

Cosmetics Industry Search Trends Report FY'25 India





Authored by

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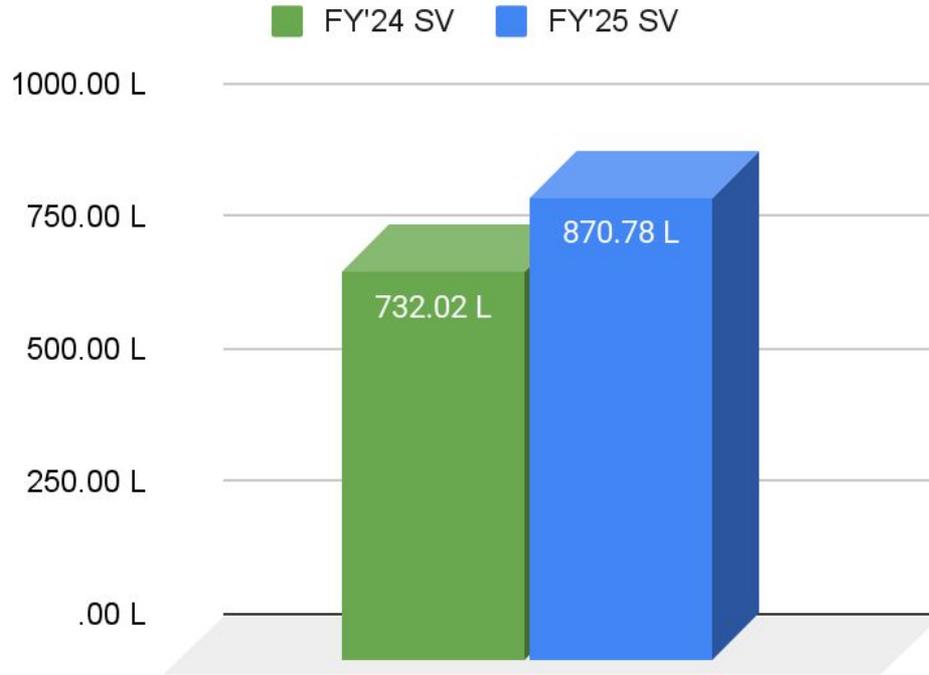
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Executive Summary

- In India, most **beauty and cosmetics** purchase journeys begin with a Google search.
- Consumers search for **skincare and makeup products, compare brands, check reviews, look for ingredients, and discover tutorials**—making it essential to understand search behaviour for impactful digital marketing.
- Our Cosmetics Industry Search Trends Report uncovers how consumer search patterns are shifting and how your brand can leverage these insights to strengthen online visibility and drive conversions.
- We analyse over **100,000+ keywords** to assess brand vs. non-brand queries, search volumes, seasonal spikes, trending product categories, and untapped opportunities for growth.
- The report also features the top beauty brands and e-commerce platforms that consistently dominate Google Search rankings.

Cosmetics Industry Search Trends



Category	FY'24 SV	FY'25 SV	% Growth
Cosmetics	732.02 L	870.78 L	18.96%

Search Volume by Query Type

Type of Query	Search Volume FY'24	Search Volume FY'25	Growth %	Market Share
Brand	218.46 L	266.53 L	22.00%	30.61%
Non-Brand	513.56 L	604.26 L	17.66%	69.39%
Total	732.02 L	870.78 L	18.96%	100.00%

Top 10 Skin Care Brands by Search Volume

Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
 Cetaphil	8.05 L	17.86 L	121.82%	13.52%
 Garnier	6.42 L	7.32 L	13.97%	5.54%
 Mamaearth	7.01 L	6.67 L	-4.90%	5.05%
 Ponds	4.62 L	5.81 L	25.81%	4.40%
 Himalaya	4.23 L	4.80 L	13.52%	3.64%
 Nivea	4.17 L	4.26 L	2.13%	3.22%
 Simple	1.83 L	3.83 L	109.64%	2.90%
 Clean and Clear	3.13 L	3.77 L	20.56%	2.86%
 LAKMÉ	3.14 L	3.28 L	4.22%	2.48%
 Minimalist	1.79 L	3.27 L	82.34%	2.48%
Others(315)	56.03 L	71.21 L	27.08%	53.92%
Total	100.42 L	132.07 L	31.51%	100.00%

Top 10 Makeup Brands by Search Volume

Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
 Lakme	6.61 L	5.93 L	-10.38%	15.39%
 Maybelline	4.59 L	4.94 L	7.54%	12.83%
 MAC Cosmetics	2.91 L	2.85 L	-2.15%	7.40%
 Swiss Beauty	1.58 L	1.79 L	13.30%	4.64%
 SUGAR	1.90 L	1.74 L	-8.33%	4.51%
 Huda Beauty	1.92 L	1.70 L	-11.45%	4.40%
 Nykaa	.92 L	1.10 L	19.48%	2.86%
 RENÉE	.51 L	1.00 L	97.66%	2.60%
 MYGLÄMM	1.38 L	.96 L	-30.62%	2.49%
 MARS	.57 L	.93 L	63.36%	2.42%
Others(195)	14.55 L	15.58 L	7.08%	40.45%
Total	37.43 L	38.51 L	2.87%	100.00%

Top Keyword Buckets

Buckets	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Skincare	348.52 L	446.17 L	28.02%	51.14%
Hair Care	152.93 L	173.90 L	13.71%	19.93%
Makeup	129.77 L	135.39 L	4.33%	15.52%
Personal Hygiene	77.18 L	92.33 L	19.63%	10.58%
Grooming Products	12.77 L	12.53 L	-1.88%	1.44%
Nail Care	12.21 L	12.12 L	-0.72%	1.39%
Total	733.37 L	872.43 L	18.96%	100.00%

Top 10 Sub - Buckets

Sub Buckets	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Face Care	277.42 L	355.53 L	28.16%	40.75%
Hair Products	152.08 L	173.22 L	13.90%	19.86%
Body Care	57.43 L	73.91 L	28.69%	8.47%
Hygiene Products	55.10 L	67.74 L	22.93%	7.76%
Lip Makeup	48.89 L	52.84 L	8.08%	6.06%
Eye Makeup	35.93 L	35.99 L	0.17%	4.13%
Face Makeup	22.40 L	23.89 L	6.67%	2.74%
Makeup Kits & Tools	21.32 L	21.47 L	0.71%	2.46%
Hair Removal	15.13 L	15.82 L	4.57%	1.81%
Beauty Supplements	11.54 L	14.92 L	29.33%	1.71%
Others(5)	36.14 L	37.10 L	2.66%	4.25%
Total	733.37 L	872.43 L	18.96%	100.00%

Top 10 Keywords

Keywords	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
kajal	10.00 L	8.23 L	-21.51%	26.02%
sun cream spf 50	.61 L	5.50 L	89.00%	17.39%
vitamin c serum	2.01 L	3.01 L	33.22%	9.52%
moisturize	1.65 L	3.01 L	45.18%	9.52%
face wash	1.65 L	2.46 L	32.93%	7.78%
rosemary oil	2.01 L	2.46 L	18.29%	7.78%
lipstick	2.01 L	2.01 L	0.00%	6.35%
simple face cleanser	.74 L	1.65 L	55.15%	5.22%
lip balm	1.35 L	1.65 L	18.18%	5.22%
foundation	1.65 L	1.65 L	0.00%	5.22%

City-Wise Search Volumes

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Top 6 Cities	185.96 L	207.16 L	11.40%	23.74%
Next 10 Cities	83.69 L	91.83 L	9.72%	10.53%
Others	463.72 L	573.44 L	23.66%	65.73%
Total	733.37 L	872.43 L	18.96%	100.00%

Top 6 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Bengaluru	42.75 L	49.35 L	15.45%	23.82%
Delhi	46.16 L	53.01 L	14.85%	25.59%
Mumbai	30.07 L	34.06 L	13.24%	16.44%
Chennai	22.55 L	26.45 L	17.29%	12.77%
Hyderabad	26.90 L	24.16 L	-10.17%	11.66%
Pune	17.54 L	20.13 L	14.76%	9.72%
Total	185.96 L	207.16 L	11.40%	100.00%

Next 10 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Lucknow	14.00 L	16.62 L	18.72%	18.10%
Jaipur	11.59 L	13.59 L	17.29%	14.80%
Indore	11.51 L	12.17 L	5.71%	13.25%
Ludhiana	8.09 L	8.97 L	10.85%	9.77%
Nagpur	8.79 L	7.95 L	-9.65%	8.65%
Coimbatore	7.75 L	7.37 L	-4.89%	8.03%
Surat	6.35 L	7.23 L	14.00%	7.88%
Bhopal	5.42 L	6.86 L	26.59%	7.47%
Visakhapatnam	5.50 L	5.78 L	5.05%	6.29%
Vadodara	4.69 L	5.29 L	12.78%	5.76%
Total	83.69 L	91.83 L	9.72%	100.00%

Vernacular Search Volumes

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	.86 L	.71 L	-17.34%	23.51%
Non-Brand	2.80 L	2.31 L	-17.54%	76.49%
Total	3.66 L	3.02 L	-17.50%	100.00%

The contribution from Non-brand keywords, when the term “Vernacular” is included, was lower in 2025.

Brand keywords include:

- हिमालय फेस वाश
- *sabse acha facewash*

Non Brand keywords include:

- मेकअप
- साबुन

Top 10 Brands **with Highest SOV**

	Top Brands	% Growth
	Nykaa	46.79%
	Myntra	33.00%
	Flipkart	29.77%
	Mamaearth	17.23%
	Pilgrim India	10.00%
	Plum Goodness	9.55%
	Aqualogica	8.67%
	Dot & Key	8.13%
	Swiss Beauty	5.85%
	The Man Company	5.64%

SOV = Share of Voice (% of Ranked SV/Total SV)
SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Top 10 Brands **with Highest SOV in 'Skin Care'**

	Top Brands	% Growth
	Amazon	73.30%
	Nykaa	50.03%
	Flipkart	26.09%
	Myntra	22.33%
	Mamaearth	20.18%
	Plum Goodness	19.09%
	Aqualogica	13.37%
	Dot & Key	12.38%
	Pilgrim India	11.10%
	The Derma Co.	10.94%

SOV = Share of Voice (% of Ranked SV/Total SV)
SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Top 10 Brands **with Highest SOV in 'Makeup'**

	Top Brands	% Growth
	Nykaa	68.33%
	Amazon	68.29%
	Myntra	58.70%
	Flipkart	31.82%
	Swiss Beauty	26.12%
	Sugar Cosmetics	15.50%
	Mac cosmetics	9.21%
	Meesho	8.35%
	Sephora	7.64%
	Mars Cosmetics	4.08%

SOV = Share of Voice (% of Ranked SV/Total SV)
SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Top 10 Brands **with Highest SOV in 'Hair Care'**

	Top Brands	% Growth
	Amazon	74.49%
	Nykaa	31.68%
	Flipkart	30.76%
	Mamaearth	26.59%
	Myntra	21.28%
	Pilgrim India	10.55%
	1 MG	9.90%
	Soul Flower	8.69%
	Arata	8.51%
	Meeso	3.92%

SOV = Share of Voice (% of Ranked SV/Total SV)
SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Key Insights

- **Brand-related** searches in the cosmetics industry **grew faster** than non-brand searches in FY'25 (**22% vs. 17.66%**), indicating rising consumer preference or awareness toward specific brands.
- **Cetaphil and Simple** saw the **highest growth** in skincare brand searches (**122% and 110% respectively**), highlighting a strong surge in consumer interest, while Mamaearth declined, signaling potential waning interest or increased competition.
- Makeup brand search growth was modest at 2.87%, with rising interest in emerging brands like Renee (97.66%) and Mars (63.36%) offsetting declines in major names like Lakme and Myglamm.
- Skincare led category growth with a 28% surge and now dominates over half the market share, while makeup showed minimal growth and grooming products declined, indicating shifting consumer focus toward skin health and hygiene.
- Face Care remains the dominant and fastest-growing sub-category (28.16% growth, 40.75% share), while Beauty Supplements also saw strong growth (29.33%), indicating increasing consumer interest in both topical and ingestible beauty solutions.
- Search growth was highest in non-metro cities (23.66%), which now contribute nearly two-thirds of total volume, signaling a strong shift in cosmetics interest toward Tier 2 and Tier 3 markets.

Data-Collection Process

- The research was conducted for **FY 2023-24 & FY 2024-25** using Google's Keyword Planner
- The data reflects Pan-India search volumes only, except where city-level data is shown
- Search volumes on Google Web Search for app-related keywords and not Playstore have been taken into account
- Search volumes for vernacular languages - where available - only reflect data for the Hindi language

As Featured On

The logo for Adgully, featuring the word "Adgully" in a stylized, red, cursive font.The logo for Mediabrief, with "MEDIABRIEF" in a bold, blue, sans-serif font.The logo for medianews4u.com, featuring the text "medianews4u.com" in a purple and blue font with a pink arrow pointing to the right.The logo for Manifest, with the word "MANIFEST" in a bold, black, sans-serif font.The logo for BW BusinessWorld, with "BW BUSINESSWORLD" in a blue, sans-serif font.The logo for Storyboard 18, featuring the text "STORYBOARD 18" in a white, sans-serif font on a red and black background.The logo for BW RetailWorld, with "BW RETAILWORLD" in a black, sans-serif font and a small shopping cart icon above "WORLD".The logo for IndiaRetailing.com, with "IndiaRetailing.com" in a black, sans-serif font.

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