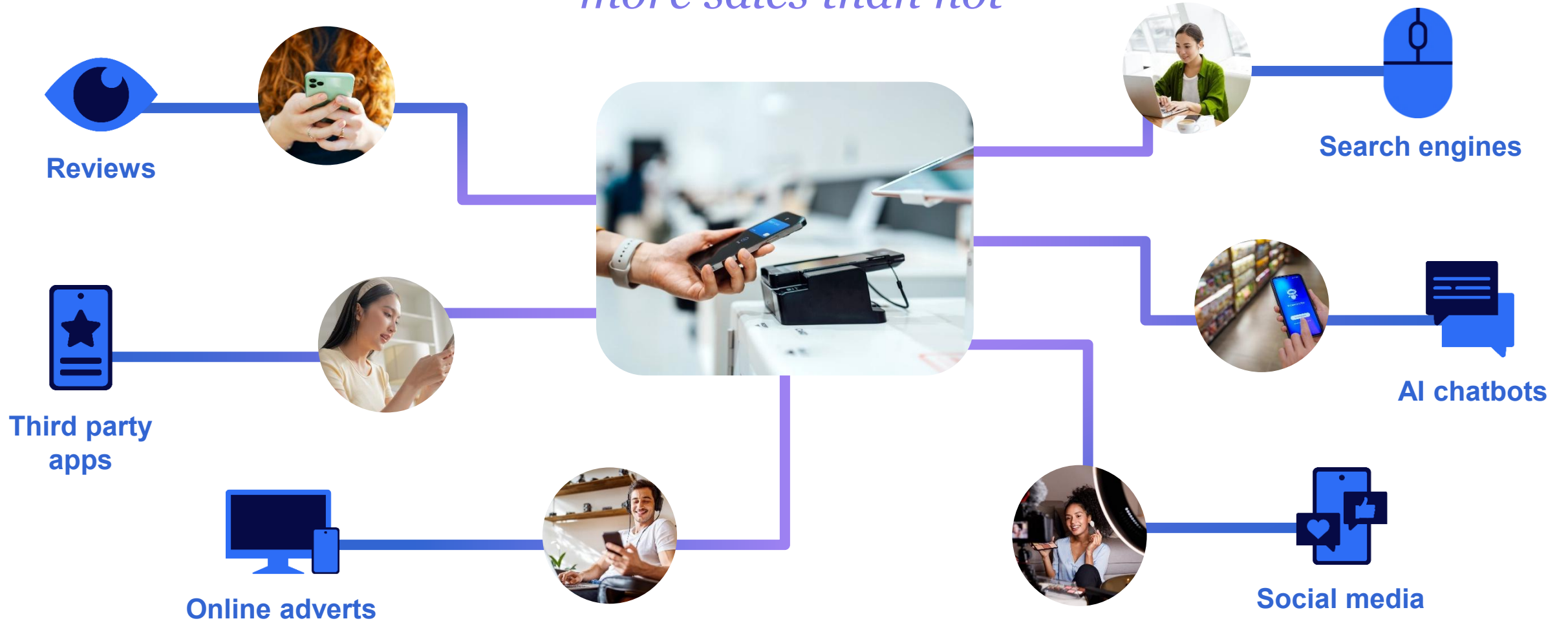
at a glance



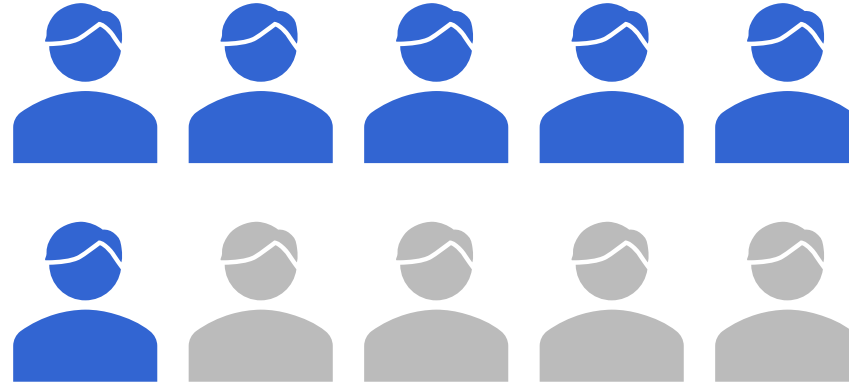
Source: NIQ Retail Measurement Data Latest 52 Weeks WE 05.09.26 | Panel on Demand Homescan Data Latest 52 Weeks WE 05.09.26

THE EVOLVED PATH TO PURCHASE MEANS

*digital will influence
more sales than not*



Shift to more digital influence and research

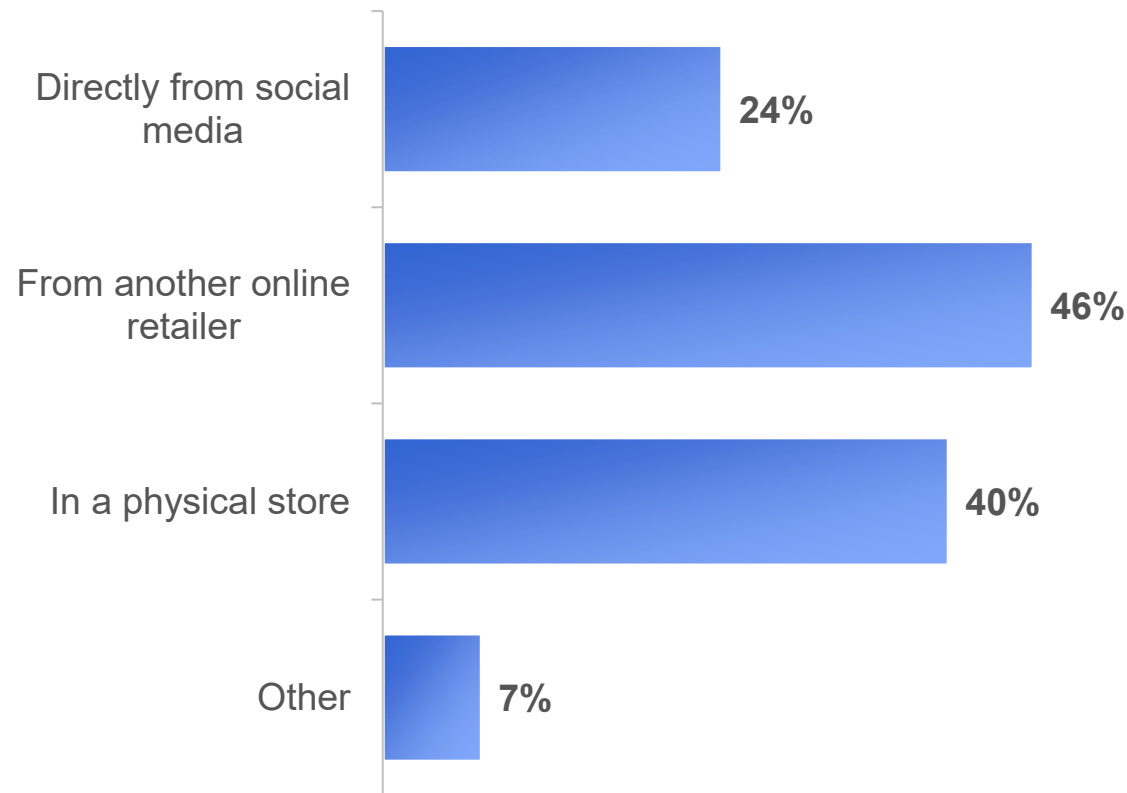


6 in 10

FMCG shoppers use online whilst
shopping in a physical store

Social media influence drives purchases to be fulfilled online

When purchasing a health & beauty product after seeing it advertised on social media, where did you buy it?



Source: NIQ Homescan Survey | March 26 | Q: When you have bought a health and beauty product after seeing it advertised on social media platform or social commerce site (e.g., TikTok, Instagram, Facebook marketplace, etc.), where did you buy it from?



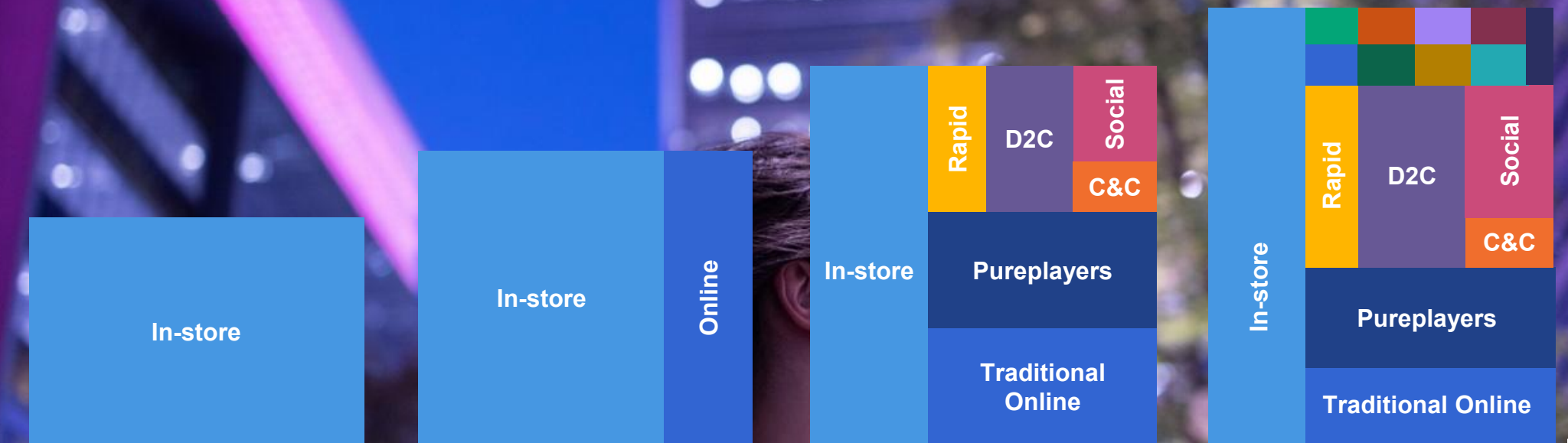
Shopping journey is reshaped by digital touchpoints, and the journey is *no longer linear and simple.*

Online channel is driving Health and Beauty market growth and it also becomes fragmented. Understanding what role each channel is playing for your brands is key for success.

Rising Online Channels

2

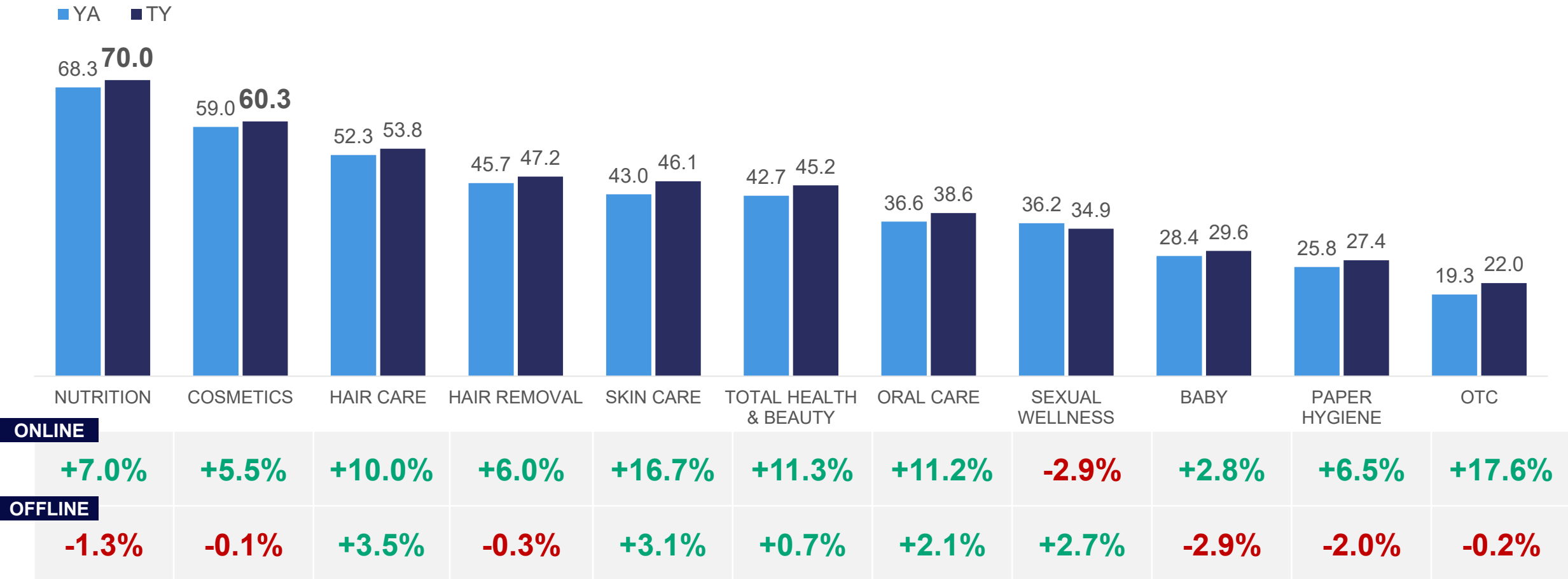
The online market is increasingly fragmented, impacting all categories



Online is growing strong in Beauty and Personal Care while OTC has room to grow in online

Online is no longer emerging channel – it has become the mainstream channel especially for Beauty and Personal Care

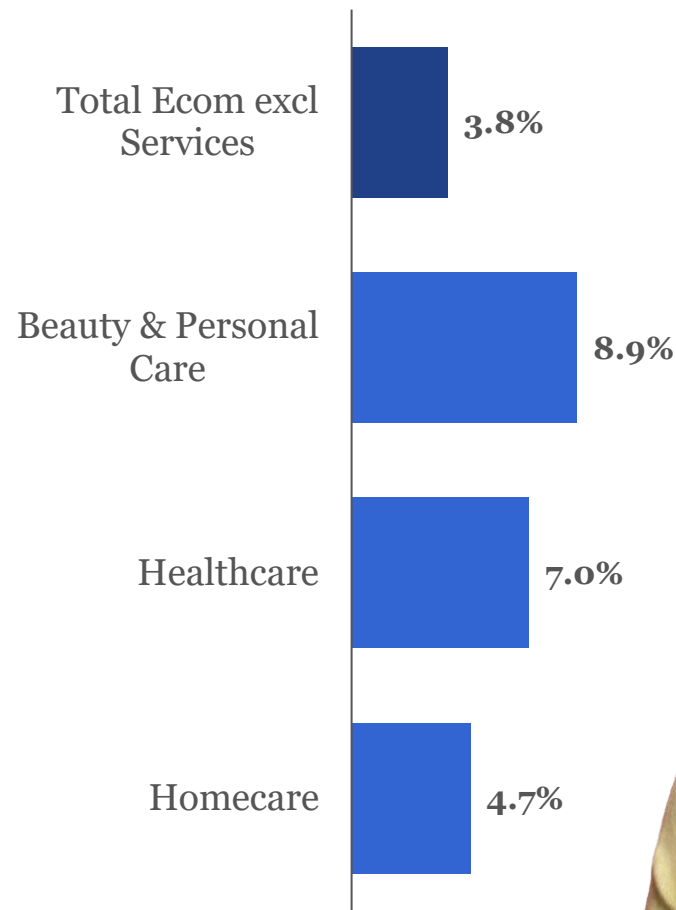
Online Market Share vs YA



Source: NIQ Omnisales MAT WE 05.09.26 | Value Share

TikTok Shop is cementing its position as a key online retailer this year

TikTok Shop Share of Online Value by Category
Latest 12 months vs YA



Source: NIQ Digital Purchases | Latest 12 months to May 2026



EXAMPLES OF SUCCESS



Medicube pink collagen gel mask

More sales went through TikTok than through Amazon

Free Soul brand

TikTok accounts for 50% of their online value sales

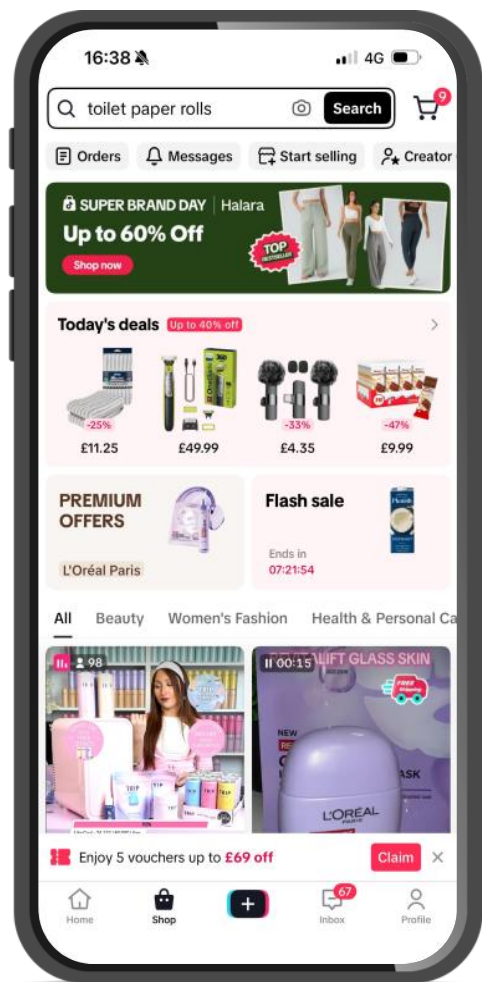


= 3.9% of Gen X online spend

TikTok Shop is not just driven by younger shoppers

Almost 1/4 of online shoppers have bought Health and Beauty on TikTok Shop in the last year

The rising e-retailer has the second highest penetration of the online shopper base



vs 2 years ago...



Average frequency has almost doubled

3.9 → 6.2



Average annual spend on the platform has almost doubled

£68 → £124



TikTok Shop has become a key part of shoppers' repertoire

17.6% → 25.2%

Source: NIQ Digital Purchases | Total Ecommerce excl Services | TikTok Shop | Latest 12 months to WE 05.09.26 vs 2YA



RAPID DELIVERY

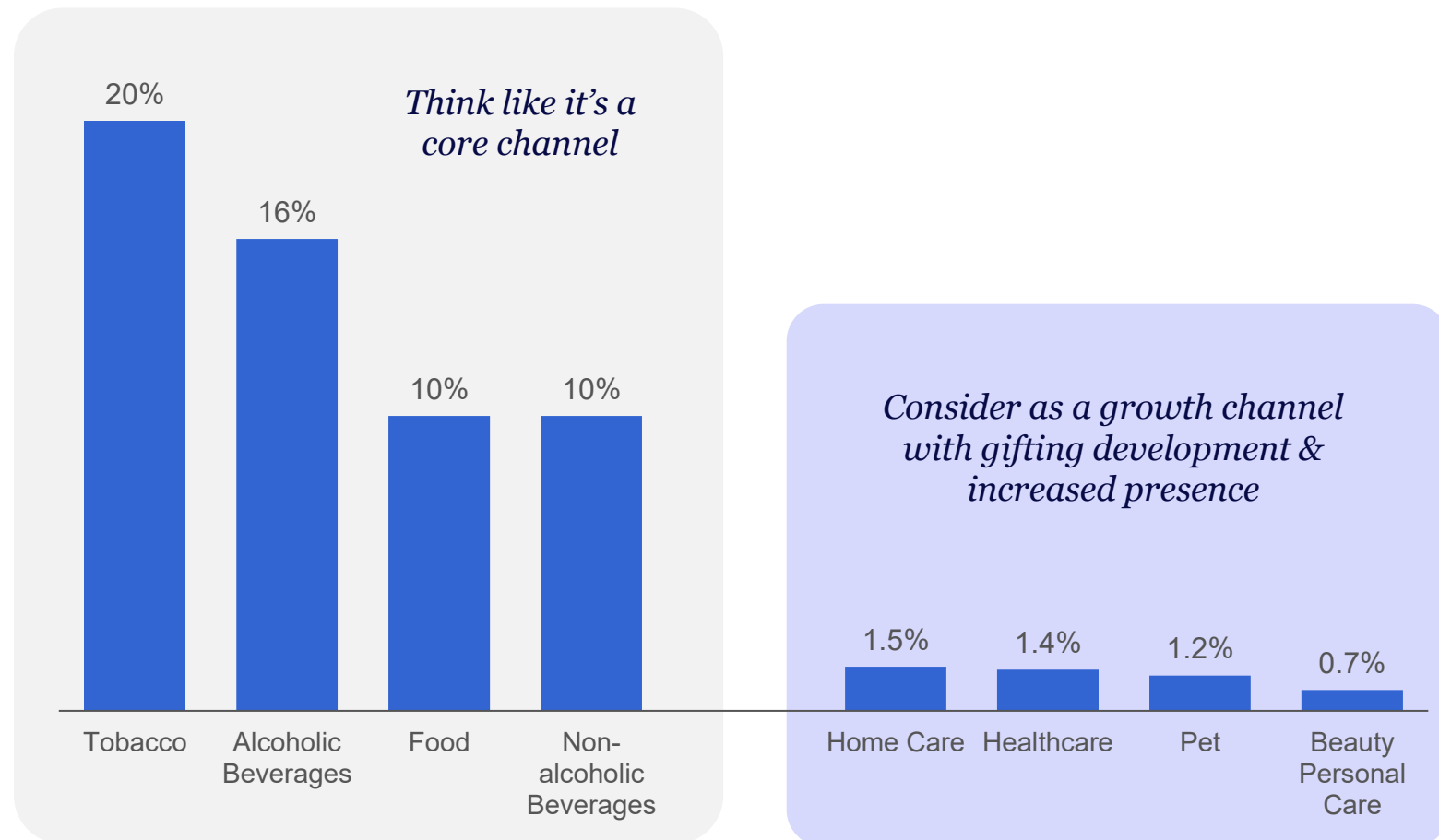
9%
of FMCG
ecommerce

2022: Only 9% had
used for groceries

2026: 33% of HHs
used for groceries

Food and beverages drive channel usage, but there remains growth potential in non-food categories

Rapid Delivery Share of Value Online by Category



Source: NIQ Homescan Survey | April 2026

NIQ Digital Purchases | FMCG | Rapid Delivery (Food delivery platforms + Quick commerce) | Latest 12 months to May 2026

Shift to a stronger desire for convenience with growing trips and spend on rapid delivery

Shopper KPI | Rapid Delivery | Latest 12 Months

Frequency

12.6

+2.0

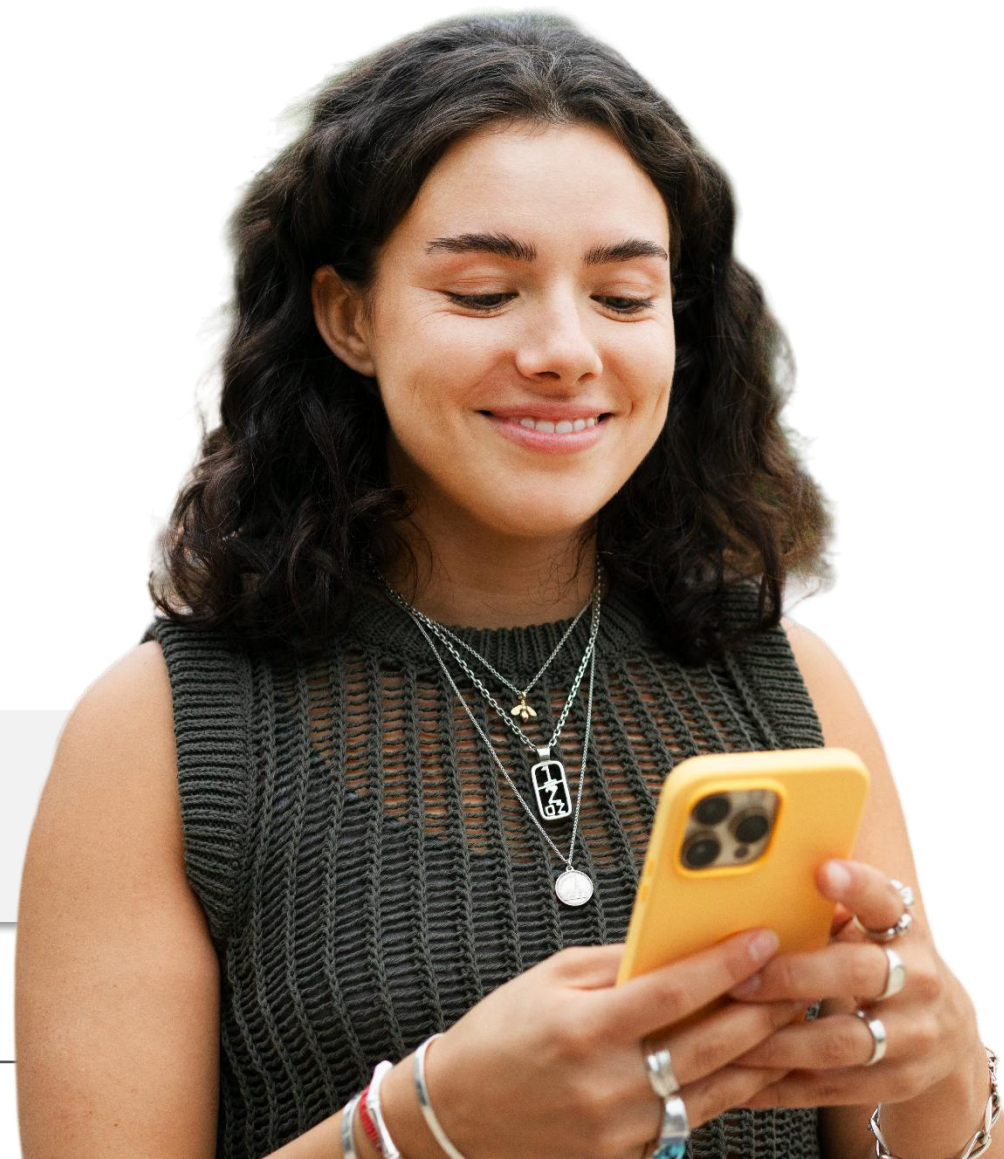
Avg Spend

£371

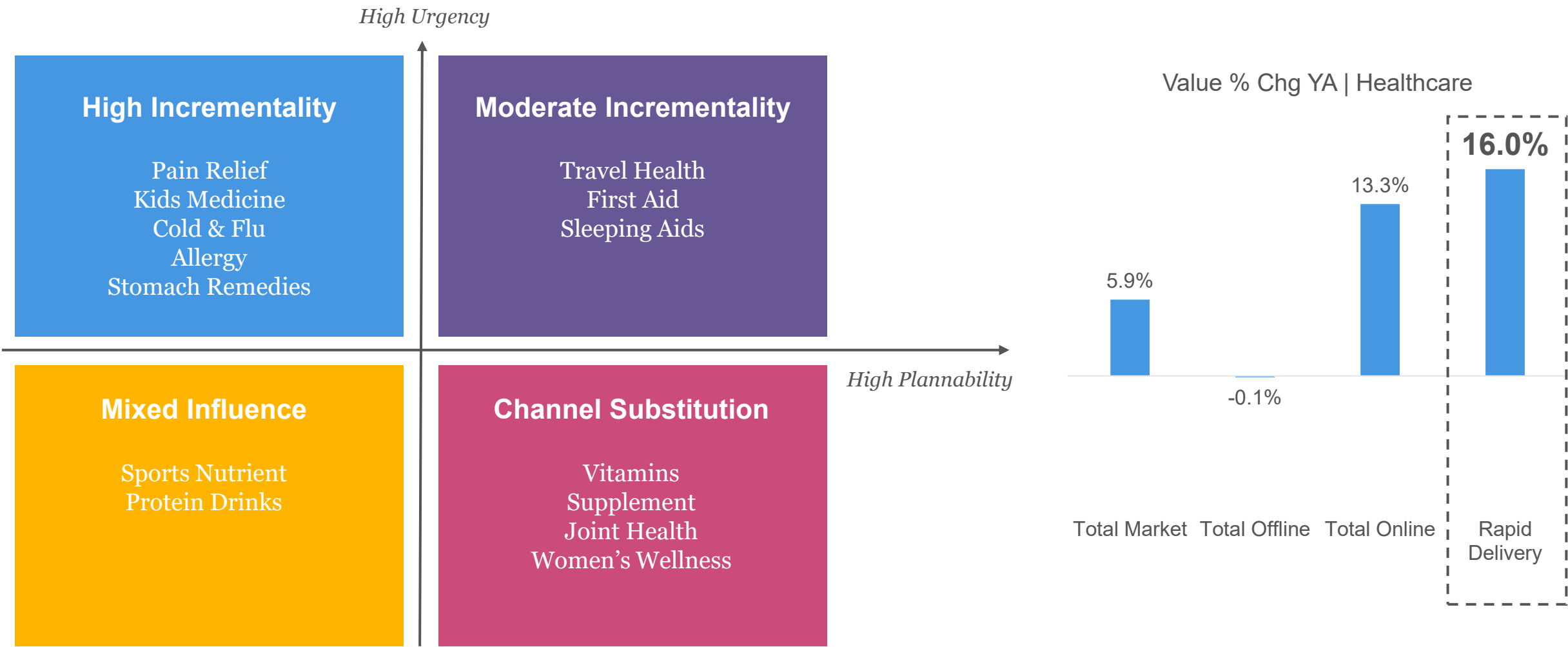
+£80

*Younger consumers are expecting more...
so are you prepared to meet these growing needs?*

NIQ Digital Purchases | FMCG | Rapid delivery | Latest 12 months to May 2026 Source: gfknewron | Base: Country- Great Britain. Product Group- Cooking / Built-in Hobs, Cooling / Freezers, Dishwashers, Gaming Consoles, Hair Dryers / Stylers, Hot Beverage Makers, Mobile Computing, Mobile Phones, PTV, Vacuum Cleaners, Washing Machines. Time Frame- Last four quarters (Jan 25 - Dec 25).



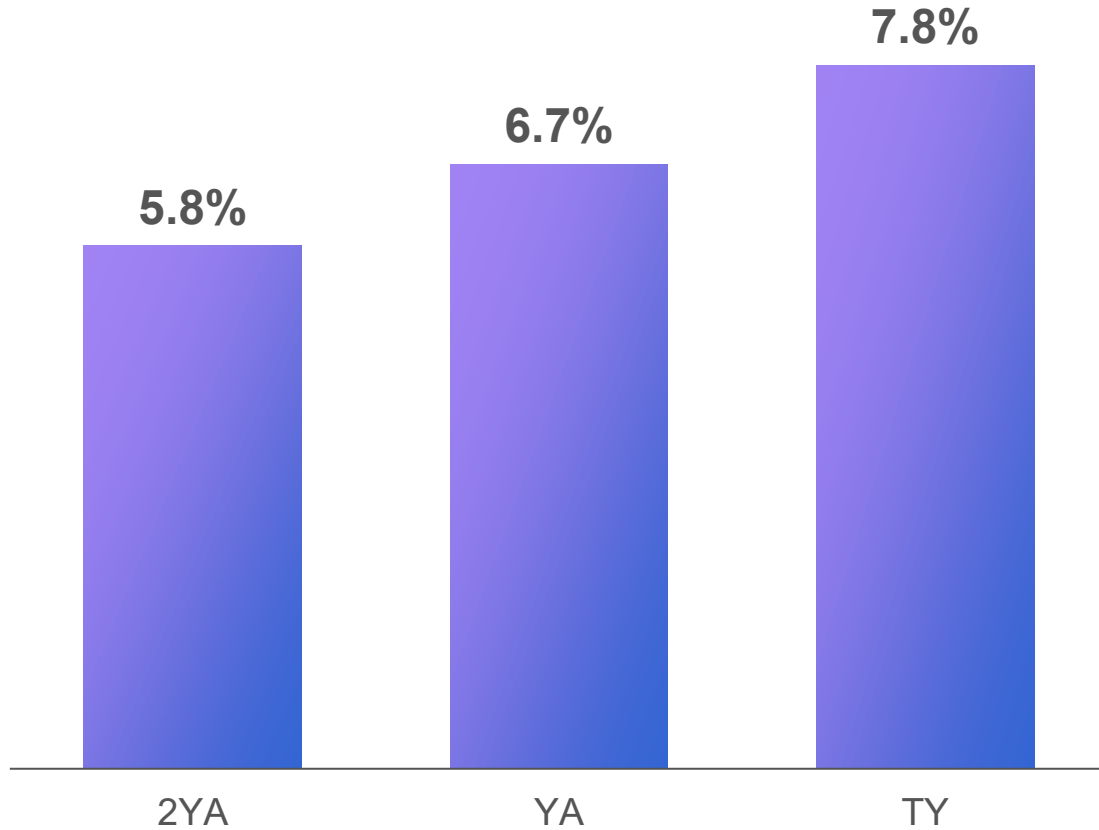
Rapid Delivery delivers incremental value in certain categories where unpredictability and urgency drives the purchase in Healthcare while channel substitution is still expected



Source: NIQ Omnisales Healthcare Latest 52 Weeks WE 05.09.26

Consumers are becoming more accustomed to quicker delivery

Same Day Delivery Share of Orders | Total Ecommerce



Source: NIQ Digital Purchases | Total Ecom excl Services | Latest 12 months to May 2026
NIQ Homescan Survey | Nov 25 | Q: Do you currently subscribe to any of the following delivery services for grocery type products?
NIQ Consumer Outlook Survey | UK Respondents | October 2025

but convenience is not limited to fast delivery



Subscriptions

1/3 of Gen Z and Millennials have at least one grocery product subscription



Scheduling orders

56% of UK shoppers say being able to schedule for a specific day and time would influence them to purchase more from a platform



Assisted shopping

58% find it helpful when retailers suggest products to them based on previous purchases and preferences – over ¾ of Gen Z and Millennials agree

Wilkinson Hydro is outgrowing Male Disposable Razors segment in Pure Player Generalists (+206.9% vs +0.5%), with subscription offers embedding the brand into shoppers' regular grocery baskets

Example:



 Wilkinson Sword Hydro 3 Men's Razor Handle, Blade Refill, 1 Pack

3 Blade Face or Body Razors for Men, Dual Lubrication, Hydrating Gel Formula, Great Shavers for Wash Bags or Holidays

[Visit the Wilkinson Sword Store](#)

4.3  (80)

Amazon's Choice

100+ bought in past month

£6⁴⁰ (£3.20 / count)

£6.49 ~~£0.00~~ with a Gift Card if approved for [The Amazon Barclaycard](#). Representative 28.9% APR variable. Credit broker: Amazon EU S.A.R.L. Lender: Barclays. T&Cs apply.

Voucher: Save 15%:Voucher applies to **Subscribe & Save** purchase option only. [Shop items >](#) | [Terms](#)

Save 5% on any 4 [qualifying items >](#) | [Terms](#)

Brand	Wilkinson Sword
Number of blades	3
Unit count	2 count
Special feature	Moisturizing Strip
Number of items	1

About this item

- UNBELIEVABLY HYDRATING: Hydro 3 men's razors feature our unique moisturizing(1) gel formula designed to help protect against skin irritation(1) and keep skin moisturized for up to two hours after shaving

£304.03K
in Value Growth in
Pure Player
Generalists

Additional Subscription-Based Offer

Subscribe & Save  

£5⁷⁶ (£2.88 / count)

FREE delivery Saturday, 12 September on orders dispatched by Amazon over £35

Shipper / Seller Amazon

Source: NIQ Omnisales – Razors & Blades | 52 weeks to August 2026

Chinese platforms have won UK consumers shown by their significant online penetration



23%



23%



9%



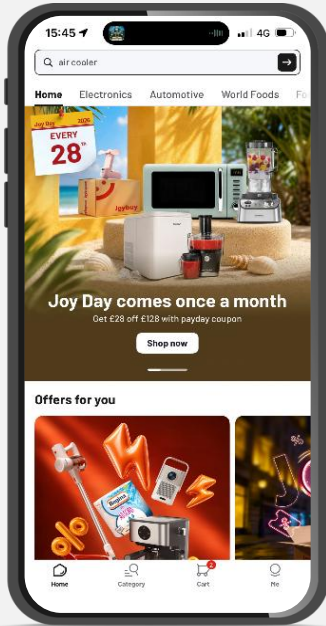
22% of early shoppers bought from Joybuy again
7 weeks after launch vs latest 7 weeks



Joybuy's share of wallet is at 10%



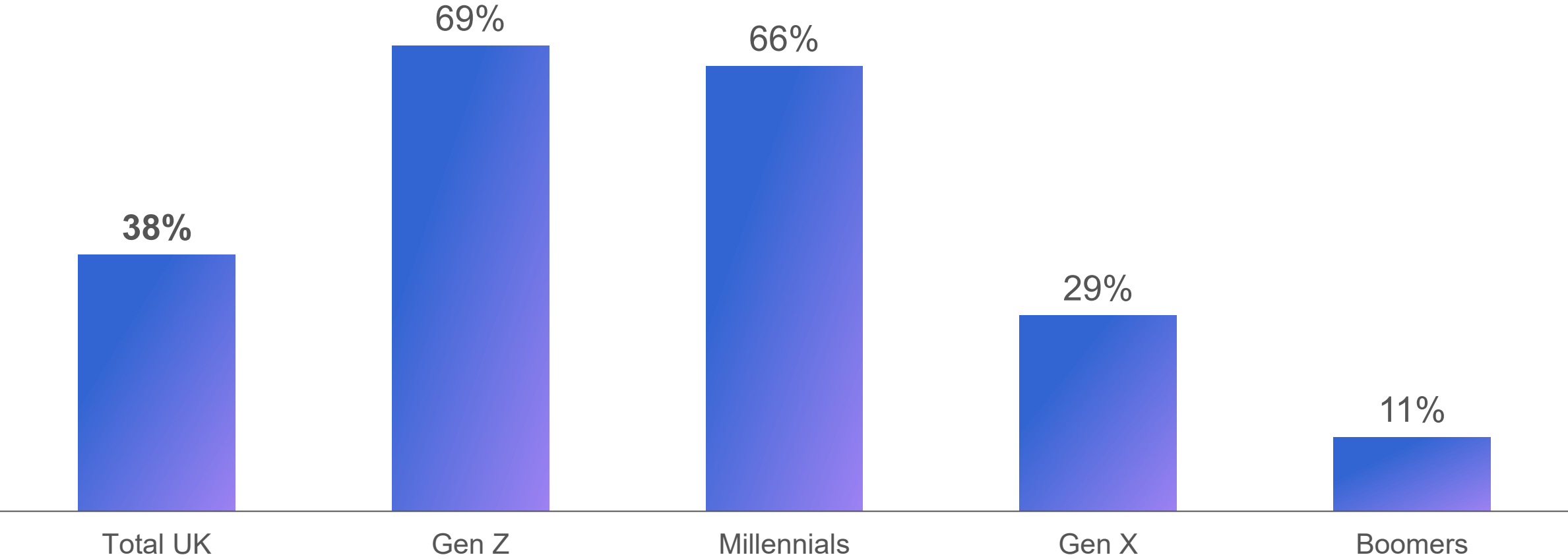
Penetration remains **below 1%** of the online shopper base so trial and repeat will be crucial to see the impact



Source: NIQ Digital Purchases | Total Ecom excl Services | Penetration of Online Shoppers | Latest 52 weeks to May 2026

AI in commerce is not niche – it’s welcomed by many consumers, especially younger shoppers

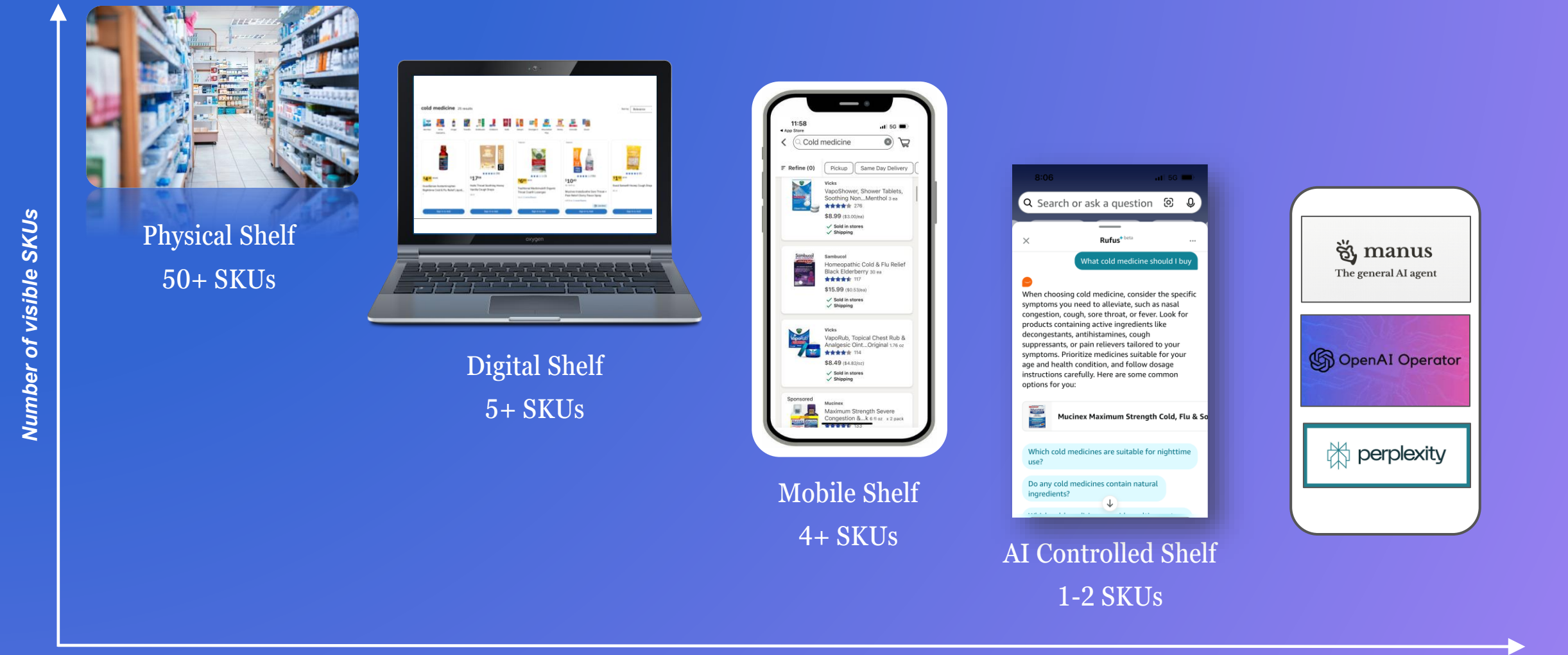
% of respondents who would be interested in using AI tools to help manage their household shopping in the future



Source: NIQ Consumer Outlook Survey | UK Respondents | October 2025

AI is poised to redefine shelf strategy

A new, even more challenging competitive environment



Source: NIQ Digital Shelf

Actions to take

Winning in the right channel:
Winning online is about understanding the role each channel plays



- Understand how your shoppers go through their shopping journeys
- Define the role of each online channel within your portfolio
- Identify which products are best suited for different channels

Consumers value convenience:
Faster delivery is now moving into assisted purchasing and automated replenishment.



- Identify your products that are suitable for rapid delivery or subscription
- Leverage AI assisted replenishment and personalization to expand the reach
- Focus on reducing friction throughout the shopper journey and embedding your brand into shopper routines

Make the Brands AI Ready:
AI is shrinking consideration set, so the future battleground is visibility



- Audit your digital shelf readiness today
- Ensure high quality of product information and comparison-ready content
- Act with data-led approach

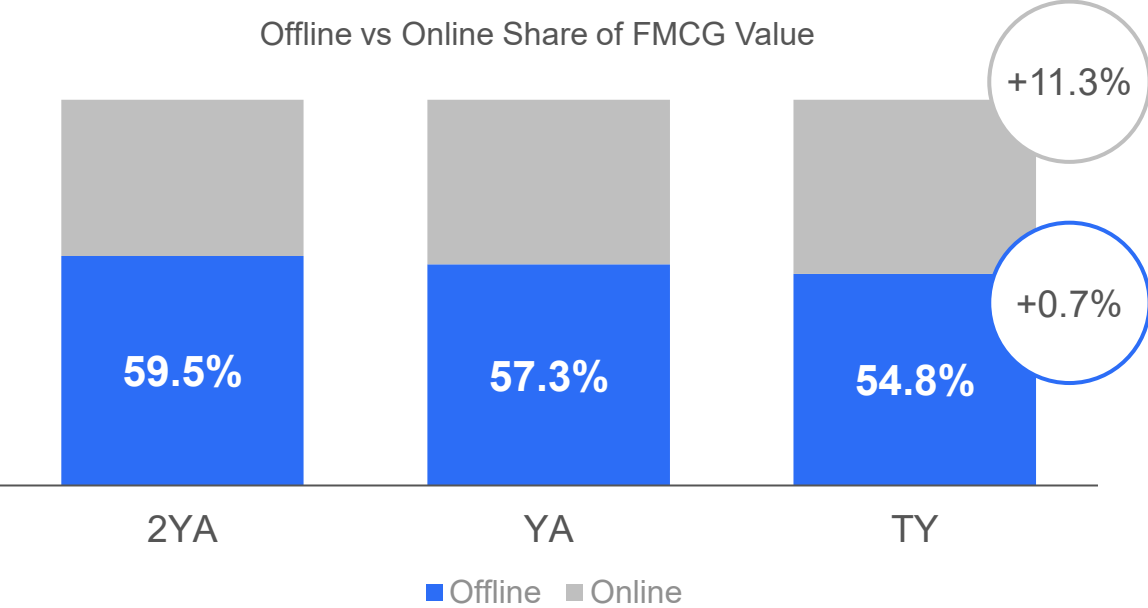
Offline remains crucial to Health & Beauty. Understand how shoppers engage in-store to support their purchase journey

Evolving Role of Offline Retail

3

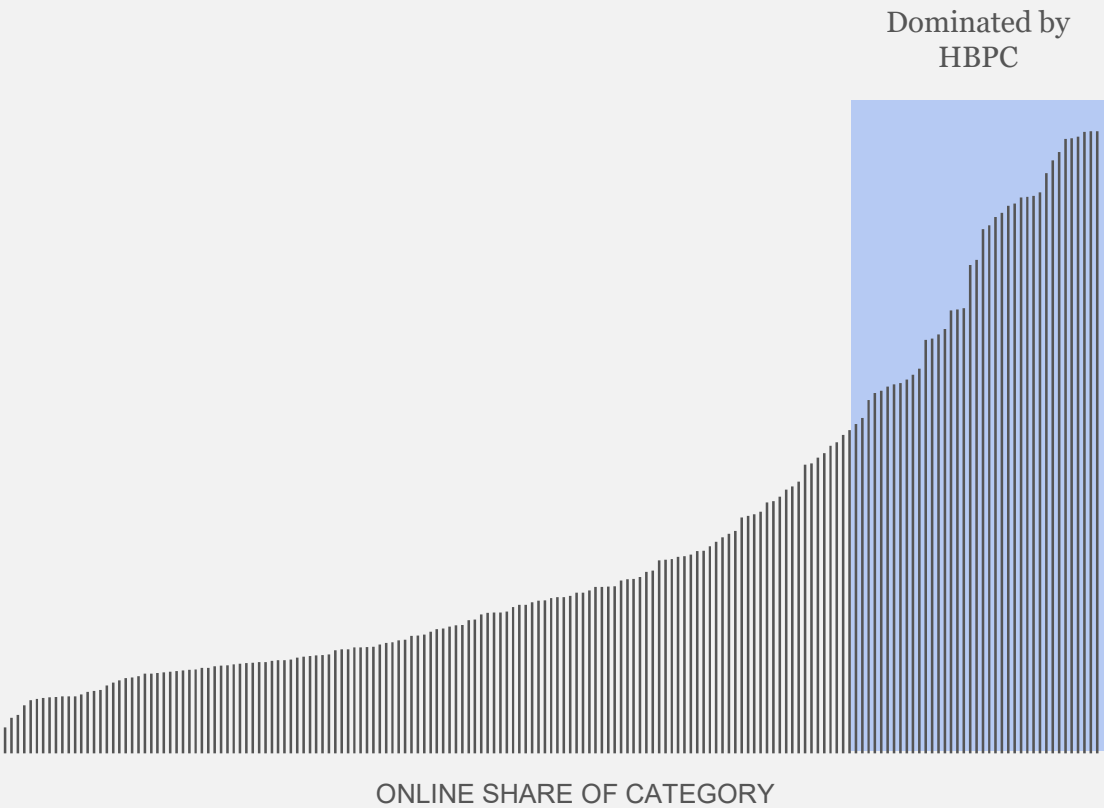
Reality check – should offline be your focus?

Offline still accounts for over 1/2 of Health & Beauty spend but loses YoY to online



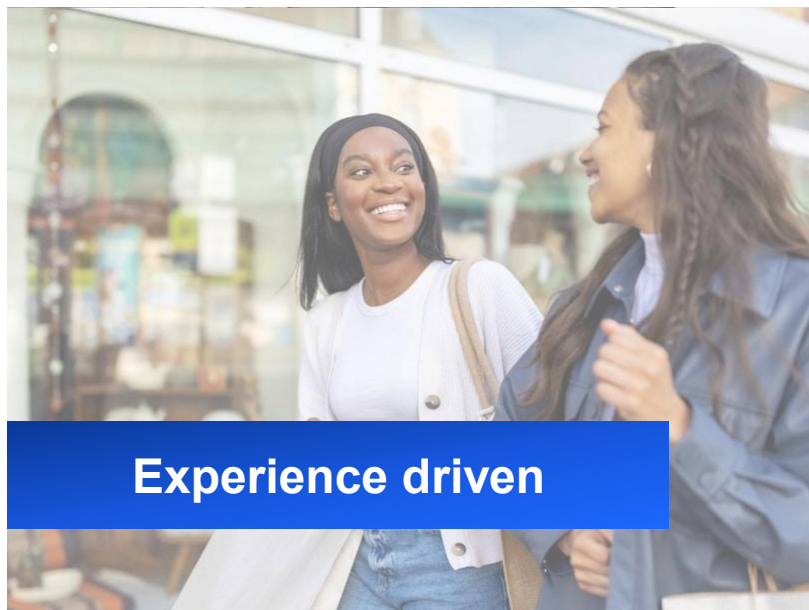
Its dominance does vary by category, with some categories already seeing the switch to online dominance

24% of categories are dominated by online sales now

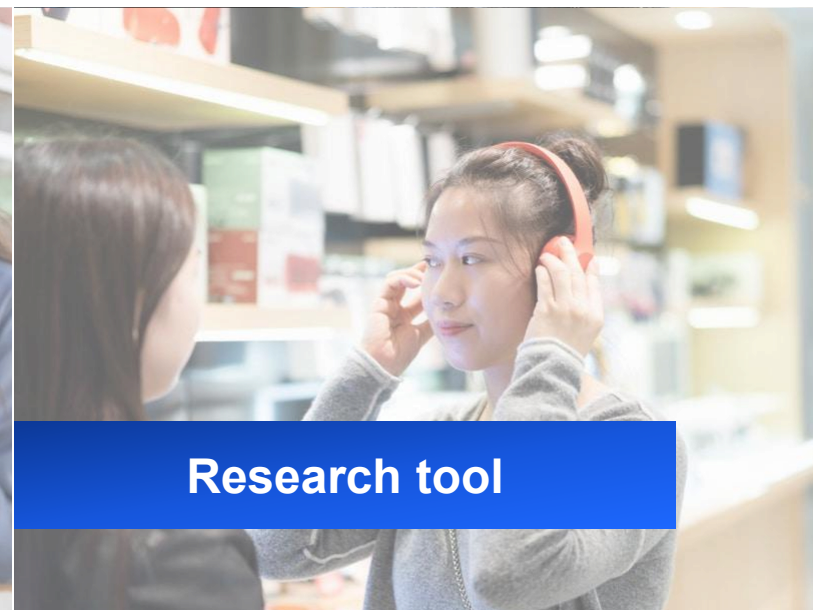


Source: NIQ Omnisaies | FMCG | Sales Value | 52we 05.09.26 | *Right hand side = 172 subcategories total – antibiotics, corticosteroids & immunomodulatory drugs not included

How will the offline channel evolve?



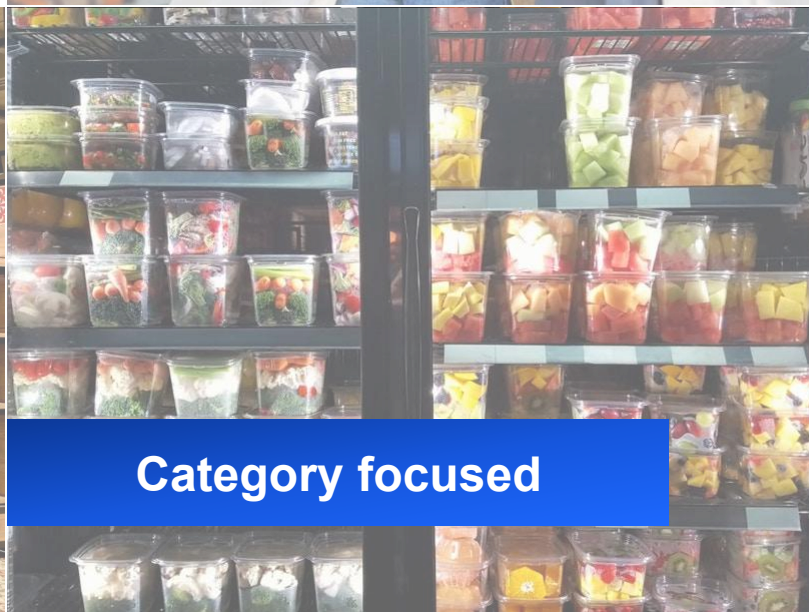
Experience driven



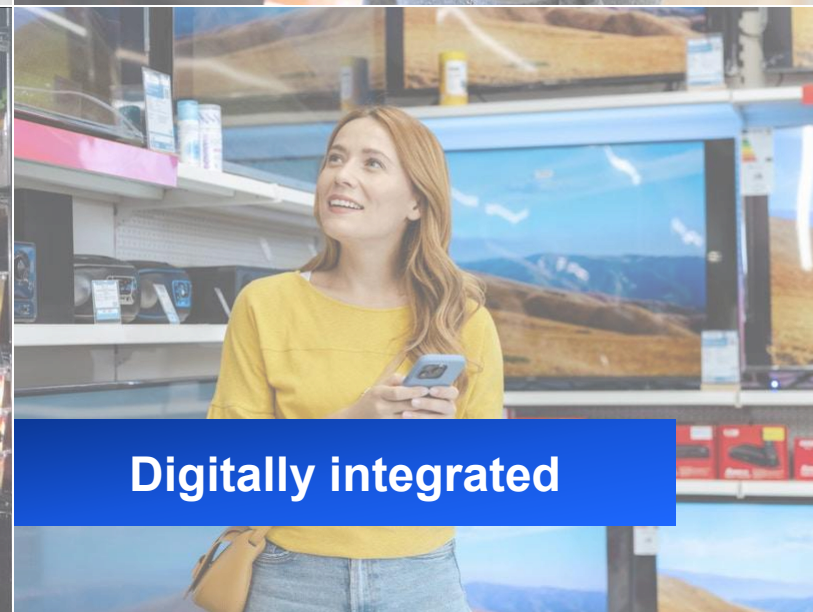
Research tool



Mission-led



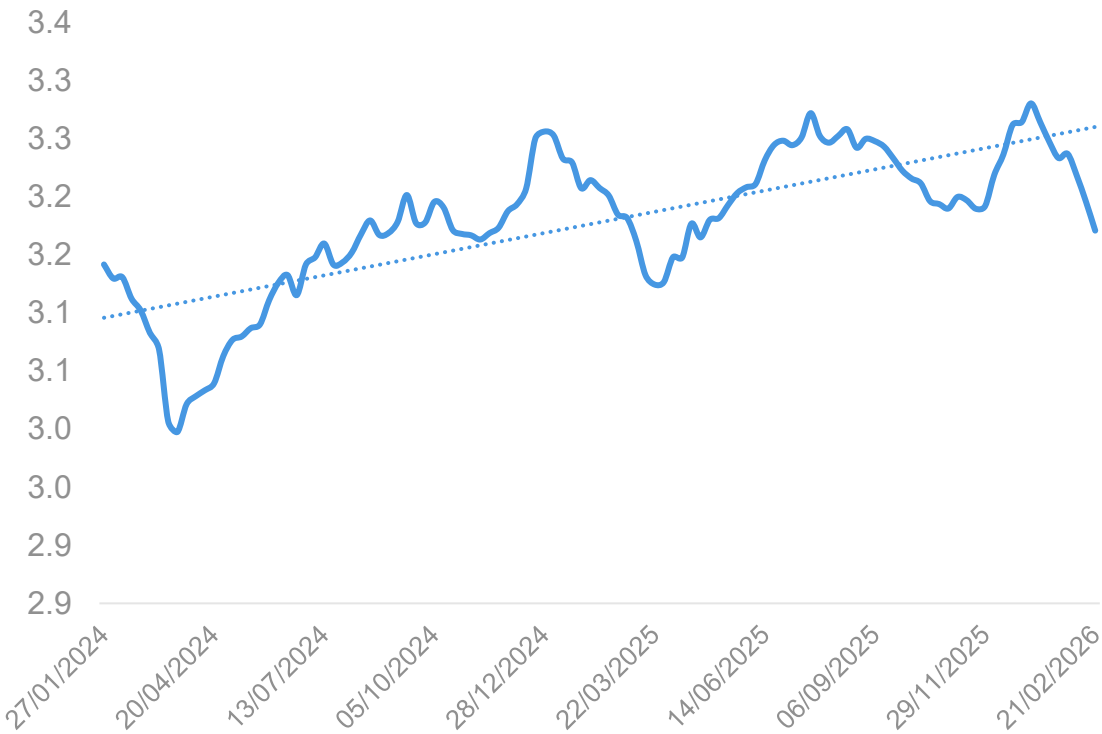
Category focused



Digitally integrated

Although store repertoire remains stable, we are gradually visiting more stores in the short term...

Store Repertoire for Beauty & Personal Care, Rolling 12 weeks



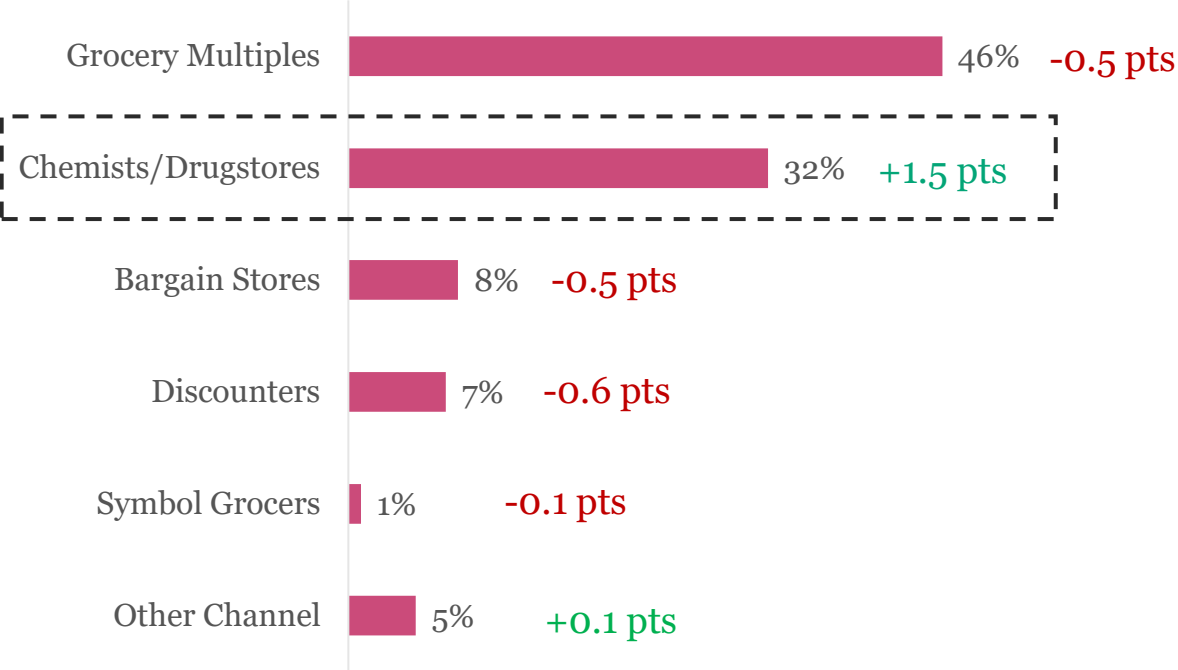
Source: NIQ Panel on Demand Homescan Rolling 12 weeks WE 21.02.26 | NIQ Scantrack & Homescan aligned coding 52 we 21.02.26

7 out of 10

hairecare brands *won shoppers* when they *grew distribution*

Chemists/High Street remains the centre of offline market in Beauty & Personal Care

Value Share of Instore Market: Beauty & Personal Care



Physical stores will still be vital to Health.

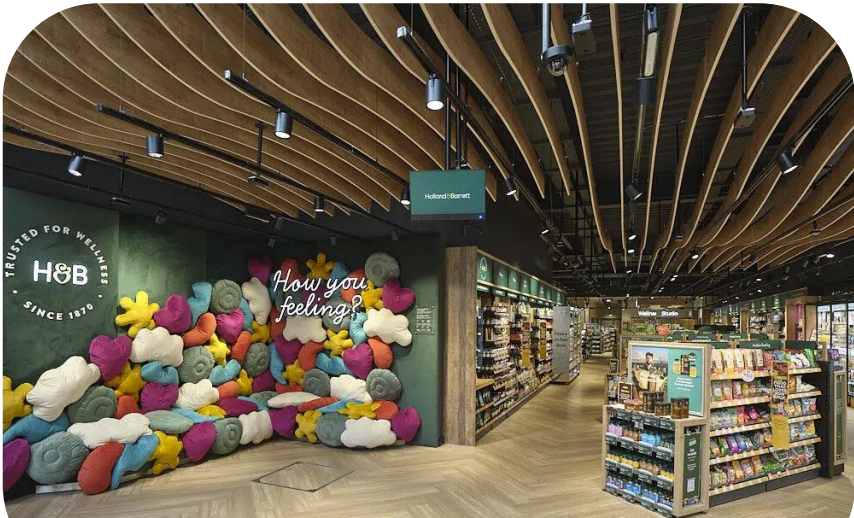
Value Share of Instore Market: Healthcare



Source: NIQ Panel on Demand Homescan – Value Share of Trade - Latest 52 Weeks – W.E 05.09.26

Holland & Barrett wins through embracing healthcare trends

Holland&Barrett



Instagram





hollandandbarrett

Holland & Barrett

3,256 posts 230K followers 1,210 following

Health Movement Wellness Nutritious Food
Expert tips and advice Tag us! @hollandandbarrett #MyHB



H&B Experts ...



Loved by you...



Women's Hea...



Movement



Nutrition



Gut Health



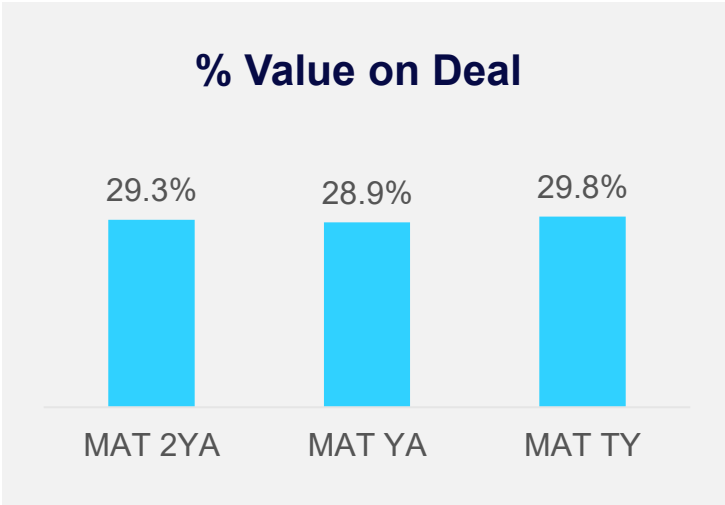
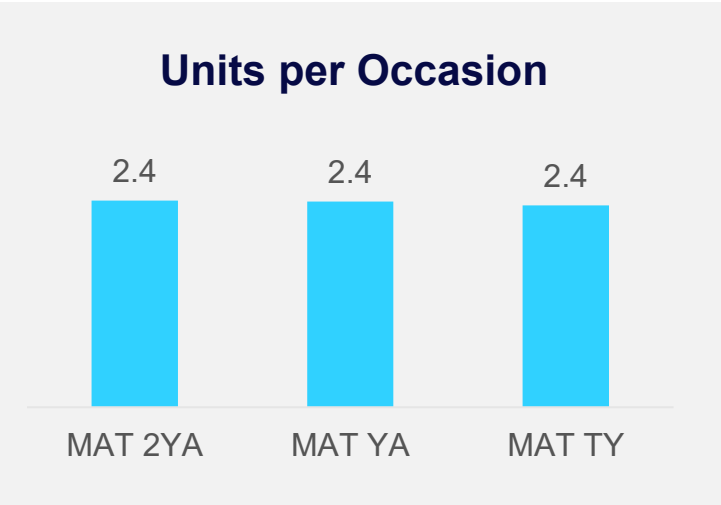
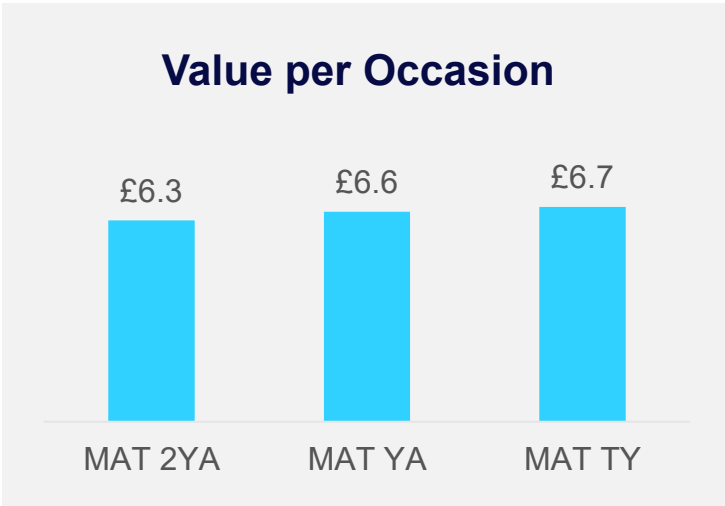
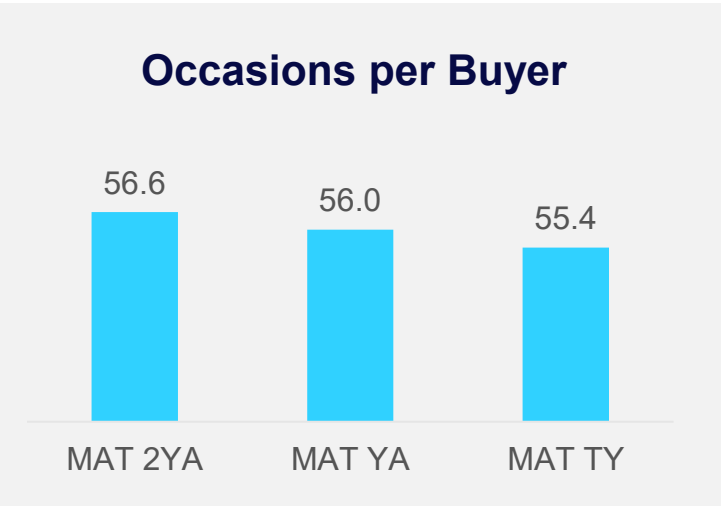
Trending







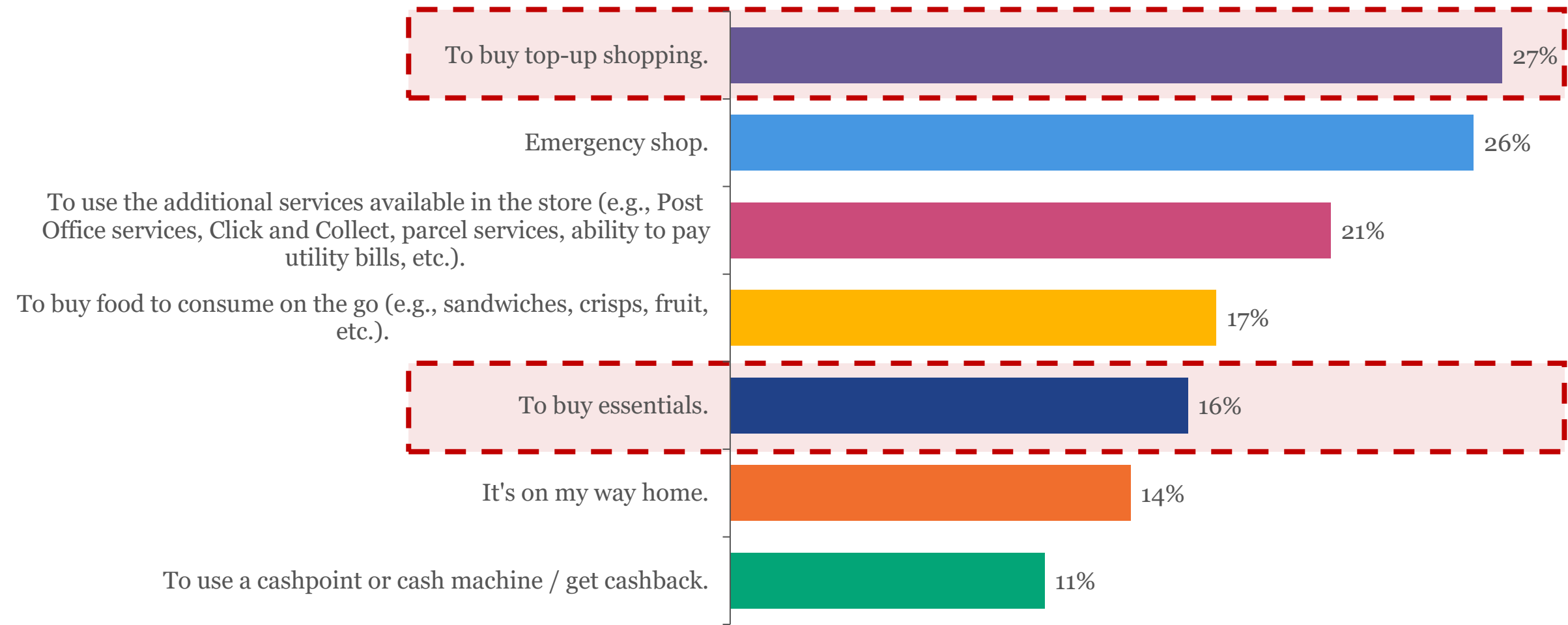
Instore engagement remains constant – shoppers are shopping slightly less often offline but continue to deliver value importance



Source: NIQ Homescan | Total GB | FMCG | Total Outlets | 52we 05.09.26

Convenience stores' additional services are a key component of the format to drive footfall

What are the main reasons for shopping at Convenience stores? | 2026



Source: NIQ Homescan Survey Powered by CAS | March 2026

Actions to take

Offline is evolving not declining:
Half of the category spend goes to instore, the role evolved into mission-led journey



- Avoid treating online and offline as competing channels. Instead, define the role of each within the shopper journey
- Prioritise investment behind missions where stores offer a competitive advantage, such as urgent needs, discovery, reassurance and advice

Experience & expertise win:
Winning retailers are gaining share by helping shoppers solve needs



- Organise merchandising and activation around shopper needs and usage occasions
- Invest in education, advice and trusted recommendations
- Create more discovery-led and solution-based shopping experiences

“Top up” and immediacy are keys:
Mission-led categories will determine future channel success



- Design category execution around how shoppers buy, not how products are organised
- Improve visibility and activation at key decision points in store
- Prioritise categories and occasions where stores provide a natural advantage.

Source: NIQ

Retailers and brands need to co-ordinate instore activation across touchpoints.

The shopper journey starts online, but a strong in-store activation will continue to be a key conversion driver.



Digital discovery



Retail media



Shelf clarity



Purchase confidence

Retailers and brands to collaborate earlier in the journey

Source: NIQ Homescan Survey powered by CAS | Mar 25 | Q : 47. In the last 12 months, have you sought healthcare advice for yourself (or other member(s) of your household) from any of the following?

*Winning starts with the shopper:
understand what moves them at each
touchpoint, then turn that insight into
smarter innovation, sharper claims
and stronger in-store action*

How to win?

4

Growing K-Beauty demand is creating new routes for brands to reach shoppers beyond traditional beauty retailers

Amazon

Scaling Demand

- K-Beauty growing x3 faster than average beauty
 - Continued expansion of beauty ranges

Sephora

Prestige Endorsement

- Partnered with Olive Young
- Expanding K-Beauty access to shoppers

Stylevana

Value-Led Access

- Large K-Beauty assortment
- Price-focused for repeat K-Beauty shoppers

YesStyle

Assortment Breadth

- Broad catalogue of K-Beauty brands
- Long-tail products often unavailable in UK retail

TikTok Shop

Discovery at Scale

- K-Beauty searches +125%
- K-Beauty basket values +35% higher than skincare average

No longer a niche trend

Now powering a new ecosystem of beauty retail

PureSeoul

Building Category Authority

- Overnight queue for store launches
- 2,000+ products across 60+ brand partners

Skin Cupid

Authenticity & Trust

- Opened London flagship store
- Curated range of 60+ Korean beauty brands

Look Fantastic

Mainstream Adoption

- K-Beauty revenue more than double YoY
- 6 new K-Beauty brands launched in 2026



Source: TikTok Newsroom (Beauty Crush Report); Naisu Beauty; Fashion Network; TheStreet; Cosmetics Business



Acquisition

Buying Korean brands or suppliers

L'ORÉAL
GROUPE



Dr.G
MY SKIN MENTOR Dr.G

- ❑ The leading Korean skincare brand was brought into the L'Oréal Group in 2024, under the acquisition of Gowoonseung Cosmetics Co.
- ❑ Followed the 2018 to acquire Nanda co. Ltd, the parent company to STYLENANDA and makeup brand 3CE.
- ❑ The addition of the brand positioned their portfolio “to meet the rising demand for K-Beauty” globally.
- ❑ Brought Dr.G to the US market in 2025 *exclusively on Amazon*

Control

At High Cost

Translation

Reframing K-Beauty ideas for local consumers

L'ORÉAL
GROUPE



Rather than competing on Korean authenticity, L'Oréal adapts K-Beauty trends for local consumers through the trusted Revitalift franchise.

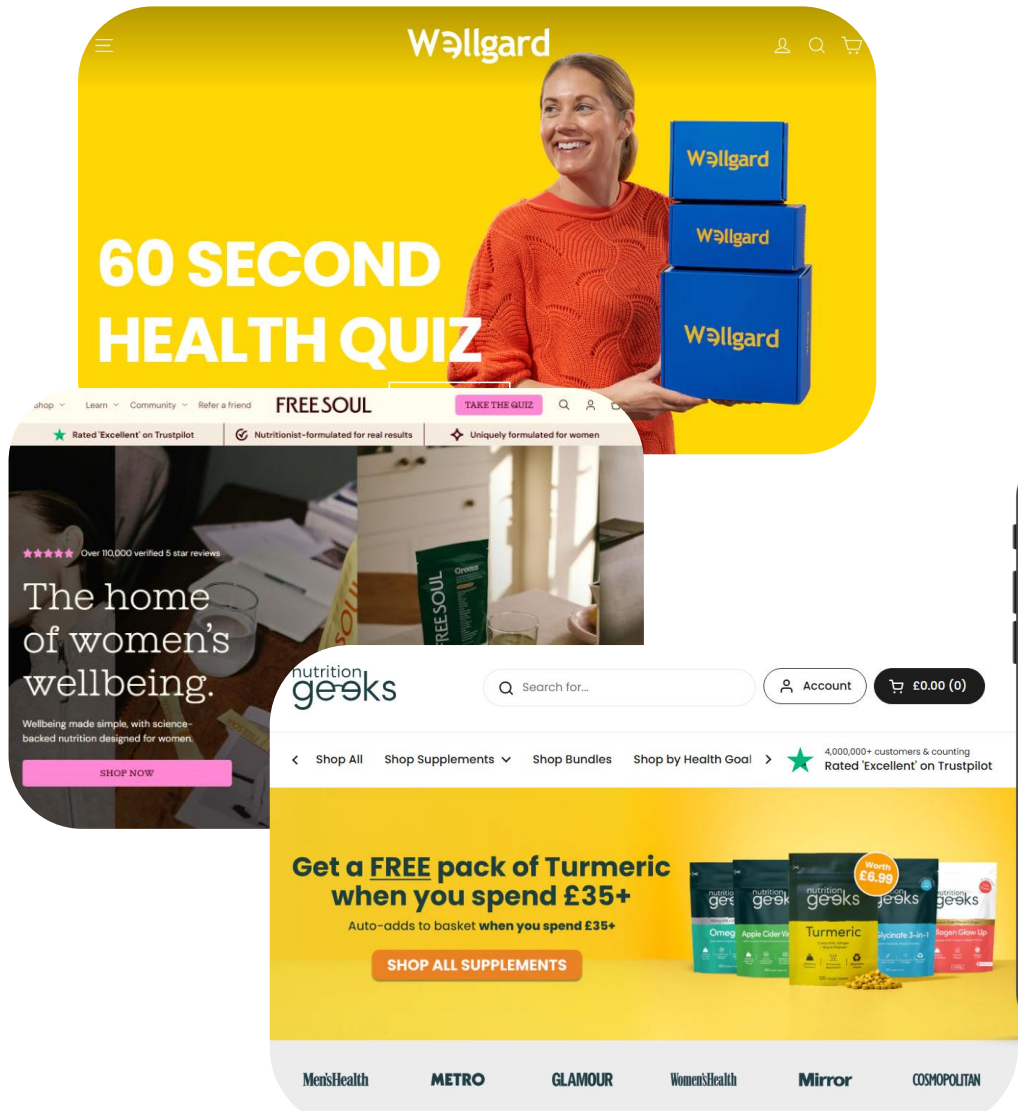
The explicit "Korean Skincare Inspired" positioning allows the brand to **capture demand for K-Beauty benefits while leveraging existing brand equity**, distribution and consumer trust.

L'Oréal's Top selling product
on TikTok in Latest 12 Months

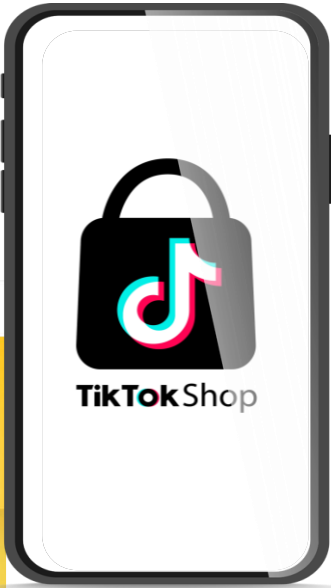
Brand Power

Constant Reinvention

Brands that win with Social Commerce and AI focus on personalisation and trust



of people using AI for personal research
31% use it at least once a week



Source: NIQ Digital Purchases - Latest 52 Weeks – W.E 24.01.2026



AI-Empowered Consumers Are Reshaping Ingredient-Led Innovation

Informed consumers are driving demand for new active ingredients, with Pirileve leading category disruption through innovation, clear efficacy messaging, and omnichannel visibility

Eye-Catchy Packaging

40% off on

HALEON

Pirileve

HAYFEVER RELIEF
120mg FILM-COATED TABLETS
fexofenadine hydrochloride

30x TABLETS

24 hour relief

Review & Offer:

Use code SNEEZE15 to save 15 percent on selected hayfever relief...

Buy 1 get 2nd 1/2 price on selected Healthcare

★★★★★

That they do what they supposed to do.

emma83_2713

The packaging is very bright in colour and is very clear as to what ingredients are in the product and what the dosage is.

Quick & Effective Symptom Messaging

24Hr Efficacy Stated:

+18.1% in Value per Buyer

+70.6% in Value per Occasion

ACTS WITHIN 1 HOUR

24 HOUR RELIEF

NON-DROWSY*

*In most people

Use of New 'Ingredient'

NO TABLET IS STRONGER* WITH 120mg FEXOFENADINE HYDROCHLORIDE

Pirileve provides max strength hay fever relief for adults & adolescents 12+

+490.6% sales value growth was recorded for the Pirileve product.

NIQ Consumer Panel Services, POD Sourcerer, Total Coverage GB, 52 w/e 27th Dec 2025, Pepto Bismol 2025 shoppers who did not buy any Stomach products in 2024

Win by shifting innovation and messaging toward *functional benefits*.



Top on-pack claims in OTC Healthcare

What's driving appeal among younger shoppers?



Source of Vitamin D

+35%
units YoY

#3



Contains
Pre-Biotic Group

+11%
units YoY

#2

What's winning with older shoppers?



Contains
Antioxidants

#1
selling OTC claim

#1



Muscle Health
Benefits

6%
penetration

#4



Immune System
Support

19%
units YoY

#5

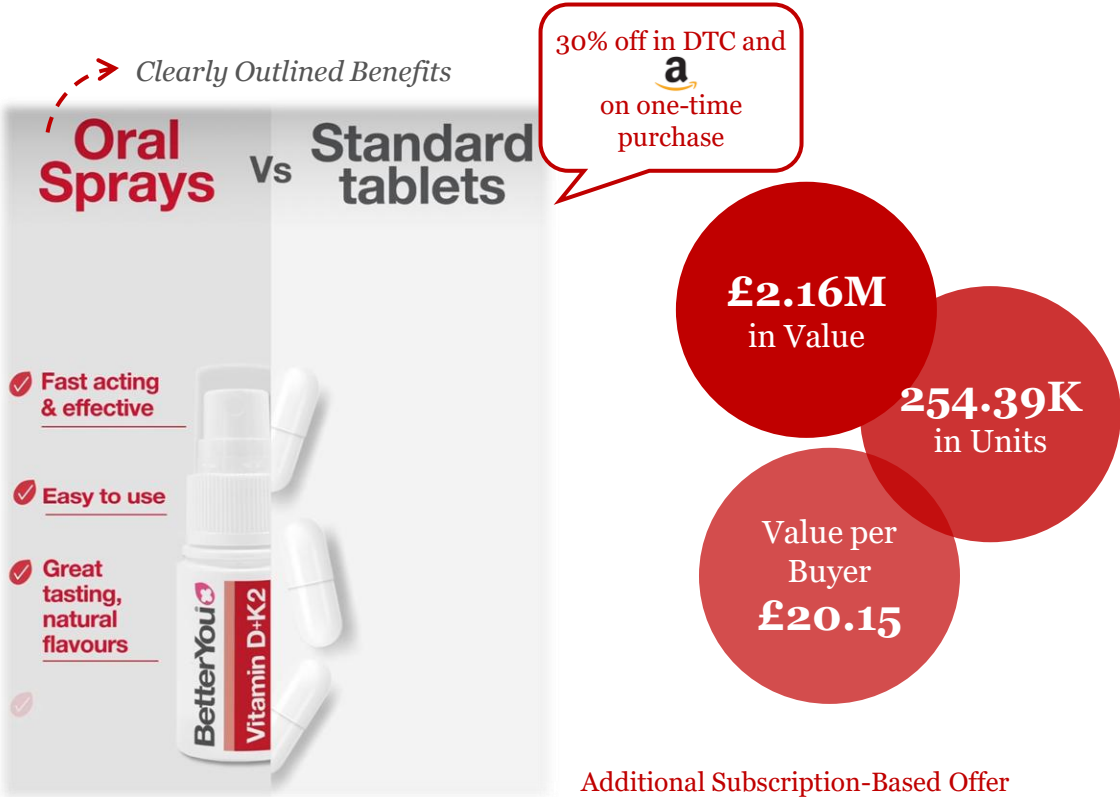
Source: NielsenIQ Panel On Demand Homescan | GB - SYNDICATED QUARTERLY | INTERNAL - QUARTERLY



NIQ Product Insights unlocks measurement through claim, certification, and ingredient product characteristics

Vitamin-led immunity growth driven by innovative formats and convenience

For Adults* **Top Seller under the ‘Immune System Health’ Claim



Source: NielsenIQ Panel On Demand Homescan | GB - SYNDICATED QUARTERLY | INTERNAL - QUARTERLY

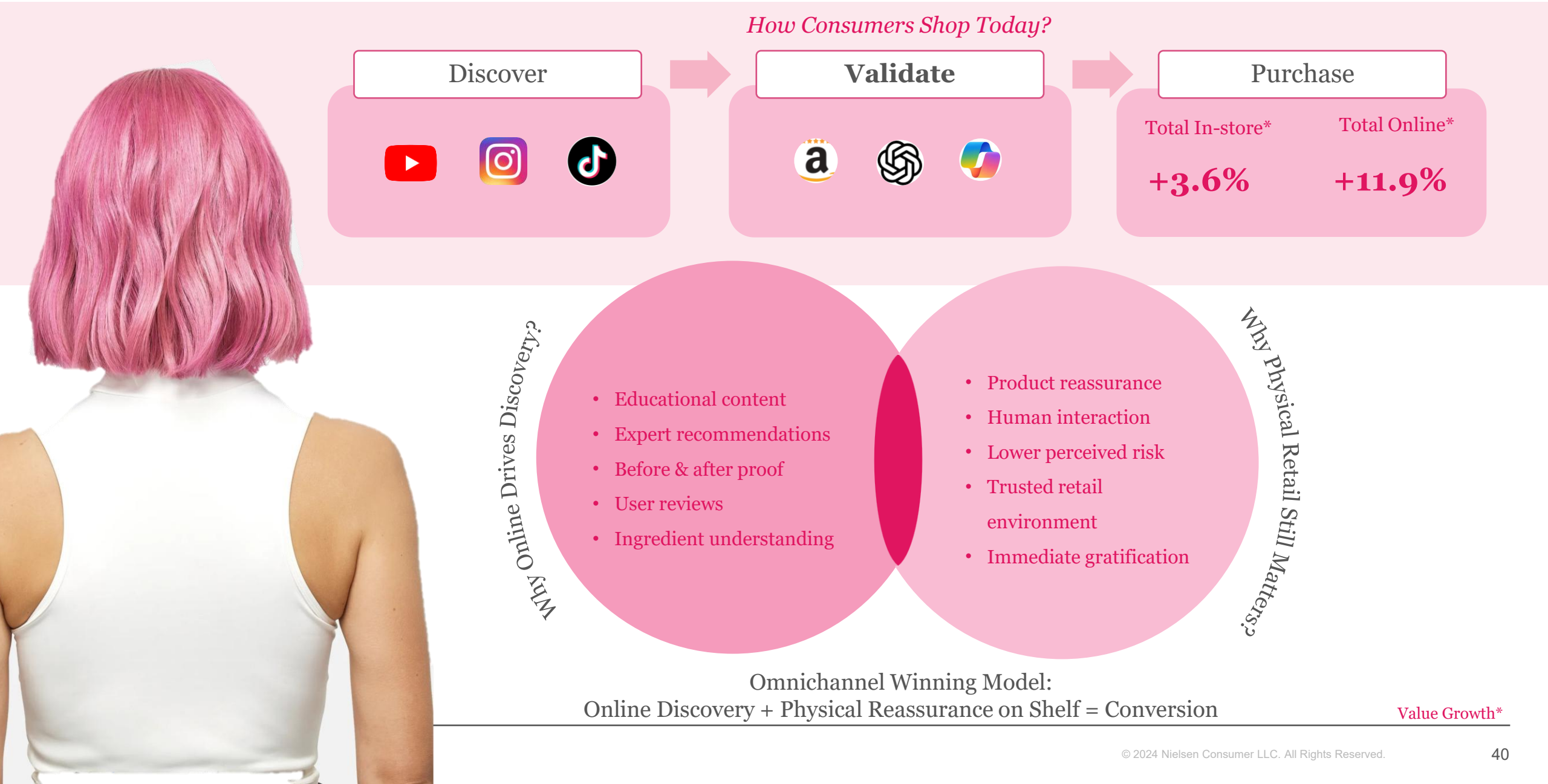
Child-focused immunity growth led by flavour-driven NPD and omnichannel reach



For Children* **Top NPD under the ‘Immune System Health’ Claim



Trust-Led categories such as Hair Colour are winning through ‘Omnichannel’ journeys



AI Visibility Is Becoming a New Competitive Battleground for Brand Discovery



Prompt: Top 3 Hydrating & Brightening K-Beauty Serum Available in the UK.*

48%
of consumers
state that the
motivation
behind buying K-
beauty skincare
is 'hydration'
and skin-health
benefits



Anua Niacinamide 10% + TXA 4% Dark Spot Correcting Serum



Beauty of Joseon Glow Deep Serum (Rice + Alpha-Arbutin)



Torriden Dive-In Low Molecular Hyaluronic Acid Serum

*AI Output:

Rank	Serum	Best For
1	Beauty of Joseon Glow Deep Serum	Best combination of hydration + brightening
2	Anua Niacinamide 10% + TXA 4%	Dark spots and pigmentation
3	Torriden Dive-In Serum	Deep hydration and glass skin

*Recommendations may vary based on AI-identified shopper preference patterns.

Examples of Success in Turning 'New' Ingredients into Trusted Skincare



Medicube

PDRN

- **PDRN at the centre of the range** helped drive brand sales to **£32.16m**, up **1,021.3%**
- Technical properties translated into **recognisable benefits**: hydration, barrier support, elasticity and glow
- Makes the emerging ingredient **easier for consumers to understand**
- **Paired with recognised actives** (peptides, collagen, niacinamide) to strengthen credibility and broaden the proposition
- Consistent, benefit-led education turns an **unfamiliar active into a trusted purchase driver**



COSRX

ADVANCED SNAIL

- **Snail mucin made the hero** of the range: Advanced Snail drives **38.3%** of **£14.36m** brand sales
- Prominently communicates **concentrations of up to 96%**, giving the once-unfamiliar ingredient visibility, credibility and a clear point of difference
- **Consistent messaging** on hydration, soothing, barrier support and skin renewal makes the ingredient's purpose easy to understand
- **Extensions** across essences, moisturisers and eye care build Advanced Snail into a complete skincare routine



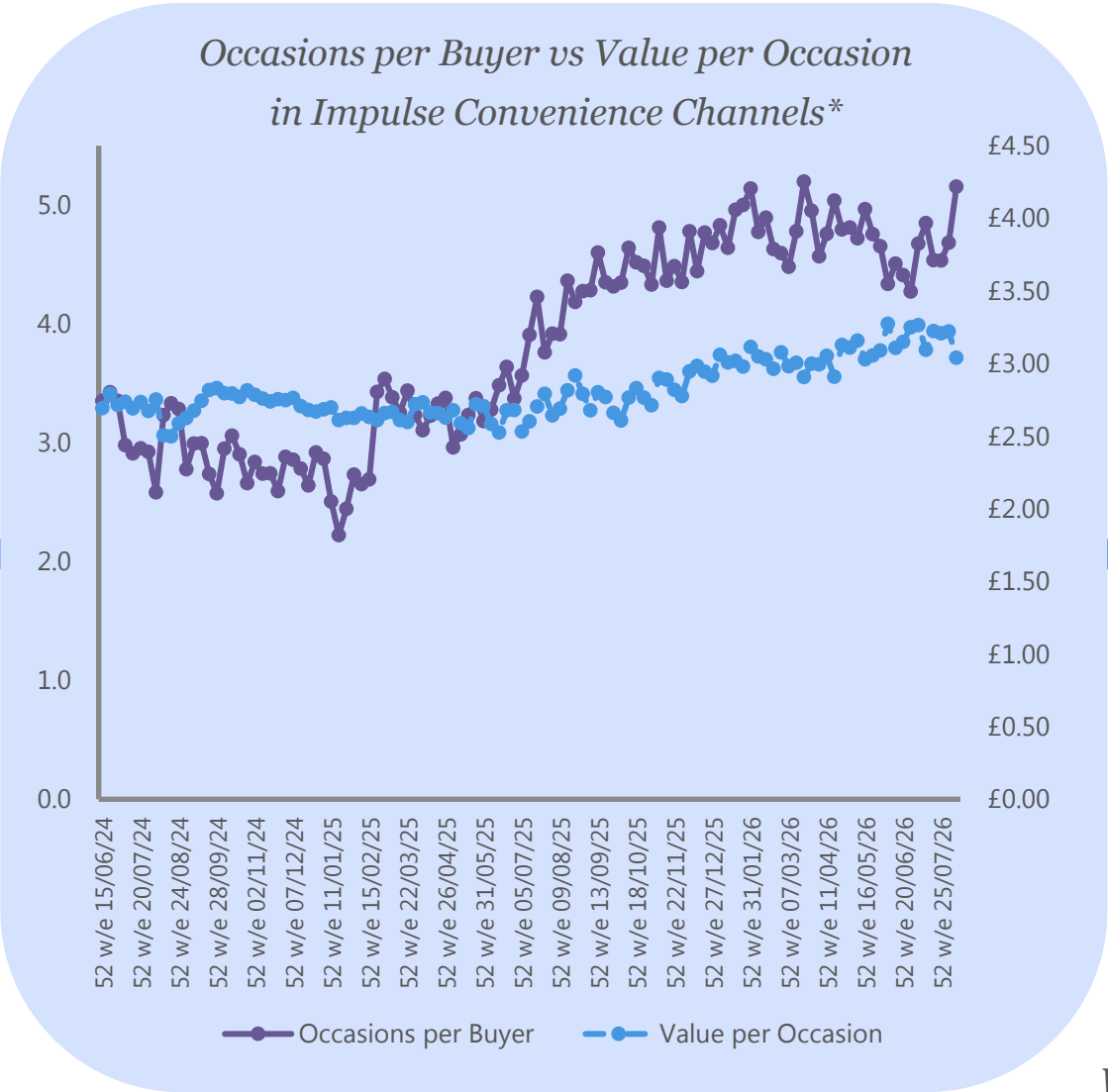
Dr. Melaxin

CEMENRETE (CALCIUM)

- **Rapid growth**: Cemenrete range is **27.7%** of brand sales, growing **42,020.6%**, and propelled Dr. Melaxin to **£25.77m** (up **15,250.9%**)
- **Doesn't rely on ingredient recognition alone**: calcium is linked to specific concerns: loss of firmness, elasticity and under-eye volume
- Proposition reinforced through **targeted formats**
- **Demand validated on TikTok Shop** before entering **196 Boots stores**
- Shows how brands can **educate consumers**, create an **emerging benefit platform** and use proven demand to **unlock wider retail distribution**

Source: NIQ Omnisales | Total Country (Personal Care) | Dr.Melaxin expands into 196 Boots stores following £19M TikTok Shop UK success

Deodorant Is Won at the Moment of Need, Making Physical Retail the ‘Important’ Channel



Where Consumers Buy?

Total Coverage

Impulse Convenience Channels

Grocery Multiples

+5.6%

+15.5%

+5.7%

in Value Growth

Winning Levers

Secondary Sitting

Checkout Visibility

Travel Formats

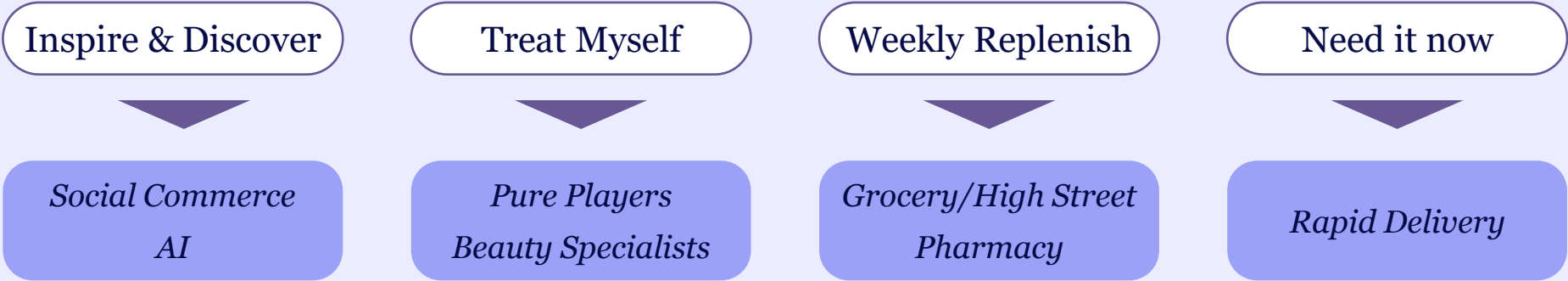
Mission-led Merchandising

When Discovery meets Visibility, brands win by being present where urgent and top-up missions occur

**Symbol Grocers*

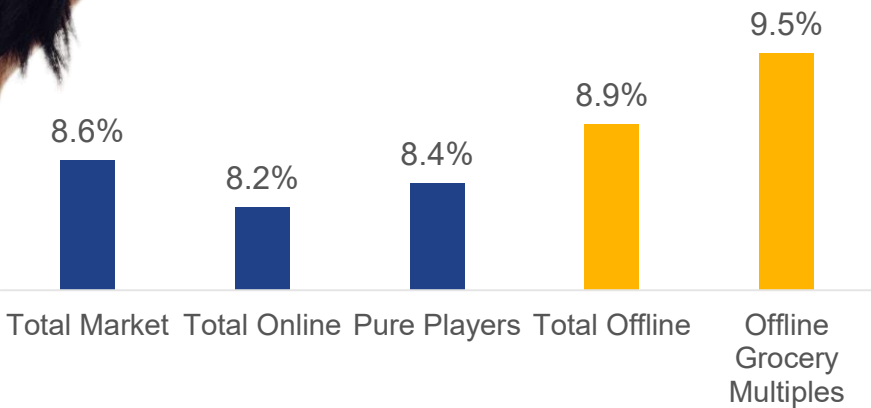
Win Haircare in different channels with different shopper missions

Different shopper mission offers opportunity for both online and offline channels



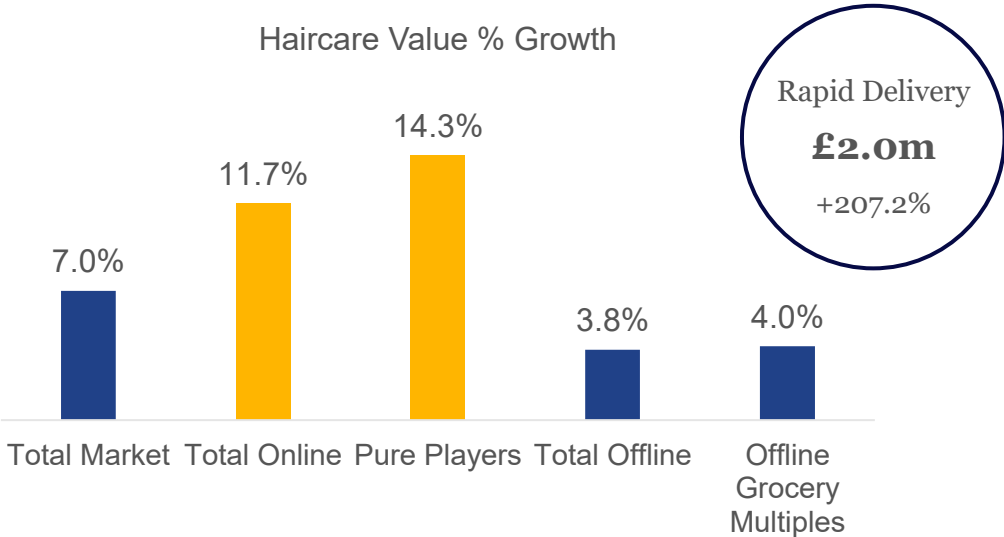
Offline remains its importance...

Haircare Value % Share in Personal Care



While Discovery and Treats are driving online...

Haircare Value % Growth



Source: NIQ Omnisaless Data Latest 52 Weeks WE 08.08.26

Oral Care is increasingly becoming an AI-Native Category

How shopping is changing?



Outcome-Based Missions Driving Growth



	GMs Offline	Online Beauty Specialists
Sensitivity:	-1.6%	+75.4%
Whitening:	-0.9%	+175.6%
Enamel Care:	-33.9%	+766.6%
Gum Health:	-16.2%	+290.7%
Fresh Breath:	+8.8%	+1,328.2%

Why Oral Care wins Online?

- ➔ Auto-Replenishment & Subscription-Based Offers
- ➔ Easy-Comparison of Ingredients
- ➔ Wider Product Choice & Bundle Savings
- ➔ Claims Easily Assessed by AI



Looking Ahead

1

A dedicated online strategy/focus

Ecommerce is changing the way consumers shop Health & Beauty and is driving most of the growth in the category. Make sure you're showing up in this space and connecting with shoppers in order to grow.

2

Align strategy with consumer need

Consumer journeys are increasingly omnichannel. Winning is not about being everywhere, but understanding which channels best support each shopper mission, with physical retail playing a critical role in immediacy, advice and trust.

3

Make brands AI ready to optimise visibility

As market evolves into online shelf and AI recommendations, brands visibility has shrunk compared with instore shelf space. Optimise product information and searchability with data-focused approach would put your brands in the front of consumer's AI usage



Future proofing is connecting with the consumer at each point in the full shopper journey

Please leave your feedback on today’s presentation through the QR code – it only takes one minute!



[LINK](#)

P.S. How the score is calculated:

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied



Kevin Chen
NIQ
Senior Insights Analyst



Silvia Ghosh
NIQ
Senior Insights Analyst



Thank you!

NIQ