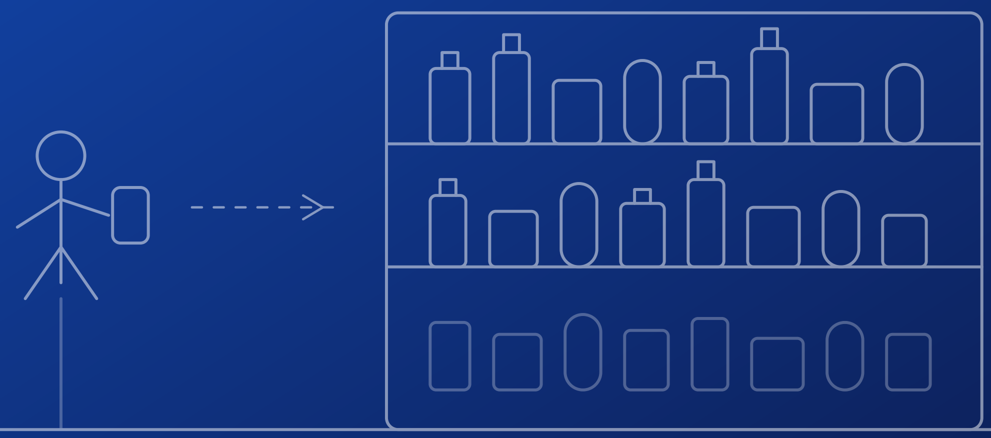
Channelplay

RETAIL EBOOK · 2026

Eye Level is **Buy Level**

The beauty shelf playbook for Saudi Arabia and the UAE.



Channelplay

Visual merchandising
Beauty and cosmetics

What's inside

Written for brand, trade marketing and retail teams selling beauty in the Gulf. Practical, benchmarked, and focused on the last three feet where the money is actually won or lost.

THE SHORT VERSION

Beauty brands spend heavily on the planogram and almost nothing on checking that it is still standing four weeks later. The plan is not the problem. The drift is.

01 The prize

Beauty in the Gulf is a growth story with a physical centre of gravity. The GCC cosmetics market was worth around USD 9.0 billion in 2025 and is forecast to reach USD 15.1 billion by 2034, growing at 5.90% a year.

Saudi Arabia is the engine. The Kingdom's beauty and personal care market is put at USD 8.03 billion in 2026, moving toward USD 10.84 billion by 2031 at 6.17% a year. Inside that, colour cosmetics and premium are both growing faster than the market average.

The part most brands under-read is the channel split. In Saudi Arabia, specialty retailers still held **56.77% of beauty and personal care sales in 2025**. Online is the fastest growing channel, but the majority of the money still crosses a physical fixture that somebody has to maintain.

Two demand shifts sit underneath the growth. More Saudi women are entering the workforce, which lifts everyday, wearable categories. And sustainability now moves purchase intent, with **41% of UAE and 36.5% of Saudi consumers** favouring sustainable products.

USD 9.0bn
GCC cosmetics market, 2025

5.90%
GCC cosmetics CAGR to 2034

USD 8.0bn
Saudi beauty and personal care, 2026

56.8%
Saudi sales through specialty retail, 2025

Where the growth is faster than the market

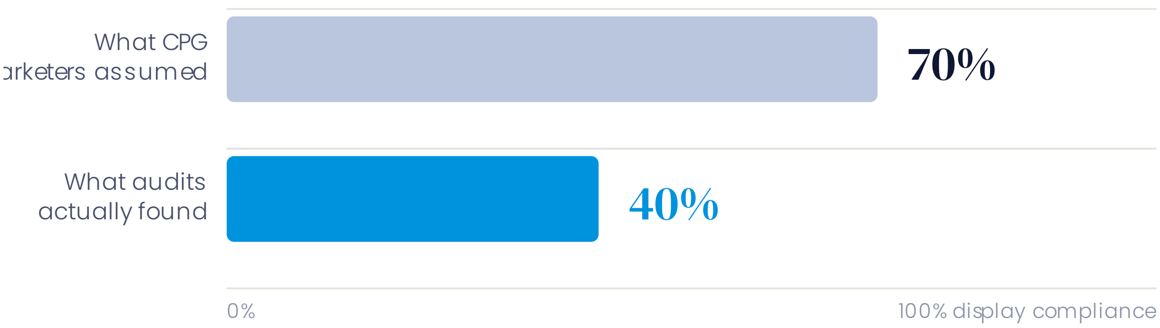
Saudi Arabia beauty and personal care, projected CAGR by segment, 2026 to 2031. Source: Mordor Intelligence. GCC market figures: IMARC Group. Consumer preference and workforce figures: IMARC Group.

Fast growth hides sloppy execution. When a category grows at 6% a year, a brand can lose share on the shelf every month and still report a bigger number than last year.

02 The plan and the shelf

Every brand believes its displays are broadly correct. The audit data says otherwise, and the size of the misread is the most useful number in this book.

What brands assume, against what auditors find



Shop! Association Compliance Initiative study, reported by One Door. Marketers estimated retail display compliance at close to 70%. Measured compliance averaged no higher than 40%.

~60%
is the commonly cited average planogram compliance rate across retail
Industry benchmark, multiple audit providers

10%
is how much compliance decays each week without monitoring
National Association of Retail Marketing Services

57.4%
of brands measure planogram compliance at all. The rest are running blind
Cognizant, reported by OmniShelf

Why a beauty fixture drifts faster than most

- **Testers deplete and nobody owns it.** An empty or broken tester kills trial on the exact SKU you are pushing.
- **Competitor creep.** On a shared lifestyle or pharmacy fixture, your allocated facings shrink by a centimetre a week and no decision is ever recorded.
- **Campaign material outlives the campaign.** Old headers stay up because removal is nobody’s task.
- **Store staff turnover.** The new team never saw the planogram. They restock from memory of how it looked yesterday.

THE QUESTION WORTH ASKING INTERNALLY

When did anyone last stand in front of your fixture in Jeddah with the

03 What the gap costs

Three separate research findings, three different mechanisms, all pointing at the same fixture.

20%

Placement

NielsenIQ estimates that poor shelf placement can cut in-store sales by as much as a fifth. This is not about being absent from the store. It is about being present in the wrong 30 centimetres of it.

NielsenIQ, 2024, reported by OmniShelf

8.1%

Profit

Getting planogram compliance right is associated with an 8.1% lift in profit. The planogram was already paid for. The lift comes from actually executing it.

National Association of Retail Marketing Services

1%

Availability

One estimate puts 10% of planogram errors at a 1% increase in stock-outs and a 0.5% fall in sell-through. Small execution drift compounds. It hits the retailer's inventory performance and your on-shelf presence at the same time.

One Door

How to frame this to a finance team

A visual merchandising programme is usually compared against its own cost. That is the wrong comparison. The right one is against the marketing already committed to the same shelf.

If a brand has paid for listing, paid for the fixture, paid for the POSM, paid for the launch campaign and paid the Beauty Advisor, then a per-visit maintenance cost is the cheapest line in the stack and the only one that protects the other four. Non-compliance does not cancel the spend. It just stops the spend from working.

04 Six standards of a beauty shelf

These are the checks we build into a visit checklist before a programme goes live. They are specific to beauty, and in this category they matter more than a generic retail audit list.

1. Colour blocking and brand zone integrity

Consistent colour logic across the fixture. Foundation and skincare in one zone, lips and colour in another. Boundaries checked at every visit, especially on multi-brand fixtures where a neighbour will happily take your space.

2. Eye level and hero positioning

Top selling SKUs and current hero products sit between **1.2m and 1.7m from the floor**, checked against the approved success picture. Hero displacement is the single most commercially damaging compliance failure in beauty retail.

3. Tester and trial unit condition

Every tester present, functional and not depleted. Beauty is a trial category. A dry tester on a hero shade is a lost sale that never appears in any report. Depletion is logged and flagged the same day.

4. Signage legibility and freshness

Price tickets, promotional headers and brand messaging checked for condition and legibility on every visit, not only during a campaign window. Faded or missing price communication quietly re-positions a premium brand as an unclear one.

5. Shop-in-shop boundary discipline

Competitor creep is normal at department store, lifestyle and pharmacy locations. The boundary is checked and restored at every visit, with a before and after photograph logged. Without the photo pair, you cannot escalate it to the retailer.

6. Post-campaign reset

Outdated material removed and the fixture returned to the standard planogram within one visit cycle of the campaign end date. The sweep is built into the schedule, never treated as an extra visit that needs a separate approval.

Two things this list is deliberately not

- **It is not stock replenishment.** In most beauty operations that sits with the Beauty Advisor or the retailer. Mixing the two blurs accountability and inflates your cost per visit.
- **It is not planogram design.** The brand owns the plan and the success picture. The merchandising partner owns whether reality matches it. Keep the two roles separate and both get done properly.

05 Not every door is the same store

A brand with 300 doors in the Gulf does not have 300 identical problems. Coverage cost falls sharply when visit frequency is matched to format instead of applied flat.

Format	What the shopper came for	The one thing to protect	Sensible rhythm	Lead KPI
Dedicated brand store	Full range, advice, the brand ritual	Planogram depth and tester condition	Quarterly deep set	Planogram compliance score
Shop-in-shop, department and lifestyle	Discovery on a crowded floor	Brand zone boundary	Every two months	Share of allocated space held
Pharmacy chain	A trusted, fast recommendation	Hero SKU at eye level	Every two months	Hero facing compliance
Hypermarket and supermarket	Value, speed, convenience	On-shelf availability and price ticket accuracy	Monthly	On-shelf availability
Mall kiosk	Impulse, gifting, footfall	Fixture condition and campaign freshness	Monthly	POSM currency

Rhythms shown are a starting position for a Gulf beauty network. Actual frequency should be set against door value, campaign calendar and observed drift rate in the first quarter.

Two coverage decisions that save real money

Route by zone, not by format

Build the route so that a single merchandiser covers dedicated stores and shop-in-shop doors on the same day in the same city zone. Splitting teams by format doubles travel and halves productivity.

Price per visit, not per head

A per-visit rate ties your cost directly to coverage delivered and keeps it flexible when the door list changes. A headcount model locks you into a fixed cost whatever the network does.

The most expensive merchandising programme is the one that visits your best door and your weakest door exactly the same number of times.

06 The visit that works

A merchandising visit is either evidence or it is a claim. These five steps are what turns it into evidence.

1. **Route in**

   GPS check-in on the app. The day's route is pre-loaded and every door is visited in sequence. No check-in, no visit, no invoice line.

2. **Check against the success picture**

   The approved planogram and success picture sit on the device. The check is section by section: product position, facings, hero placement. At shop-in-shop, hero visibility and the brand zone boundary.

3. **Fix on site**

   Minor corrections made immediately. Display resets, POSM placement, shelf tidying, loose signage. Anything requiring a vehicle larger than a standard car is flagged, not attempted.

4. **Log and escalate with severity**

   Issues photographed, categorised and tagged minor, moderate or urgent. Urgent items push a notification to the brand contact within the hour. Severity tagging is what stops a dashboard becoming noise.

5. **Report out within two hours**

   An auto-generated visit report reaches the brand within two hours: compliance score, photos per scope area, issues logged, actions taken. Open issues stay live until a named person closes them.

THE RULE THAT MAKES ALL FIVE WORK

Photo-gate everything. If a check can be marked complete without a picture attached, it will eventually be marked complete without being done. Compliance in beauty is visual, so proof of compliance has to be visual too.

07 The shelf scorecard

Eight numbers worth reporting monthly

Metric	What it tells you
Planogram compliance score	Percentage of scope areas passing against the approved success picture, per door.
Visit completion rate	Visits delivered against visits planned. The base number under everything else.
Hero facing compliance	Whether the current hero SKU held its eye-level position. The most commercial single check.
Tester availability	Percentage of testers present and functional. A leading indicator of conversion in beauty.
Share of allocated space held	Facings held against facings agreed. Your early warning on competitor creep.
Issue resolution rate and ageing	How many logged issues get closed, and how long the open ones have been open.
POSM currency	Percentage of doors carrying the current campaign and none of the previous one.
Compliance trend, not level	The direction over rolling three months. Your own trend beats any industry average.

Five questions for any visual merchandising partner

- Can I see the raw visit photographs, not just the score?
- How quickly does an urgent issue reach a named person at my end?
- Is the platform yours, or are you reselling somebody else's?
- What is explicitly outside scope, in writing?
- How do you handle a short-notice launch or a Ramadan window?

WHERE TO START

Pick your top 30 doors in one city. Run a proper baseline audit against the success picture. Whatever number comes back is your real starting point, and it is almost never the number in the plan.

Channelplay

A tech-led, people-first retail execution partner

Channelplay Middle East runs visual merchandising and field execution programmes for beauty, FMCG and consumer brands across Saudi Arabia and the UAE, on our own platform.

Visual merchandising	Planogram compliance, brand zone integrity, POSM deployment and campaign resets, per visit.
Sales force outsourcing	Beauty advisors, promoters and merchandisers, recruited, trained, deployed and managed.
Retail audit	Independent store checks, share of shelf, price and promotion compliance.
1Channel platform	GPS-verified visits, photo-gated checklists, severity tagging, live dashboards and auto-generated visit reports.

200k+
stores powered by 1Channel across India and the GCC

2 hrs
from store visit to auto-generated report

UAE KSA
own entities, own teams, own compliance

100+
brands served across the group

Talk to us about your shelf

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