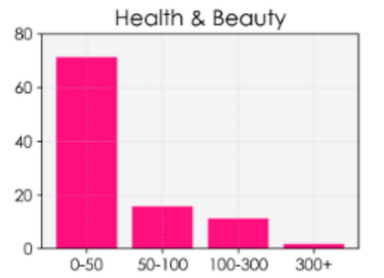
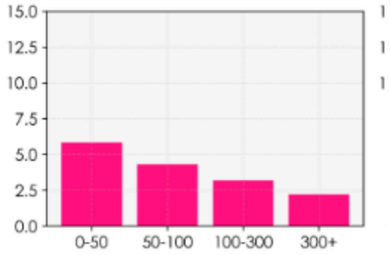
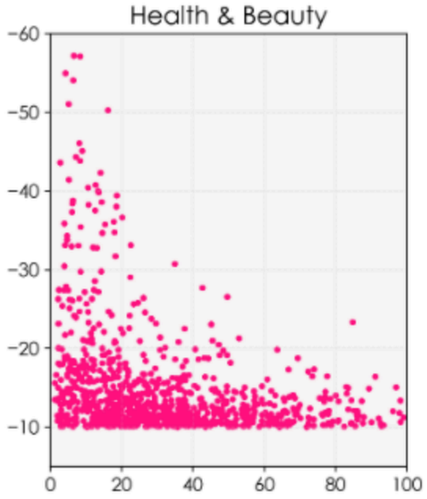
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Holiday Pricing Report 2026: Beauty and Wellness

Pricing data, trends and forecasts for Europe and the US

✦ KEY FINDINGS

Beauty is the treat shoppers keep

UK shoppers cut back on clothes this summer but spent 5.6% more on health & beauty.

Gifts get bought in November

42% of Dutch fragrance buyers at Black Friday are already shopping for December.

Black Week borrows from Christmas

Deals pull gift demand forward and squeeze margin, as Douglas saw last season.

Brands grow, perfumeries pay

L'Oréal's European sales rose 9.9%, while Douglas cut prices and lost 4.5% like-for-like.

Cheap beauty gets the deepest cuts

In Omnia's DE/NL data, 71% of health & beauty sits under €50, where most cuts landed.

Discount claims are under scrutiny

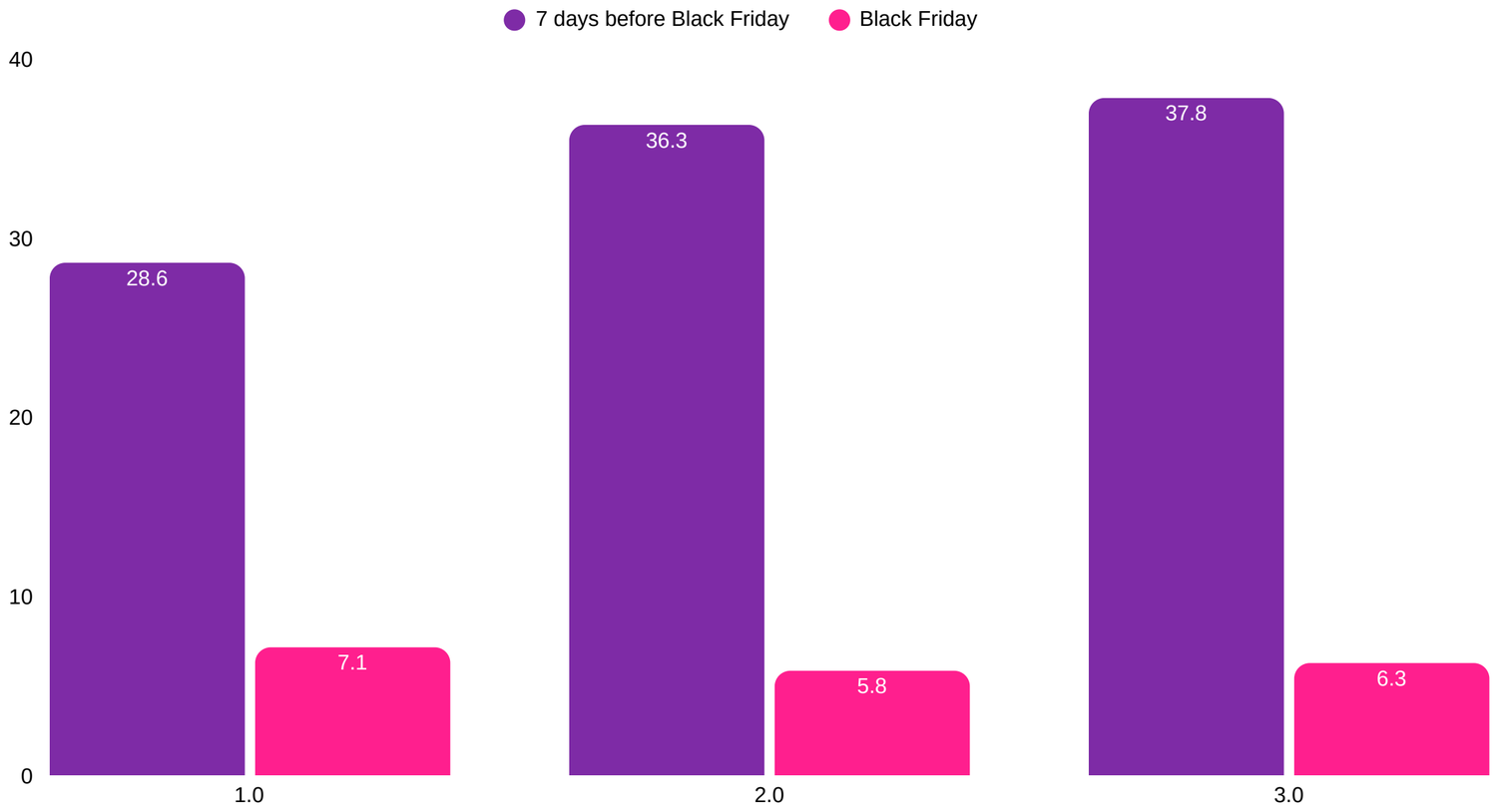
18 of 24 large Dutch sellers checked, across sectors including cosmetics, made misleading price claims.

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Europe Up Close: Netherlands

Dutch shoppers buy their beauty gifts early

iDEAL payments, millions



42%

of fragrance buyers at Black Friday 2025 were shopping for December

+32%

run-up week payments, 2023 to 2025

~40%

of Dutch consumers planned to buy nothing on Black Friday

Sources: iDEAL Black Friday update 2025; NIQ Black Friday survey, Netherlands, 2025

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EUROPE UP CLOSE

Shoppers still buy beauty, but they wait for the deal

GERMANY

€6.2bn

Black Friday and Cyber Monday sales forecast, up almost 6% (HDE)

GERMANY

58%

of shoppers use Black Friday for Christmas shopping (HDE)

GERMANY

–10.4%

sales at online perfumery Parfumdreams, April to June 2026 (Douglas)

UNITED KINGDOM

+5.6%

health & beauty spending, July to September, while fashion fell 4.4% (KPMG)

UNITED KINGDOM

Flat

non-food sales in October, as shoppers waited for Black Friday (BRC)

NETHERLANDS · ACM

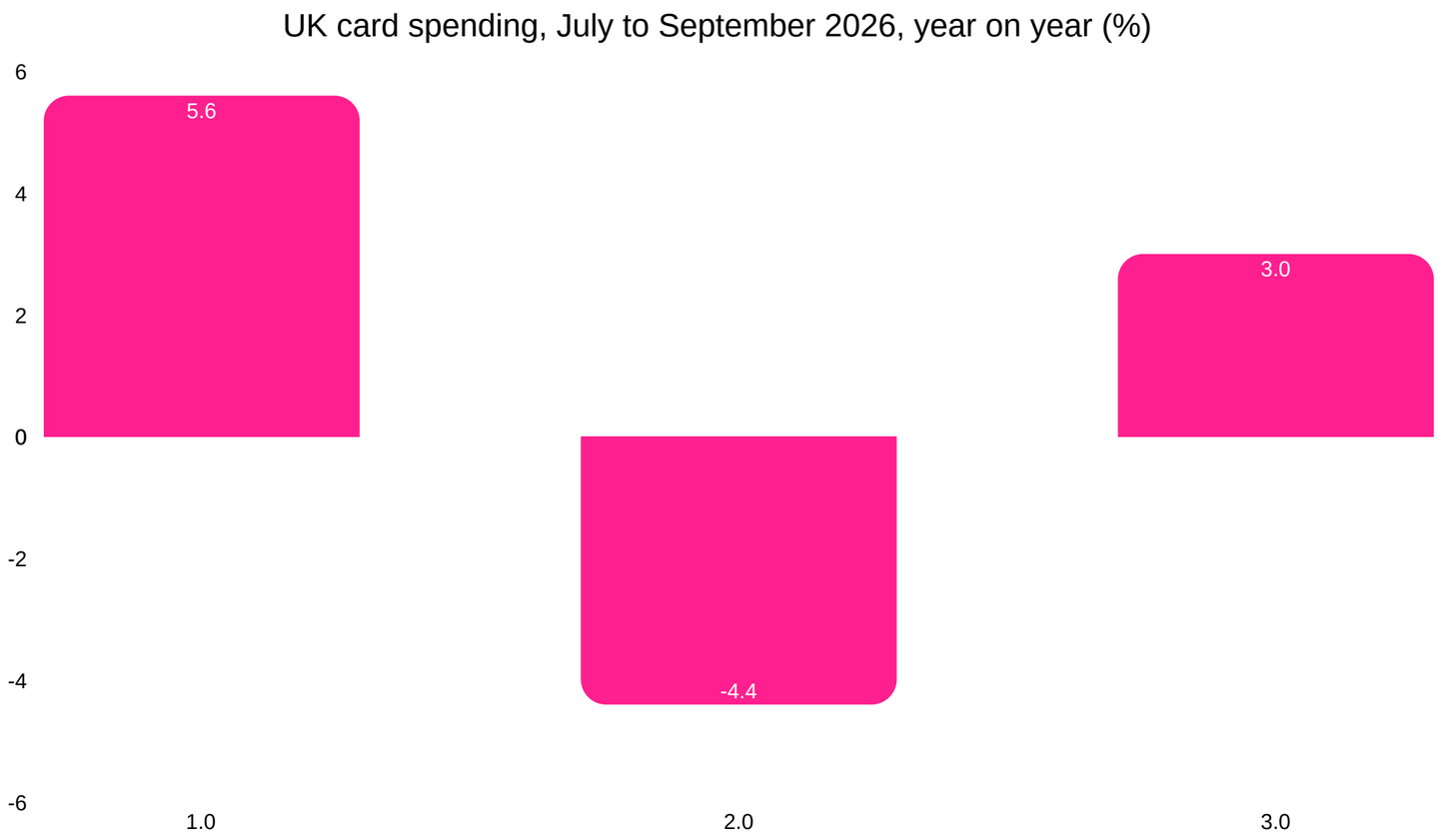
18 of 24

large sellers, across sectors including cosmetics, made misleading discount claims

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Europe Up Close: United Kingdom

Beauty is the treat shoppers keep



+7.9%
average basket

−1.3%
customer numbers

−0.8%
shopping trips per customer: fewer visits, bigger baskets

Spending is going to targeted treatments and specialist care rather than routine top-ups.

Sources: KPMG UK Consumer Spending Report Q3 2026; BRC-KPMG Retail Sales Monitor

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Europe Up Close: Beauty Retailers and Brands

The brands grow, the chains pay for it

Douglas

3.5x

normal Friday web traffic on Black Friday 2025

−4.5%

like-for-like sales, April to June 2026

A.S. Watson

+2.8%

Western Europe comparable store sales, H1 2026, down from 4.6%

+4.9%

Eastern Europe, same period

L'Oréal

+9.9%

Europe like-for-like sales, July to September 2026

Luxe

luxury fragrance and online led the growth

Coty

−5%

EMEA like-for-like sales, July to September 2026

−3%

mass beauty, same period

Sources: Douglas Q1 and Q3 2025/26; CK Hutchison 2026 interim report; L'Oréal Q3 2026 sales; Coty Q1 FY27

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The US

US shoppers buy more beauty online, and trade up

INDICATOR	FIGURE	TYPE
Online cosmetics sales, Nov 1 to Dec 31, 2026	**$9.2bn, +9.5%**	Forecast
Online cosmetics sales, Nov 1 to Dec 31, 2025	**$8.4bn, +9.3%**	Actual
Personal hygiene sales in Cyber Week 2026, vs average September sales	**+150%**	Forecast
Peak online discount, all categories, Cyber Week 2026	**Up to 30% off list**	Forecast
Fragrance sales, 2025 season vs October 2025	**+295%**	Actual
Share of units from the priciest personal care products, 2025 season	**+34%**	Actual

Pink rows: forecasts. Source: Adobe Analytics (2025 recap, 2026 forecast). Adobe publishes no beauty-specific discount figure; the 30% peak covers all categories.

EU/UK vs US

Same gift list, different rules

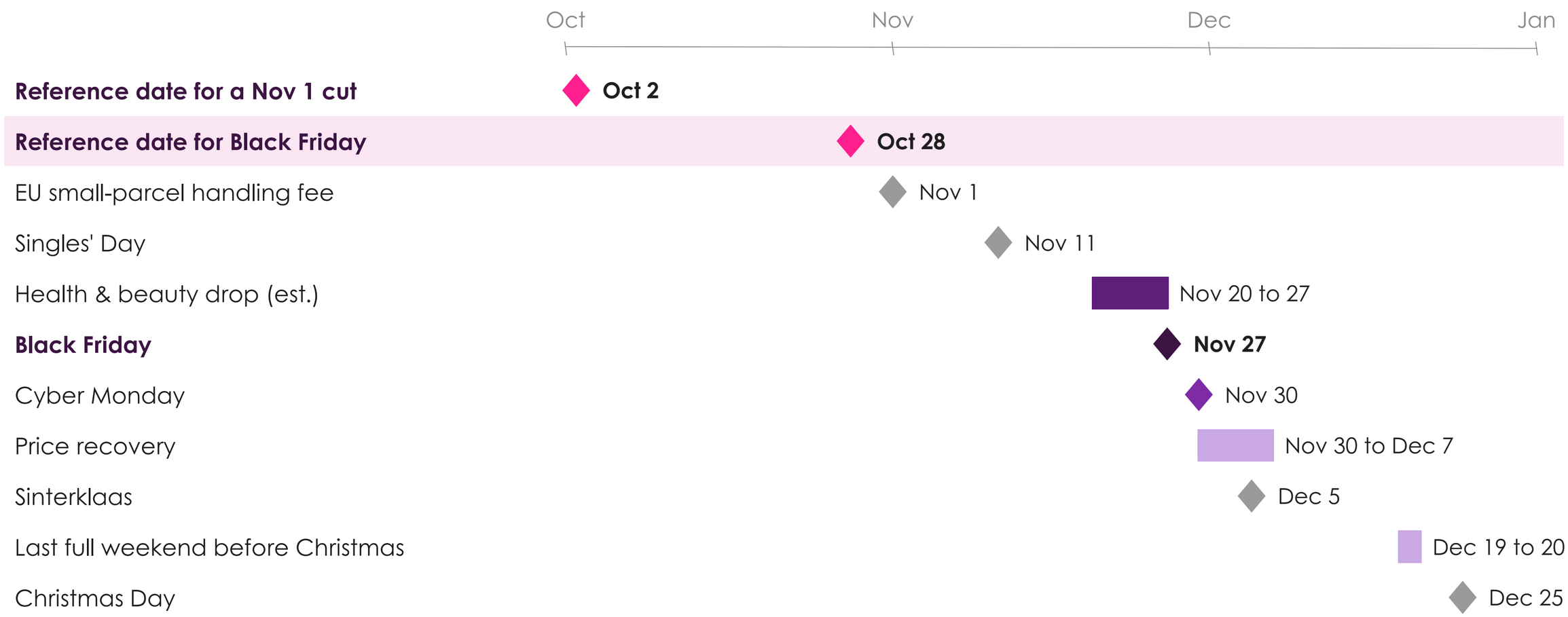
	Netherlands	Germany	UK	US
Beauty signal	42% of fragrance buyers bought ahead for December	Douglas DACHNL sales −5.8% like-for-like, Apr–Jun 2026	Health & beauty spend +5.6%, Jul–Sep 2026	Online cosmetics $9.2bn, +9.5% (forecast)
Peak moment, 2025 (all categories)	Run-up week: 37.8m iDEAL payments vs 6.25m on the day	Black Friday: 48% planned to shop it	Not covered	Cyber Monday: $14.25bn online
2026 outlook	No 2026 forecast yet	€6.2bn Black Friday and Cyber Monday, almost +6% (forecast)	October non-food sales flat ahead of the deals	Online holiday sales $275.1bn, +6.7% (forecast)
Discount rules	**EU 30-day lowest price, enforced by the ACM**	**EU 30-day lowest price**	Outside the EU rule	Not covered

Only the EU ties every discount to a 30-day price history. One global promo calendar risks over-discounting in weak European markets or under-competing in the US.

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Holiday Calendar, Oct 2026 to Jan 2027

Beauty discounts land late



The 30-day window runs back from the day each cut starts. The health & beauty drop is an estimate based on 2025, when prices fell sharply in the final week before Black Friday.

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OMNIA DATA · BLACK FRIDAY ANALYSIS

What Omnia tracked around Black Friday 2025

6 weeks

of daily pricing data around Black Friday

~60k products

tracked daily

3 categories

Consumer Electronics, Sporting Goods, Health & Beauty

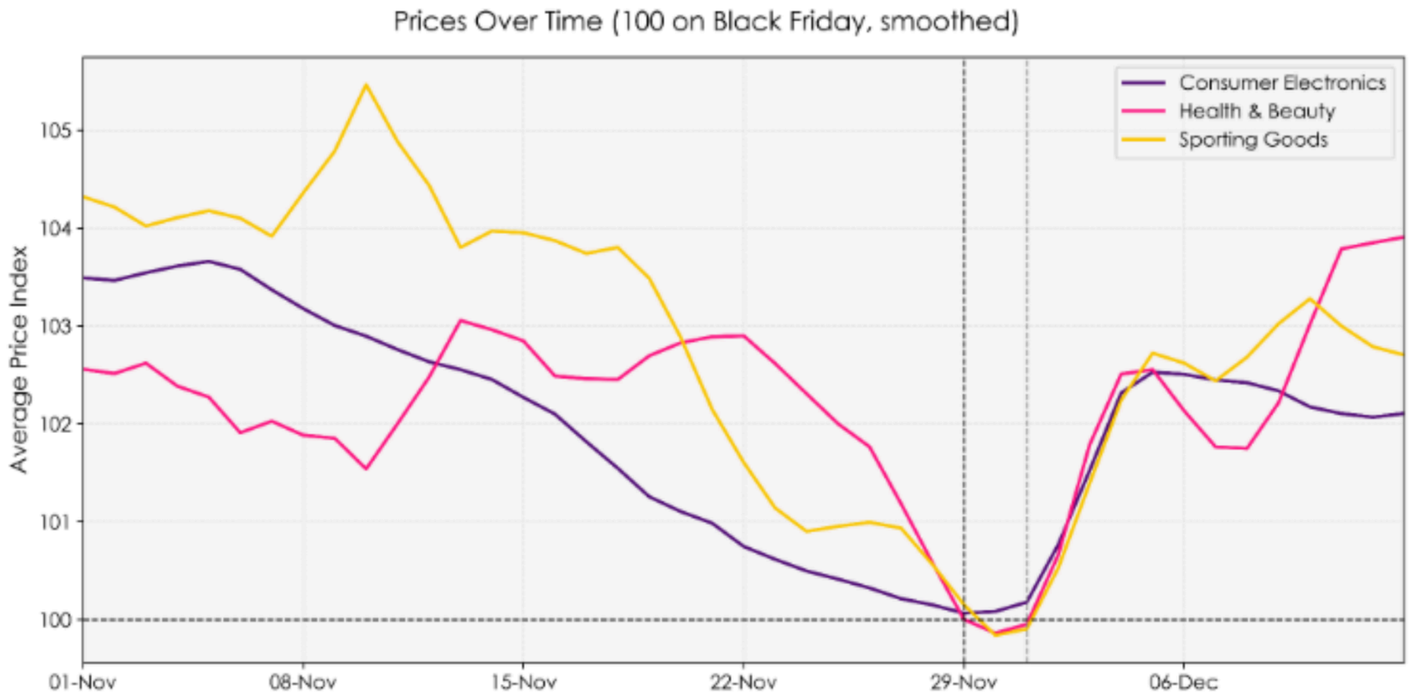
DE + NL

German and Dutch markets

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Black Friday Insights

Beauty held its price until the final week



Health & Beauty

Flat for most of November, sharp drop in the final week, then the fastest rebound.

Consumer Electronics

Earliest and most gradual decline.

Sporting Goods

Prices climb first, peak about a month out, then drop sharply.

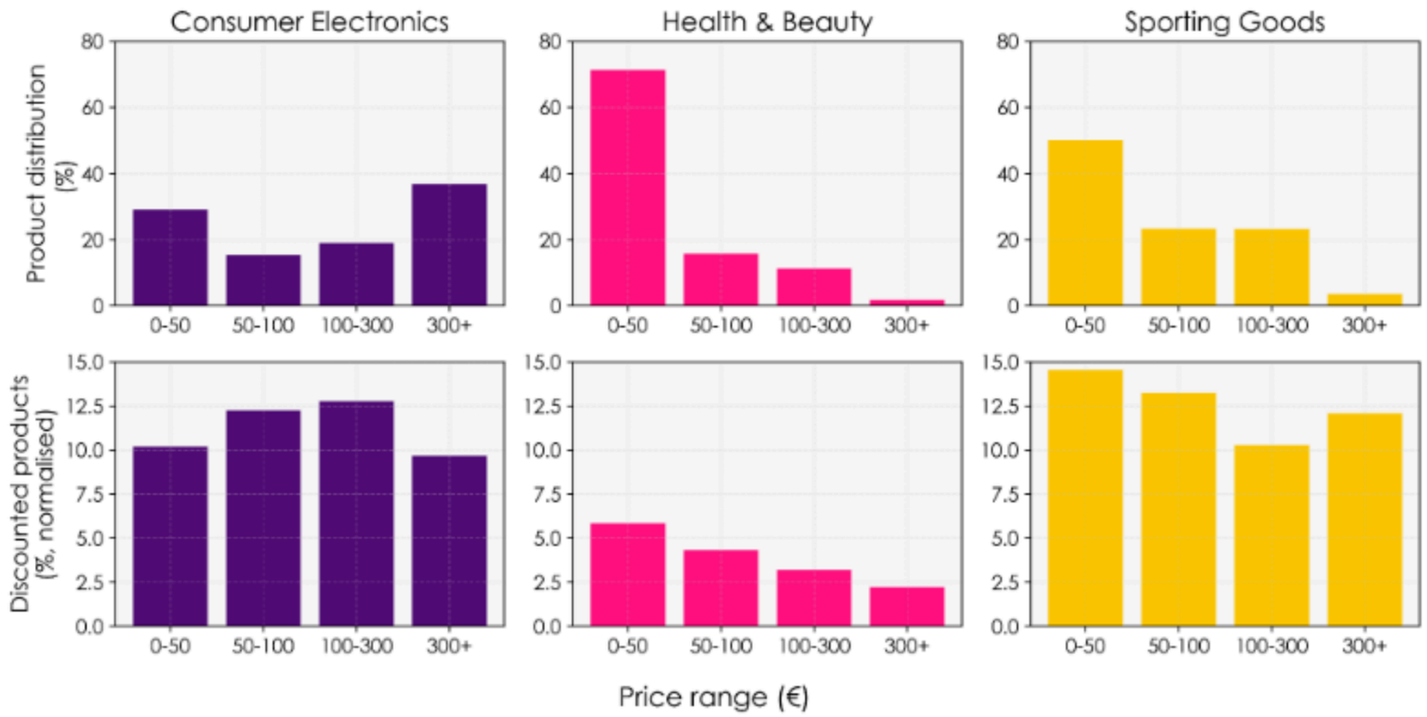
Holding price until the last week keeps the 30-day reference price high.

Average price index, 100 on Black Friday 2025, smoothed. Germany and the Netherlands. Source: Omnia Retail.

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Black Friday Insights

Cheap beauty got cut most



71%

of the health & beauty catalogue sits under €50, and that tier was discounted most often.

~50%

of sporting goods sits under €50, with the same skew.

37%

of consumer electronics sits above €300, with no strong skew once normalised.

Cheaper beauty products were also discounted more deeply.

Top: share of catalogue per price range. Bottom: discounted products, normalised. Black Friday 2025, Germany and the Netherlands.
Source: Omnia Retail.

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Black Friday Insights

Deep cuts happen where nobody compares



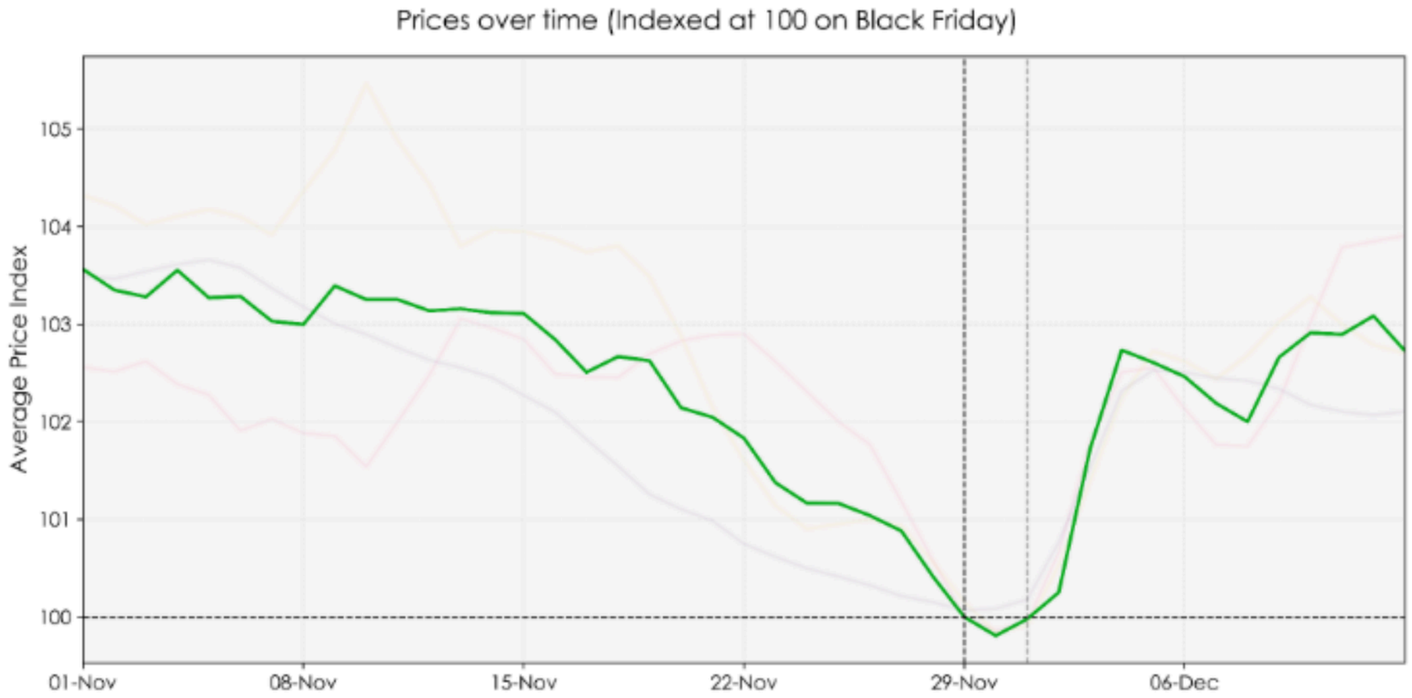
10–20% where products with dozens of competing offers cluster

40–60% cuts appear almost only on products with few competing offers

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Black Friday Insights

Prices slide early and recover within a week



2+ weeks

before Black Friday, prices started moving down across all three categories.

102–103

index level reached within about a week, most of it around Cyber Monday.

Plan the recovery as carefully as the drop: schedule step-backs from Cyber Monday.

Average price index across all three categories, 100 on Black Friday 2025. Source: Omnia Retail.

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Omnichannel and DTC

Who sets the beauty price now

RETAILER WEBSHOPS

3.5x

normal Friday traffic to the Douglas and Nocibé webshops on Black Friday 2025, peaking at 25,000 orders an hour

ONLINE SHARE

~40%

of Douglas sales in Germany, Austria, Switzerland and the Netherlands already happen online

PERSONAL CARE DEVICES

40–50%

discount claims in electronics vs 20–30% in fashion and sports, according to Philips Personal Health

AI ASSISTANTS

+130%

AI-referred clicks to US retail sites forecast by Adobe. Personal care is a top-five category for AI-assisted shopping

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Forecast

Our 2026 beauty & wellness pricing forecast

PREDICTION · OMNIA'S READ	CONFIDENCE	BASED ON
Health & beauty prices hold for most of November, then drop sharply in the final week	**Medium**	Omnia Black Friday 2025 data
The deepest cuts land on products under €50 and lines with few competing sellers	**Medium-high**	Omnia price-tier and competition data
Fragrance and gift sets sell early, pulling demand from December into November	**Medium-high**	NIQ; Douglas Q1; HDE 2026 forecast
Prices recover by about Dec 7	**Medium**	Omnia price index, 2025
Premium perfumery chains in Germany and the Netherlands keep competing on price	**Medium**	Douglas Q3; A.S. Watson H1
Southern and Eastern Europe keep outgrowing Europe's core beauty markets	**Medium**	L'Oréal Q3; A.S. Watson H1; Douglas Q3
UK health & beauty keeps outgrowing other non-food, with fewer, bigger baskets	**Medium**	KPMG Q3; BRC
US online cosmetics sales grow by around 9%	**Medium-high**	Adobe 2026 forecast
More scrutiny of strike-through prices in beauty	**High**	ACM; EU-wide sweep; Boots Ireland guilty plea

Pricing Playbook

Eight steps for beauty brands and retailers

01

Map the 30-day window for every step down

Oct 28 for a Black Friday price, Oct 2 for a cut starting Nov 1.

02

Don't raise prices before the event

A later discount is measured against the lowest price of the 30 days before it.

03

Hold price until the final week

Cutting early builds a lower price history for every later discount.

04

Match the market on heavily compared products

Bestsellers clustered at 10–20% off; going deeper buys little.

05

Use less-compared lines for headline deals

Gift sets, exclusives, own brands and last season's sets.

06

Protect premium with value, not price

Minis, gift-with-purchase and sets keep the hero price intact.

07

Plan the recovery and the second peak

Step back from Cyber Monday, then plan Sinterklaas and Christmas.

08

Make product data agent-readable

Size, ingredients, shade, price per ml, stock and delivery.

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Talk to one of our consultants about dynamic pricing.

Request a demo

Sources: Omnia Retail Black Friday 2025 data, iDEAL, NIQ, Thuiswinkel Markt Monitor, ACM, HDE, Barclays, Sensormatic, JD Sports, On, Dick's Sporting Goods, Adobe, PwC.