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EU EXPANSION: TIKTOK'S QUIET TAKEOVER OF THE EUROPEAN BEAUTY MARKET

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PUBLISHED MAY 20, 2025

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As the world of global beauty retail continues to fragment, **TikTok Shop**, one of the most viable proponents developed by TikTok, is quietly and successfully staging one of the most significant channel disruptions since the rise of TikTok as a social entertainment app, is rapidly growing

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and one of its latest plays—expanding TikTok Shop across the European Union—signals a bold new chapter, not just for TikTok, but for the beauty industry at large.

Since its official launch in the UK in 2023, TikTok Shop has garnered attention as both a platform and a marketplace, blending content, influence, and instant commerce in a way that feels native to Gen Z and millennial consumers. With the EU rollout already in motion, and targeting key beauty markets such as France, Italy, Germany, the Republic of Ireland, and Spain, TikTok is eyeing a continent with over 449 million consumers with a projected \$129 billion beauty market by 2029, according to Statista.

For beauty brands, especially indie ones, the promise of TikTok Shop in the EU is potent, including direct access to a digital-native customer base, lower barriers to entry in traditionally hard-to-penetrate markets, and algorithmic discovery that goes beyond the limitations of shelf space or SEO. “TikTok Shop has definitely lowered the barriers to entry, especially for mobile-native, content-driven indie brands that are able to generate authentic engagement,” said Jill Krakowski, CMO of Cosnova Inc., to BeautyMatter. “The platform gives smaller players a real chance to get noticed, test products quickly, gather feedback, and gain traction without the traditional retail overhead.”

The Intersection of Commerce, Culture, and Conversion

Beauty is arguably TikTok Shop’s most successful vertical to date. According to Statista, TikTok Shop’s global gross merchandise value (GMV) was approximately \$1 billion in 2021. In 2024, it reached \$33.2 GMV, showing the fast growth and success of the platform's e-commerce feature. “TikTok Shop is reshaping the future of e-commerce. We are building something far more impactful than traditional online shopping or social commerce,” Nora Zukauskaitė, Integrated Marketing Director of TikTok Shop UK, said to BeautyMatter. “We have created an experience where buyers genuinely want to shop, not because of who they follow, but because they’ve discovered products they truly connect with. We call this discovery e-commerce.”

In the UK alone, the platform has allowed indie sellers to reach audiences in the EU and vice versa, through holiday campaigns, Black Friday deals, and easier cross-border commerce, according to intelligence company, Charm.io. “We’re giving sellers the platform to be storytellers of their products and to bring that spark back that has always

been a part of in-person shopping,” Zukauskaitė continued. “TikTok Shop is where buyers can find that next favorite product they didn’t even

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From lash serums and fragrance mists to viral color-changing lipsticks, the platform has proven especially fertile for small-to mid-sized brands with storytelling DNA. The immediacy of video, paired with the influence of creators, shortened the funnel, removing traditional friction points like product discovery, third-party validation, and even packaging allure. “With one beauty product sold every second in the UK, we know that this innovative way of shopping resonates with our TikTok active and engaged users,” Zukauskaite said. “We also know that 88% of TikTok users have discovered brands and products that they are interested in purchasing on the platform. We are a discovery engine and [with a] discovery commerce’s seamless solution.”

EU as Strategic Counterweight to the US Market

TikTok’s push into the EU also comes at a geopolitically interesting moment. In early 2024, the United States proposed new tariffs on Chinese and South Korean-made goods, including electronics and certain consumer products—a move that could soon affect components used in skincare devices, packaging, or cosmetic tools. In parallel, the platform itself is under scrutiny, with ongoing debates around a potential US ban or forced divestiture of TikTok by its parent company, ByteDance.

While no final decision has been made, uncertainty in the US market is prompting Chinese cross-border sellers and global TikTok stakeholders to diversify their e-commerce strategies. Enter the EU—a politically complex but commercially valuable region where TikTok faces fewer regulatory threats and where digital shopping is surging. “We see this development not as a replacement for existing retail or e-commerce channels but as a complement; one that allows us to meet consumers where they are most inspired and most engaged,” Krakowski said.

“So far in Europe, we have launched [essence and Catrice Cosmetics through] TikTok Shop in Germany. It allows us to pilot exclusive product bundles, respond to emerging trends in real time, and build stronger emotional connections through creator-led storytelling,” chimed in Sebastian Romanus, Director Digital Brand and Community Experience for Cosnova Inc. “Ultimately, our goal is to create a seamless omnichannel journey, and TikTok Shop plays a strategic role in informing both global marketing and future product innovation through the insights it generates.”



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arrival is not only opportunistic but could be essential for brands looking to hedge against market volatility and tariff-based cost increases in the US. “We are always guided by demand and exploring new ways to enhance the TikTok experience,” said Zukauskaitė. “We’ve seen the positive impact of TikTok Shop across our multiple international markets, and we’re excited to continue experimenting with this new commerce opportunity to support businesses of all sizes and enable our community to discover and engage with products they love,” she continued.

Logistics, Localization, and the Challenge of Fragmented Markets

Still, entering the EU is no small feat. Unlike the US, the EU is a patchwork of languages, cultures, and consumer behaviors. What resonates with Gen Z shoppers in Berlin may fall flat in Milan or Madrid. Localization is crucial, and so is logistics. TikTok has therefore partnered with various third-party fulfillment services in Europe to streamline shipping and returns, an area that many indie beauty brands cite as their top challenge.

“We leverage TikTok Shop’s marketplace model and work with third-party fulfillment providers that fully comply with EU standards and general data protection regulation (GDPR) requirements. The customer experience is at the heart of our approach,” said Romanus. “We continuously monitor platform performance and customer feedback to fine-tune delivery speed, packaging, and the overall post-purchase journey. Any regional rollout is approached strategically, considering scalability, local language requirements, and adherence to national consumer laws—ensuring consistency across the board,” added Krakowski.

The EU expansion could accelerate this shift towards the platform, especially in markets like France and Italy, where legacy beauty houses have strong roots. TikTok Shop might not replace the department store, but it could become a key driver of consumer discovery and category growth, particularly in skincare, fragrance, and hybrid wellness-beauty products.

With its EU expansion, TikTok Shop is redefining the infrastructure of beauty commerce. From tariffs and tech regulations to cultural preferences and purchasing psychology, the platform is navigating a matrix of forces that could either solidify its power or expose its limits.

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