

US Mid Year State of Beauty 2026



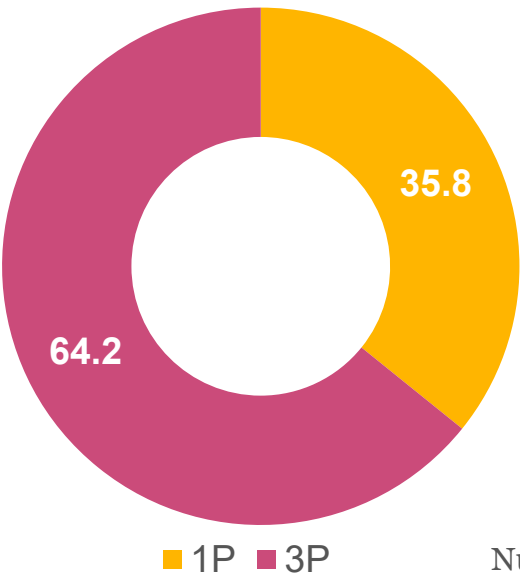
The U.S. beauty and personal care market remains remarkably resilient, reaching \$123.3B in sales and growing +12.0% year over year, with online growth significantly outpacing in-store performance.

In-Store	Online	Total Beauty and Personal Care
\$66.9B	\$56.4B	\$123.3B
+3.9%	+23.3%	+12.0%

Source: NielsenIQ POD Omnishopper Panel Total US L52 week ending 7/11/2026 vs YA.Dollar percent change

Amazon 3P accounts for almost 2/3rd of Total Amazon Beauty Sales. It is crucial to have line of sight to this market to capture the true full view of Beauty

\$ Share – Total Beauty 



■ 1P ■ 3P

Amazon 3P – Total Beauty

\$25B Sales

+31% \$ % Chg

2,958

Number of Beauty Brands on Amazon 3P with \$1M Sales vs 636 for 1P

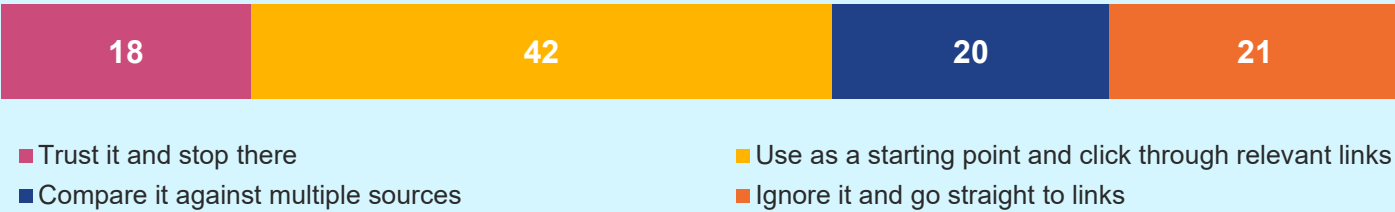
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Consumers are increasingly embracing GenAI as a shopping companion, but they still want to remain in control and validate AI-generated recommendations before making purchase decisions.

Trend Spotlight: Beauty AI a new beauty discovery layer

Behavior after reading an AI-generated summary on a search engine



Consumers are divided in their interest in having GenAI assist while shopping, with 24% strongly opposed

Interest in having a GenAI agent help you research and purchase a product?

