

RETAIL-READY PLAYBOOK

The truth about what gets you on the
beauty shelf - and keeps you there.

**BEAUTY
CONNECT**

In Partnership with
> Flixmedia
Because Experience Matters

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EXECUTIVE SUMMARY

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Asking the questions emerging and scaling beauty brands need answered, the Beauty Connect Retail-Ready Playbook pulls back the curtain on the decision-making of today's industry retailers.

We've gathered exclusive intel from leading retailers in our community, surveyed to explore exactly what they're looking for in brand partnerships for 2025 and beyond - from shelf-readiness must-haves and missteps that make buyers think twice, to rising product categories they find hard to ignore.

In an industry that generates \$677 billion in global revenue and is set to grow 3.33% YoY through to 2028 ^[7], beauty brands are competing in a market that demands originality and flair.

Brands outside the top 20 saw sales surge by 6.9% in 2024 ^[2] - proof that the appetite for fresh and innovative players is real. But what is influencing which new brands land on the shelves?

Hear straight from the retailers on how beauty brands can take the guesswork out of their journey and focus on the factors that truly fit the store.



Joanne Murphy
Head of Content
BEAUTY CONNECT

Beauty industry
generating

\$677B

in revenue

Sales for challenger
brands grew by

6.9%

In 2024

OUR RETAIL COMMUNITY



BEAUTYSPACE

bloomingdales



the detox market



Neiman Marcus

NORDSTROM

SEPHORA



Walgreens

Walmart

BEAUTY BREAKOUTS

The secret to growth: Community



Challenger brands like RHODE, MAËLYS, and PHLUR are overtaking heritage names in attracting Gen Z and Alpha shoppers ^[5]. Beyond celebrity sparkle or social buzz, they ranked among the top brands growing through D2C in 2025 for their quality formulas and authentic messaging.

Organic community and social engagement topped the list of retailers' KPIs for identifying a brand with breakout potential. Specific metrics cited were:

follower counts on social media, authentic consumer reviews, trending conversations, and high levels of comments and shares.

Retailers also want to see a founder's passion and expert knowledge, from a history in the category to previous experience with legacy brands.

Other priority KPIs included strong differentiation through innovative, results-driven products, brand collaboration, and distinctive offerings, with lasting impact measured by category growth impact, trend-setting, customer reach, and organic search visibility. **The takeaway: In beauty retail, it's not just standout products or sharp strategy; the essential ingredient is what amplifies both for long-term success.**



MONA KATTAN
FOUNDER & CEO
KAYALI

The founder of community-first brand KAYALI speaking at Beauty Connect LA this year.

WHAT RETAILERS ARE LOOKING FOR



Authenticity is the New Conversion Metric

Authentic content builds shopper trust. Featuring UGCs on retailer sites drives longer page visits and deeper product engagement, effectively turning browsers into buyers.

Source: [Flixmedia]

RETAIL READINESS

The non-negotiables for mid-sized brands

These are the non-negotiables for beauty brands beyond the breakout stage. Retail entry demands more than traction, as retailers look for proof you can scale with consistent results.



High Fulfilment & Local Distribution

Tight local distribution and fulfilment rates are dealbreakers. One in three retailers want to see products landed in the US, supported by local warehousing, inventory availability across a full range, and streamlined delivery. Operational readiness can be a make or break.

Highlight: John Paul Mitchell Systems relocated its HQ, opening a global product distribution center to meet retail demand.

Quality Ingredients

Nearly half say 'science-backed' formulas that deliver results are vital, consistently focusing on the ingredients lists of efficacy-based launches. Confirming the trend in beauty retail, consumers are prioritising high-performing products that solve key concerns ^[1].

Highlight: Martha Stewart using the backing of 350 dermatologists to validate claims behind her Elm Biosciences skincare line.

Organic D2C Traffic

A loyal community and high social engagement is a top non-negotiable for mid-sized brands to hit the shelves.

Highlight: Rare Beauty's dedicated social media community of around 11 million, focused around inclusive beauty matters and mental health advocacy.

Consider the Impact of Authentic, Enriched Brand Content on Retailer PDPs

Pages featuring authentic, enriched brand content have demonstrated:

+4.9% average increase in revenue
+3.3% uplift in sales conversion
+5.2% increase in average order value (AOV) ^[8]

POLISHING YOUR PITCH



Common mistakes beauty brands make in retail



45%

TOO BROAD, TOO EARLY

Nearly half of retailer respondents said broadening distribution too early can hinder your success. It risks fuelling price wars, weakening buyer relationships, and diluting the point of difference that first drew the buyers in.

Interestingly, existing in-store presence was rated as the least important signal of a brand's retail readiness - proof bigger isn't always better.



45%

NOT HAVING A CLEAR & PROFITABLE RETAIL BUSINESS PLAN

Thinking too short-term - or too far ahead - can make retailers lose faith in your numbers and your ability to deliver. Show projected sales that prove near-term profitability and a scalable model for steady growth.

By incorporating investments in marketing, sampling, and product development, you demonstrate that your plans have real traction.



30%

LACK OF OPERATIONAL READINESS

Retailers flagged brands that can't dedicate enough resources to support in-store launches - whether it's productivity, inventory, advertising budget, or production capacity. Without these, scaling becomes risky.

OTHER RED FLAGS

- ▶ Comparing your brand to competitors in the pitch
- ▶ Ignoring retailer feedback
- ▶ Expanding product offerings without a clear, core value proposition

SCALING SUCCESSFULLY

From first shelf to full rollout – your path to nationwide and beyond.

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Show you can translate buzz into consistent sales. 100% of our survey respondents ranked proven product demand as the ‘most important’ signal for being ready to scale in retail, with receipts on repeat purchase rates, sell-out drops, growing order volumes, and waitlists all crucial for moving forward in your journey.

Highlight: Beyoncé’s Cécred securing 2M paying customers and a 100K+ waitlist for its Restoring Hair & Edge Drops. On launch at Ulta, sales doubled forecast in a single day - showing how verifiable demand builds retailer confidence and accelerates rollouts.

THE MOST IMPORTANT SIGNALS TO SHOW YOU’RE READY TO SCALE IN RETAIL

Social and eCommerce now drive more than 50% of beauty sales globally ^[9]

Analytics captured from syndicated content can help brands demonstrate proven sell-through and repeat-purchase trends, crucial data for retailer confidence.



Proven
Product
Demand

Stable & Scalable
Supply Chain

Strong Operational
Infrastructure

Experienced Leadership & Team

Effective Marketing for In-Store Traffic

Healthy Retail Margins & Promotional Flexibility

Compelling In-Store Presence

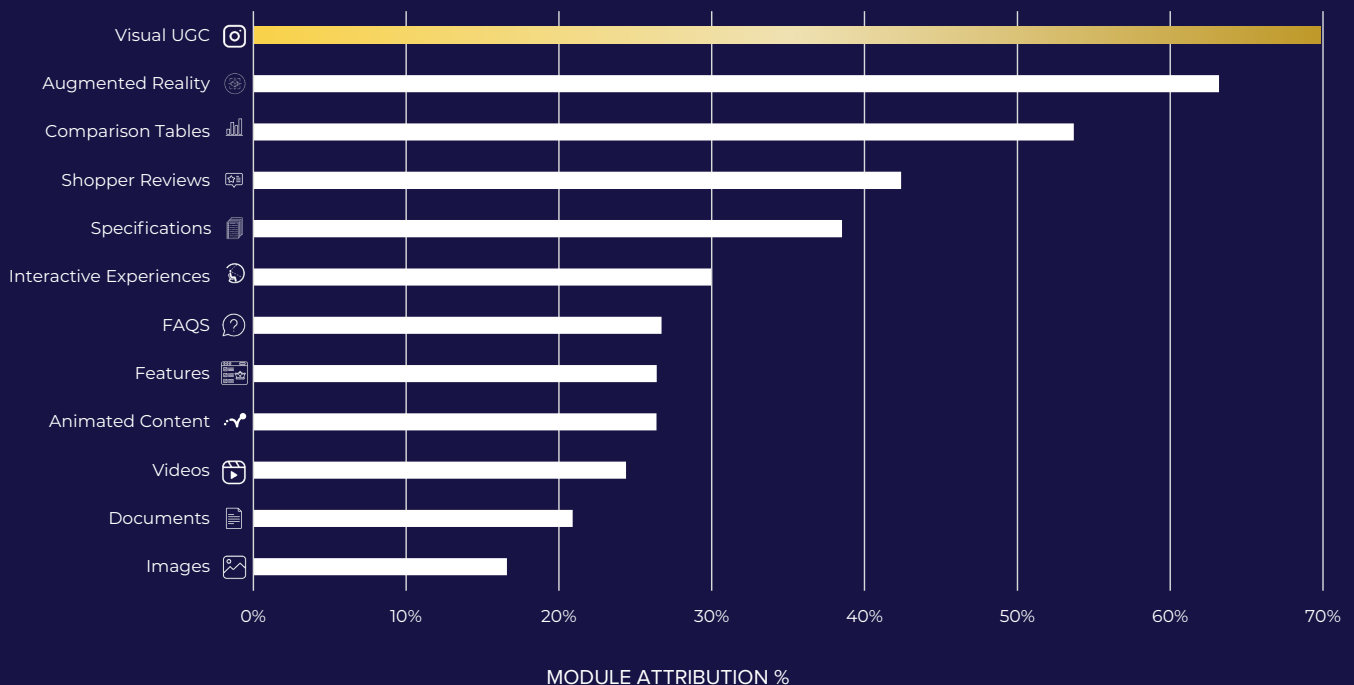


INSIGHTS FOR ACCELERATING DIGITAL SHELF PERFORMANCE THROUGH THE RETAILER CHANNEL



While disruptive platforms like Amazon and TikTok capture the spotlight, the online retailer channel remains one of the most powerful environments to gather actionable data and build genuine engagement. Based on Flixmedia's insights from over 1 billion shoppers, the following findings show how brands can drive higher Add-to-Cart (ATC) rates and prepare for success across all products and markets.

ADD-TO-CART RATE ATTRIBUTION BY CONTENT TYPE



TRUST SELLS: UGCs DRIVE THE STRONGEST CONVERSION AND ENGAGEMENT

Across brands, UGCs consistently have the strongest influence on Add-to-Cart (ATC) behaviour among all content types, with reviews ranking as the next most powerful driver. When UGC was added to PDPs, scroll depth rose +11% and dwell time +6%, suggesting shoppers explore further after engaging with social proof.



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INSIGHTS FOR ACCELERATING DIGITAL SHELF PERFORMANCE THROUGH THE RETAILER CHANNEL

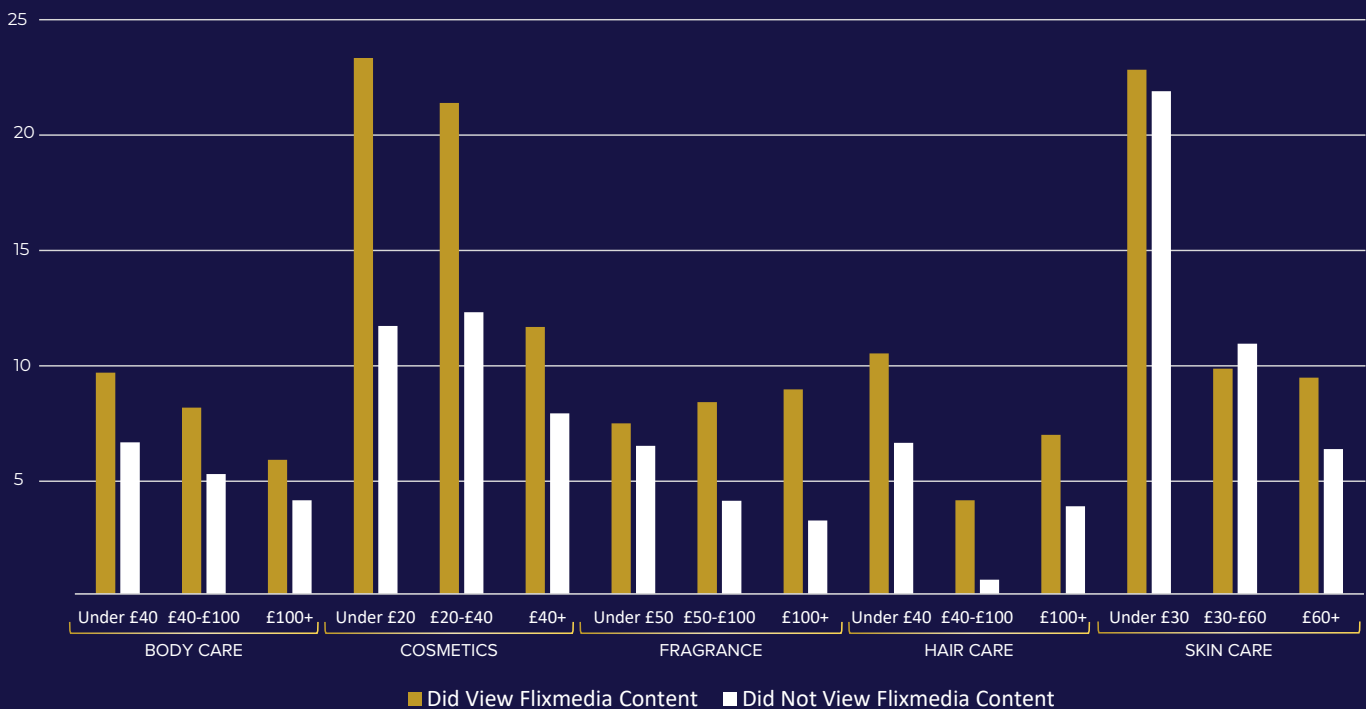


PREMIUM-PRICED PRODUCT PDPS ENRICHED WITH RICH CONTENT DELIVER THE HIGHEST ADD-TO-CART UPLIFT

Across beauty categories, premium-priced products enriched with Flixmedia syndicated rich content deliver the highest Add-to-Cart uplift. This underscores the importance of content that builds trust, educates, and connects emotionally to support higher-value purchases.

ADD-TO-CART RATE: VIEWED FLIXMEDIA CONTENT VS DID NOT VIEW FLIXMEDIA CONTENT

BASED ON A 3-MONTH PERIOD



CONTENT KEEPS SHOPPERS COMING BACK

Exposure to rich content builds loyalty:

- 41.9% of shoppers who viewed Flixmedia content made a repeat purchase, compared to just 30% of those who didn't
- Shoppers who viewed Flixmedia content made 1.66 repeat purchases, compared to 1.4 among those who didn't



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THE RETAILER HOTLIST

What categories are beauty retailers buying into for 2025 and beyond?

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SKINCARE

Skincare is the #1 category on beauty retailers' radar, with over half focusing on it in the next 6–12 months. Leaders like **DECIEM**, **Medik8**, and **SkinCeuticals** reflect the demand for high-end, clinical offerings.

K Beauty was mentioned as one to watch, with the sub-category gaining particular momentum with shoppers aged 18-34, thanks to the social buzz of brands like **Beauty of Joseon** and **Laneige** ^[5].

K-Beauty's formula-focused, results-first approach is hitting the sweet spot.

HAIRCARE

The 'scientification' of beauty is reshaping haircare, with retailers naming it a top category for launches and expansions. Amazon flagged 'performance-driven haircare' as a growth trend, reflected in Prime Day sales for brands like **Olaplex**, **Color Wow**, and **Redken** ^[4].

Consumers are also on board: 83% view haircare as affordable ^[1], while breakout areas like scalp care - now a \$15B market ^[6] - are booming, driven by wellness trends and rising demand for solutions to hair loss and dandruff, with Google searches for the latter up 67% YoY ^[6].

HOT PICKS



LED Anti-Aging Tools



GLP-1-Related Products



Gen Z/Alpha Specific Ranges



Sleep Enhancements



Minis & Travel Formats



Clean-Living Products

FRAGRANCE

Fragrance is the #2 category for new launches and expansions, with retailers highlighting extensions into body, hair, and clean lines. Watchlist brands include **Rare Beauty**, **KAYALI**, and **Patrick Ta**. On Amazon Prime Day, fragrance posted the second-highest YoY sales growth after haircare, led by **Lattafa** and **Sol de Janeiro** ^[1]. Affordability is shaping strategies, but both luxury scents and accessible swaps are fueling D2C growth ^[5].

INSIGHTS IN ACTION

In 2024, Ulta shared the drivers behind their Wellness Strategy at Beauty Connect LA. Five years after launching dedicated shopping spaces in 700 stores, the retailer expanded the initiative to almost all 1,400 locations, focusing on educating consumers on the purpose of wellness and tackling misinformation.



TOP 3 KEY TAKEAWAYS



1

PROVEN DEMAND OPENS DOORS

Retailers ranked proven product demand as the #1 sign of readiness.

Action: Show hard evidence - repeat purchase rates, sell-out drops, order growth, and waitlists - in a simple, visual format in your pitch.

2

COMMUNITY IS CURRENCY

A loyal, engaged audience makes you more attractive to buyers.

Action: Foster authentic interactions, user-generated content, and use testimonials to highlight your brand's connection with consumers.

3

SUBSTANCE OVER STYLE

Unique visuals help, but retailers prioritise proven product benefits.

Action: Back claims with clinical data, consumer trial results, or ingredient efficacy studies - then let your packaging reflect your brand personality.

JOIN US IN NOVEMBER

Your retail questions answered LIVE at
Beauty Connect LA

BEAUTY CONNECT

If retail expansion is on your radar, BCLA is where the playbook comes alive. On November 3-5, legacy beauty retailers and category leaders will take the stage to answer your biggest scaling questions in real-time.

Returning for its 9th year at Fairmont Century Plaza, this is where strategy turns into action - key stakeholders will breakdown what it takes to scale in retail.

EVENT HIGHLIGHTS

Starting off this year's agenda on the main stage, **Marissa Galante, Fashion Director, Accessories and Beauty at Bloomingdales** and **Kevin Wong, Vice President of Merchandising of Beauty at Target** will be spilling their secrets on 'The Blueprint for Future-Ready Retail'.

Alison Kohlenstein, Vice President of Merchandising at Ulta Beauty and **Romain Gaillard, Founder & CEO of The Detox Market**, will share how brands should be 'Formulating for Retail Success'.

Later in the afternoon of day 1, a panel discussion on 'Scaling with Soul: Balancing Innovation & Brand Identity', includes exclusive insight from **Cindy Deily, VP of Merchandising, Skincare at Sephora**, on how brands can maintain authenticity in a competitive retail environment.

Michelle LeBlanc, VP of Beauty, Personal Care & Hispanic Center of Excellence at CVS Health, will unpack disruptive 'Longevity & Beauty' trends with leading brands and industry experts.

See full
agenda



Sephora and Flixmedia join the conversation on balancing innovation with authenticity— offering perspectives shaped by their global experience in beauty retail activations.

Flixmedia **SEPHORA**
Because Experience Matters

Meet the Buyers!

In a rare opportunity, brands will be able to ask away at our **Retail & Brand Lunch** on day 2 of our Beauty Connect LA event, hosted by



Marissa Galante Frank
Fashion Director, Accessories & Beauty
bloomingdales



Romain Gaillard
Advisory Board Member, Founder & CEO
the detox market



Noah Rosenblatt
President North America
BEAUTYSPACE



Kevin Wong
Vice President of Merchandising of Beauty
TARGET

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