

Beauty in brief report

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zalando



Beauty, rebalanced.

Welcome to the Zalando 2025 Beauty in Brief report. Drawing on insights from over 52 million customers across Europe, Zalando’s in-house beauty experts analyse key consumer trends and global cultural patterns to predict what’s next.

But to predict what’s next, it’s about understanding what’s now. Exploring five core themes of 2025, the Beauty in Brief report unpacks eight emerging micro trends changing the face of beauty – and, what’s more – the no.1 desire propelling the shift forward.

In 2025, the pursuit of beauty is no longer about perfection – it’s about achieving balance. As digital fatigue and rising stress levels take their toll, consumers are turning to beauty as a tool for inner calm, emotional wellness, and everyday resilience. Quick fixes are no longer sufficient; in their place, there’s a growing interest in rituals that regulate, restore, and empower – designed to benefit not only the skin but also the state of mind.

With summer on the horizon, bioadaptive beauty is becoming essential: products that work with real life – redness, heat, sweat, and all – while supporting individual rhythms and biological needs. Beauty routines are transforming into restorative practices, helping consumers reset their energy, reconnect with themselves, and express who they truly are.

Unpack The Trends Cultivating Balance In 2025 →

“2025 is proving an exciting year for beauty as we see more products and innovative ingredients enter the market to support much deeper needs. By blending inspiration, entertainment and commerce on Zalando, our ambition is to transform how customers engage with beauty. Understanding key cultural patterns is absolutely critical to this, and that’s where our Beauty in Brief report comes in – revealing the biggest emerging trends driving buying habits today and indicating what’s in store to create a calmer tomorrow.”

Virginie Duigou,
Head of Beauty Buying at Zalando


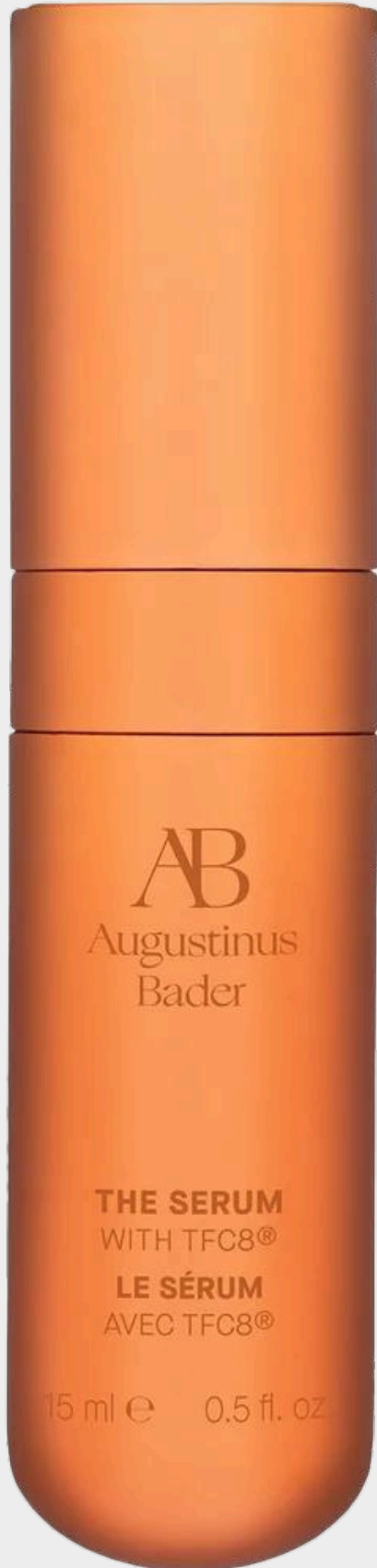
Energy Reset

Following years of digital burnout, emotional overdrive, and post-pandemic hypersensitivity, consumers are seeking beauty rituals that don't energise – instead – they regulate. With chronic stress symptoms on the rise, this emotional wear-and-tear is now visibly manifesting in the skin: sensitivity, dullness, flare-ups, and fatigue.

Here, energy resetting becomes central. Lazy routines, stress-care products, and sensorial beauty regimens will encourage effortless self-care and relaxation. These routines will enable consumers to nourish and restore their bodies without overwhelming their busy lives. By focusing on wellness, regulation and efficiency, the beauty routine is transformed into a healing experience.






	Micro Trend		
	<h1>Lazy Routines</h1>		
	Key Shift	From Complex Routines → To Streamlined Rituals	
	<p>Routines that reduce decision fatigue and time-pressure while offering calming, targeted results are on the rise, seeing #3steproutine trending as an antidote to complex beauty rituals. With searches for ‘minimalist skincare’ up 125%¹ on Zalando, simplified, one-step solutions like ILIA's <u>Super Serum Skin Tint</u> offering coverage, skincare, SPF and glow all in one are expected to spike. Low-maintenance hairstyles adorned with French barrettes and embellished snap clips are also on the up – not only due to their quick-fix chic appeal, but their ability to keep fly-aways and overstimulation at bay.</p> <p>In bodycare, multi-use oil-based products will become staples – with ‘shower oils’ seeing a 164% search increase on Zalando. Hydrating, cleansing and plumping formulas like Sol de Janeiro’s <u>Beja Flor Body Wash</u> infused with cacay oil (a gentle retinol alternative) and squalane will become go-to solutions for streamlined shower routines – perfect for packed summer schedules.</p> <p>¹The percentages shown throughout the report represent an increase in consumer interest tracked by Zalando's Trend Spotter across the last six months.</p>		<div>125%</div> <div>minimalist skincare</div>
	<div>164%</div> <div>oil based products</div>		

	Micro Trend		
	<div>Nervous System Regulation</div>	<div>81%</div> <div>clean perfume</div>	<div>  </div>
	<div>Key Shift</div> <div>From Boosting Energy → To Nervous System Recovery</div>	<div>  </div>	<div> <div>700%</div> <div>calming skincare</div> </div> <div> <div>250%</div> <div>augustinus bader's the serum</div> </div>
	<div> <p>Beauty products that downregulate the nervous system and reduce the body's response to sensory overload are trending. As awareness of stress's impact on skin and overall health grows – with #cortisolface reaching over 6.8k posts on TikTok – cortisol-lowering fragrances, calming skincare rituals, and barrier-restoring serums are aiding relaxation and rejuvenation in 2025. With searches for 'clean perfume' up 81% on Zalando, the Nue Co.'s best-selling <u>Forest Lungs</u> fragrance, for example, contains phytoncides that reduce stress and boost the parasympathetic nervous system. Having a mindful fragrance wardrobe allows consumers to intuitively match scents to their emotional states – whether it's seeking calm, clarity, or a joyful boost.</p> <p>In skincare, 'how I regulate my skin + mind' routines are also gaining more traction with searches for 'calming skincare' up 700% on Zalando. This is seeing formulas like Augustinus Bader's <u>The Serum</u> – up 250% – applied to the face, neck and décollete in gentle movements as part of wind-down evening routines. Containing calming antioxidant-rich ingredients such as rice bran oil and pomegranate seed concentrate, products like The Serum soothe both stressed skin and nerves.</p> </div>		

BioHacking Beauty

Beauty is merging with biohacking. Combined with increasing costs, the post-pandemic boom in at-home beauty treatments is continuing to steer people away from clinics and towards DIY treatments. And with the rise of 'Cosmetic Chemists' on TikTok, consumers are taking science into their own hands. Sleep, in particular, is now a peak optimisation window for reducing stress and turning the skin's biological age back in time. This means taking advantage of the skin's natural recovery cycle at night by using skincare that enhances the process. From hydrogel under eye patches and overnight face masks to scalp oils and aromatherapy pillow mists, science-backed products are booming in beauty.






	Micro Trend		
	<div>Beauty Sleep</div>		<div>  <div>123%</div> <div>scalp serums</div> </div>
	Key Shift	From Passive Rest → To Active Overnight Regeneration	
	<p>Sleep is becoming a biohacking opportunity as routines increasingly blend skincare and sleep rituals. While #SleepingPretty, ‘wake up better’ and ‘unwind with me’ content is taking off on TikTok, searches for overnight masks on Zalando have surged by 264% and scalp serums have spiked 123%.</p> <p>In 2025, expect products like Clinique’s <u>Moisture Surge Overnight Mask</u>, infused with soothing natural ingredients like mango seed butter and aloe vera, to become bedtime biohacking staples. Meanwhile, treatment-focused formulas such as Face D’s <u>Retinol Recovery Night Mask</u> are riding the wave of retinol’s continued reign in nighttime skincare.</p> <p>Scalp care is also growing, with moisturising serums powered by peptides, caffeine, and castor oil like The Ordinary’s <u>Multi-Peptide Serum For Hair Density</u> set to gain even more traction. And as summer inches closer, hydration will only become more crucial in nighttime biohacking beauty routines.</p>		<div> <div>264%</div> <div>overnight masks</div> <div>   </div> </div>





Real Life Beauty

In 2025, beauty is breaking out of the bathroom and showing up where life actually happens – on the street, in the sun, in the gym, during the commute, and across climates. Research shows that consumers are much more intent on wearing SPF daily, and Gen Z in particular are seeking makeup that resists humidity, friction, and stress.

The new standard in beauty? Real skin that lives real lives. Consumers are no longer impressed by polished perfection – they want to see authentic beauty that sweats, scars, flakes, ages, and heals. In 2025, many women feel beauty advertising still sets unrealistic standards. The reaction? A welcome shift towards inclusive, feature-supportive products, not flaw-erasing ones.



	Micro Trend		
	<h1>Life-Proof Formulas</h1>		
	Key Shift	From Performance Beauty → To Performance-Proof Beauty	
	<p>This year, the goal is to look refreshed, not flawless – favouring functional products that fit into real schedules and perform in real life. Beauty formulas built to protect against UV, hold up against humidity, calm skin conditions and support the effects of hormone fluctuations are growing in demand.</p> <p>Known for its calming credentials, Dr. Jart+ searches are up 100% on Zalando. The Korean brand's <u>Cicapair™ Tiger Grass Camo Drop Serum</u> with SPF and a colour correcting formula engineered to calm luteal phase redness and conditions like rosacea, for example, is expected to gain more traction.</p> <p>Meanwhile, clutch-sized, on-the-go products such as <u>Living Proof's Lip Phd Advanced Dry Shampoo</u> and anti-frizz oils like <u>Arkive's The Good Habit Hybrid Oil</u> infused with baobab and jojoba oil are also predicted to see an increase in demand as busy summer schedules and humidity take hold. The aim is to feel put together not perfect – and to do it in under 5 minutes.</p>		<div> <div>  </div> <div>  </div> </div> <div> <div>100%</div> <div>dr. jart+</div> <div>  </div> </div>

Micro Trend			
<h1>Sweat-Compatible Systems</h1>			
Key Shift	From Silence And Stigma → To Strength And Support		
<p>Women are more open than ever about their menopause experiences, with hot flush reactions, perimenopause “what I eat in a day” and menopause skincare content circulating on socials in 2025.</p> <p>This is seeing a rise in tutorials and demand for products designed to withstand heat and sweat while providing hydration and long-lasting, breathable coverage. Starting with a hydrated and nourished base, KORRES’ <u>White Pine Luminous Awakening Moisturiser</u> is enriched with a blend of peptides, lily extract and polysaccharides designed to restore lost moisture and create a youthful appearance during menopause. Its subtle rose tint adds a healthy glow, making it ideal for a natural no-foundation look, or as a base for full-coverage makeup.</p> <p>As for withstanding hot flushes and high outdoor temperatures, TirTir’s viral <u>Cushion Foundation</u> offering 8+ hours of heatproof wear is seeing a 183% search increase on Zalando. Sweat proof and transfer resistant foundations like Charlotte Tilbury’s <u>Airbrush Flawless Foundation</u> are also proving menopause makeup bag musts.</p>			<div><h1>183%</h1><p>cushion foundation</p></div> 

Undetectable Makeup

Key ShiftFrom Flaw-Concealing → To Celebrating Unique Features

Fresh-faced, breathable looks that embrace rather than transform authentic features are continuing to flood FYPs, with searches for ‘light coverage’ up 200% on Zalando. Letting freckles shine through, showing off beauty spots, and keeping contouring to a minimum. The priority is to gently enhance natural features while cancelling out shadows with subtle coverage.

And while bold, full coverage looks are still in favour, natural makeup routines – particularly for daytime outings – are expected to continue down the ‘barely there’ route, but become even more paired back. This could look like pin-point concealing, brow jel in place of mascara, subtle earthy tones around the eyes and using a lip-blush duo stick like RMS Beauty’s LIP2CHEEK balm in Modest for flushed cheeks and the viral ‘kissed lip’ look. Lightly groomed brows with transparent gels like Anastasia Beverly Hills’ Mini Brow Freeze Gel are also set to become staples – offering a natural yet clean finish. The beauty of undetectable makeup? It’s as diverse as the people who wear it.



Comfort in Nostalgia

In 2025, beauty is seeing a return to classic aesthetics, embracing timeless, dependable beauty rituals and products. After years of chaotic trend cycles, TikTok makeup maximalism, and constantly shifting beauty ideals, a powerful counter-movement has emerged: the quiet return of the classic. Consumers are seeking the stability and confidence that comes with tried-and-tested, iconic looks with many finding comfort in familiar beauty rituals.

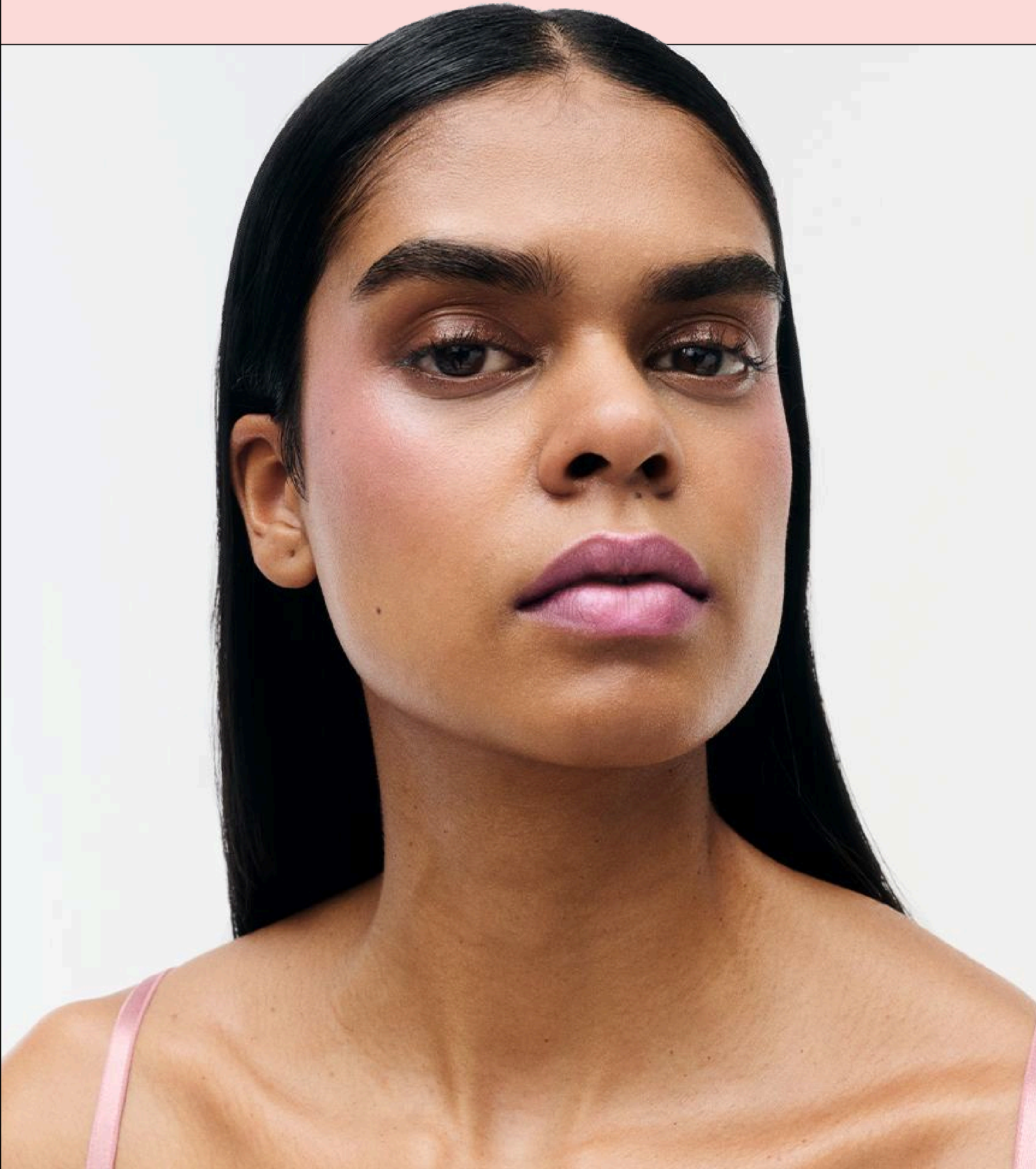
90s minimalism. Milky nails. A center part and a slick bun. These are more than just timeless looks – they’re emotional anchors. They represent visual confidence and reduced decision fatigue. This trend will continue to resonate through 2025 as consumers seek predictability and comfort in their beauty routines.



	Micro Trend			
	<h1>90s Minimalism & Neutrals</h1>		<div><div>133%</div><div>90s minimalism</div></div>	
	Key Shift	From Statement Beauty → To Back-To-Basics Minimalism		
	<p>From nails to hair to brows, minimalist styles iconic of the 90s are making a comeback. Offering reliable, polished, timeless beauty that doesn't ask for attention, but earns it anyway – milky nails, neutral palettes, slicked-back styles, and French tips are enjoying a resurgence.</p> <p>Searches for '90s minimalism' are up 133%, with neutral and brown shadows, up 66% and 77% respectively on Zalando. Nude lips are also seeing a huge 142% spike. This is driving an increased interest in neutral lipsticks like MAC's <u>Glow Play Lip Balm</u> which are predicted to polish off light coverage looks with barely-there eye makeup, and a slick-back bun. As for nails, cloudy varnishes like ESSIE's <u>Gel Couture Polish in Of Corset</u> complete a back-to-basics 90s aesthetic.</p>			<div><div>77%</div><div>brown shadows</div></div> <div><div>143%</div><div>nude lips</div></div>

True Radiance

In 2025, the meaning of ‘glow’ has fundamentally changed. What was once a visual goal – highlighter strobe, all-over shimmer – has evolved into something deeper and calmer. In fact ‘glow’ is a reflection of wellness; as the definition of radiance is more about the calm and balance found within rather than just surface level ‘shine’. This is seeing a rise in K-beauty layering and barrier-first rituals that focus on achieving a natural glow through consistent care – prioritising calm, hydration, and, above all, balance.



	Micro Trend		
	<h1>Glow by Layering</h1>		 <div> <div>248%</div> <div>k beauty</div> </div>
	Key Shift	From Instant Glow Hacks → To Glowing From Within	
	<p>Touted for its innovative ingredients and gentle, step-by-step skincare routines that promote long-term skin health, Korean-inspired beauty is on the rise with searches for 'K beauty' up 248% on Zalando.</p> <p>And while matte skin may be trending, 'dewy skin' is still in the lead, seeing a search term spike of 311% on Zalando. This is also seeing the quiet return of skin cycling – alternating stronger active ingredients like retinol with rest days to give the skin a break and support its natural repair cycle.</p> <p>To achieve this naturally healthy, porcelain-like effect – with 'glass skin' searches also up 232% – beauty enthusiasts are incorporating K-beauty cleansing oils, rice milk toners, and serums like TIRTIR's <u>Ceramic Milk Ampoule</u> into their routines.</p> <p>To polish off the regimen, Sunday Riley's <u>C.E.O. Vitamin C Rich Hydrating Cream</u> nourishes and locks in the benefits of every other step. The aim is to hydrate every layer of skin to create a plump and nourished base that channels glow-from-within vitality.</p>		<div> <div>311%</div> <div>dewy skin</div> </div>  <div> <div>232%</div> <div>glass skin</div> </div> 

On Balance...

In 2025, consumers are carving out a new, healthier relationship with beauty. It's no longer about striving for external perfection – it's about prioritising internal calm. Energy resets, finding comfort in nostalgia, feature-supporting products, DIY biohacking, and rituals shaped to achieve true radiance are helping them get there.

Moving into summer, this reflects a shift towards beauty routines becoming restorative practices that promote overall well-being and authentic self-expression, with consumers expecting products to deliver more than just one benefit. Consumers want beauty that works with their busy lifestyles and biology: helping them not only look their best, but feel their best.

Ultimately, this shift represents an evolution in beauty from providing surface-level fixes to inner confidence – where products don't just change how people look, but how they experience life.



Thank You!

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