

GLAM UP

Annual Beauty Trends Report

Edition 1 - June 2025



Created by



Intelligence Partner
NielsenIQ

About Flipkart

Established in 2007, Flipkart has enabled millions of sellers, merchants, and small businesses to participate in India's digital commerce revolution. With a registered user base of more than **500 million**, Flipkart's marketplace offers over **150 million products** across **80+ categories**.

Today, there are over **1.4 million sellers** on the platform, including Shopsy sellers. With a focus on empowering and delighting every Indian by delivering value through technology and innovation, Flipkart has created thousands of jobs in the ecosystem while empowering generations of entrepreneurs and MSMEs.

Flipkart has launched multiple customer-centric innovations which focus on enhancing digital payment offerings for all customers while making online shopping more accessible and affordable for millions of Indians.

The Flipkart Group is one of India's leading digital commerce entities and includes group companies Flipkart, Myntra, Flipkart Wholesale, Cleartrip and super.money.

About NielsenIQ

NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together the two industry leaders with unparalleled global reach

Today NIQ has operations in **95+ countries** representing **97%** of the **world's GDP**. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms, NIQ delivers the Full View (TM)



About **Glam Up**

Glam Up Fest is Flipkart's flagship beauty event, designed to celebrate and spotlight the vibrant world of Beauty and Personal Care. The fest brings together India's most loved brands, new-age disruptors, and beauty enthusiasts under one digital roof — offering an unmatched mix of selection, savings, and discovery.

More than just a sale, Glam Up Fest is a curated experience that helps customers across India explore trending products, expert recommendations

Exclusive launches in



Skincare



Makeup



Haircare



Personal hygiene

With special value bundles, influencer-led content, and regional brand showcases, the fest is tailored to serve beauty needs across Bharat — from first-time users to beauty-forward GenZs. Through Glam Up Fest, Flipkart reinforces its commitment to making beauty more accessible, inclusive, and enjoyable for all, no matter where they shop from.

And for the first time ever in 2025, Glam Up Fest will also launch the inaugural edition of the Annual Beauty Glam Up Report — an insights fueled take on the trends shaping India's beauty landscape

Key Highlights



Flipkart

2023 GLAM UP

25+



Engagement Zones

500+



Content Pieces

2024 GLAM UP

60+



Engagement Zones

40K+



Content Pieces

1BN+



Impressions Generated

5



Product Launches

1.5K+



Influencer Attendance

Foreword



MANJARI SINGHAL
Vice President

FMCG & General Merchandise



The beauty landscape in India is in the midst of a vibrant transformation — and no one is driving it more than GenZs. Their evolving preferences, digital fluency, and expressive approach to beauty are reshaping the industry as we know it.

At Flipkart, we've always believed in staying close to the consumer. **The Glam Up Trends Report is a reflection of that belief — an effort to listen, understand, & anticipate what beauty means to the next generation.**

This report is the result of a deep, collaborative effort between teams. A special thank you to the InsightsOne team led by Priyanka, and to Kartheek and Aakriti from the Beauty & Personal Care Team for their invaluable contributions.

Foreword



PRIYANKA BHARGAV
Senior Director



Beauty today is bold, expressive, and constantly evolving — and no one captures that spirit quite like GenZ. Whether it's a focus on skin health, a passion for active ingredients, a love for nostalgic aesthetics, or an embrace of hybrid formats, they're redefining the beauty playbook.

The Glam Up Trends Report helps decode this dynamic shift. With rich data, real consumer voices, and cultural context, it highlights what's truly resonating. Trends like **Hydration Daze**, **Scientific Obsession**, **kiSKIN**, and **Cherry Cherry Lady** go beyond surface appeal — they reflect how young India is engaging with beauty in deeper, more expressive ways.

This report is the result of thoughtful collaboration between Flipkart Insights Team with Beauty Personal Care team and our intelligence partner, NielsenIQ. Kejal and Ankur from InsightsOne team - your collaboration and enthusiasm was instrumental in shaping this narrative.

We hope this report sparks fresh thinking, challenges conventions, and inspires the next wave of beauty innovation.

Foreword



ROOSEVELT D'SOUZA

Head of Customer Success -
FMCG, India

NielsenIQ

India is emerging as the world's fastest-growing market for beauty products. At an All-India level, the beauty market is growing faster than FMCG, driven by price growth of **5.4%** compared to 0.3% for FMCG as of MAT September 2024. This trend is mirrored in urban markets, where beauty categories are growing at **8.4%** during the same period.

While mainstream and mass segments hold more than **50%** of beauty sales in MAT September 2024, **premium+** (premium, super premium, and luxury) is growing at **11%**, contributing **43%** to overall beauty sales. Skincare is the largest contributor within premium+, accounting for **35%** of sales, followed by shampoo at **27%**.

India's beauty boom is also being driven by the democratization of retail through e-commerce. With offline entry barriers lowering and GenZ consumers more willing to explore new brands, many startups have found success in a market once dominated by a few established names.

India is now the fastest-growing online market globally for beauty products. Beauty e-commerce and quick commerce sales grew by **39%** in value between June–November 2024 compared to the previous year and witnessed **3% growth in offline retail** (physical stores), as per NielsenIQ Market Measurement.

The rise of influencers and beauty bloggers has given niche brands an opportunity to thrive. Indian consumers are increasingly experimenting with new formulations and international trends. The surge in online beauty sales is not just about accessibility—it's about product variety, convenience, and the influence of social media. As of 2024, **17% of Indian consumers purchase beauty products online**, up from **13%** a year ago.

As e-commerce evolves from being just a channel to becoming a growth enabler—and as premium and wellness trends continue to shape the market—India's beauty boom is poised for its next chapter of growth.

The Glam Trail: Your Guide Through the Report



Beauty's Billion-Dollar Bloom

From aisles to algorithms — why beauty is booming like never before.



5 Beauty Buys a Second?!

Flipkart's beauty game is fast, fierce, and absolutely fabulous



Mass to Class

Personal. Premium. Powerful — Flipkart's luxe beauty is growing 70% YoY.



Nuskhe Meet AI

How haldi masks made room for hyaluronic heroes and AI skin scans.



Beauty for Every Birthday

Gen Alpha to GenX — everyone's got a skincare story.



GenZ = The CEO of Beauty

They're not just shoppers. They're trendsetters, testers, and tastemakers.



Trust the Creator, Add to Cart

GenZ doesn't browse — they follow, swipe, and buy straight from their feeds.



Trend Drop 2025: Straight from GenZ's Shelf

Hydration Daze, Scientific Obsession, kiSKIN, Cherry Cherry Lady & more — the trend drops they're loving.



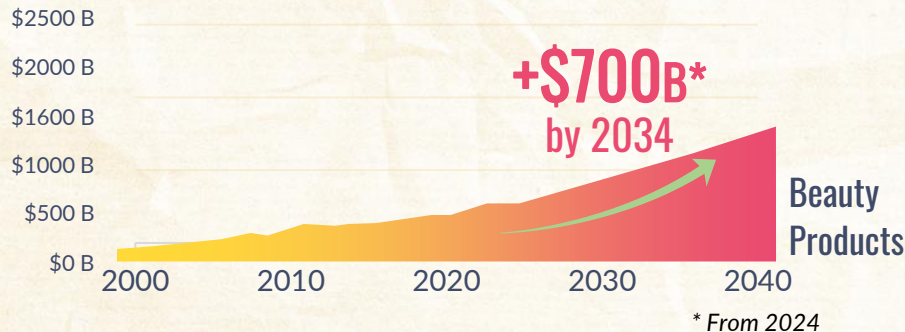
Big Love & Bigger Shoutouts

Cheers to the creators, collaborators, and caffeine-fueled teams behind the magic.

Did You Know? Beauty's Going Billion-Dollar Big – and Fast!

Global Future Forecast

Beauty Market to hit \$ 1 Trillion by 2034



Key growth drivers

- New generational needs
- Newer geographies
- Rising incomes across emerging and established market

Ecommerce drives global growth

with India being the key player
showing ~40% growth YoY



Did you know?

Flipkart sells **5** beauty orders per second

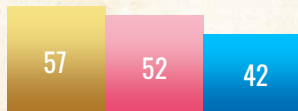
The glow-up never stops. Flipkart's on a roll, Non-stop!

With over **148 million** beauty orders in 2024, Flipkart is at the heart of India's online beauty boom



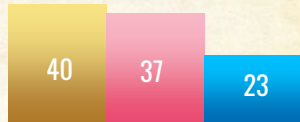
~3 out of **4** FMCG shoppers purchase beauty products online.

► Shopper Penetration%



Beauty Penetration

► Beauty contribution%



Value Cont. in E-comm

■ Skincare ■ Make-up ■ Haircare



India online BPC industry Growing at **~40%** CAGR

Growth Drivers



Increasing affluence

An impressive **8.2%** GDP growth in 2024 keeps India at the forefront of global economies.

Discretionary spends increased by **1.5X** of non-discretionary spends



Democratization of information & expertise - courtesy social media



Growing preference for high quality, premium beauty products



Wider assortment including D2C growth (**36.4%** CAGR)

438 Online exclusive brands with **131%** growth Y-0-Y



Growing Quick Commerce penetration in India

Growing at CAGR of **15.5%**
15-20% of Q-commerce GMV comes from non-food categories within which BPC contributes to **~45%** of GMV



Climate-Driven Beauty Surges

Anti-Pollution & Clean Skincare Grow at **9.5-15.9%** CAGR and is expected to reach a projected revenue of **US\$ 669.4** million by 2030

Big on Beauty Bigger on Premium!

Indians are upgrading
their beauty game - buying

1.5X

more premium products.

And gearing up to
be **one of the top**

10

Luxury beauty
spenders in
the world.

Premium Value



16%

Of color cosmetic
shoppers are
premium buyers



Spends **2 times**
As compared to total
cosmetic shoppers



Contribute to

35% of total value
of the color
cosmetic category



Fuelled by :

More women joining the workforce
Grew by about ~20% in the last 5 years

*Flipkart's premium
beauty & personal care
selection growth is*

70%

GMV year-on-year



8%*
Fragrances

16%*
Hair Oil

2%*
Nail Enamel

1%*

Hair
Conditioner

27%*
Shampoo

9%*
Hair
Dyes

2%*
Lipsticks

35%*
Skincare

**Glam
Up**

Flipkart

Shifting Consumer Attitudes



I prefer
premium products



Prepared to pay more
for things that will
make my life easier



Pay extra to
personalize



Pay more for
Organic

2019 2024

Premium + Beauty** Contribution Growth
43% vs YA of 11%

*Category Contribution to growth

**Beauty = Skincare, haircare & Make-up

Beauty Then vs Now : Nuskhe *meet* Next Gen AI



2009

Turbo Beauty

Brands began gravitating toward **science-backed beauty products**, and customers started prioritizing composition, effectiveness, **expert validation** (Mom, Doctors).

This shift empowered them to make more informed decisions about their beauty routines.

2019

Beauty with a brain

Access Improved – Consumers grew more **knowledgeable, using social media** and digital platforms to educate themselves.

Gharelu Nuskhe gained prominence, DIY masks, & Regimens gained popularity, Influencers played a Key role in breaking down product ingredients and explaining the manufacturing process.

2021

Beauty Eco-lution

Post-pandemic, beauty consumers became more **eco-conscious, valuing sustainability and ethical practices.**

Brands embraced biotechnology, developing bio-identical ingredients and using advanced scientific methods to boost product performance.

2025 onwards....

Beauty AI





GenZ influenced global trends, powered by AI, enabling smarter, more personalized diagnostics and regimens.

Hair Care taking center stage of wellness. **Trend and Ingredient first culture. Hence, rise of D2C**

85% of Indian Customers seek scientific evidence to validate claims of the brands.

These innovations allowed for hyper-precise skincare and hair care and makeup solutions tailored to each individual.

Crack the Code!! Beauty for Every Generation

Boomers	GenX	Millennials	GenZ	Gen Alpha
 Beauty Needs Firmness, hydration, age spots, mature hair	Fine lines, hormonal shifts, stress-related issues	Pigmentation, fatigue, urban stress, early aging	Acne, sensitivity, blue light damage, hyperpigmentation	Gentle, non-toxic, parent approved; fun, safe self-expression
 Routine Simple. Consistent. Trusted actives.	Balanced. Science-backed indulgence.	Active layering, ingredient-conscious, skin cycling, SPF daily	Minimal steps, slugging, barrier repair	Supervised, inspired by role models and YT influencers
 Solution Preference Efficacy > experimentation. Loyal to what works	Functional luxury, wellness fusion, precise solutions.	Ethical, clean, effective; open to new brands/formats	Affordable, aesthetic, multi-use, Social Media-driven	Edutaining, gamified, sensory experiences
 Brand Levers Celebrate age, reward loyalty, luxe feel without the splurges	Tailored offerings, nostalgia with results	Transparency, inclusivity, innovation; value connection over legacy	Novelty, educational content, creator co-creation	Safety, storytelling, fun, genuine — Social media beauty access

Confidence in Care

From "anti-aging" to "pro-aging" with grace



Rediscovering Beauty

From "utility" to "reignited self-care & individuality"



Purpose Meets Performance

From "makeup-first" to "skin-first with social awareness"



Instant, Inclusive, Influenced

From "beauty standard" to "beauty freedom + function"



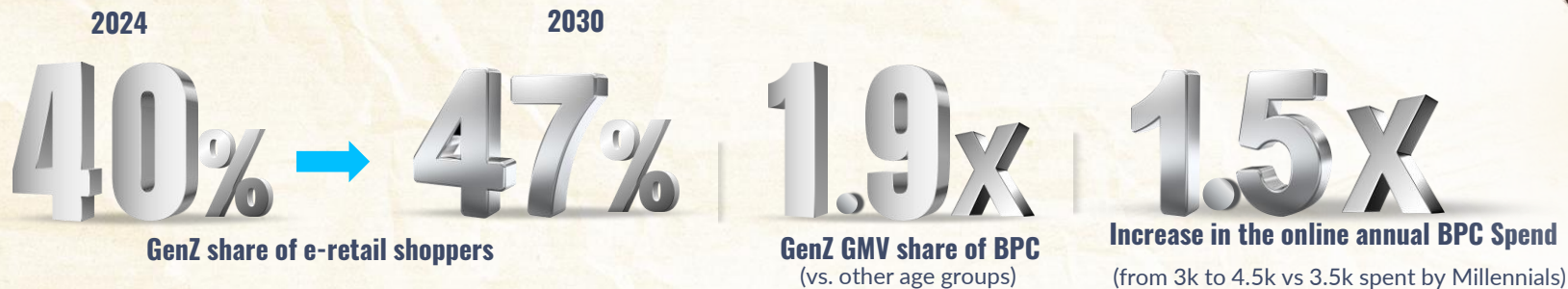
Beauty as Play, Education & Safety

From "first exposure" to "early empowerment + experimentation"



GenZ Isn't Just Shopping They're Running the Show!

Amongst the BPC shoppers, **GenZ** is the Fastest-growing segment



Platform choice

50%

Shop from more than five e-retail apps/platforms

Platform Discovery

0.4%

Scrolls on search results page vs millennials (~3 scrolls by GenZ on the product listings page vs ~7 scrolls by millennials)

Payment

90%

GenZ digital transactors use UPI for payments (vs ~60% for other shoppers)

42%

GenZ use debit card which is 2x higher than average digital transactors

GenZ's **Beauty World**: Where Creators Are Catalogues & Trust is the Checkout



Personality Traits



Excited by what's new; Want to know & explore



Seek to make highly informed choices



Influenced by Social Media



Open to try new things



Trust-first

Shopping Habits



Trend over Brand

Adapt basis new trends in industry or their changing needs



Derive joy & utility from free trials



Creators is the new search

72% Gen-Z search on creator pages while purchasing vs 49% millennials



Platform preference driven by authenticity perception

Caution about Platform or product rises for skin-related purchases



Rely on Recommendations & Research before they buy

Given higher delay in impact of beauty products, engage more in research



GenZ's got **flair** : they search where **creators** style and **share!**

And guess what's smart? Most of these stars are vibing with Flipkart!

70%

GenZ discover new beauty brands on Instagram – vs just **~50%** of others

30%

Shopping Decisions are influenced by creators

Flipkart is launching **Creator Marketplace**, first large-scale video commerce platform in India for Customers and Creators

Now watch Beauty related Videos on FK Play!

1 in every **4** videos on Flipkart Play is beauty-related
Now that's a glow show!

50% of Flipkart creators are all about that glam game!

Flipkart
Play

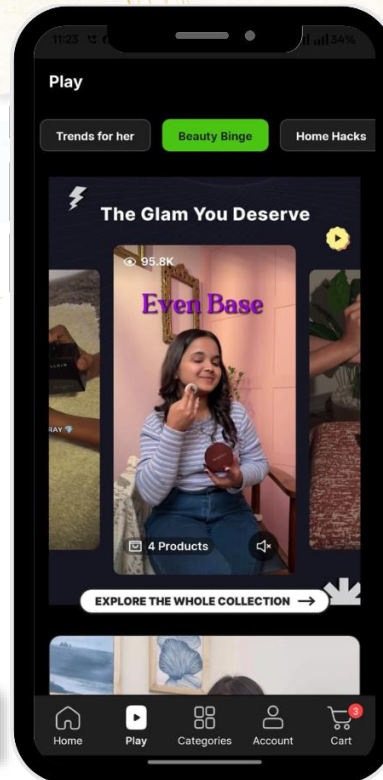
Short form Video

Live Streaming gets huge thumbs-up from GenZ

BPC content is already converting **1.5X** faster vs previous month.

Going live with beauty?
It's buzzing with **150+** interactions per hour!

Live Video



Hype, Hauls & Hacks

What It Takes to Be a GenZ Beauty Hero

1 Over-Index on social media to tap GenZ

Value proposition
Wide, low-priced, trendy assortment

Significant digital spends
Facebook/Instagram ads & paid partnership with influencers

4 Boost fresh assortment and reward usage

Promote assortment newness
("daily new" tabs), and content
(style tips, quizzes)

Rewards for usage
(for reviews, social media hashtags)

Playbook to Scale Across Markets



Trend-first Commerce

2 Offer low-priced hyper-trendy assortment

Daily drops of new styles

Trendspotting from bestsellers of e-retailers, influencer/user-generated content and search trends

3 Leverage tech-enabled, test-to-scale supply

Rapid new style launches at low MOQ enabled by crashing design-to-transit time in asset-light model



Spoiler Alert

**These Trends
Are About to Be
Everywhere**



It's giving **GLAM**, It's giving **GLOW** These GenZ trends are stealing the show



Minimalist, Multi-functional, Hydration-centric skincare routines.

What's driving the theme?

Skinimalism

GenZ is embracing simple, 2-3 step skincare routines with high-performance ingredients.

Products like niacinamide serums, vitamin C moisturizers, and salicylic acid cleansers are replacing lengthy routines, focusing on skin health & ease.

#LessIsMore and **#SkinimalismTrend** posts grew **~35%***, showing rising love for minimal, effective skincare.

Glazed Donut Skin

A trend where skin appears shiny, hydrated, and luminous — like a glazed donut

Indian GenZs use ceramide creams and peptide-rich serums to achieve a glowing, glass-like finish with minimal effort.

#GlazedDonutSkin posts are up **~40%*** as dewy skin dominates beauty reels and content.

Slugging & Skin Cycling

Smart skincare layering routines that give glow with less effort.

GenZs alternate actives (like retinol and AHAs) and seal in moisture at night with thick creams or balms.

#Slugging posts are up **~25%***; **#SkinCycling** content grew **~40%*** in Indian beauty reels this year.

Flipkart



Face Wash sales rose by **123%***

Face Serums by **80%***



"Niacinamide" searches surged by **~70%***

No. of orders for Niacinamide Face Serums grew by **1.7x***



No. of orders for Ceramide Creams & Gels grew by **2.8x***



I like a simple routine that works — just basic, effective skincare without too many steps

* in Q1'25 vs Q1'24 amongst GenZs

 Customer verbatims

Scientific Obsession

Ingredient-first and science-led, This beauty routine's a step ahead!

What's driving the theme?

Powder Play

Customizable, water-activated cleansers offering a gentle, eco-conscious cleanse.

Powder-to-foam face washes are gaining love for their minimal packaging, travel-friendliness, and ability to control texture — perfect for GenZ's skin-first and sustainability mindset.

#PowderCleanser and **#WaterlessBeauty** are trending for their clean beauty appeal; the global powder cleanser market is set to hit **\$5.56B** by 2032

Skin Shielding Squad

Barrier-restoring skincare with ceramides for dryness, sensitivity, and irritation.

Ceramides are now key in moisturizers and night creams for repairing stressed, post-acne, or over-exfoliated skin — especially during seasonal changes or after using strong actives.

Mentions of **#CeramideCream** and **#BarrierRepair** grew **~48%***, with reels focusing on **"barrier-loving routines"** trending on Instagram

Glow with Care

Brightening meets barrier repair using gentle, effective ingredients.

GenZs are using kojic acid, niacinamide, and glycerin-based products to tackle pigmentation, soothe inflammation, and lock in hydration.

YouTube Shorts saw a **4x*** spike in content on **"Kojic Acid"** **1.2x*** increase of **#kojicacid** on Instagram

Purify & Protect

Targeted detox skincare to fight pollution, acne, and oiliness.

GenZs are using charcoal and Ketofoord-based cleansers to deep clean pores and manage breakouts — especially in urban, humid environments.

1.3x* increase of **#ketoconazole** on Instagram in India

Did you know?

62%

GenZ's search beauty products by ingredients and not brands

Flipkart 

Searches for kojic acid rose by **1.7x***

glycerin by **1.3x***

No. of orders for Kojic Acid products grew by **4.8x***

Searches for ketofoord rose by **2.2x***

Charcoal by **1.3x***



I always check the ingredients now — I want products that are backed by science, not just trends.

* in Q1'25 vs Q1'24 amongst GenZs

 Customer verbatims

Hydration Daze

Moisture in, Dullness Out — That's What Glow Is All About!

What's driving the theme?

Hydration-Centric Formulations

A trend where Indian consumers choose products packed with hydrating ingredients to keep skin soft and healthy

How? Gel-based face washes, water creams, and hydrating serums with ingredients like hyaluronic acid, glycerin, and salicylic acid are now essentials in daily routines — offering deep hydration without heaviness.

Social Buzz Google searches for “hyaluronic acid” in India rose by **78%** between 2022 and 2024, reflecting the growing shift to hydration-first skincare.

Dew Boosters

Non-greasy, hydrating gel moisturizers that provide a fresh, dewy glow.

GenZs are gravitating toward lightweight, water-based moisturizers and hydrating gels that offer intense moisture without the heaviness, making them ideal for humid, hot climates.

#GelMoisturizer and **#HydrationHack** posts up **38%** in 2025, fueling the demand for shine-free, glowing skin.

Flipkart




Face Creams and Gels sales rose by **1.4x***



No. of orders for Hyaluronic Acid Face Creams & Gels grew by **1.9x***

Hydration is everything — when my skin feels soft and fresh, I know it's working ”

* in Q1'25 vs Q1'24 amongst GenZs

 Customer verbatims

Hair Game Strong: From Oils to Actives

Old meets bold in Gen Z's scene —Peptides and oils, the ultimate dream!

What's driving the theme?

Power-Dosed Oils

New-gen hair oils upgraded with targeted, performance-driven ingredients.

GenZs are picking non-greasy oils in droppers, sprays, and rollers — enriched with actives to tackle hair fall, dandruff, and scalp irritation, without the stickiness.

K-Gloss Goals

High-shine hair treatments that fight frizz and boost gloss.

Gloss masks, lamellar rinses, and rice water conditioners are trending for their ability to smooth hair, tame frizz, and give an instant reflective shine — a quick fix for dull, tired strands.

"Rice water for hair" searches rose **5x** (2023–2025) on Google

Searches for "bhringraj oil" rose **2.3x***; **#HairOilRoutine** and **#NonGreasyOils** posts grew **2.6x** YoY, driven by custom oil rituals online



Flipkart 

Hair Serum sales rose by **2x***




Search for "Hair Mask" amongst GenZs increased by **1.3x***



Search for "Rice Water" increased by **2x***

Hair care isn't just shampoo & oil anymore – I follow a proper routine with targeted products now ”

* in Q1'25 vs Q1'24 amongst GenZs

 Customer verbatims

Root Revival

The Rise of Scalp Care

Rooted in Care, Not Just Hair — Scalp's the New Self-Care!

What's driving the theme?

Scalp Microbiome Reset

A new wave of scalp-care that targets root-level issues with skin-first formulas.

GenZs are choosing scalp detox shampoos and microbiome-balancing tonics to manage flakiness, excess oil, and sensitivity — shifting from dandruff cures to scalp health solutions.

Google searches for “scalp detox” and “scalp microbiome” grew **~30%** (Q4 2024 vs Q3); **#ScalpDetox** and **#MicrobiomeShampoo** reels are up **1.5x***

Scalp Serum Supremacy

Lightweight scalp serums are replacing heavy oils for mess-free, targeted care.

GenZs are using fast-absorbing serums to tackle dandruff, dryness, and scalp irritation — offering quick relief without the greasiness.

Searches for “best scalp serum for dandruff” are up **4.2x** YoY (Google Trends 2025); Spate reports a **+55%** global surge; **67%** of GenZs in India want scalp-improving products (NielsenIQ 2024).

Flipkart



Search for “Scalp Powder/Scalp Shampoo” increased by **1.7x***

My scalp feels cleaner and healthier with these new haircare products. ”

* in Q1'25 vs Q1'24 amongst GenZs
Customer verbatims

Scent-Sational : Where Mood Meets Memory

It's more than scent, it's mood on mist — Gen Z's spritz comes with a twist!

What's driving the theme?

Smellmaxxing

Fragrance layering as a form of scent-enhanced self-presentation and status signaling.

GenZs are stacking body mists, lotions, and perfumes to create unique scent signatures — like a personal scent wardrobe.

Content around “Smellmaxxing routine” and “Perfume layering tips” is up **1.4x** YoY, with **1M+** combined views from Indian creators in 2025

Gourmand Fragrance Boom

Dessert-inspired scents that blend nostalgia with indulgence.

GenZs, especially women, are loving sweet notes like marshmallow, pistachio, and brown sugar in mists, roll-ons, and perfumes — for a cozy, feel-good vibe.

#GourmandPerfume has **12M+** views globally; Indian creators use tags like **#DessertInABottle** and **#SmellLikeCake** to rave about these “edible” scents.

Fragrance Reawakening

GenZ is embracing fragrance as part of their daily confidence ritual.

As they move from campus to corporate life, GenZ prefers subtle, long-lasting scents in mini perfumes and roll-ons to stay fresh and polished.

Google searches for “office perfume for women” and “how to smell fresh all day” are up **3.6x** YoY (2024–2025) in India.



Flipkart 


Sales for Perfumes/ Fragrances rose by **2.2x***



Search for “Attar” increased by **2.5x***

It's not just smelling good, it's feeling something every time I wear it

* in Q1'25 vs Q1'24 amongst GenZs

 Customer verbatims

Cherry Cherry Lady: The New Age of Makeup

Color that Pops, Culture that Drops — Makeup That Never Stops

What's driving the theme?

Eye Catching: Surma Revival

Traditional surma is making a bold comeback, adding depth and drama to the eyes.

GenZ is embracing this cultural classic with modern takes — using kajal and kohl for intense, dramatic eyes that blend heritage with edge.

#SurmaLook posts rose **45%** on Instagram in 2025.

Luscious Lips: Glossy Boldness

Glossy, tinted lips are taking over, with a shift from matte to hydrating, high-shine finishes.

GenZ is choosing lip glosses and balms with vibrant color and hydration — bringing back the juicy, youthful vibe with a bold twist.

#GlossyLips posts grew **50%** in Q1 2025; TikTok content on glossy lip tutorials is up **30%** since Q4 2024.

Flipkart 

number of orders for Lipstick grew by **~70%***



Searches for Lipstick among GenZ grew by **~50%***



Flipkart searches for Surma jumped **~33x***

Makeup is my way of telling my story—bright and unapologetic

* in Q1'25 vs Q1'24 amongst GenZs

 Customer verbatims

Sun – In & Stunning

Sun care isn't seasonal anymore — it's stylish, smart, and always on.



What's driving the theme?

SPF = Selfie Protection Filter

SPF is GenZ's new glam base — with tinted sunscreens, serums, and dewy finishes doubling as skincare and makeup.

Sunscreen is built into daily GRWM routines. Glow-enhancing formulas are preferred over chalky creams, especially for college, dates, and streetwear-ready looks.

#DailySPFIndia and **#SPFIsSkincare** saw a **1.7x*** YoY increase

Over **2.4M** views from Indian creators on Reels and YouTube Shorts promoting “SPF + glow” routines

Swipe & Shield

Portable sunscreen sticks and gels are redefining how GenZ stays sun-safe on the go.

Mess-free SPF sticks and water-free serum formats make sun protection easy to carry, reapply, and use — perfect for GenZ's busy, low-waste lifestyle.

Hashtags like **#SunscreenStick** and **#OnTheGoSPF** are up **~28%*** with creators showcasing sun-care routines in compact formats.

Re-apply Rituals

Reapplication is no longer boring — it's an online flex. GenZs glamorize SPF touch-ups as part of their midday beauty check-ins

From SPF powder puffs to misting over makeup, GenZs are turning reapplication into a midday ritual — often shared through selfie videos, vlogs, or **#3PMCheckIn** trends

#SPFReapply and **#ReapplyRoutine** content grew **2.2x*** on Instagram and YouTube Shorts

Flipkart

Sales for Sunscreen rose by **2x***

the search for SPF & related products increased by **~76%***

Sunscreen is my go-to for healthy, glowing skin every day

* in Q1'25 vs Q1'24 amongst GenZs

Customer verbatims

Korean Street

Where Seoul's street style meets Indian GenZ's beauty beat.

What's driving the theme?

Skin Blur, Not Full Cover

Forget cakey foundations — GenZ is opting for blur creams, tone-up bases, and BB drops to get that K-drama filter IRL.

These products create a soft-focus look while keeping it light and breathable. Think: "I woke up like this" skin with a photo-ready finish.

#BlurCream and **#GlassSkinIndia** content grew **2.4x YoY** in Q1'25

Searches for "blur sunscreen" and "tone-up cream" grew **3.1x*** on Google India

Skintellectual Snacking

GenZs are "snacking" on Korean skincare — buying mini/trial sizes of viral K-beauty products and trying ingredient-led routines like mugwort, ginseng, and snail mucin.

It's more try and flex than loyalty. The thrill is in unboxing new serums and showing off 5-step routines with new actives.

Hauls tagged **#MiniSkincareIndia** and **#KBeautyTrial** saw **3x***

Dew Drops > Powder Pop

Highlighters are out, serum-y skin illuminators and water-based blushes are in. It's about glowy cheekbones without shimmer.

From SPF powder puffs to misting over makeup, GenZs are turning reapplication into a midday ritual — often shared through selfie videos, vlogs, or **#3PMCheckIn** trends

#SPFReapply and **#ReapplyRoutine** content grew **2.2x*** on Instagram and YouTube Shorts

Flipkart 



Searches for Korean Products increased by **~81%***





Seoul street style inspires my everyday makeup look”


From Plains to Peaks, Beauty Speaks


From Hills to Thrills, Beauty Follows Regional Drills!


NORTH ZONE


 High AQI (PM2.5 > 100); Delhi among the most polluted cities globally


 High intake of dairy and spicy foods


 Low to Moderate

 Hard water prevalent


 Dryness, pigmentation, premature aging


 Hair fall, dryness, scalp buildup


 Anti-pollution skincare, hydrating serums, scalp detox treatments


 2x increase* in Orders for Face Serum 1.3x increase* in Orders for Shampoo


WEST ZONE


 Moderate to High AQI; urban areas affected by industrial pollution


 Spicy and oily foods common


 Moderate to High

 Varies; some regions with hard water

 Oily skin, acne, tanning


 Greasiness, dandruff, hair thinning


 Oil-free cleansers, mattifying products, scalp care routines


 1.5x increase* in Shampoo orders

What's driving the theme?


EAST ZONE


 Moderate AQI; seasonal variations


 Rice-based diets, high in fish and vegetables


 High humidity

 Soft water


 Excess oiliness, sensitivity, rashes


 Frizz, dandruff, scalp sensitivity


 Gentle cleansers, soothing skincare, hydrating hair masks


 2x increase* in Facewash orders


SOUTH ZONE


 Generally better AQI; exceptions in urban centers


 Coconut-rich diets, fermented foods


 High humidity

 Soft to moderately hard water






 Acne, hyperpigmentation, Sunburn, Tanning

 Frizz, scalp infections, hair fall

 Antifungal skincare, lightweight moisturizers, anti-frizz hair products

 2.2x increase* in Hair Serum orders

Air Quality Index (AQI) & Pollution

 High  Moderate  Moderate - High  Better  Low

Humidity Levels

 High  Moderate to High  Moderate  Low to Moderate


 Water Quality

 Dietary Patterns

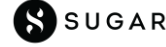
 Common Skin Concerns

 Common Hair Concerns

 Recommended Solutions

 Flipkart Data

Flipkart Glam Up Brand Strength



Acknowledgements



MANJARI SINGHAL
Vice President

FMCG & General Merchandise

Seasoned leader with extensive experience across e-commerce, FMCG, and beauty. She currently heads Flipkart's FMCG and General Merchandise business, driving strategic growth and category innovation



PRIYANKA BHARGAV
Senior Director

InsightsOne

Seasoned Marketing leader with experience across e-commerce, Telecom and FMCG. She specializes in brand strategy, Consumer Behaviour, and UX. She currently leads Brand Marketing, Strategic Insights, and UX Research at Flipkart, driving customer-first innovation and growth



KARTHEEK KANUMURU
Senior Director

Beauty & Personal Care

Experienced leader in consumer goods and e-commerce, currently heading Flipkart's Beauty and Personal Care category. He focuses on driving strategic growth and fostering innovation in the segment.



AAKRITI BHATIA
Director

Beauty & Personal Care

Seasoned business professional with 10+ years of experience across e-commerce and strategy. Currently serves as Director in the Beauty & Personal Care Category, leading brand relations & driving growth through cross-functional collaboration and strategic execution.



KEJAL GOSAR
Associate Director

InsightsOne

With 10+ years of experience in consumer research, she specializes in uncovering deep behavioral insights across FMCG and e-commerce sectors. Known for leading strategic, data-driven initiatives and translating complex data into actionable, customer-centric narratives to drive business impact



SUYASH SHRIVASTAVA
Associate Director

Beauty & Personal Care

Associate Director at Flipkart with over 9 years of experience. Currently leads strategic initiatives planning to drive demand and customer growth for the Beauty & Personal care category. Passionate about leveraging consumer insights to optimize sales performance and market expansion.

Acknowledgements



RATUL BORAR
Senior Manager

Beauty & Personal Care

Senior Manager at Flipkart with over 7 years of experience in category management. He plays a pivotal role in driving growth and innovation within the Beauty and General Merchandise (BGM) segment, contributing to initiatives like the Flipkart Glam Up Fest



ANKUR SENGUPTA
Assistant Manager

InsightsOne

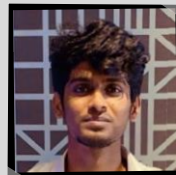
Insights professional with 6+ years of experience in consumer research across e-commerce, covering categories like beauty, grooming, loyalty etc. Passionate about decoding emerging trends and turning consumer behaviour into actionable strategies.



ALLAN MENEZES
Analytics Manager

Analytics

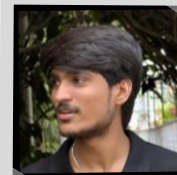
Analytics professional with 9+ years of cross domain experience, passionate about turning complex business challenges into impactful, data driven solutions that move the needle.



RISHI T
Manager

Beauty & Personal Care

BPC Category Strategist with hands-on experience in pricing, planning, and growth which gave me a front row seat to perceive how trends take shape and scale. Over time, I've grown curious about what drives consumer choices beyond the numbers and increasingly drawn to the 'why' behind them.



SUGALI KRISHNA NAIK
Business Analyst

Beauty & Personal Care Analytics

Analytic Insights professional with a background in Mathematics and Computing from IIT Kharagpur. Loves using data to solve problems and help businesses grow. From Kurnool and enjoys playing cricket in free time.

Next Stop: Your Beauty Breakthrough

From **hydration highs** to **science-packed** serums and **Insta-glam** must-haves —you're now in on the biggest beauty moves of **2025**.

So what are you waiting for?



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Glossary:

1. Primary consumer researches (N= ~5000) immersions done by InsightsOne team
2. Qualitative Consumer Immersions (200 hours) Powered by KYC, an in-house customer immersion programme by InsightsOne
3. Flipkart Internal Data
4. Nielsen IQ Beauty Council Report -2025
5. Google Trends Data