Tech (SDA)
Beauty & Wellness

May 2026

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NielsenIQ powered by GfK intelligence

Economic polarization divides intention to purchase beauty products heading Into 2026

A divided economic landscape sets the stage for polarisation between premiumisation and luxury vs affordability

Products

24% of consumers
***plan* to spend less** on
Beauty & Personal Care
Products in 2026

20% plan to spend more

Net (spending more vs spending less)

Products		Services
-24	Strugglers	-30
-8	Rebounders	-21
-11	Cautious	-25
+11	Unchanged	+1
+21	Thrivers	+11

Services

30% of consumers
plan to spend less
on Salons & Beauty
Grooming in 2026

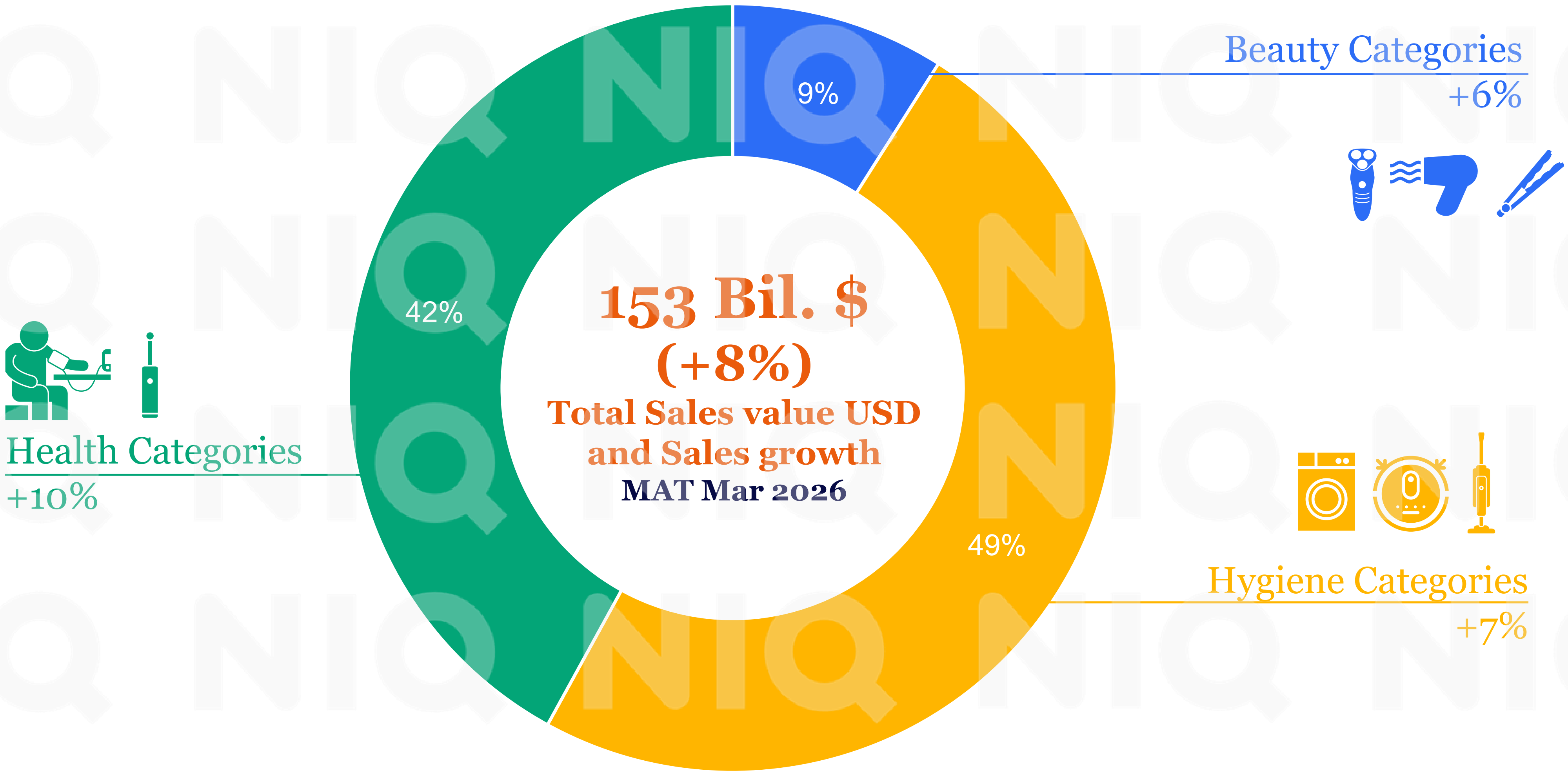
14% plan to spend more

Source: NielsenIQ Consumer Outlook 2026 | Q4A. Looking ahead, how will you manage your spending in the next 12 months?
SDA Beauty and Wellness – May 2026-NF

Addressable Market, Seasonality & Brands

Universe of health, hygiene and well-being categories in tech and durables

Beauty & Wellness categories at large grew in past 12 months by +6%; hair care and shavers drove the momentum while wellness categories declined



Source: Market intelligence Sales Tracking Period : Apr 24 – Mar 25 Categories : Beauty: Hair Dryer, Har Stylers, Hair Clippers , Shavers, Shaver Accessories, El. Male System Razor, El. Muscle Stimulation, El. Massagers, El. Cosmetics, El. Blankets
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40% respondent's state

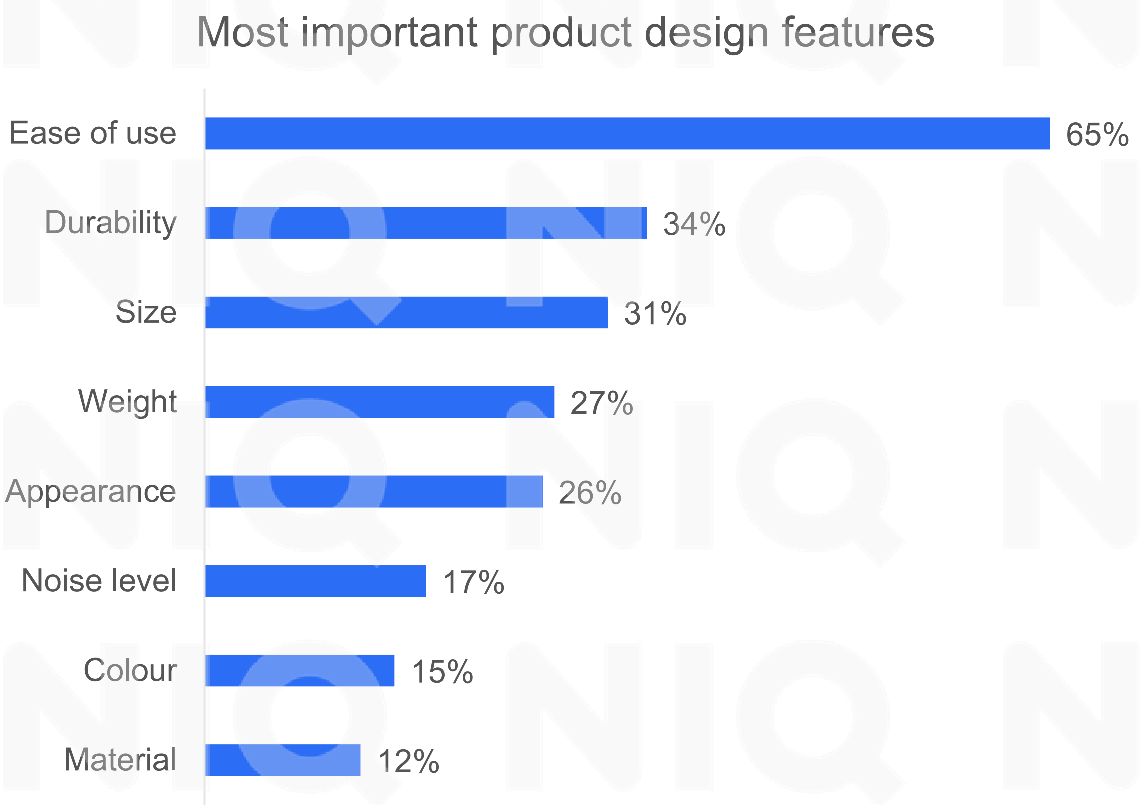
“The look and style of technology product is very important in deciding which one to buy”

+6 pts vs 2023

This tendency is particularly high in Emerging Asia

Source: NIQ Consumer Life 2025 SDA Beauty and Wellness – May 2026-NF

Which of these product design aspects were most important to the consumers' final choice?

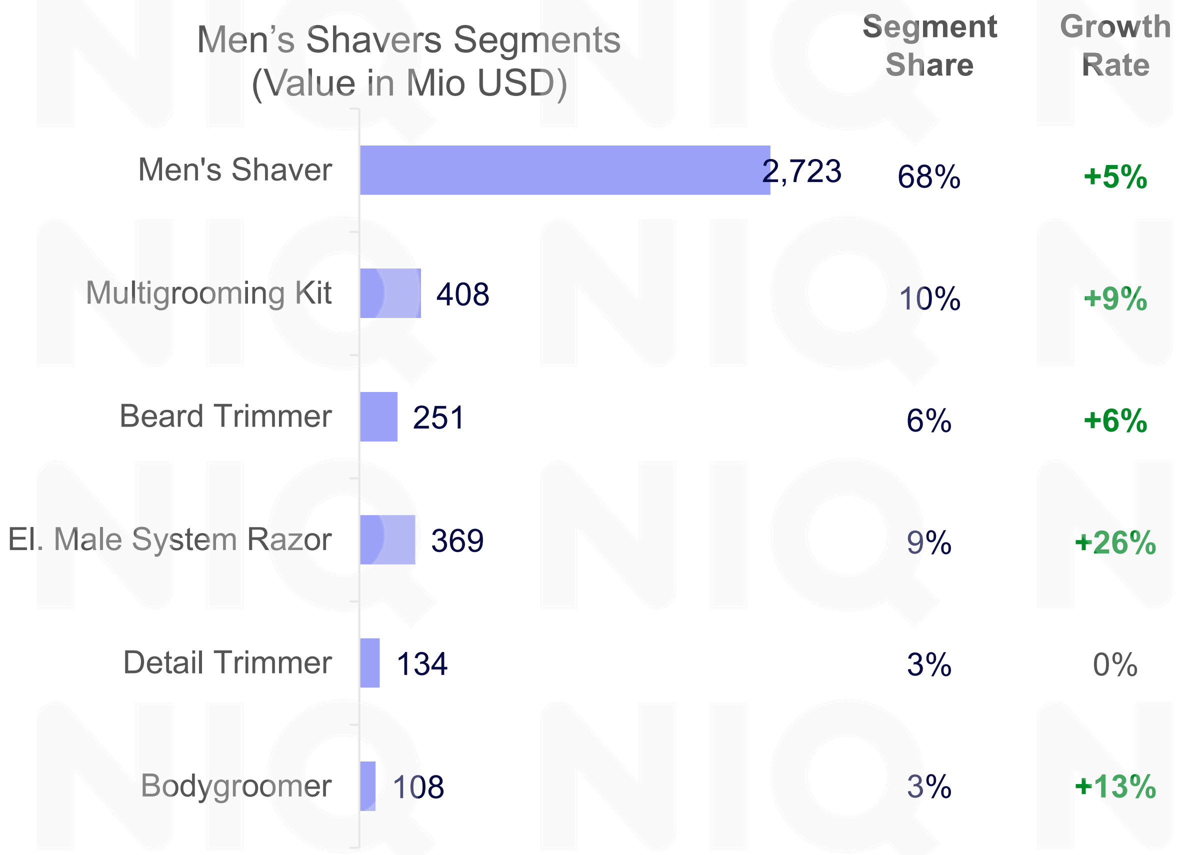


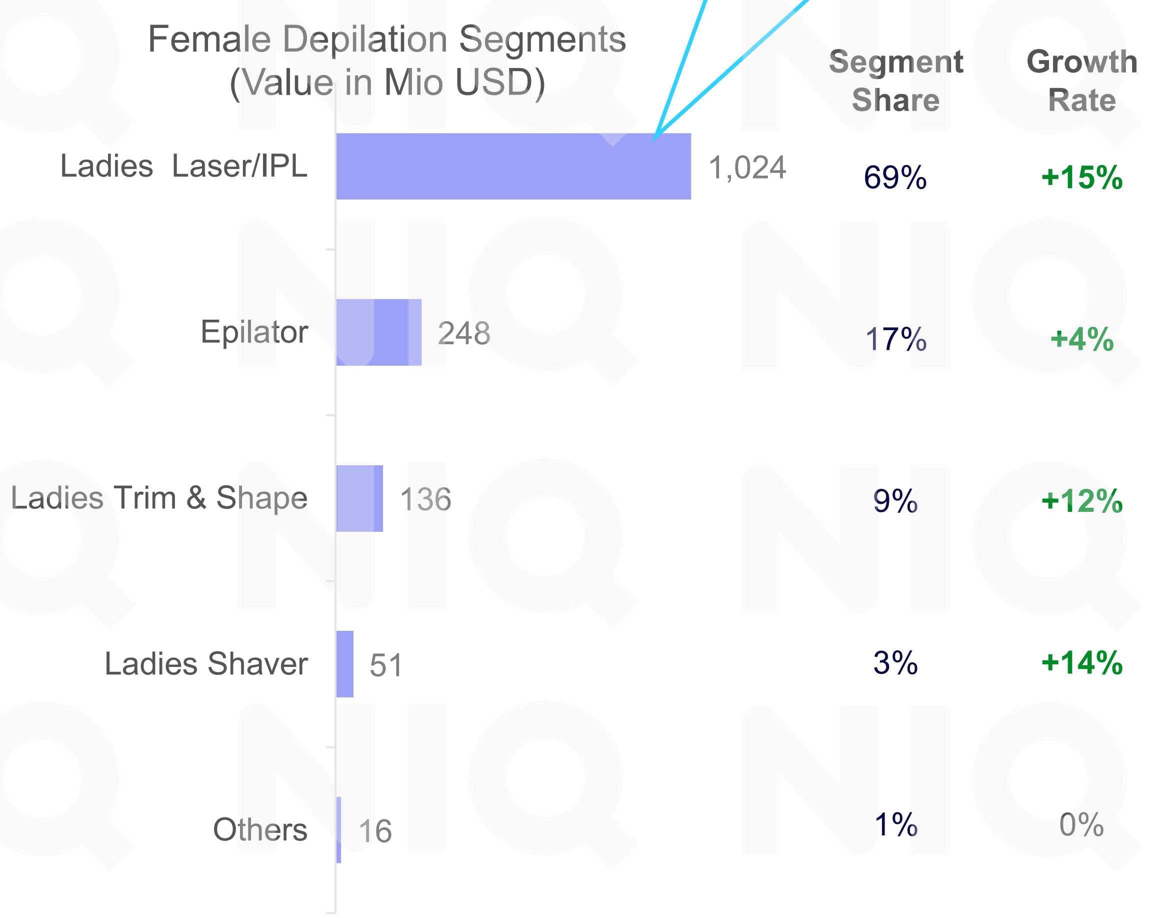
Country: Germany, Great Britain, Italy | Product Group: Hair Dryers / Stylers | Countries: FR, DE, GB, IT, JP, ES
Time Frame: Last four quarters (Jan 25 - Dec 25) SDA Beauty and Wellness – May 2026-NF

All male shavers especially El. male system razors, Body-groomers grew

Male shaver account for 72% value share and female depilation for 28% value share

Ladies Las/IPL is a key category of Female Shavers. Key brands have products but are limited by the regulatory framework in various countries





Source: Market Intelligence Sales Tracking Period Apr 2025- Mar 2026 Global GfK Panel market excluding North America, Russia Category: Shaver
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Sale & regulation of Intense Pulsed Light (IPL) devices as over-the-counter products vary significantly across different countries

No	Country	Regulatory Body	Medical Device Classification	Regulatory Notes	Ease of Market Entry
1	**United States**	FDA (Food and Drug Administration)	Typically Class II (Special Controls)	IPL devices are regulated as **light-based non-laser devices with thermal effect**; require **510(k) clearance** showing equivalence; strong safety (thermal, labeling) controls	**Moderate**
2	**European Union**	European Commission / Notified Bodies (MDR 2017/745)	Typically **Class IIa / IIb** (Annex XVI aesthetic devices)	IPL covered under **"high-intensity electromagnetic radiation equipment"**; even cosmetic/home-use devices are regulated like medical devices; CE marking + clinical & safety evidence required	**Difficult** – MDR significantly tightened with heavy clinical/QMS burden
3	**Canada**	Health Canada	Class II or III depending on intended use	Risk-based Class I–IV system; most active therapeutic-aesthetic devices fall into **Class II requiring device license (MDL)**; quality system compliance required	**Moderate** – structured but documentation-heavy
4	**Japan**	PMDA / MHLW	Class II or III depending on risk	4-class risk system; Class II often **third-party certification**, higher classes require **PMDA review + approval**; local MAH mandatory	**Moderate–Difficult**
5	**China**	NMPA (National Medical Products Admin.)	Class II or III depending on use	IPL devices are regulated under revised CMDE guidelines. Risk-based (Class I–III); requires **local testing, Chinese standards (GB/YY), and registration**; stringent clinical and documentation requirements	**Difficult**
6	**India**	CDSCO (Central Drugs Standard Control Org.)	Class B or C (moderate risk)	IPL devices are regulated under the Medical Devices Rules, 2017.Risk-based Class A–D; **licensing mandatory (since 2022 expansion)**; classification depends on invasiveness/risk	**Moderate**
7	**Saudi Arabia**	SFDA (Saudi Food and Drug Authority)	**Case-by-case (device classification done during registration)**	IPL devices are regulated under the Medical Devices Law. Must first obtain **product classification via SFDA system**; device vs cosmetic depends on **claims & mechanism**; risk subclass assigned during registration	**Moderate-Difficult**
8	**Brazil**	ANVISA	Class II or III depending on risk	IPL devices must be registered with ANVISA under RDC 751/2022. Local representation and compliance with Brazilian GMP are required **8**	**Difficult**

Source: Operon Strategist and desk research and expert inference | SDA Beauty and Wellness – May 2026-NF

Men’s shavers is a quite saturated category but niches continue to grow

Head shavers and portable shaver are two niches which we saw were growing steadily YTD 2025;

Value & growth % of segment

100 Mio US $

+22%

MAT Mar 2026

Men’ s Shavers with Head shaving function/form

MAT Mar 2026

Men’ s Shavers

5467 Mil USD +9%

Value & growth % of segment

504 Mil US $

+20% vs PY

MAT Mar 2026

Q1 2025 is growing at 3%

Portable Men’ s Shavers | China

Examples

Remington XR1600

Philips S1134/00

Wahl 7507-016

Examples

Flyco FS890

Yoose Mini

Philips PQ 182/16

Source: Market Intelligence Sales Tracking Period : Apr 2025 – Mar 2026 Countries: Global excl. Russia, North America, For Portable Mens Shavers : China | SDA Beauty and Wellness – May 2026-NF

Hair Dryers and Hair Stylers grew on the brand of innovation and new launches from key brands, brands pushed are also pushing premium SKUs with more attachments

Hair care Segments Value in Mio USD)		Segment Share	Growth Rate
Pistol Grip HairDryer	2,766.8	43%	+5%
Hot Air Stylers	1,524.2	24%	+14%
Straightener (Styler)	1,234.7	19%	+6%
Tongs	203.1	3%	+12%
H.Straightening Brushes	90.4	1%	-7%
Hair Clippers	330.5	5%	+1%

Source: GfK Market Intelligence Sales Tracking Apr 2024- Mar 2025 Global GfK Panel market excluding North America, Russia Categories : Hair Dryer, Hair Styler, Hair Clipper
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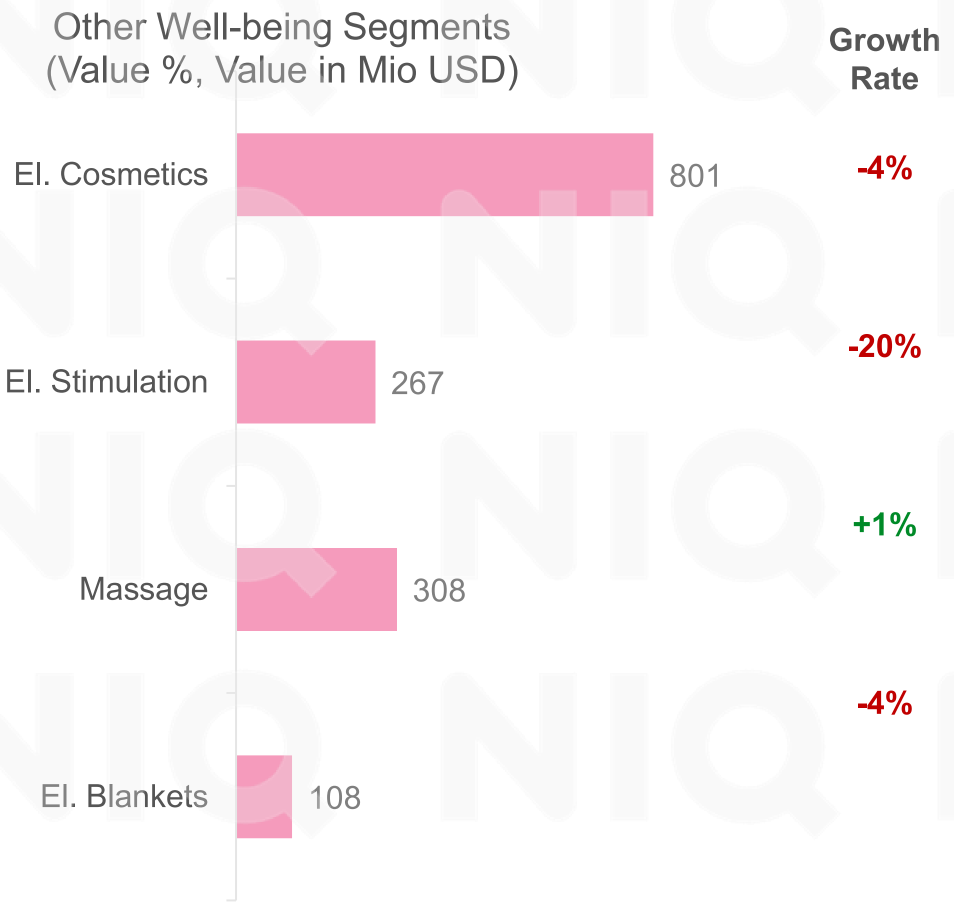
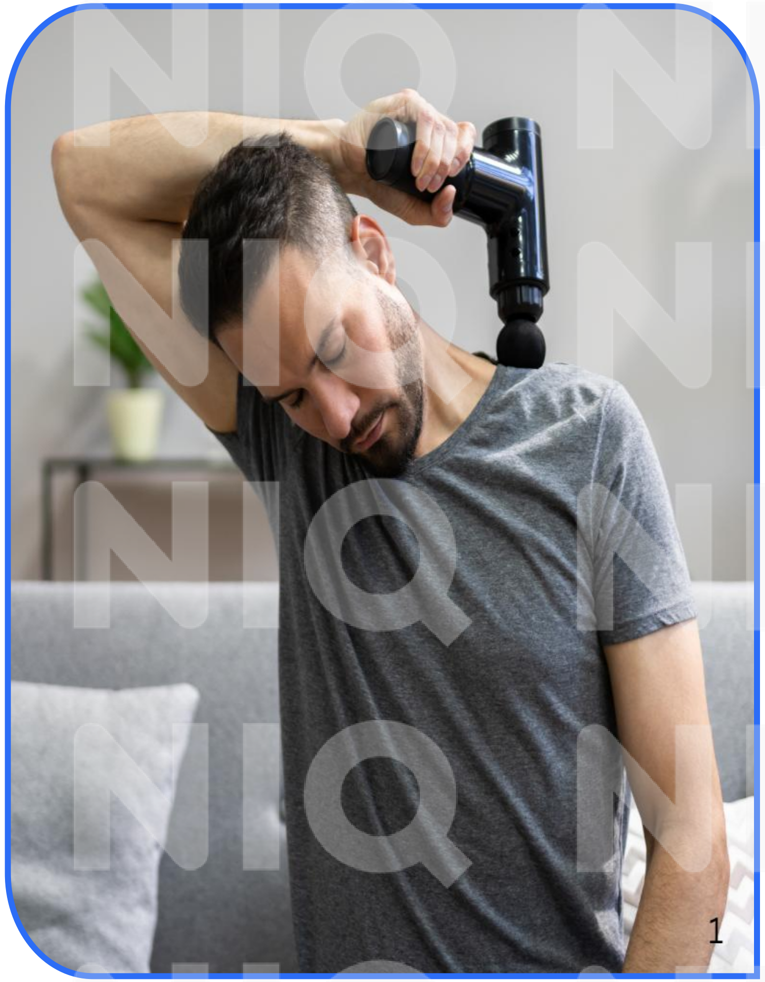
Well-being categories typically are a discretionary consumer purchase, and these were not a priority for the consumers in Q1 except El. Blankets due to winters in northern hemisphere

Decline in El. Cosmetics is due to saturation and legislation & El. Stimulation is due to market saturation





Source: Market Intelligence Sales Tracking Period Apr 2025 –Mar 2026 Global GfK Panelmarket excluding North America, Russia Categories : El. Cosmetics, El. Stimulation, El. Massage, El., Blankets
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Among small appliances; volume-wise personal care /wellness categories overindex on share of sales via online channel

Source: Market intelligence Sales tracking period Apr 24-Mar 25 vs Apr 25 – Mar 26 Categories:Shavers, Shaver Accessories , El. Male Sys Blades, Hair Dryers, Hair Stylers, Hair Clippers, El. Cosmetcs, El. Stimulation, Massage, El. Blankets
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Retail is evolving fast

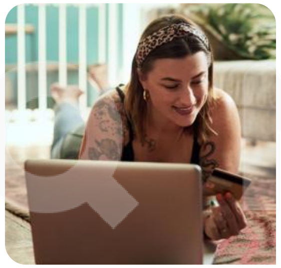
Consumers curate their own path to purchase.

In-store

4% of outlets generate 1/3rd of TCG revenue globally

8% online vs. 3% of offline TCG revenue growth globally

E - commerce



Social commerce

18% of consumers purchased directly through TikTok shop

16% of consumers use quick delivery (<30mins) apps frequently

Quick commerce

Source: In notes

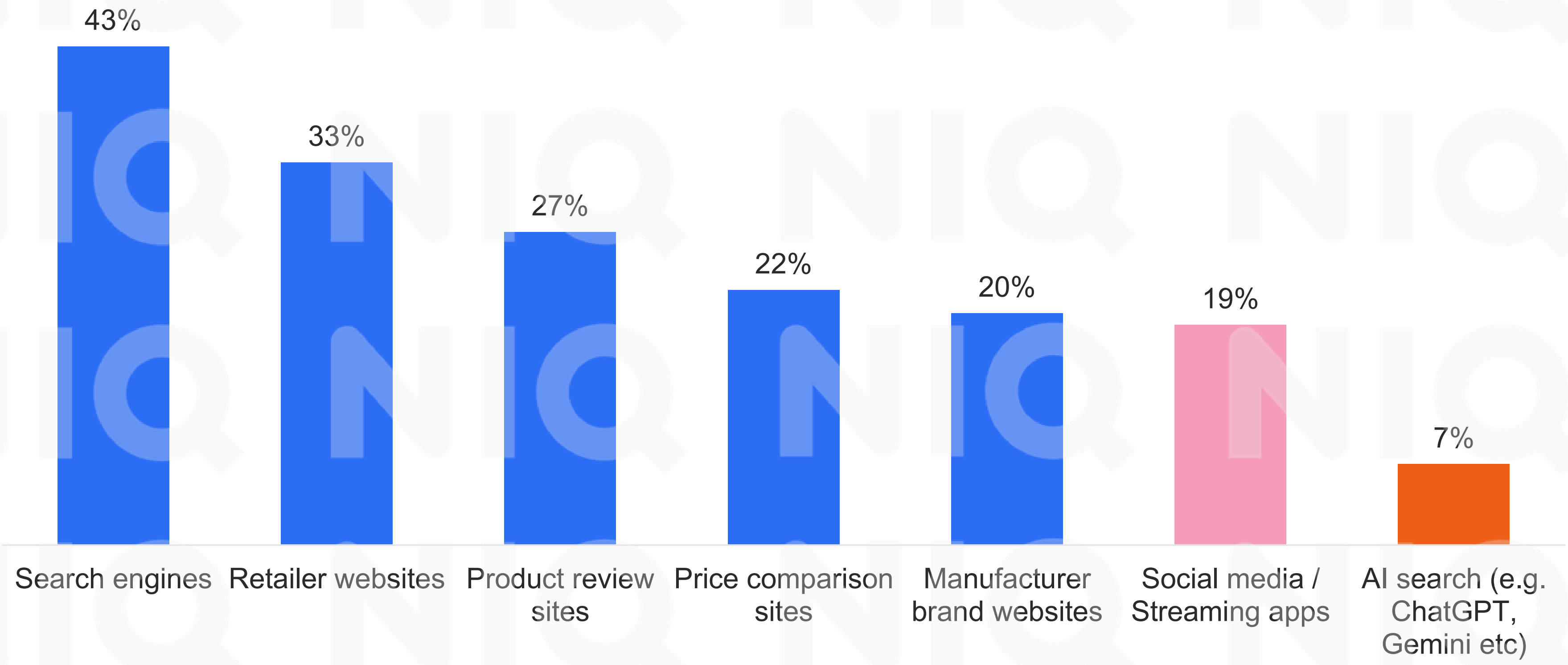
AI is becoming a new shopping touchpoint; its relevance is expected to grow exponentially

While instore research accounts for 32% online touchpoints account for 60% of the research

10%

of Tech & durables consumers used AI search in their purchase journey

Most important touchpoints in purchase journey (**research**) | **SDA2** | Jan-Dec'25 | all countries tracked*

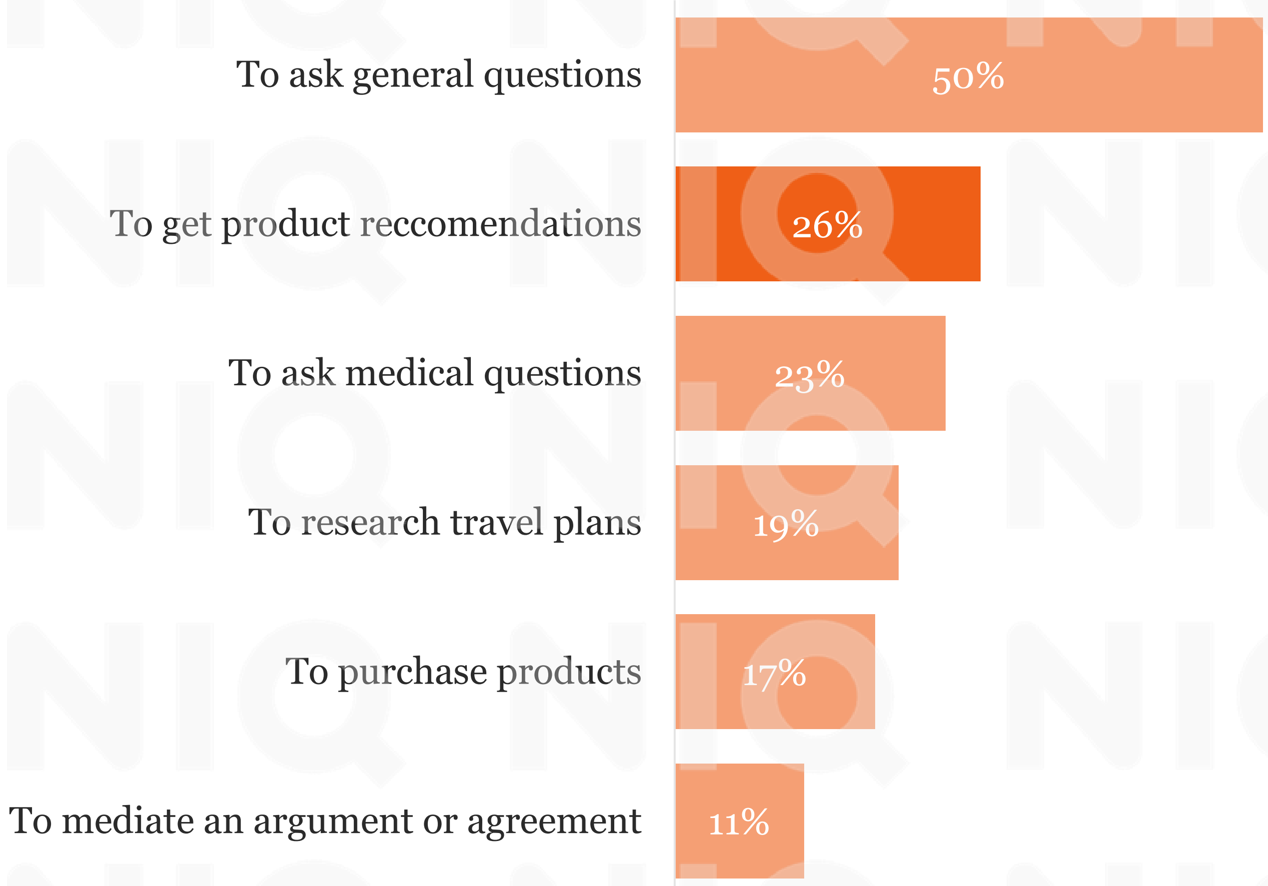


Source: NIQ newron consumer; Most important touchpoints in purchase journey (research) | *France Germany Italy Japan Spain Great Britain Categories: Hair Dryer/Styler, Shavers SDA Beauty and Wellness – May 2026-NF

How are consumers using GenAI?

Consumers are turning to chatbots for advice on their products and routines – taking the control away from brands and retailers

Q. Have you used Generative AI (e.g. Chat GPT, Gemini, Copilot) for any of the following?



49% of have gotten ***Beauty Products*** recommendations from Gen AI

Source: NielsenIQ LLM Survey US – Base: 1021 SDA Beauty and Wellness – May 2026-NF

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Social commerce driving discoverability.. and sales

Influence, validation and conversion all in a single app as purchase paths adapt

53% of global consumers say they have purchased a product **directly through social media**

32%	35%	56%	66%	70%	100%
North America & West Europe	*Eastern Europe*	*Latin America*	*Asia Pacific*	*Middle East Africa*	*China*

WhatsApp	Facebook Shop	TikTok Shop	Instagram	YouTube
25%	25%	22%	20%	14%

Source: NielsenIQ Consumer Outlook 2025 | Q. Have you ever purchased a product directly through any of these social media platforms? SDA Beauty and Wellness – May 2026-NF

The new trusted advisors are increasing online and peer-led

Smaller influencers are shifting Douyin livestreaming towards a more strategic model matrix

Key Opinion Leaders (KOLs) are trusted, well-respected influencers with proven expertise in a particular field

Key Opinion Consumers (KOCs) are amateur enthusiasts in a certain field, but has greater decision-making influences among users on livestreams and can drive the purchasing behaviour of other potential consumers

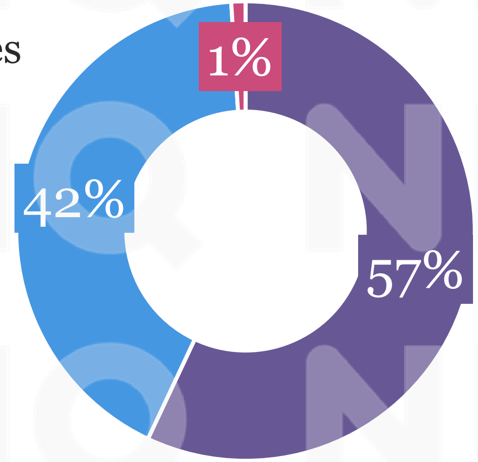
Influencer Livestream Sales by Sales Type

KOC: +2%

Sales Shares vs YA

***2.4** units sold per audience*

Long Tail



KOL: -2%

Sales Shares vs YA

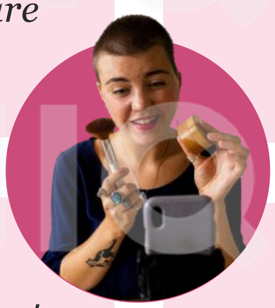
***1.0** units sold per audience*

Cost Efficiency

KOC collaboration costs are relatively low, with more controllable ROI

High Trust Level

Stronger influence within specific circles



High Trust Level

Consumers are more likely to accept opinions from peers

Better Conversion

Stronger loyalty, better conversion effects

Source: NielsenIQ eCom Panel MAT202506 SDA Beauty and Wellness – May 2026-NF

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