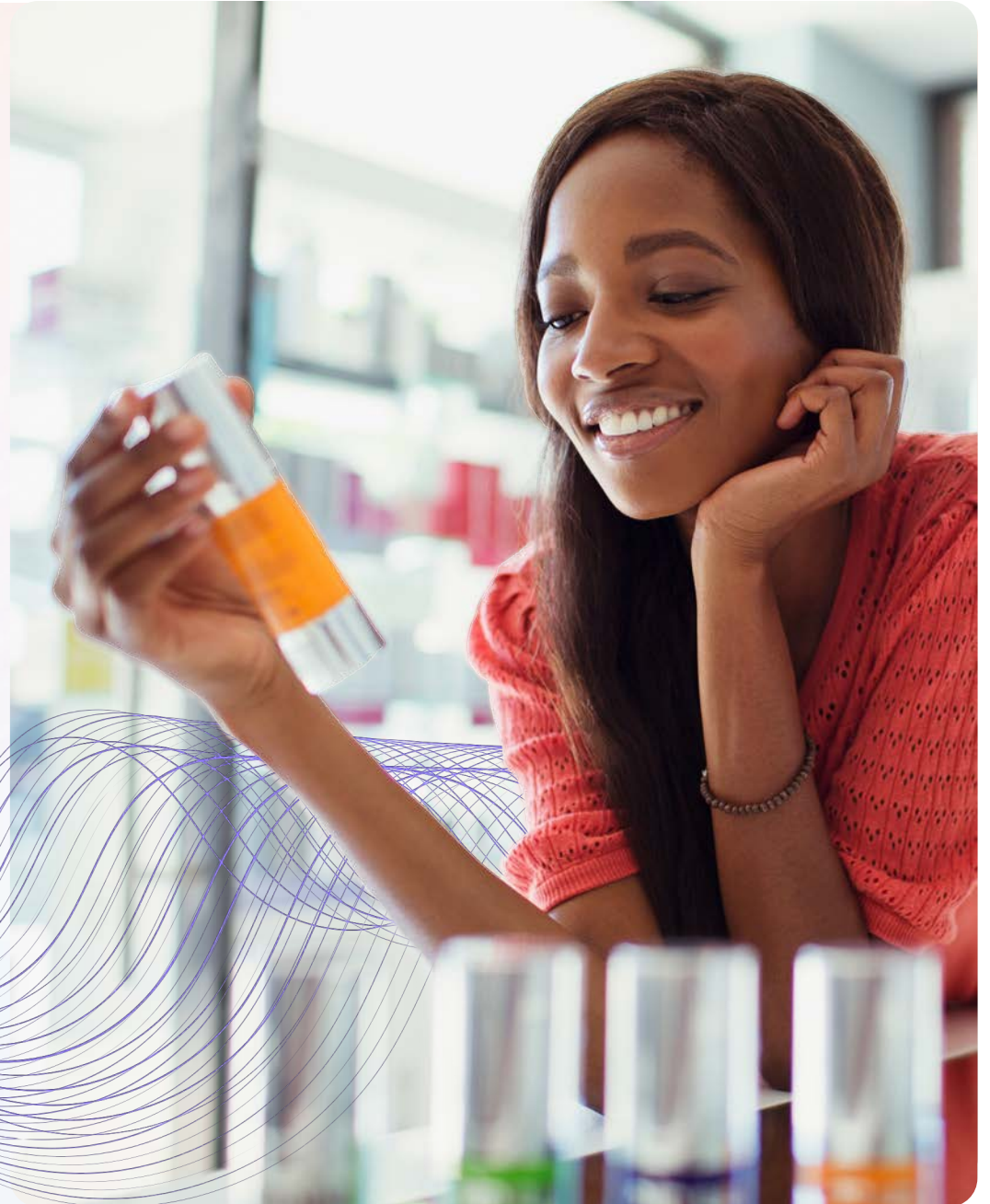


CRITEO

Health & Beauty Pulse 2026

GLOBAL



Inside the modern beauty buying ritual

Insights on discovery, AI adoption, and purchase decisions

In 2026, Health & Beauty shoppers are swatching in-store, scrolling online reviews, and turning to AI for guidance as they decide what makes it into their carts.

Criteo data reveals a category where personal routines matter, but loyalty isn't set in stone. Shoppers are constantly refreshing their habits as they discover new brands and new ways to restock the products they use every day.

Drawing on data from hundreds of brands and retailers, alongside insights from more than 4,500 consumers around the world, this report explores how Health & Beauty shoppers choose today and how marketers can turn curiosity into repeat routines.

Health & Beauty vitals:

Q2 in review

01

Swipe, swatch, shop:

How Health & Beauty gets bought

02

AI as beauty influencer:

What smarter shopping looks like

03

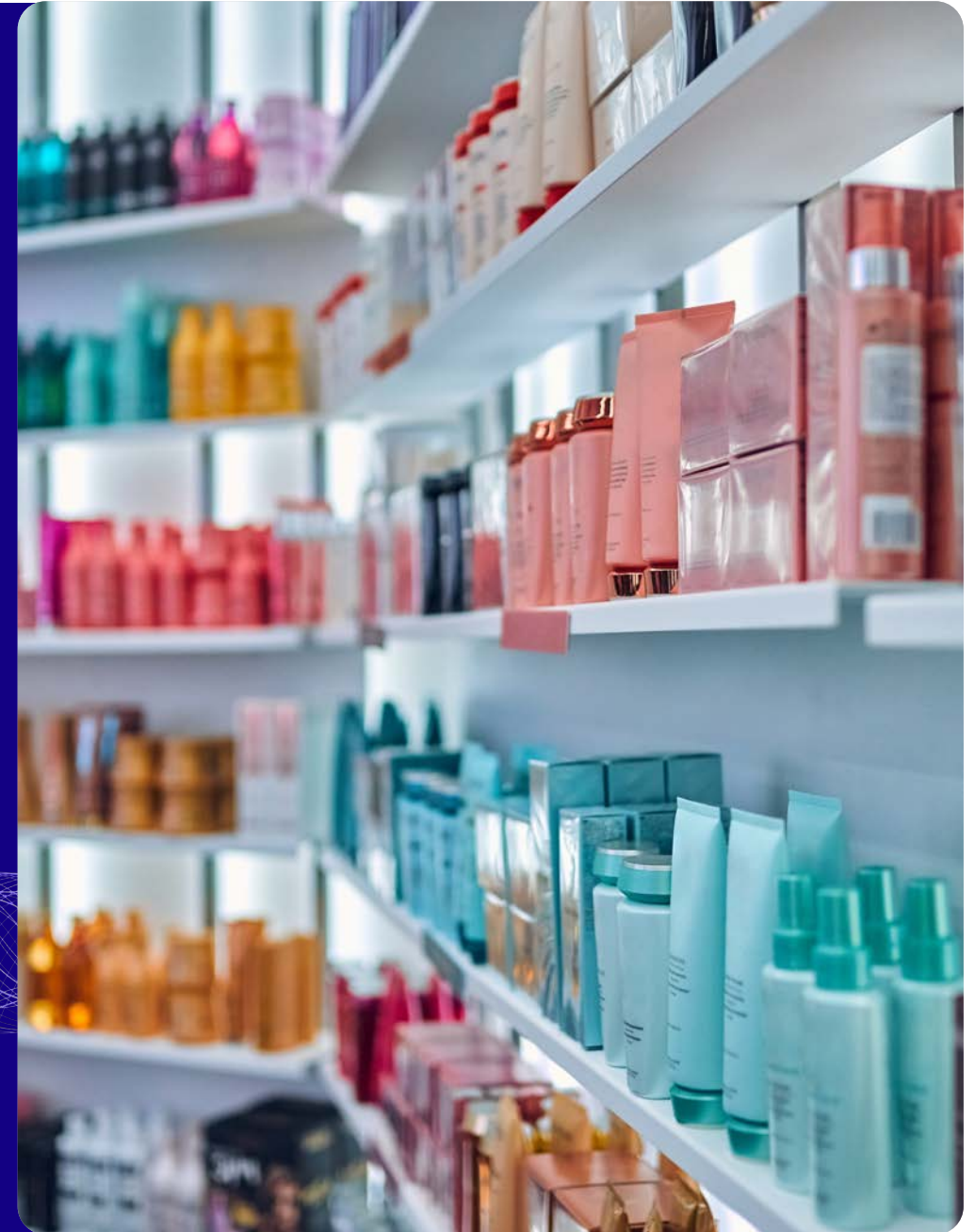
Glowing opportunities:

Where marketers can win

04

01

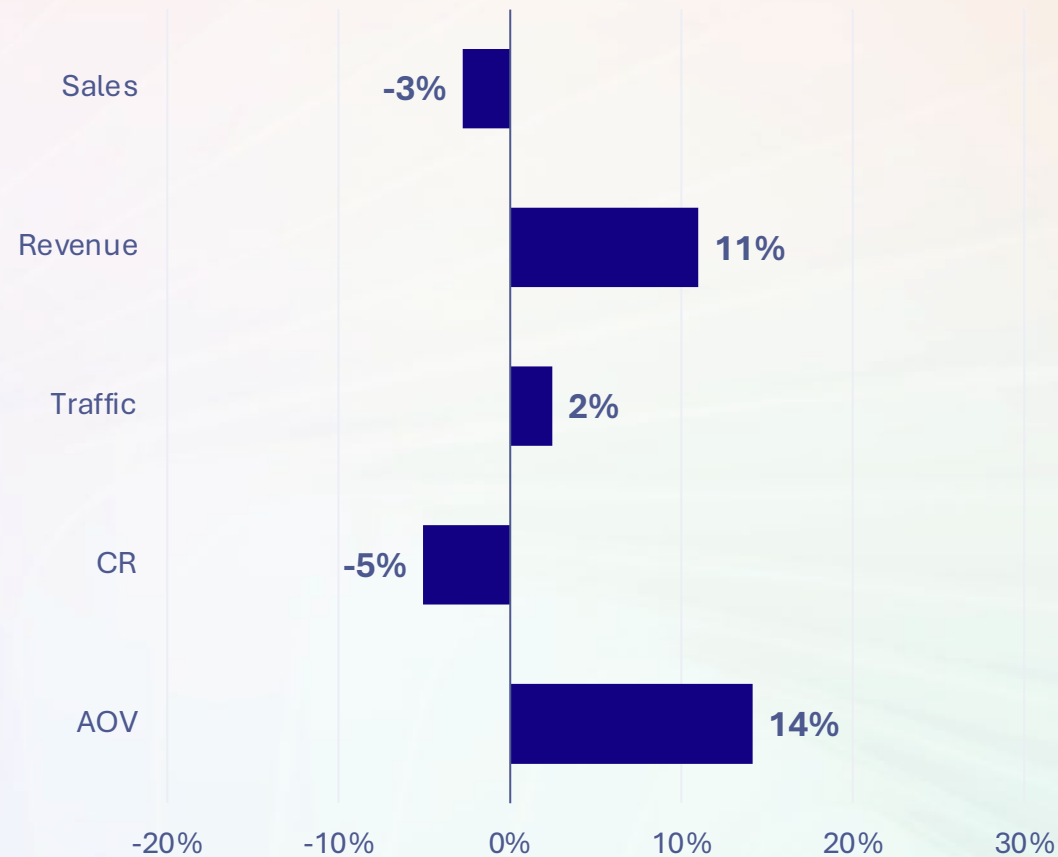
Health & Beauty vitals: Q2 in review



Shoppers in the Americas are spending more at checkout

Health & Beauty in the Americas delivered mixed results year over year. Revenue increased 11%, driven by shoppers placing higher-value orders, while fewer visits converted into checkouts.

Shoppers are still spending, but with fewer visits converting, brands need to stay visible as consumers browse across options.

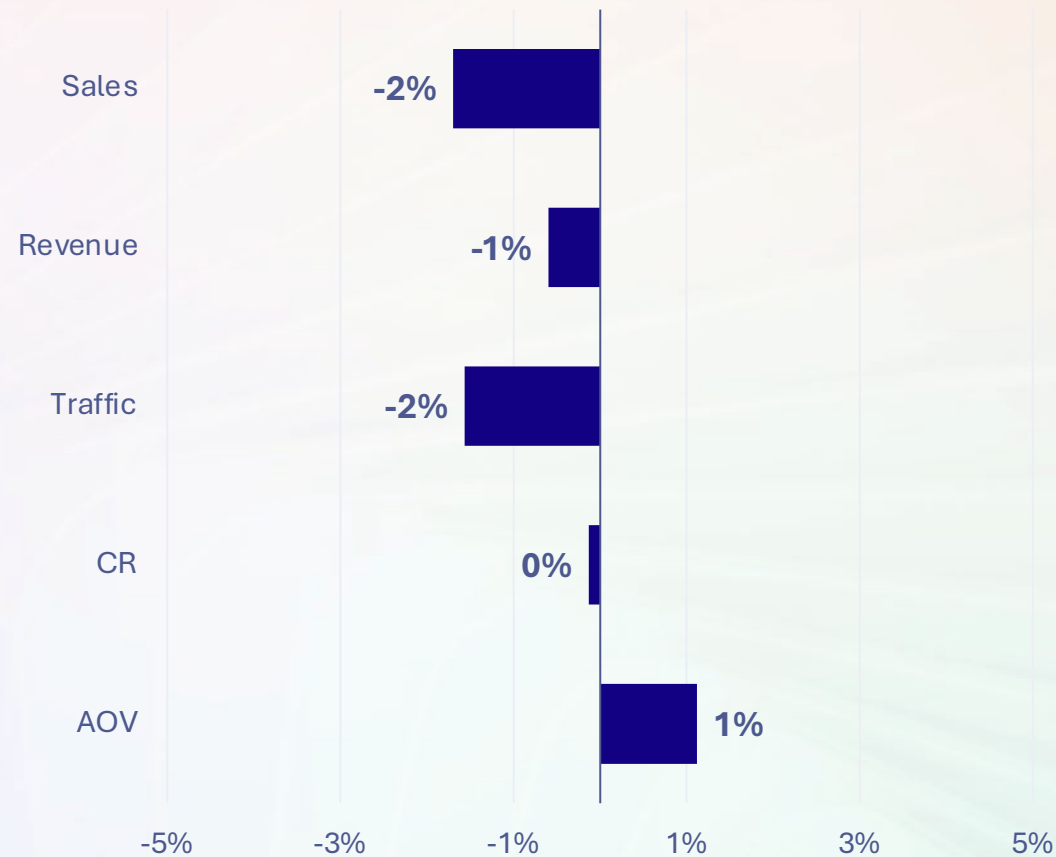


Source: Criteo Commerce Data. Health & Beauty, AMER. Year-over-year Q2 performance (Apr 1–Jun 7, 2026 vs. Apr 1–Jun 7, 2025). All site types.

Shoppers in EMEA are keeping their glow steady

Health & Beauty in EMEA delivered relatively stable year over year performance, with slightly fewer shoppers visiting and buying year over year.

Conversion remained flat, while order vales increased 1%, suggesting shoppers stayed selective but continued spending when they found the right fit.

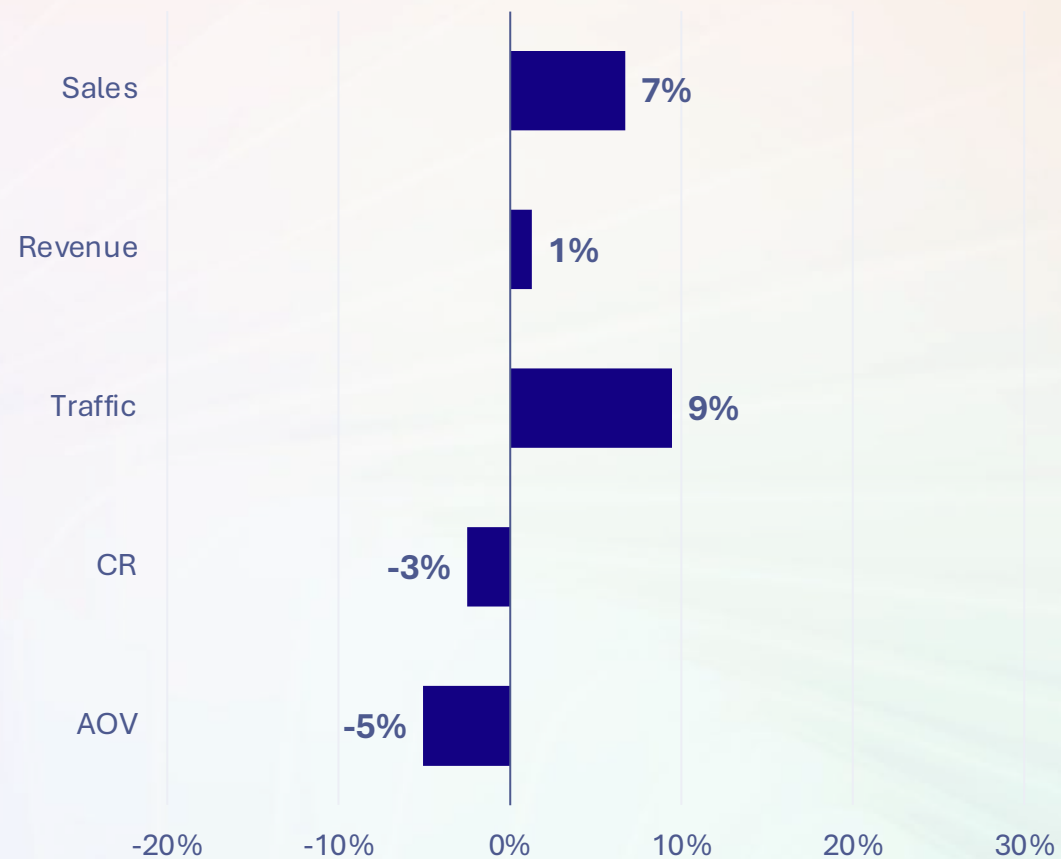


Source: Criteo Commerce Data. Health & Beauty, EMEA. Year-over-year Q2 performance (Apr 1–Jun 7, 2026 vs. Apr 1–Jun 7, 2025). All site types.

Shoppers in APAC are browsing more, but buying carefully

Health & Beauty in APAC delivered strong top-of-funnel momentum, with traffic up 9% and sales up 7% year over year.

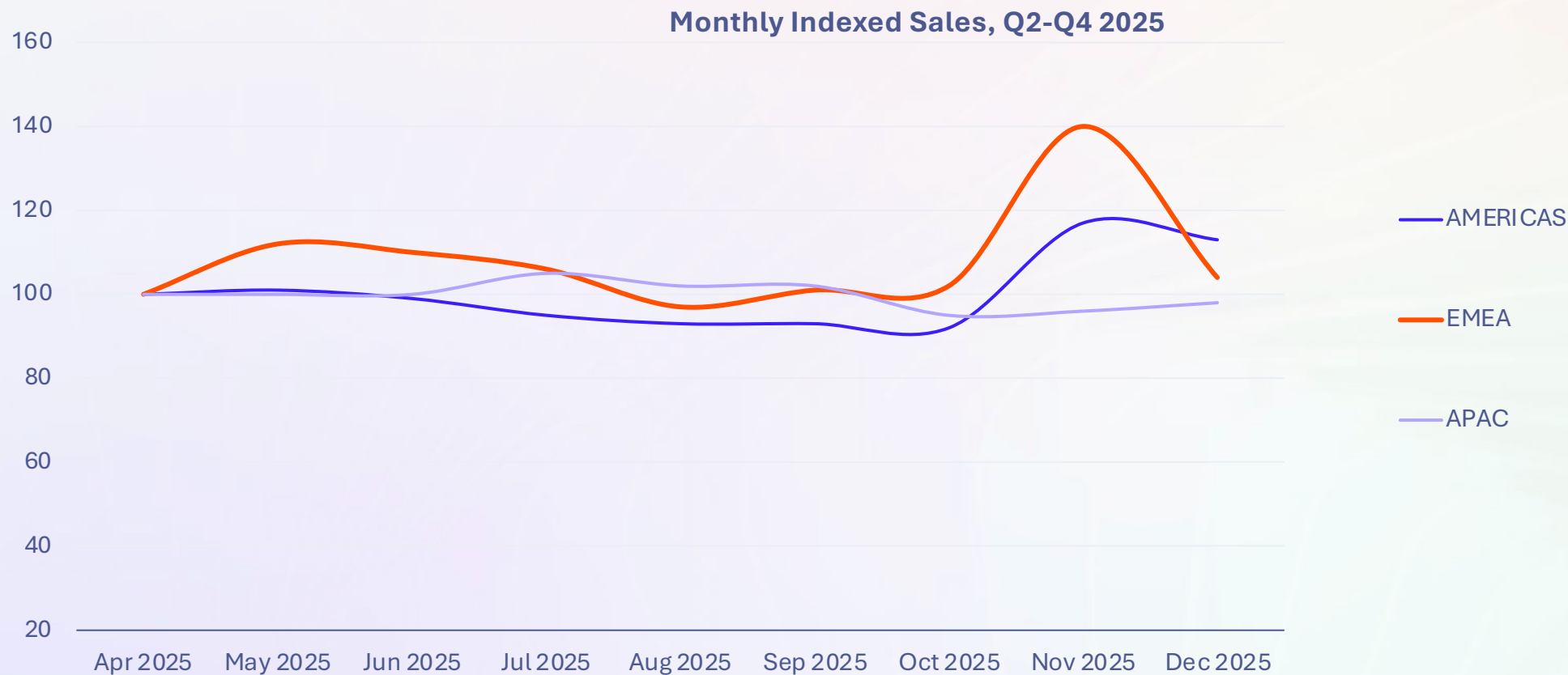
Revenue grew more modestly as fewer visits turned into purchases and average order values declined, suggesting shoppers were active, but more cautious at checkout.



Source: Criteo Commerce Data. Health & Beauty, APAC. Year-over-year Q2 performance (Apr 1–Jun 7, 2026 vs. Apr 1–Jun 7, 2025). All site types.

Shoppers are hitting their glow-up moments at different times

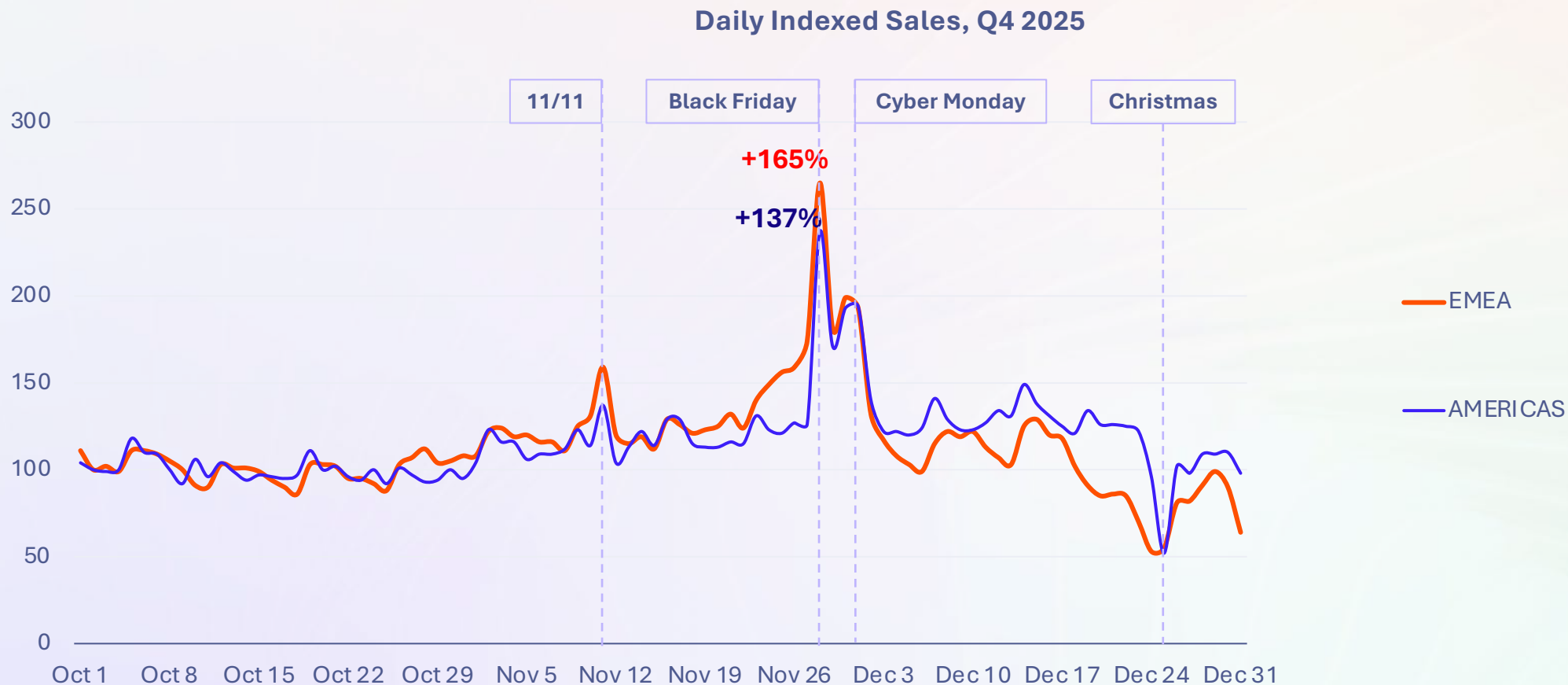
Shopping patterns in the category diverged across regions in 2025. EMEA showed the strongest late-year acceleration, driven by a sharp November surge. The Americas rebounded in Q4 after a softer mid-year period, while APAC remained comparatively stable through year end.



Source: Criteo Commerce Data. Indexed sales in Health & Beauty relative to the month of April 2025. All site types. Regional breakdown.

Black Friday is bringing Health & Beauty shoppers out in full force

Both EMEA and the Americas reached their highest Health & Beauty sales levels in late November, showing how strongly these shoppers respond to Black Friday.

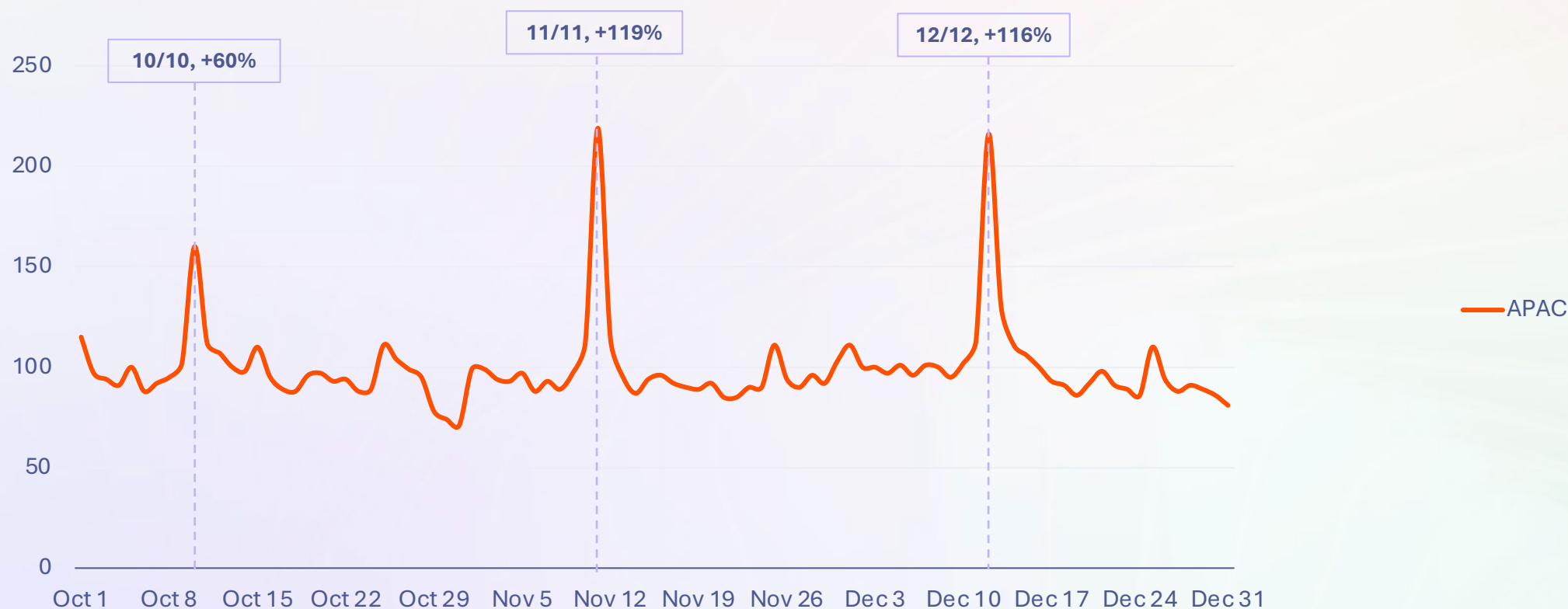


Source: Criteo Commerce Data. Indexed sales in Health & Beauty relative to the first four weeks of October 2025. All site types. EMEA and the AMER. Percentage increases represent online sales on Black Friday 2025 compared to the same baseline period.

Double Dates are bringing APAC Health & Beauty shoppers to the cart

Health & Beauty in APAC follows a distinct multi-peak pattern, with sales surging around 10/10, 11/11, and 12/12. Rather than building toward one year-end peak, demand concentrates around recurring Double Date moments, making promotional readiness critical across Q4.

Daily Indexed Sales, Q4 2025



Source: Criteo Commerce Data. Daily Indexed sales in Health & Beauty compared to the first 4 weeks of October 2025. All site types. APAC. Percentages represent the max increase of online sales during Double Dates in 2025, compared to the same baseline.

02

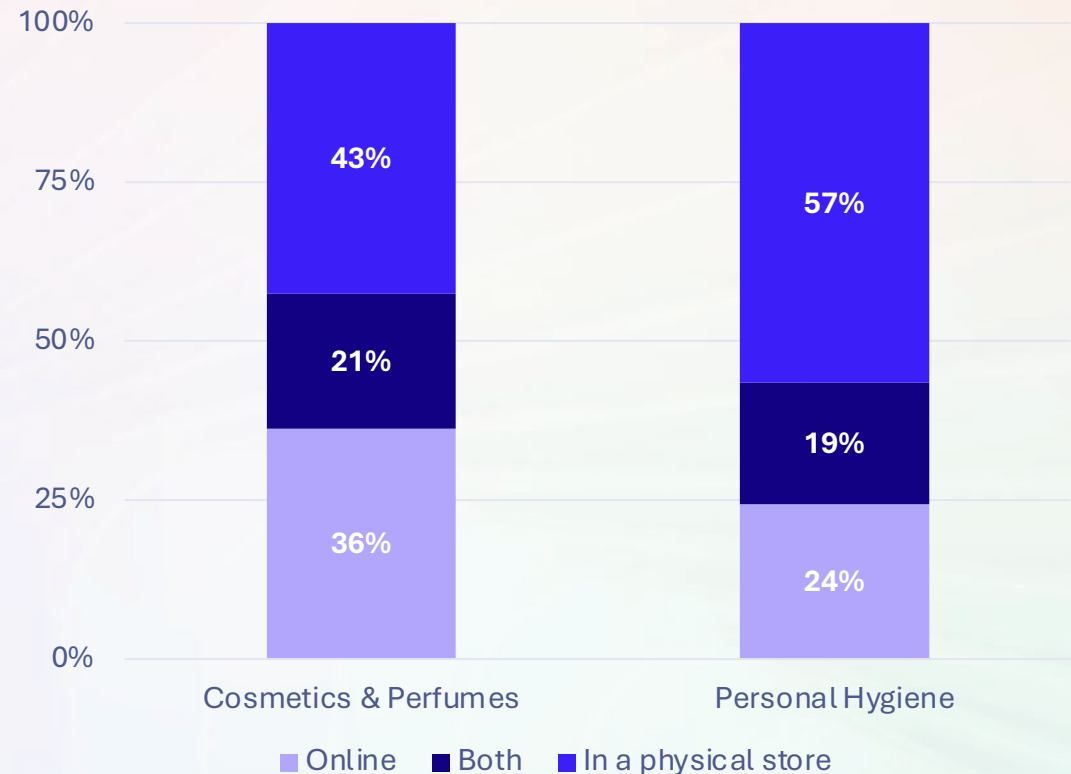
Swipe, swatch, shop: How Health & Beauty gets bought



The beauty counter stretches across digital touchpoints

Although in-store remains the largest purchase channel, 57% of Cosmetics & Perfumes purchases and 43% of Personal Hygiene purchases involve an online touchpoint, showing how Health & Beauty shoppers move between digital browsing and physical shelves before they buy.

Where did your recent beauty purchases take place?



Source: Criteo Shopper Survey. June 2026 (N=4,595). Global: US, UK, FR, DE, JP, and KR. *Online (36%) and Both (21%) combined accounts for more than 50% online purchases (57%).

Shoppers are taking shade and scent seriously

Health & Beauty shoppers browse deeper before buying Makeup and Perfume & Cologne, where shade, scent, and personal fit can play a bigger role than in routine replenishment categories like Shampoo & Conditioner and Bath & Body.

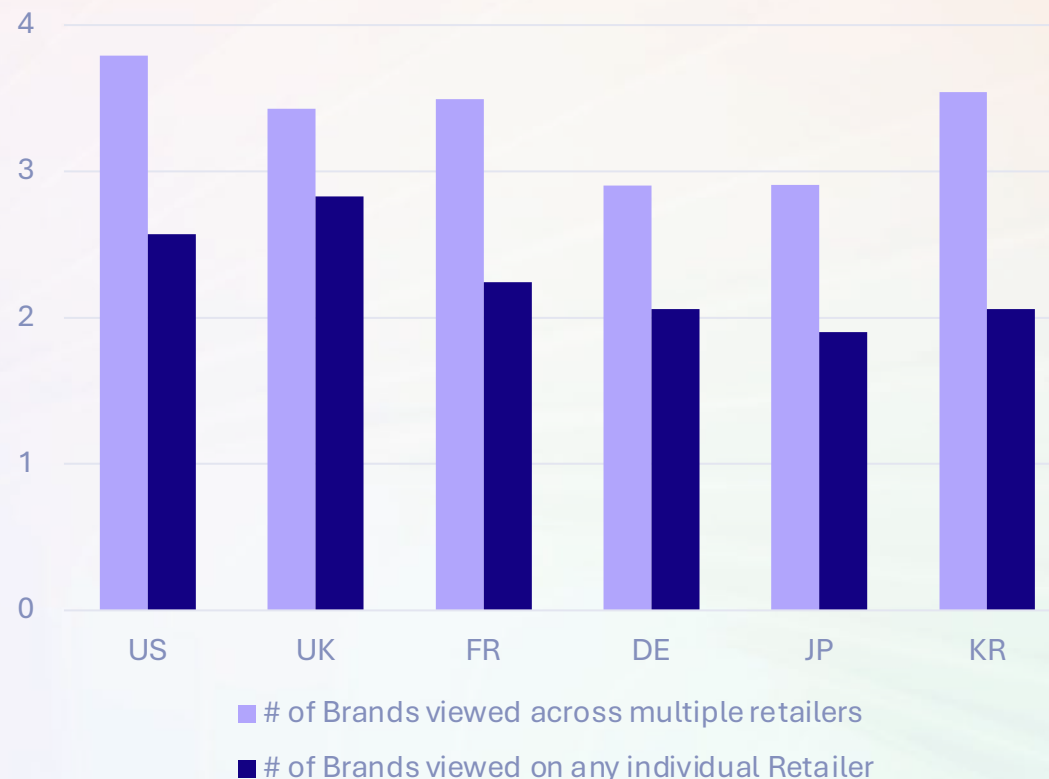
	Avg # of SKUs browsed before purchase
Makeup	19
Perfume & Cologne	12
Skincare	5
Shampoo & Conditioner	3
Bath & Body	3

Source: Criteo Commerce Data. Health & Beauty products purchased Jun 1–7, 2026. One month of pre-purchase browsing behavior analyzed. Hundreds of retailers and brands observed. United States.

More beauty shelves mean more brand discovery

Across markets, Health & Beauty shoppers encounter a broader set of brands when they browse across multiple retailers instead of staying with a single retailer.

Global — Average number of brands viewed across multiple retailers vs. a single retailer



Source: Criteo Commerce Data. Global Health & Beauty purchases made Jun 1–7, 2026. One month of browsing behavior analyzed. Hundreds of retailers and brands observed. Comparison reflects the average number of brands viewed by the same shoppers across multiple retailers versus a single retailer. US, UK, FR, DE, JP, & KR combined.



Beauty shoppers are making brand loyalty conditional

Beauty shoppers may have preferred brands, but loyalty is not guaranteed. Ingredients, hands-on product experiences, and shared values all influence whether a brand stays in the routine or gets replaced.

Source: Criteo Shopper Survey. June 2026 (N=4,580). Global (US, UK, FR, DE, JP, & KR). Question: "Regarding your beauty and personal care purchases, which of the following statements describe you? (Select all that apply)."

34%

remain loyal to their preferred beauty brands and rarely switch

32%

prefer beauty brands that use natural ingredients

27%

rely on in-store testers or samples before making a purchase

22%

view sustainability as a key driver of brand selection

Shoppers see the beauty of trying something new

Across select categories, up to 53% of frequent Health & Beauty consumers globally buy from brands they have not purchased from in the previous 12 months, creating a meaningful opportunity to win high-intent shoppers as they refresh their routines.

Share of new-to-brand buyers by category

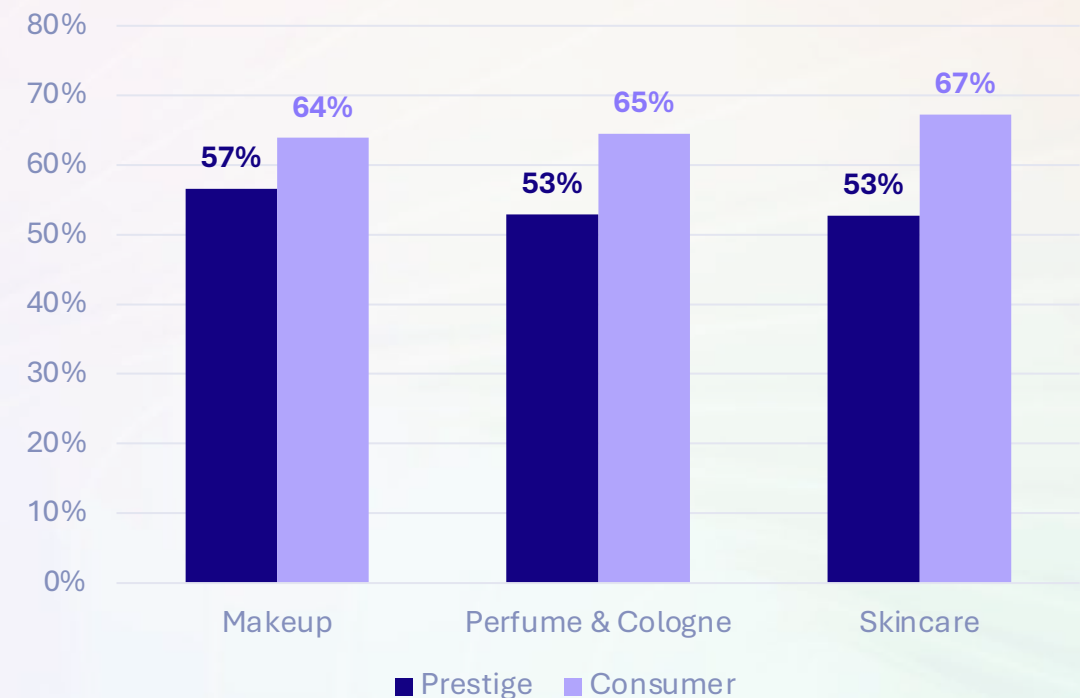
	Global	US	UK	FR	DE	JP	KR
Perfume & Cologne	53%	62%	61%	60%	49%	41%	43%
Makeup	50%	51%	59%	54%	47%	44%	42%
Skincare	50%	51%	61%	59%	52%	41%	40%
Shampoo & Conditioner	42%	49%	47%	45%	44%	32%	33%
Cosmetic Tools	41%	48%	43%	48%	38%	35%	36%
Bath & Body	37%	43%	36%	39%	31%	38%	36%

Source: Criteo Commerce Data. Health & Beauty purchases made Jun 1–7, 2026, with 12 months of prior purchase history analyzed. Hundreds of retailers and brands observed. New-to-brand indicates the shopper had not purchased that brand within the previous 12 months. US, UK, FR, DE, JP, and KR.

Accessible beauty brands are attracting more new buyers

Widely available consumer beauty brands, such as those commonly found across drugstores, mass retailers, and everyday retail channels, are attracting a higher share of new-to-brand buyers than prestige brands, which are typically positioned at higher price points and more premium retail environments.

Global – Share of new-to-brand buyers by category
(Prestige vs. Consumer Brands)



Source: Criteo Commerce Data – Global, Health & Beauty products purchased in the period June 1-7, 2026 with 12 months of past purchase behavior considered. Hundreds of Retailers and Brands observed. Buyers had made at least one other purchase in the product category over the last 12 months. New to Brand indicates they had not purchased this brand in that 12 months. Brands are classified based on their average price points, retail positioning, distribution channels and industry reputation.

Beauty shoppers are surveying the crowd before they commit

Reviews and ratings are the top influence for Health & Beauty shoppers globally, with 46% including them among their top three sources. Recommendations from friends and family, in-store testing, and search engines also play important roles.

When deciding which Health & Beauty products to buy, which sources influence you the most?

	Global	US	UK	FR	DE	JP	KR
Reviews and ratings	46%	42%	45%	34%	38%	54%	61%
Recommendations from friends/family	37%	36%	39%	39%	43%	30%	36%
In-store testing or sampling	31%	26%	28%	37%	33%	32%	27%
Search engines	30%	33%	30%	27%	25%	32%	35%
Social media creators/influencers	23%	22%	26%	25%	15%	23%	28%
Online ads	18%	23%	18%	14%	22%	11%	22%
Brand websites/social channels	16%	21%	19%	14%	12%	22%	9%
AI or personalized recommendations	15%	15%	16%	15%	17%	13%	15%
Retailer recommendations or featured products	13%	17%	17%	11%	17%	7%	9%
Beauty publications/websites	12%	13%	14%	16%	9%	14%	7%
Other	2%	3%	2%	3%	3%	1%	1%

Source: Criteo Shopper Survey. June 2026 (N=4,595).

Personalization is becoming part of the beauty ritual

Globally, 41% of Health & Beauty shoppers prefer personalized recommendations based on their tastes or purchase history. Another 31% prefer to browse and filter options themselves, while 14% report no strong preference.

What's your preferred shopping experience when purchasing Health & Beauty products?

	Global	US	UK	FR	DE	JP	KR
Personalized recommendations (based on my tastes/purchase history)	41%	35%	40%	37%	33%	42%	56%
Show me everything (I browse all options and filter myself)	31%	36%	37%	29%	36%	26%	23%
Fewer, curated picks (expertly edited, "best of" selection)	14%	15%	12%	19%	12%	13%	12%
I don't have a preference / it depends	14%	14%	11%	15%	19%	18%	8%

Source: Criteo Shopper Survey, June 2026 (N=4,595).

03

AI as beauty influencer: What smarter shopping looks like



AI is becoming a beauty advisor

Globally, 38% of consumers report using AI assistants during at least some beauty and personal care shopping trips, showing AI's growing role in product discovery, research, and decision-making.

How often do you interact with AI chatbots or assistants when shopping from the following categories?

(Selected answers: "For all or almost all my purchases" & "For most of my purchases" & "For some of my purchases")

	Global	US	UK	FR	DE	JP	KR
Consumer electronics	48%	50%	52%	47%	53%	33%	53%
Travel (flights, hotels, experiences)	44%	44%	49%	44%	46%	32%	52%
Home & Furniture	38%	42%	43%	33%	39%	26%	45%
Beauty / Personal care	38%	45%	42%	36%	36%	27%	44%
Apparel / Fashion	37%	43%	43%	32%	37%	27%	44%
Groceries / Household items	32%	41%	35%	24%	29%	23%	40%

Source: Criteo Shopper Survey. June 2026 (N=6,307). (Answer options: "For all or almost all my purchases", "For most of my purchases", "For some of my purchases", "Only occasionally", "Never")

AI-surfaced products are shaping the beauty shortlist

Among Health & Beauty shoppers who use AI assistants, 57% say recommendations or featured products surfaced within AI responses are highly or moderately influential when they decide what to buy.

How influential would recommendations or featured products within an AI assistant's response be on your purchase decisions in the following categories?

(Selected answers: "Highly influential" & "Moderately influential")

	Global	US	UK	FR	DE	JP	KR
Travel (flights, hotels, experiences)	63%	70%	63%	64%	64%	56%	64%
Consumer electronics	61%	66%	65%	61%	63%	55%	58%
Beauty / Personal care	57%	59%	56%	57%	59%	56%	54%
Home & Furniture	55%	62%	57%	49%	53%	56%	53%
Apparel / Fashion	53%	59%	56%	48%	52%	53%	49%
Groceries / Household items	52%	61%	53%	46%	51%	47%	52%

Source: Criteo Shopper Survey, June 2026 (N=5,125). Base: Respondents who interact with AI chatbots when shopping from the selected category at least occasionally.
(Answer options: "Highly influential", "Moderately influential", "Slightly influential", "Not influential at all")

AI is helping restock the bathroom cabinet

Globally, 40% of consumers say they would be comfortable allowing an AI assistant to automatically reorder routine personal care products, such as shampoo, toothpaste, and skincare items, when supplies run low.

Comfortable with
AI-assisted reordering

40%

Source: Criteo Shopper Survey, June 2026 (N= 6307). Global (US, UK, FR, DE, JP, & KR).
Share of respondents who picked “Personal care (e.g., shampoo, toothpaste, skincare)” in the question “For which of the following categories would you feel comfortable allowing an AI assistant to automatically reorder items on your behalf when supplies run low? (Select all that apply)”.

04

Glowing opportunities: Where marketers can win



Own the Health & Beauty journey from first look to repeat buy

Show up across screens and shelves

Health & Beauty shoppers move between stores, screens, and retailers before buying. Use online and in-store signals to reach both digital-first and store-led shoppers with consistent campaign messaging and product content.

Invest in multi-retailer experiences

Multi-retailer browsing exposes shoppers to more brands. Use retail media and commerce placements to capture attention wherever shoppers are comparing options.

Turn reviews into trust drivers

Ratings and reviews are a top purchase influencer. Bring review snippets into creative and product content to build trust across the digital path to purchase.

Make AI part of your cross-channel mix

AI assistants are starting to influence product research and recommendations. Optimize product content, availability, and messaging so your brand can show up when shoppers turn to AI for guidance.



Turn curiosity into repeat routines

Win shoppers as brand loyalty shifts

Health & Beauty shoppers are open to switching and trying new brands. Use conquering strategies, education, and product benefits to reach high-intent shoppers before they default to familiar options.

Bring shade and scent stories to life

Makeup and fragrance shoppers browse more before buying. Use richer product content, comparisons, and high-impact videos to communicate product benefits clearly.

Personalize the path to purchase

Shoppers value tailored recommendations. Use audience signals and dynamic creative to deliver more relevant product suggestions and offers based on hopper history.

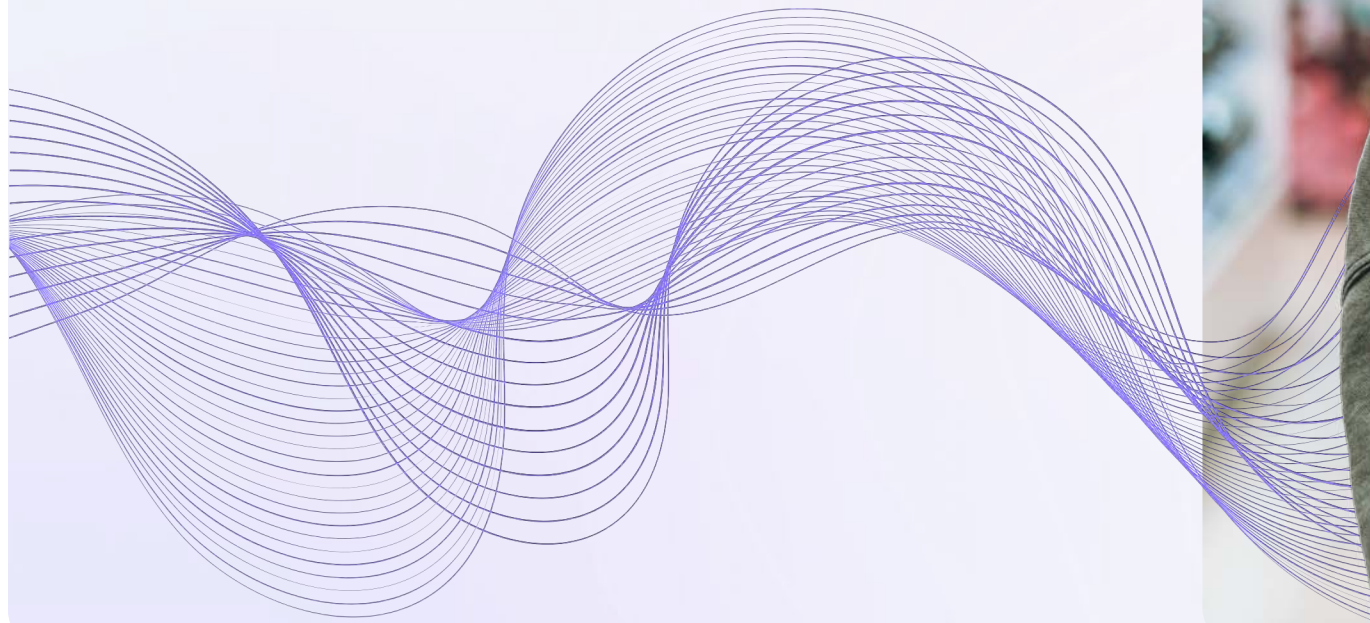
Keep earning a place in the ritual

Loyalty matters, but Health & Beauty shoppers are open to switching. Strengthen product detail pages with clear ingredients, benefits, value, and reviews to help shoppers choose confidently and find your brand through AI-assisted search.



Thank you

CRITEO

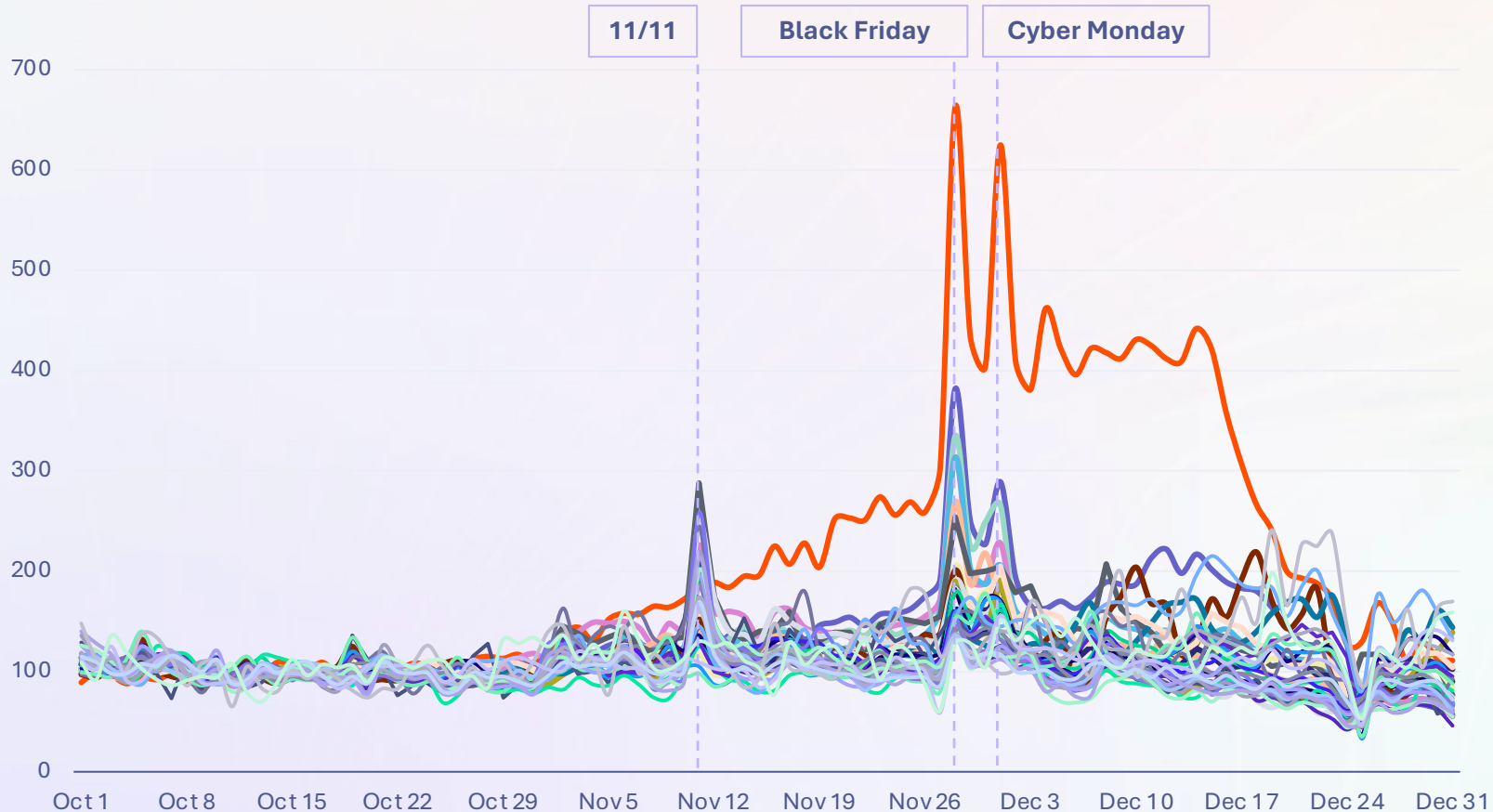


Appendix



Daily Indexed Sales in Health & Beauty, October 2025 - December 2025

Top trending products based on the index on Black Friday 2025



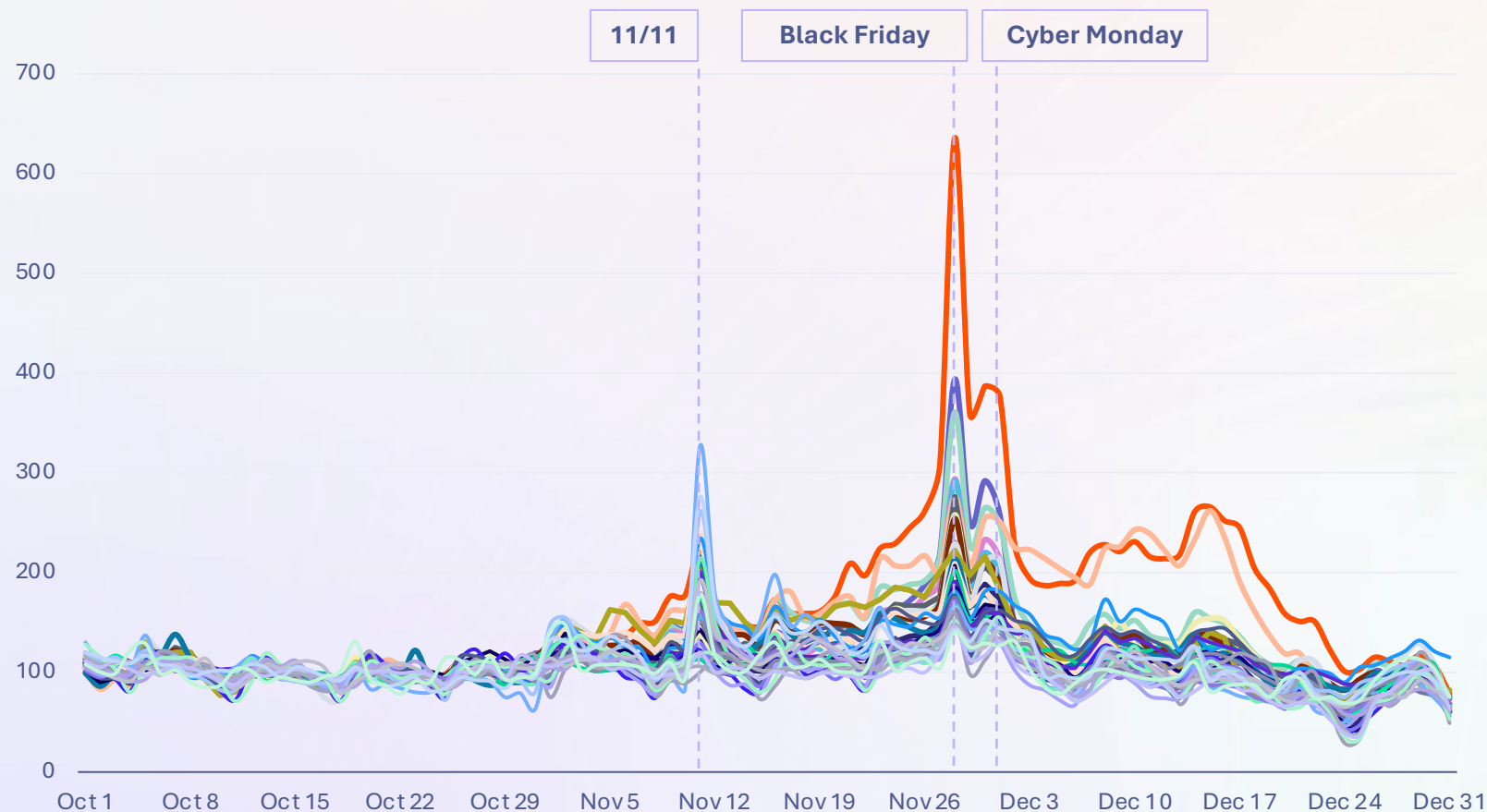
Sales Increase on Black Friday

- Bath & Body Gift Sets (+563%)
- Perfume & Cologne (+282%)
- Skin Care (+235%)
- Makeup (+214%)
- Hair Styling Tools (+213%)
- Shampoo & Conditioner (+169%)
- Eye Masks (+154%)
- Hair Styling Products (+105%)
- Shaving Cream (+101%)
- Hair Loss Treatments (+91%)
- Jewelry Holders (+91%)
- Eyeglasses (+90%)
- Hair Color (+83%)
- Hot & Cold Therapies (+83%)
- Cosmetic Tools (+82%)
- Massagers (+79%)
- Hair Styling Tool Accessories (+62%)
- Electrical Muscle Stimulators (+62%)
- Vitamins & Supplements (+62%)
- Hair Clippers & Trimmers (+60%)
- Bath & Body (+59%)
- Contact Lenses (+56%)
- Toothbrushes (+54%)

Source: Criteo Commerce Data - Indexed sales compared to the first 4 weeks of October 2025. All site types. AMERICAS. Percentages represent the increase/decrease of online sales on Black Friday 2025, compared to the same baseline.

Daily Indexed Sales in Health & Beauty, October 2025 - December 2025

Top trending products based on the index on Black Friday 2025



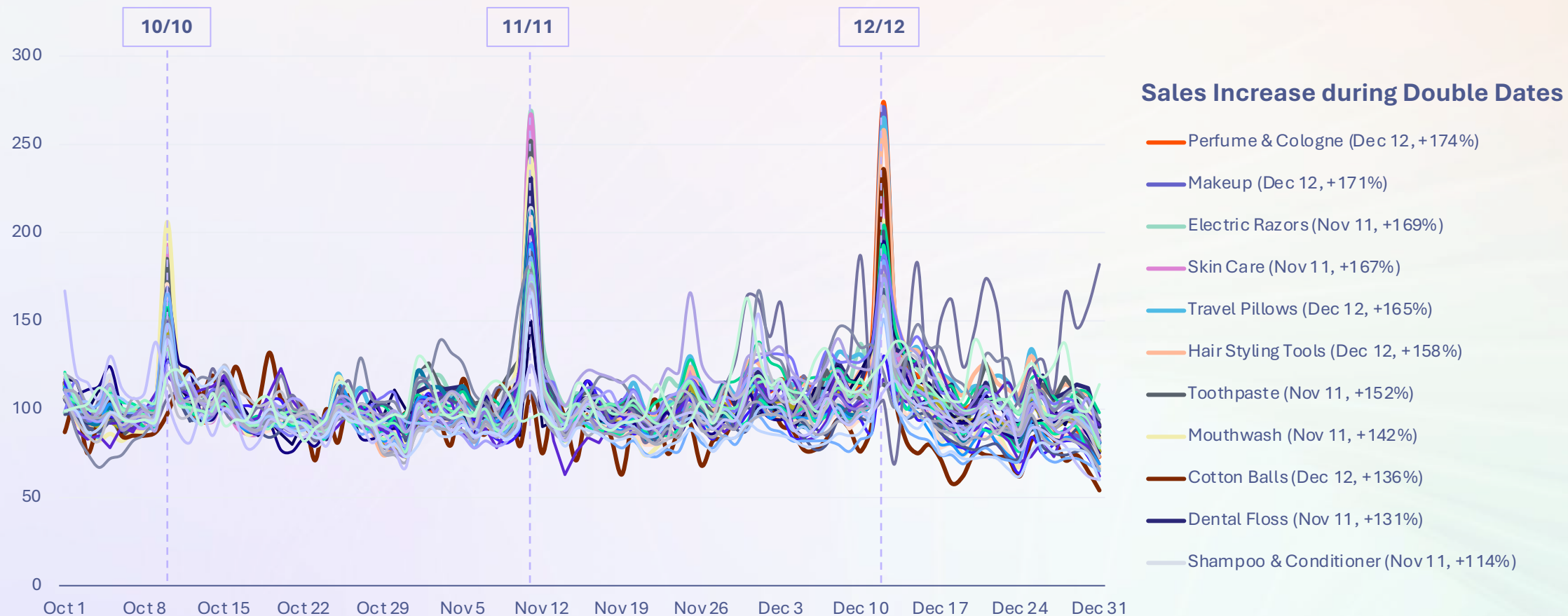
Sales Increase on Black Friday

- Perfume & Cologne (+536%)
- Makeup (+294%)
- Hair Styling Tools (+261%)
- Skin Care (+194%)
- Hair Styling Products (+192%)
- Cosmetic Sets (+176%)
- Toothbrushes (+176%)
- Shaving Cream (+158%)
- Hair Clippers & Trimmers (+154%)
- Shampoo & Conditioner (+130%)
- Personal Lubricants (+129%)
- Electric Razor Accessories (+122%)
- Electric Razors (+113%)
- Hair Removal (+109%)
- Hair Loss Treatments (+107%)
- Deodorant & Anti-perspirant (+102%)
- Cosmetic Tools (+91%)
- Vitamins & Supplements (+87%)
- Bath & Body (+85%)
- Contact Lens Care (+82%)
- Jewelry Holders (+81%)
- Razors & Razor Blades (+77%)
- Massagers (+77%)

Source: Criteo Commerce Data - Indexed sales compared to the first 4 weeks of October 2025. All site types. EMEA. Percentages represent the increase/decrease of online sales on Black Friday 2025, compared to the same baseline.

Daily Indexed Sales in Health & Beauty, October 2025 - December 2025

Top trending products based on the max index during Double Dates in 2025



Source: Criteo Commerce Data - Indexed sales compared to the first 4 weeks of October 2025. All site types. APAC. Percentages represent the max increase/decrease of online sales during Double Dates in 2025, compared to the same baseline.