

# Beauty's Black Friday Expectations 2026

NielsenIQ



# November is a Pivotal Month in Beauty

Led by Black Friday and Singles Day, November holds significant shopping events where beauty plays a key role -

## November 2026

| Mon              | Tues             | Weds             | Thurs            | Fri              | Sat              | Sun              |
|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
|                  |                  |                  |                  |                  |                  | 1 <sup>st</sup>  |
| 2 <sup>nd</sup>  | 3 <sup>rd</sup>  | 4 <sup>th</sup>  | 5 <sup>th</sup>  | 6 <sup>th</sup>  | 7 <sup>th</sup>  | 8 <sup>th</sup>  |
| 9 <sup>th</sup>  | 10 <sup>th</sup> | 11 <sup>th</sup> | 12 <sup>th</sup> | 13 <sup>th</sup> | 14 <sup>th</sup> | 15 <sup>th</sup> |
| 16 <sup>th</sup> | 17 <sup>th</sup> | 18 <sup>th</sup> | 19 <sup>th</sup> | 20 <sup>th</sup> | 21 <sup>st</sup> | 22 <sup>nd</sup> |
| 23 <sup>rd</sup> | 24 <sup>th</sup> | 25 <sup>th</sup> | 26 <sup>th</sup> | 27 <sup>th</sup> | 28 <sup>th</sup> | 29 <sup>th</sup> |
| 30 <sup>th</sup> |                  |                  |                  |                  |                  |                  |

**11.11 (Singles Day):** 11.11 was first conceived in China as a counter to Valentine's day, now one of the largest annual shopping events where retailers offer discounts on products including beauty and luxury goods.

**Black Friday:** Black Friday sales are held across the world, with deep discounts often starting more than a week in advance. Occurs on the Friday after Thanksgiving to mark the start of the Christmas shopping season.

**Cyber Monday:** Black Friday's digital follow-up event to encourage online shopping, heavily focusing on technology and electronics.

# Q4 Also Starts the Seasonal Selling

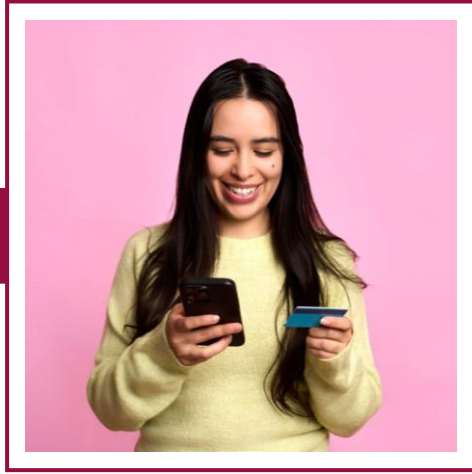
Advent calendars, seasonal sales and online events

## Holiday Calendars



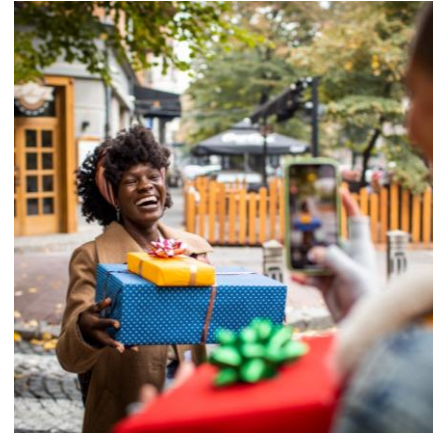
Such is the demand for beauty calendars; their launches are now events in themselves. Calendars from the likes of Sephora, Space NK, Liberty and Charlotte Tilbury are hotly anticipated yearly.

## 10.10 Sales



Inspired by the success of other double-digit sales events like 11.11, the 10.10 sale has become a significant annual sales event, primarily in Southeast Asia, for exclusive discounts.

## Seasonal Gifting



Across the final months of the year, consumers are shopping for gifts for their loved ones including fragrances, gift sets and beauty devices during the seasonal sales.

## Prime Day

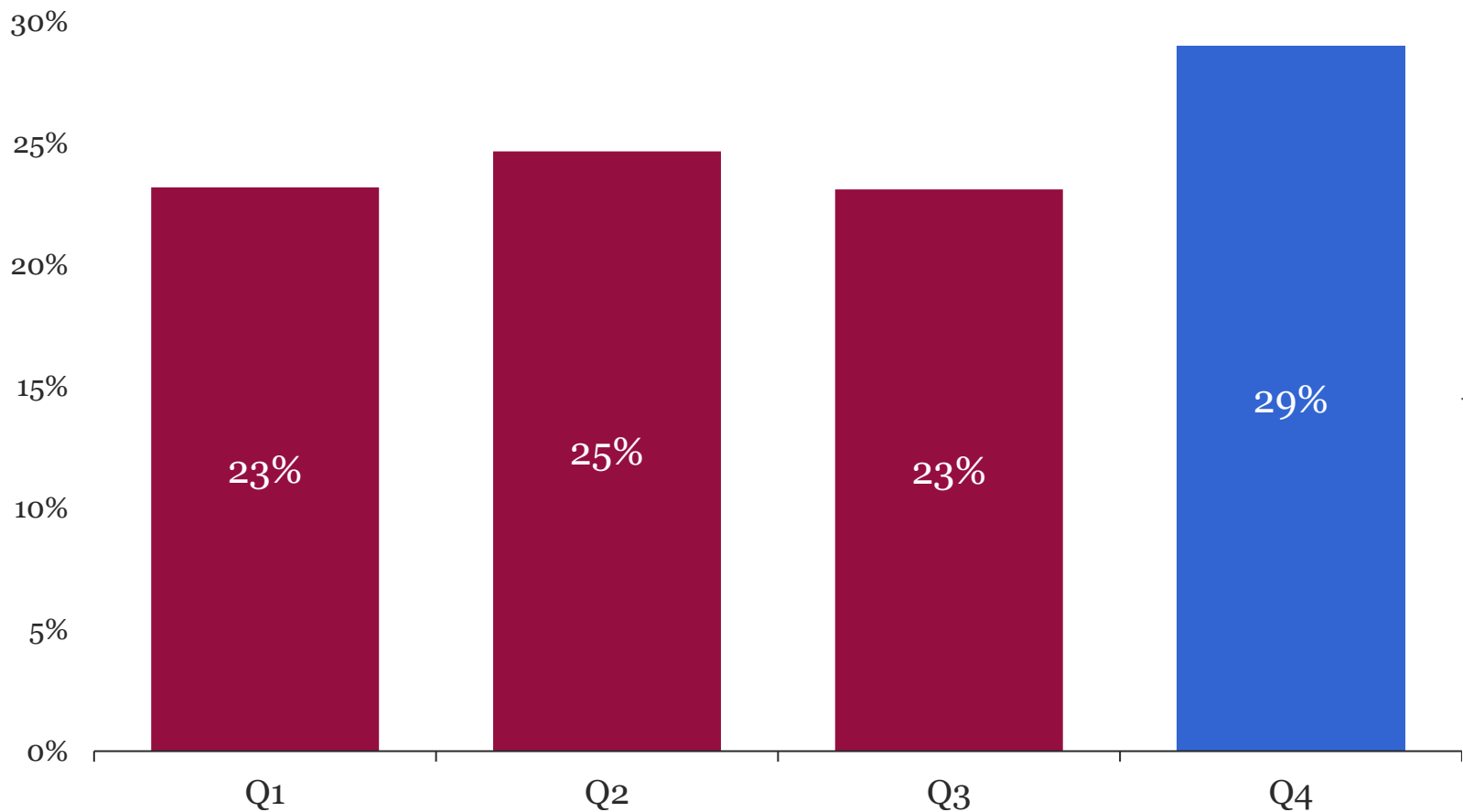


The second Amazon Prime Day event of 2026 is expected to fall on the second week of October, bringing deals to consumers in 26 countries across the globe.

# Beauty's Most Important Quarter

The final quarter of the year generates the most value for global beauty, sparked by seasonal sales

Global Value Sales by Quarter - Beauty



Q4 shares by region

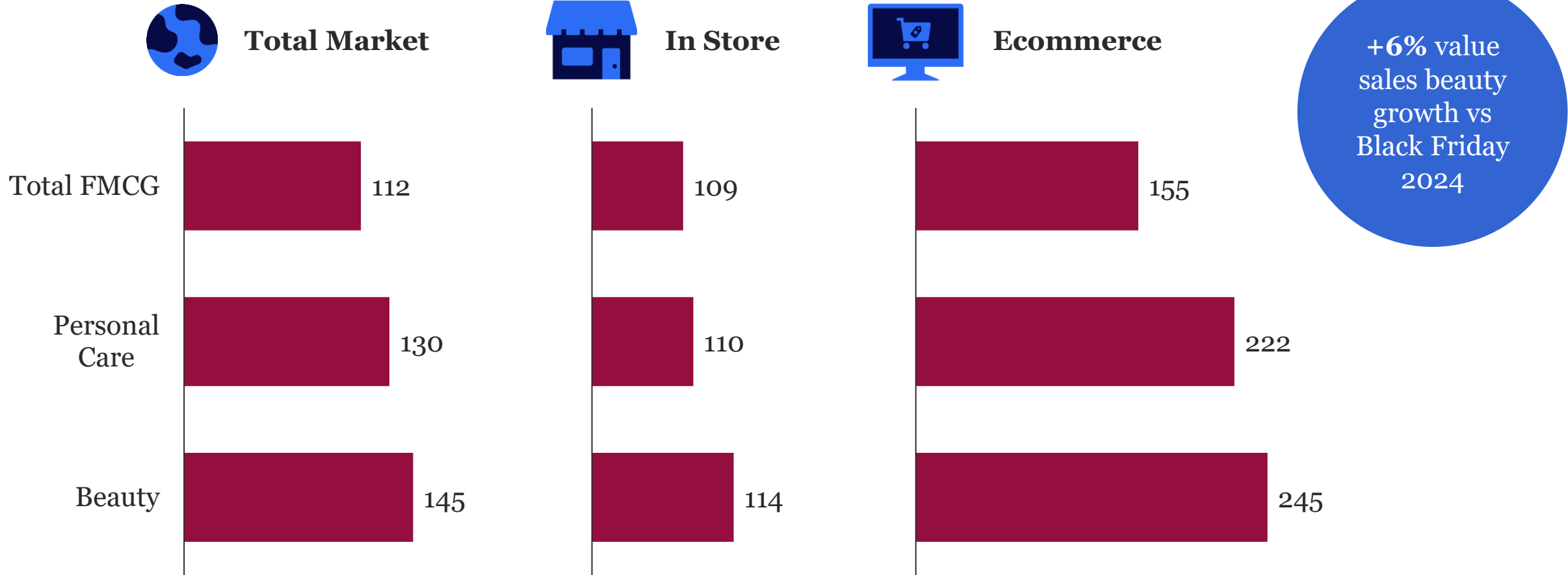
|                    |     |
|--------------------|-----|
| North America      | 31% |
| Asia Pacific       | 29% |
| Europe             | 28% |
| Latin America      | 27% |
| Africa Middle East | 26% |

Source: NielsenIQ Retail Measurement, Omnisaless, Omnishopper Panel, Strategic Planner Monthly – Full Year 2025 – Cosmetics, Fragrances, Hair Care, Skin Conditioning & Moisturising, Cleansing & Sun Care

# Black Friday's Sales Boom

The biggest uplift during Q4's sales surge is driven by Black Friday, on the fourth Friday of the month

Black Friday Value Index v Avg Week  
(2025)

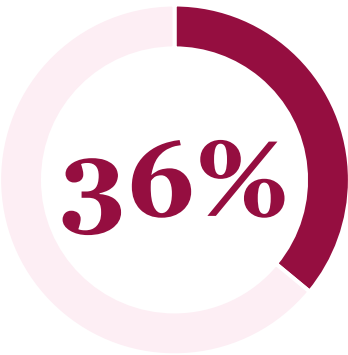


Source: NielsenIQ Omnisaes, SPG Weekly – Full year 2025 – 58 markets

# Black Friday is an Opportunity to Invest

Consumers often plan or are prompted to buy big-ticket items including beauty devices during the Black Friday event

*“Promotions were the reason why I finally bought the product”*



*Among top 3 reasons for final choice*

**+180%**

Small Domestic Appliances value sales during Black Friday week 2025 vs average week

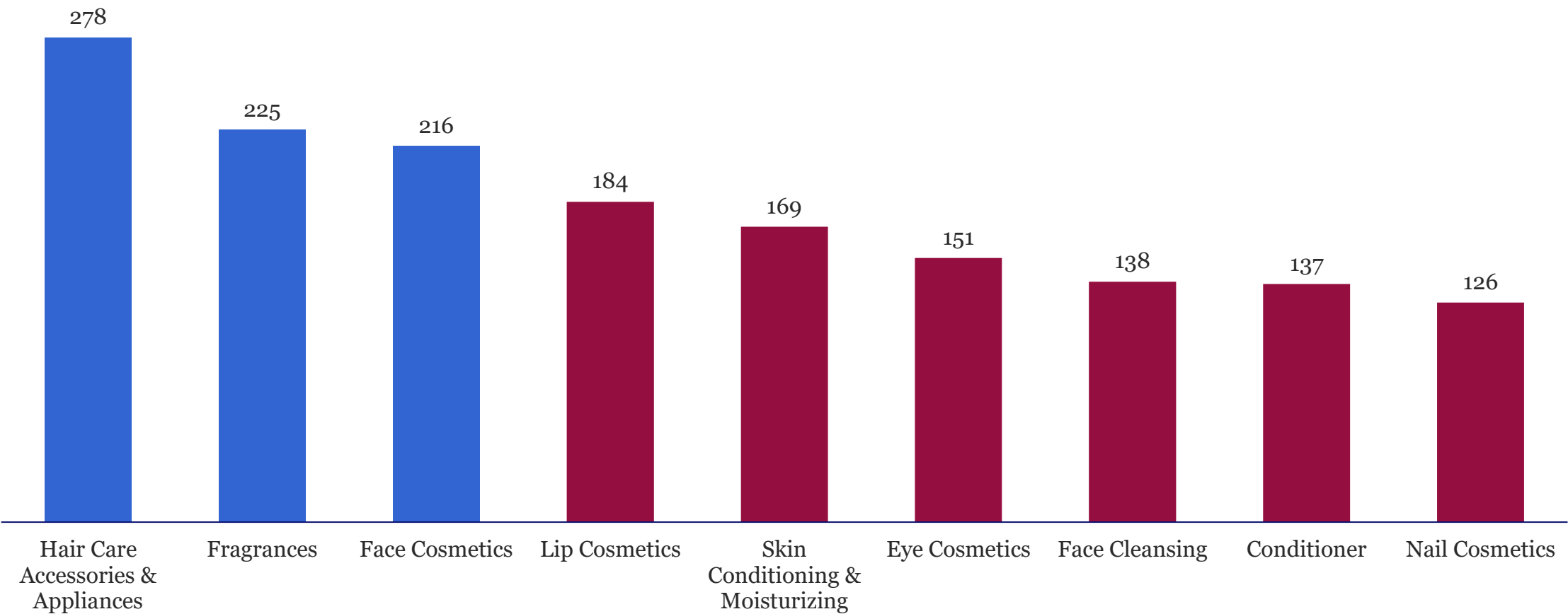


NielsenIQ Consumer Life 2025 | Source: GfK Market Intelligence: Sales Tracking, comparison Black Friday 2025 to 2024;; tracked product groups differ between countries Categories : Vacuum Cleaner, Hot Bev. Maker, Shavers, Dental Care, Air treatment, Food Preparation, NEW : Hair Dryer, Hair Stylers, Electric Fryers Black Friday SDA Quick Snapshot 2025-NF

# Hair Care Appliances and Fragrances Lead Black Friday Shopping

Categories across the beauty aisle experience sales uplifts during Black Friday week, led by high-price indulgences and gifts

Black Friday Week Value Sales Index vs Average Week (2025)

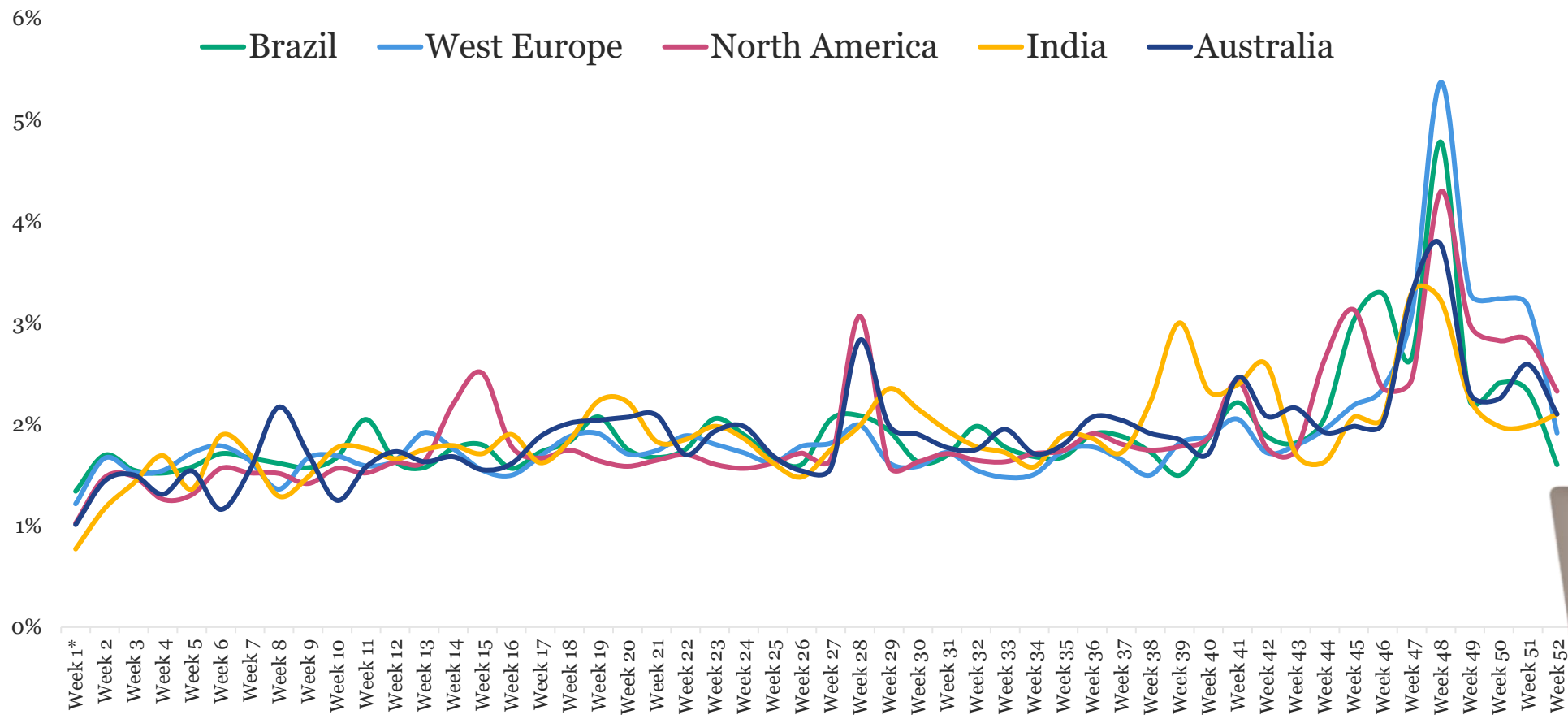


Source: NielsenIQ Omnisaales, Black Friday Week (ending 29<sup>th</sup> Nov 2025) vs Full year 2025 – EU5 (GB, FR, IT, DE, ES)

# Black Friday Drives Beauty's Biggest Sales Spike

The November period brings beauty's biggest sales days around the world

Value Contribution to 2025 Value Sales – Beauty – Ecommerce



Source: NielsenIQ Digital Purchases 2025/01/01 – 2025/31/12 | France, Spain, UK, Italy, Germany, Brazil, United States, Canada, India, Australia  
Cosmetics, Fragrances, Hair Care including Accessories & Appliances, Face Cleansing, Sun Care, Skin Conditioning & Moisturising

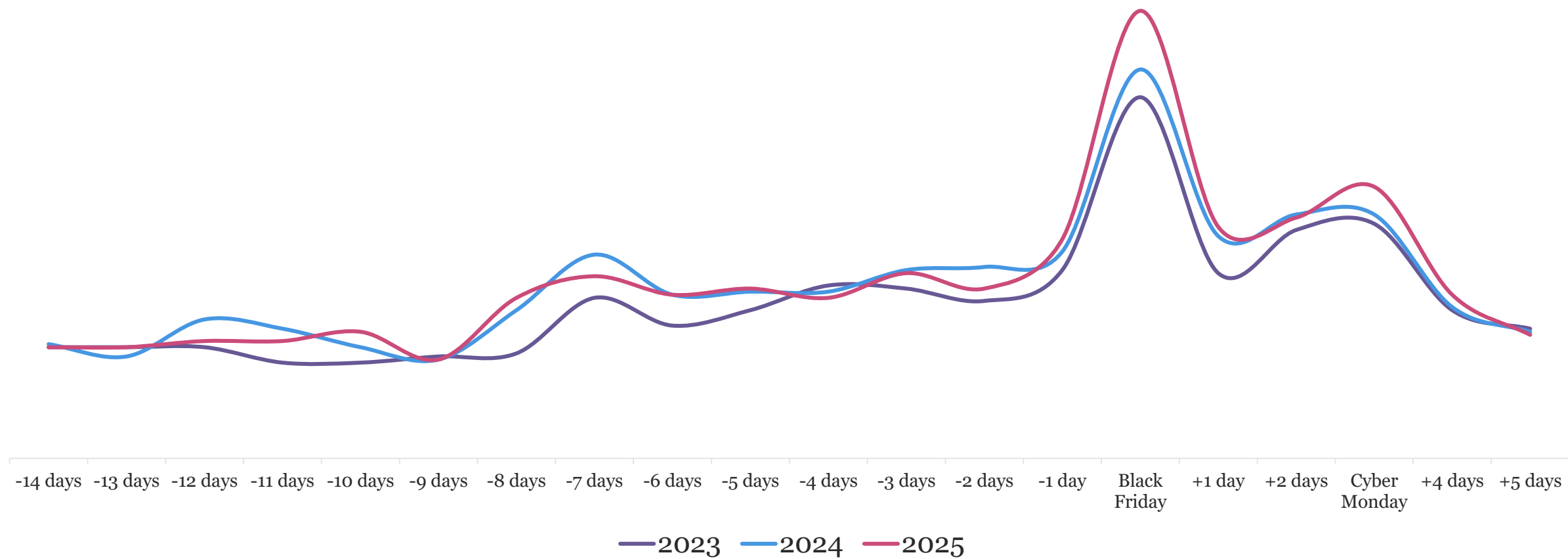




# Black Friday Gets *Longer*

The sales day became a sales week, and is now turning into a 2-week period of deals as offers open earlier

Daily sales as a % of total annual sales - UK



Source: NielsenIQ Digital Purchases Black Friday periods 2023, 2024, 2025 - United Kingdom

# Big Names on Black Friday

Hair technology and luxury beauty brands win big during the sales event as consumers cash in for high value purchases

## Hot Brands (+/- share of beauty\* value vs FY2025)

\*excluding hair care accessories & appliances

|                                                                                    | #1                                                                                                             | #2                                                                                                            | #3                                                                                                     | #4                                                                                                                | #5                                                                                                    |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
|    |                               | CharlotteTilbury                                                                                              |                      |                                |                    |
|    |                               | LANCÔME<br>PARIS                                                                                              | yepoda<br>예쁘다                                                                                          | Medik8                                                                                                            | PL O U I S E                                                                                          |
|    |                               | <br>good hair day, every day |                      | LANCÔME<br>PARIS                                                                                                  | <br>GIORGIO ARMANI |
|   | <br>good hair day, every day |                             | KIKO<br>MILANO                                                                                         | yepoda<br>예쁘다                                                                                                     | DIOR                                                                                                  |
|  |                             |                            | <br>GIORGIO ARMANI | <br>good hair day, every day | CharlotteTilbury                                                                                      |



Source: NielsenIQ Digital Purchases 2025/01/01 – 2025/12/31 | Cosmetics, Fragrances, Hair Care, Face Cleansing, Sun Care, Skin Conditioning & Moisturising

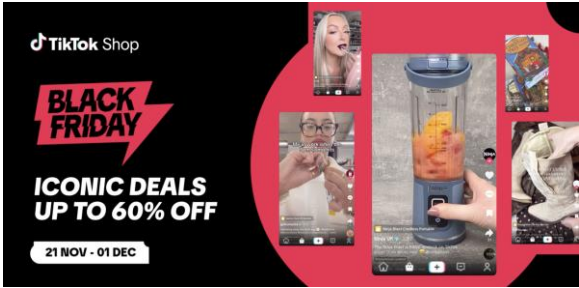
# Destinations for Deals

Sephora saw successes across Europe during Black Friday 2025

**Rising E-Commerce Retailers** (+/- share of beauty value vs FY2025)

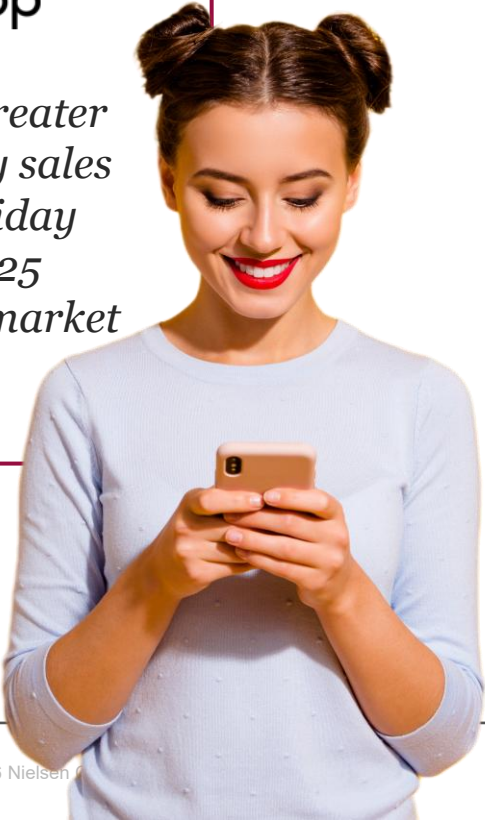
|                                                                                    | #1                                                                                  | #2                                                                                  | #3                                                                                  |
|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|    |    | LOOKFANTASTIC                                                                       | SPACENK                                                                             |
|    |    |    | NOTINO                                                                              |
|    |    |    |   |
|   |   |   |  |
|  |  |  | DOUGLAS                                                                             |

One to watch



 **TikTok Shop**

*TikTok Shop held a greater share of online beauty sales during the Black Friday period than its 2025 average in each EU5 market*



Source: NielsenIQ Digital Purchases 2025/01/01 – 2025/12/31 | Cosmetics, Fragrances, Hair Care, Face Cleansing, Sun Care, Skin Conditioning & Moisturising

# Scent and Styling Steal the Show

Premium fragrances and hair styling tech dominate the best-selling products of the Black Friday period

Select Top Selling Items by value during Black Friday – EU5



Source: NielsenIQ Digital Purchases 2025/11/28 | Cosmetics, Fragrances, Hair Care, Face Cleansing, Sun Care, Skin Conditioning & Moisturising | Germany, Italy, France, Spain, United Kingdom

# Different Consumers, Different Priorities

Understanding your consumer's shopping preferences through NielsenIQ Digital Purchases



Gen Z Men



**Fragrances**



Millennial Women



**Skin Conditioning  
& Moisturising**



Millennial Women



**Fragrances**



Boomer Men



**Hair Care Accessories  
& Appliances**

Source: NielsenIQ Digital Purchases 2025/11/22 – 2025/12/01

# Win Black Friday With NielsenIQ Digital Purchases

NielsenIQ Digital Purchases gives a 360 view of the online market to understand shares, trends, product performance and consumer behaviours

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

**6M**

E-SHOPPERS

**GDPR**

COMPLIANT

**+2K**

ONLINE  
MERCHANTS

**3 YEARS**

BACK DATA

**THE MOST ACCURATE DATA**

PASSIVELY ACQUIRED - DELIVERED WEEKLY

TRUSTED  
BY



LOOKFANTASTIC



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# Are You Prepared for Black Friday?

NielsenIQ Omni Solutions Bring You the Insights Needed to Navigate the Sales Period



## Preparing for the Rush

- **Retailers and brands must treat Black Friday as a peak season**, not just a promotional event. This means:
  - **Inventory planning** should be aligned with expected surges, especially in top-performing markets like Germany and Spain.
  - **Omnichannel co-ordination** is critical — ecommerce and physical retail should be synchronized to maximize reach and conversion.
- **Marketing budgets should be front-loaded** into Q4, with emphasis on performance media and conversion-driving tactics.
- Consider **exclusive online bundles or limited-time SKUs** to capitalize on urgency and drive higher basket values.



## Beauty Leads the Charge

- **Category-specific activation is essential.** Beauty brands should:
  - Launch **targeted campaigns** with influencers and creators in the lead-up to Black Friday.
  - Use **personalization and sampling strategies** to drive trial and repeat.
- For retailers, **curated category pages and gift guides** can help surface high-performing products and increase dwell time.
- **Cross-category bundling** (e.g., fragrances and cosmetics) could unlock incremental value and appeal to gifting shoppers.



## Early Anticipation

- **Pre-Black Friday engagement is now a must.** Brands should:
  - Start teasing offers and building wish lists in early October.
  - Use **re-targeting and CRM segmentation** to re-engage high-intent shoppers.
- Consider **tiered promotional strategies**:
  - Early access for loyalty members.
  - “Warm-up” deals to build momentum and capture early conversions.
- **Data-driven forecasting** should incorporate early signals (e.g., site traffic, basket builds) to dynamically adjust pricing and stock.

# Thank You

**Sources used in this report:** NielsenIQ Omnishopper Panel, NielsenIQ Omnisales, NielsenIQ Retail Measurement, NielsenIQ Digital Purchases.

**Category Coverage:** Personal Care is defined as Deodorant, Hair Removal, Bath & Shower, Feminine Hygiene, Oral Care and Beauty. Beauty in this report is defined as Cosmetics, Fragrances, Hair Care & Skin Care including Sun Care. \*Coverage varies by market.

**External Sourcing:** All news items, brand images and brand logos are sourced from the respective brand’s website or social media, or credited news page in the slide sourcing.



Explore the Beauty Inner Circle for more beauty trends and insights



## Tell Us Your Thoughts



How the score is calculated:

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