NielsenIQ

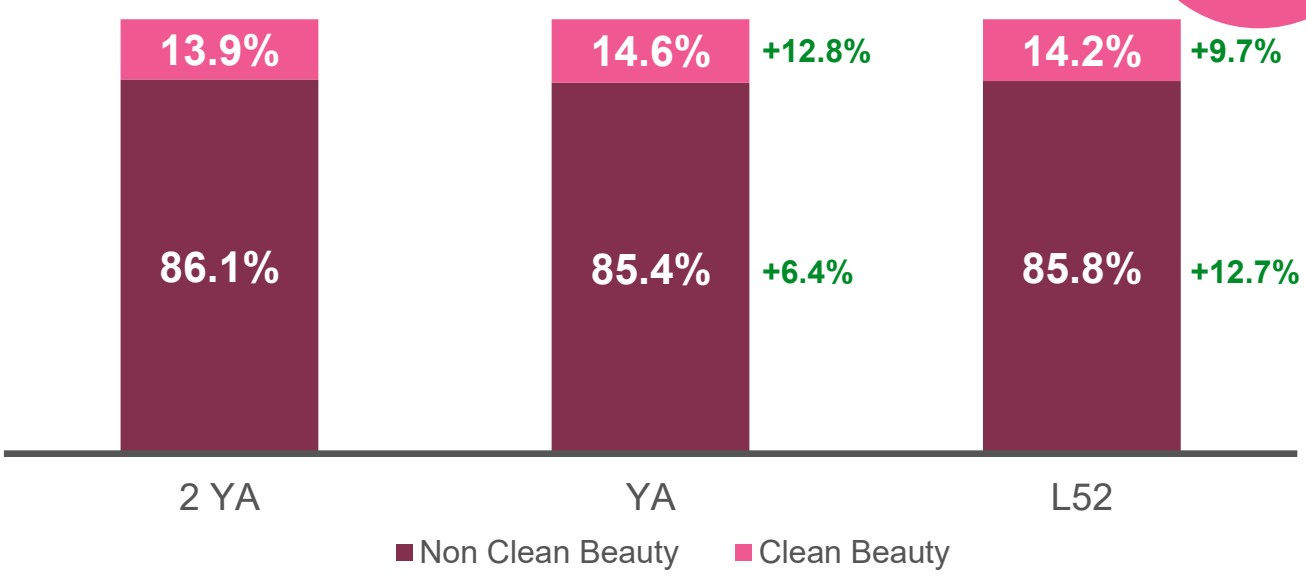
US Clean & Sustainable Beauty 2026



Clean Beauty Sales have stabilized at about 14% of all beauty sales, around $17.8B, a substantial portion, but no longer the growth driver that it has been in the past

$17.8B
Clean Beauty

Clean Beauty dollar share



Who is the Clean Beauty buyer?

4+ member household

High income

Aged 25-44

Kids in household

Hispanic

Clean "free from" attributes are softening as consumers are increasingly looking for the addition of key ingredients in products

+4.5%
Free from Phthalates

+3.2%
Free from Parabens

+2.7%
Free from Sulfates

Source: NielsenIQ Omnishopper Panel Total US 52 weeks ending 08/08/2026. Source: NielsenIQ RMS Total US xAOC Latest 52 weeks ending 8/8/2026 NPI

NielsenIQ

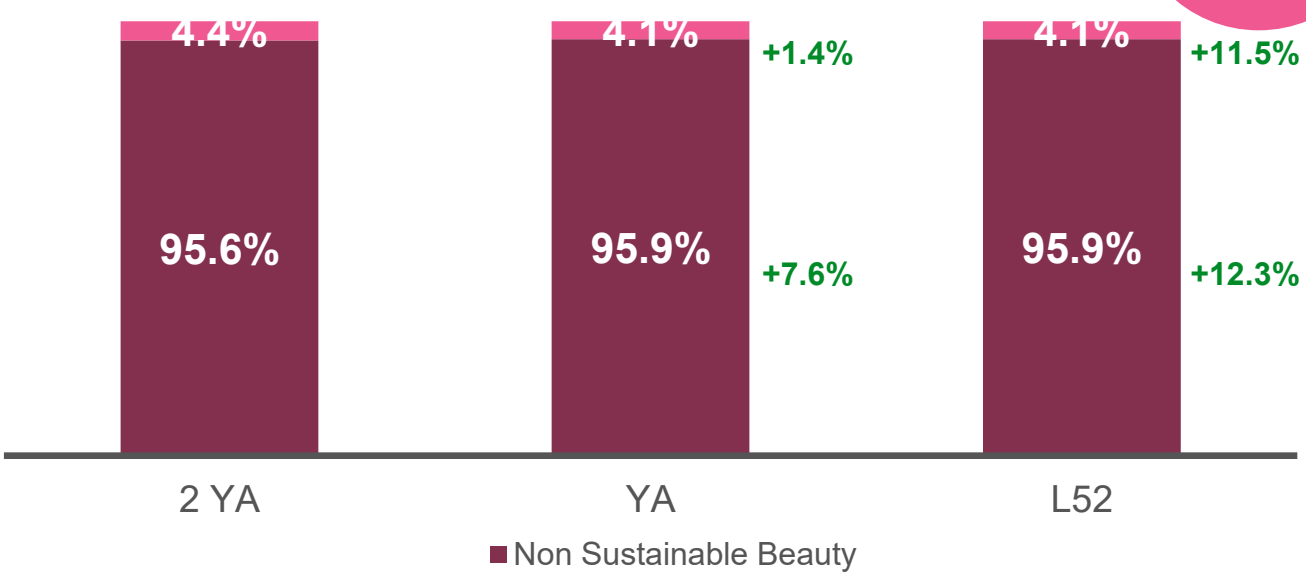
US Clean & Sustainable Beauty 2026



Sustainable products show potential as capturing a new wave of ethically-mined consumers, though growth is modest.

$5.1B
Sustainable Beauty

Sustainable Beauty dollar share



Who is the Sustainable Beauty buyer?

5+ member household	High income	Aged 25-44
Kids in household	Hispanic	Asian

Sustainable attributes are outpacing clean "free from" attributes

+12.4% B Corp	**+6.6%** Cruelty Free	**+6.4%** Sustainability Certified

Source: NielsenIQ Omnishopper Panel Total US 52 weeks ending 08/08/2026. Source: NielsenIQ RMS Total US xAOC Latest 52 weeks ending 8/8/2026 NPI

NielsenIQ

US Clean & Sustainable Beauty 2026



Appendix

Clean Beauty Definition

- Data is pulled using NielsenIQ Omnishopper Panel unless otherwise noted
- The definition is brand based by brand positioning, using the total brand in each instance
- Brands were chosen based on their inclusion in “clean” retailer programs for Ulta, Sephora, Target, and Credo

Sustainable Beauty Definition

- Data is pulled using NielsenIQ Omnishopper Panel unless otherwise noted
- The definition is brand based by brand positioning, using the total brand in each instance
- Brands were chosen based on their inclusion in “sustainable” retailer programs for Ulta, Sephora, and Credo
- Mass Brands were chosen based on if 60% of their total dollar sales came from at least 3 of the following label insights sustainability characteristics: Environmental, Social, Animal, or Packaging