

# Navigo

MARKETING

# Executive Summary

---

The Amazon 2024 Beauty Review highlights key trends shaping the beauty industry on Amazon, revealing that brands with strategic advertising investments and optimized content are outperforming those relying solely on organic traffic. While CeraVe (9.7%) remains the top skincare brand, Nutrafol (+1.9%) and La Roche-Posay (+2.6%) are rapidly gaining share. Paid sponsorship activity peaked during Prime Day (July), but Q4 saw lower-than-expected ad investment.

Fragrance and skincare are becoming more competitive, with newer brands leveraging paid media to challenge category leaders. As competition rises, a holistic Amazon strategy combining advertising, content optimization, and cross-platform marketing will be crucial for sustained success.

# Why Partner With Navigo?

We Drive Growth for Beauty Brands on Amazon

---

- **Amazon Experts in Beauty** – We focus exclusively on beauty brands, ensuring deep category knowledge and proven success strategies.
- **Data-Driven Decisions** – We leverage advanced analytics to optimize performance, improve ROI, and uncover market opportunities.
- **Advertising That Works** – Our paid media strategies deliver higher conversion rates and increased market share.
- **Content That Converts** – We enhance product pages, imagery, and A+ content to drive visibility and boost sales.
- **Proactive Brand Protection** – We monitor pricing, unauthorized resellers, and brand reputation to maintain control of your presence.

# Table of Contents

Beauty & Personal Care.....	5
Fragrance.....	11
Skincare.....	17
Hair Care.....	23
Makeup.....	29
Key Takeaways .....	34



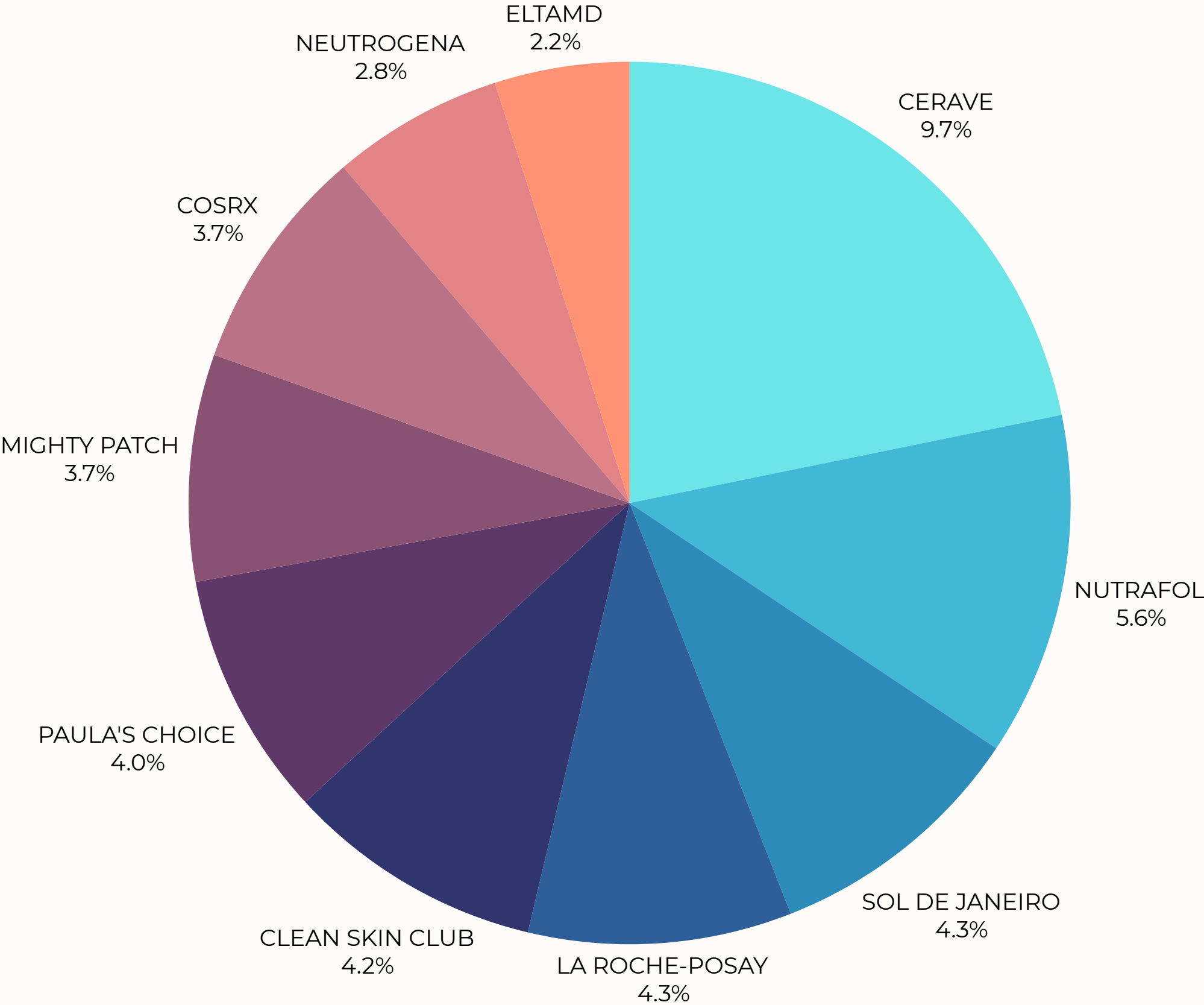
# Beauty & Personal Care Overview

Top brands, items and performance in the Beauty category for 2024



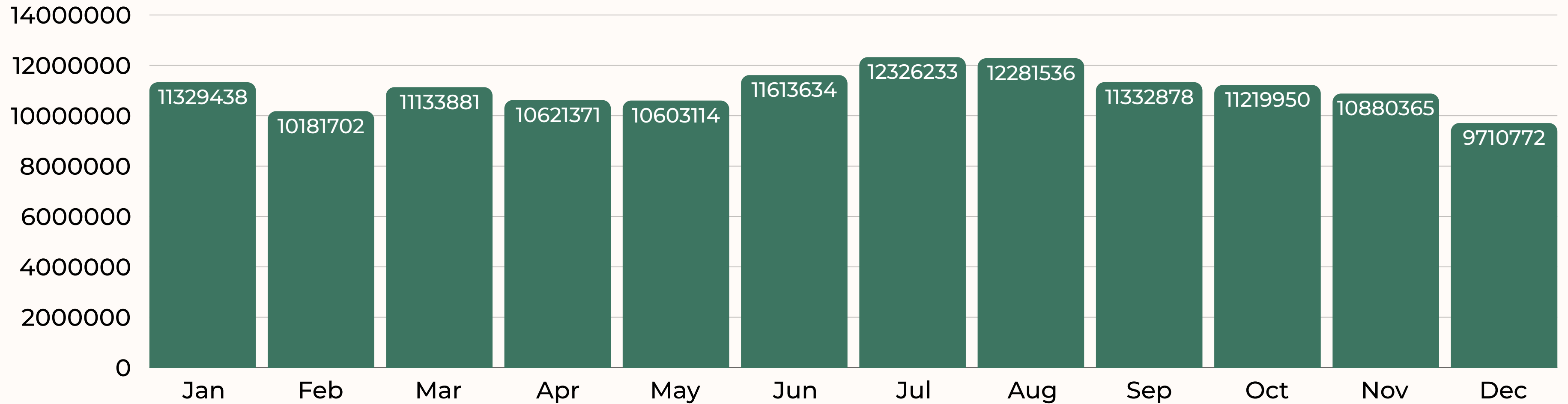
# Category Share of Sales

## Top Brands In Beauty



- Top brands in the category accounted for 44% of total sales. The average price point in Beauty is \$28.92.
- Top Gainers:
  - Nutrafol: +1.9%
  - La Roche-Posay: +2.5%
  - Clean Skin Club: +2.2%
- Top Losers:
  - Cerave: -1.5%
  - Paula's Choice: -1.3%
  - COSRX: -1.7%

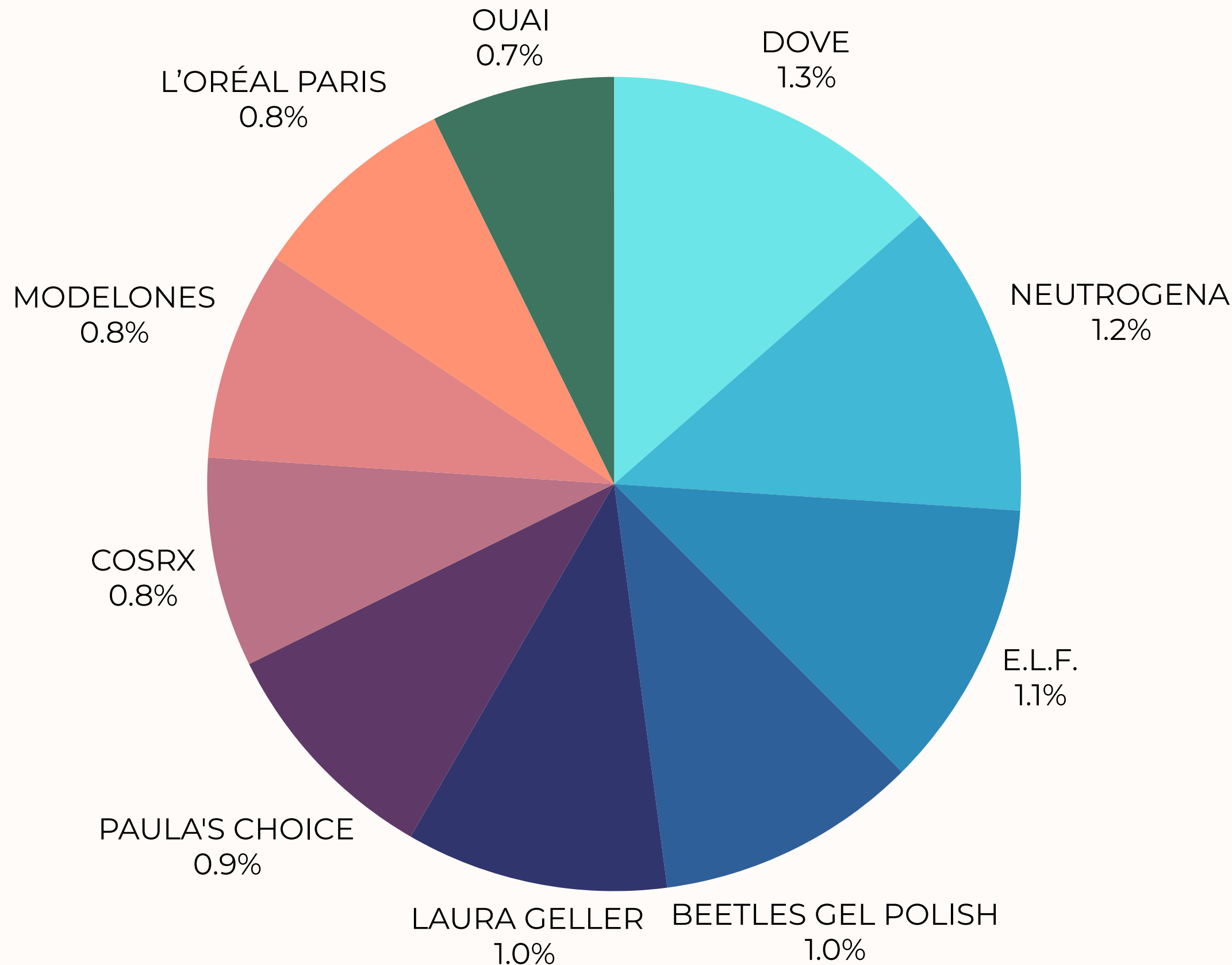
# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) peaked during Prime Day in July with Q4 being abnormally low when comparing to prior years.

# Beauty Advertising Activity

---



- **The Top Brands represented 9.7% of all sponsored product activity** – see breakdown to the left.
- Sponsorship share is much closer than sales share with less than 0.5% between the top 10 brands



Product	Brand
Clean Skin Club Clean Towels XL™, 100% USDA Biobased Face Towel, Disposable Face Towelette	CLEAN SKIN CLUB
SimplyVital Collagen, Retinol & Hyaluronic Acid Cream	SIMPLYVITAL
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant-Facial Exfoliant	PAULA'S CHOICE
Aquasonic Black Series Ultra Whitening Toothbrush	AQUASONIC
Optic White Overnight Teeth Whitening Pen	COLGATE
Mighty Patch™ Original patch	MIGHTY PATCH
3D Whitestrips Professional Effects,	CREST
Oral-B iO Deep Clean Rechargeable Electric Powered Toothbrush	ORAL-B
COSRX Snail Mucin	COSRX

The Top 9 sponsored products represented 22.6% of total sponsorship share.

- Many top selling brands are not represented as top advertised brands as Amazon evolves and brands rely on external traffic to drive sales.

Product	Brand
Nutrafol Women's Balance Hair Growth Supplements	NUTRAFOL
Clean Skin Club Clean Towels XL™	CLEAN SKIN CLUB
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant	PAULA'S CHOICE
Mighty Patch™ Original patch from Hero Cosmetics	MIGHTY PATCH
COSRX Snail Mucin	COSRX
Sol de Janeiro Hair & Body Perfume Mist	SOL DE JANEIRO
La Roche-Posay Toleriane Double Repair Face Moisturizer	LA ROCHE-POSAY
CeraVe Moisturizing Cream 19 Ounce	CERAVE
Eltamd UV Clear Face Sunscreen SPF 46	ELTAMD

The Top 9 products represented 28% of total Sales share.

- **Mighty Patch** has been toppled from the top position on Amazon in the beauty category with Nutrafol and Clean Skin Club closely contesting the number 1 spot.

# Fragrance

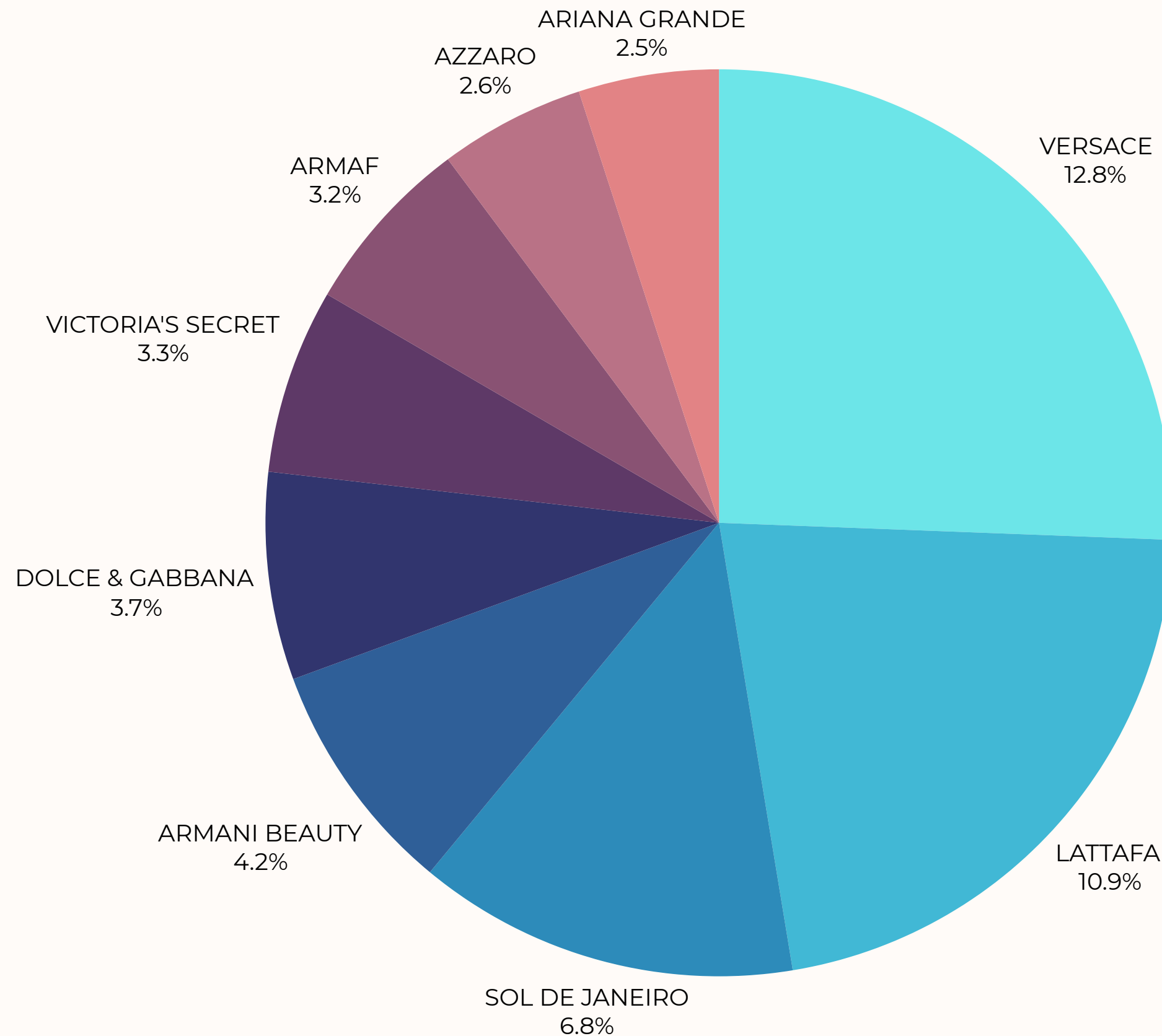
---

Top brands, items and performance  
in the Fragrance category for 2024



# Fragrance Share of Sales

## Top Brands In Fragrance



- Top brands in the category accounted for 50% of total sales. The average price point for the top 10 is \$56.50.

- Top Gainers:

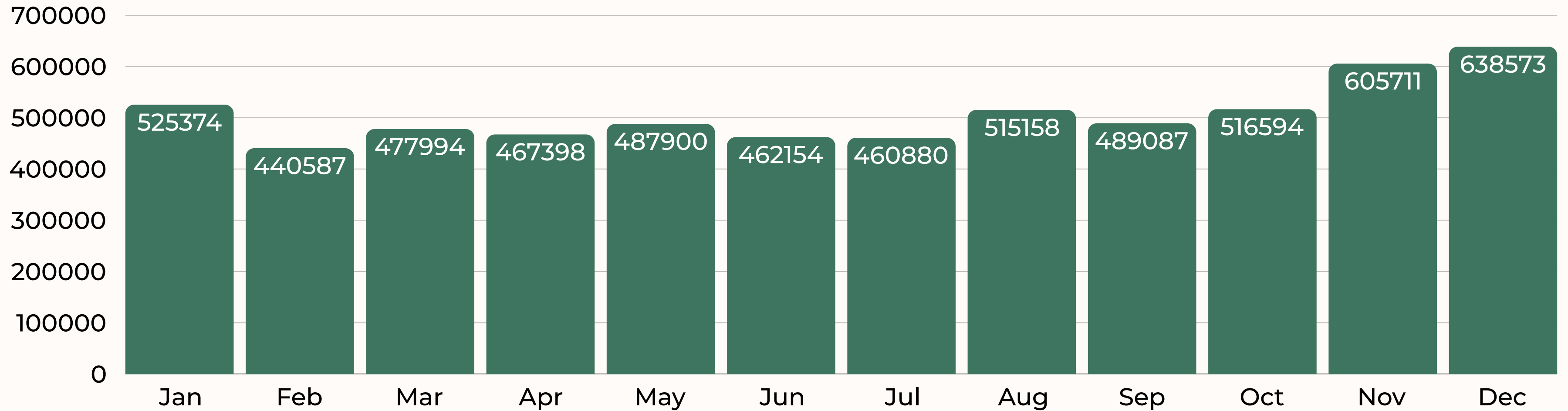
- Versace: +3.1%
- Lattafa: +4.1%
- Armani: +1.4%

- Top Losers:

- Sol De Janeiro: -3.1%
- Dolce & Gabbana: -4.3%
- Victoria's Secret: -2.1%



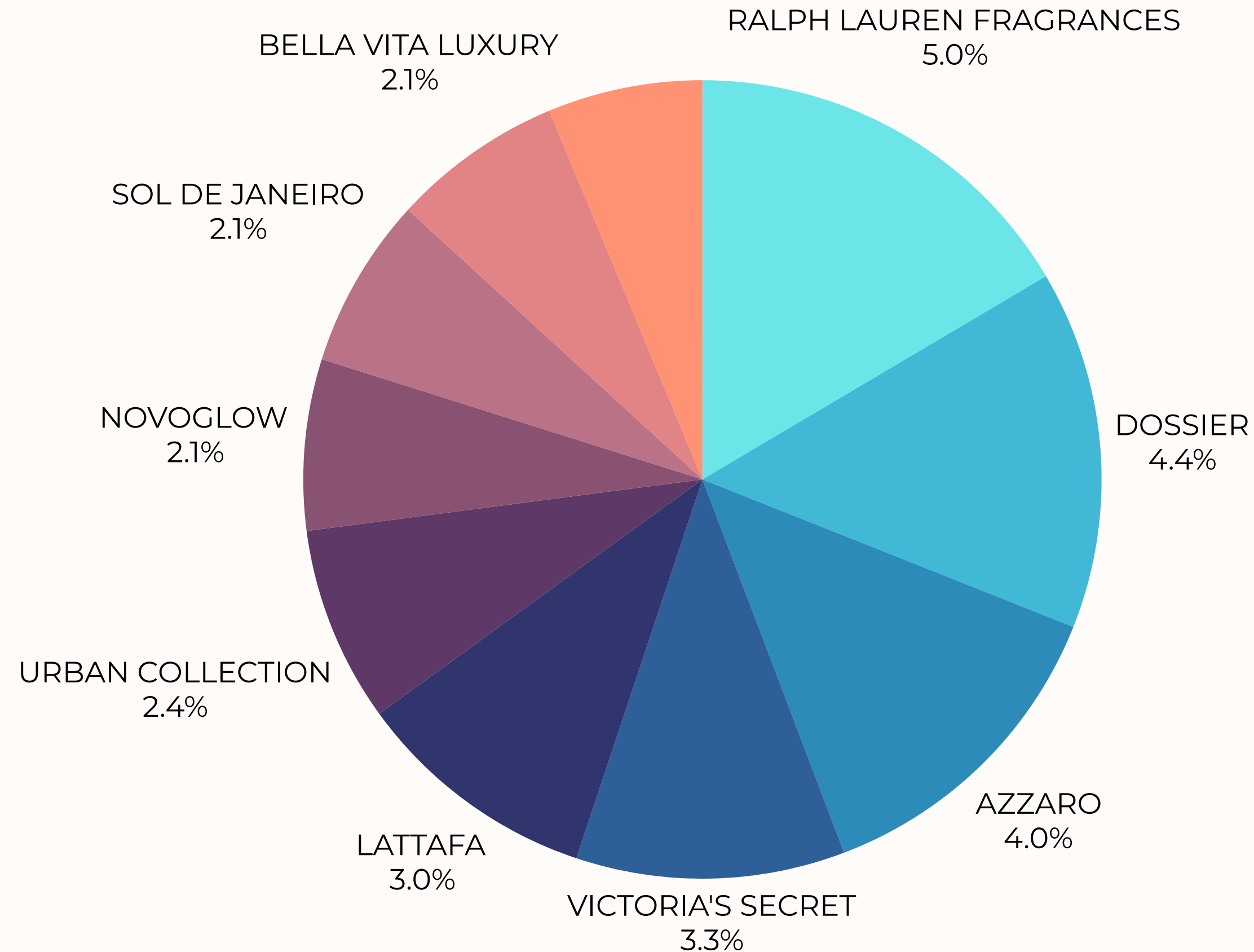
# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) peaked during Q4 with strong increase from Q1 as brands leveraged the increased holiday traffic on Amazon.

# Fragrance Advertising Activity

---



- **The Top Brands represented 30% of all sponsored product activity** – see breakdown to the left.
- Sol De Janeiro and Victoria's Secret both decreased YoY category share despite their total Advertising placing them in the top 10 brands.

Product	Brand
Lattafa Eau de Parfum Spray	LATTAFA
Azzaro The Most Wanted Eau de Parfum Intense	AZZARO
Dossier - Ambery Vanilla 1.7Oz	DOSSIER
Dime Beauty Perfume 7 Summers, 1.7 oz	DIME
Honey Oud Eau de Parfum (3.4 fl. oz.)	BELLA VITA LUXURY
Coco C5 for Women Eau De Parfum	URBAN COLLECTION
Perfume Sampler Set for Women -	INFINITE SCENTS
Crema Cologne for Men - Spice & Black Vanilla Mens Cologne Spray 3.4 Fl Oz	CREMO
Perfumes Maahir Black Edition for Unisex Eau de Parfum Spray, 3.4 Ounce	LATTAFA

The Top 9 sponsored products represented 23.6% of total sponsorship share.

- **Ralph Lauren**
  - Despite being the top advertiser in the category they are not a top brand in share of sales and are not represented amongst the top products. This indicates they are spreading budget across too many products.

Product	Brand
Sol de Janeiro Hair & Body Perfume Mist 8.1oz	SOL DE JANEIRO
Sol de Janeiro Hair & Body Perfume Mist 3.4oz	SOL DE JANEIRO
Versace Eros for Men 3.4 oz Eau de Toilette Spray	VERSACE
Lattafa Yara for Women Eau de Parfum Spray, 3.40 Ounce / 100 ml	LATTAFA
Ariana Grande Cloud Body Mist	ARIANA GRANDE
Versace The Dreamer for Men 3.4 oz Eau de Toilette Spray	VERSACE
Armani Beauty - Acqua di Giò 3.3oz	ARMANI BEAUTY
Billie Eilish Eau de Parfum	BILLIE EILISH
Armani beauty - Acqua di Giò 6.7oz	ARMANI BEAUTY

The Top 9 products represented 20.4% of total Sales share.

---

- **Sol De Janeiro**
  - Maintaining the top two spots despite a significant decrease in market share year over year shows how popular they remain.
- **Versace**
  - Increasing advertising with a focus on hero products has lead to Versace increasing their market share to be the number one brand in fragrance.



# Skincare

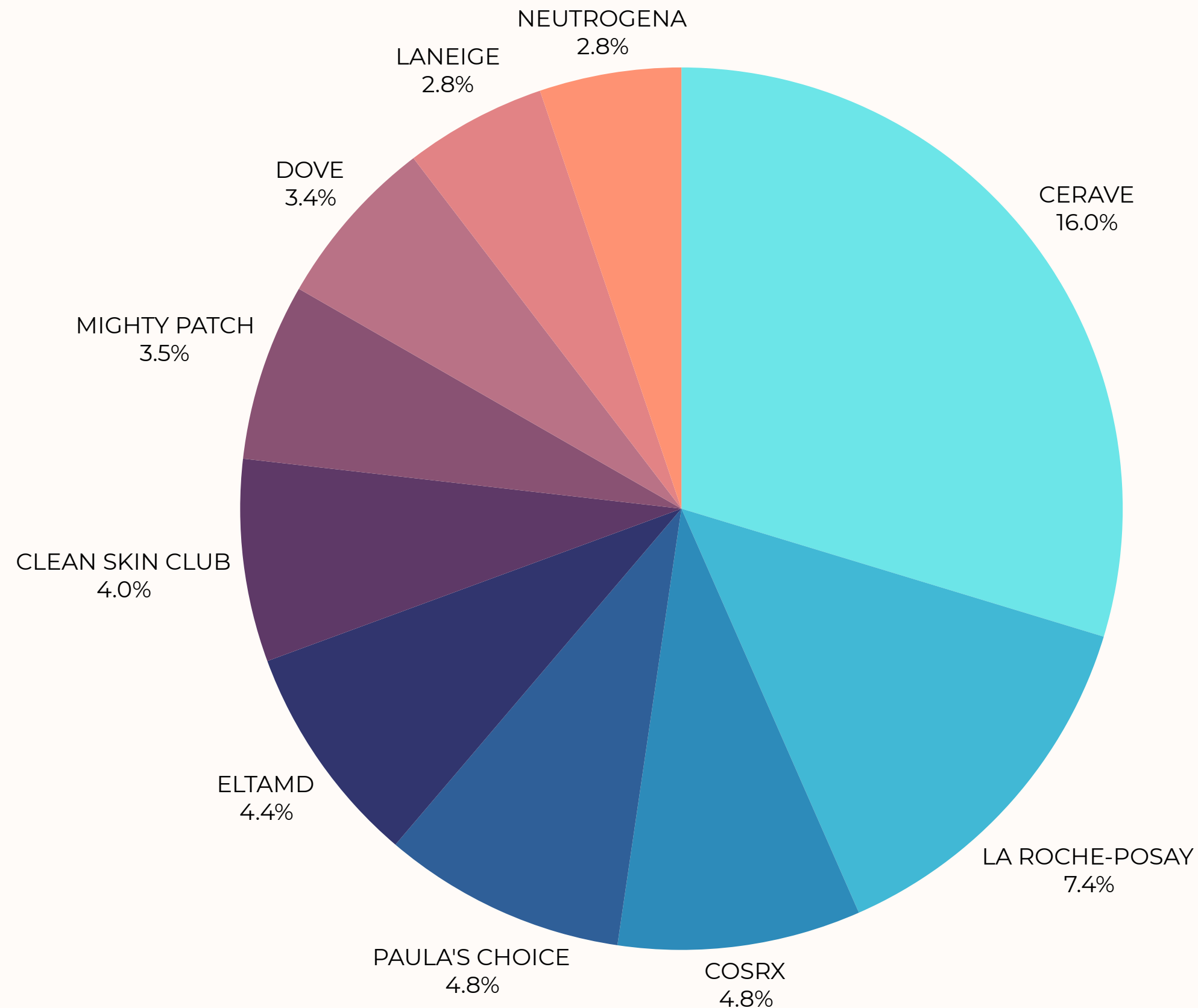
---

Top brands, items and performance  
in the Skincare category for 2024



# Category Share of Sales

## Top Brands In Skincare



- Top brands in the category accounted for 54% of total sales. The average price point for the top 10 is \$28.99.

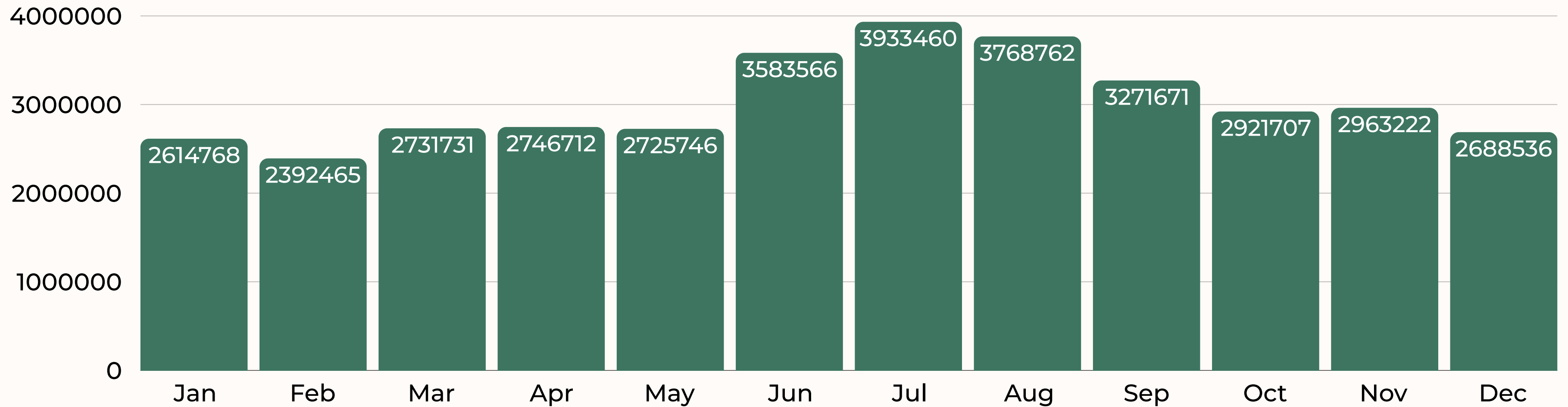
- Top Gainers:

- La Roche-Posay: +2.6%
- Clean Skin Club: +1.5%
- Dove: +0.9%

- Top Losers:

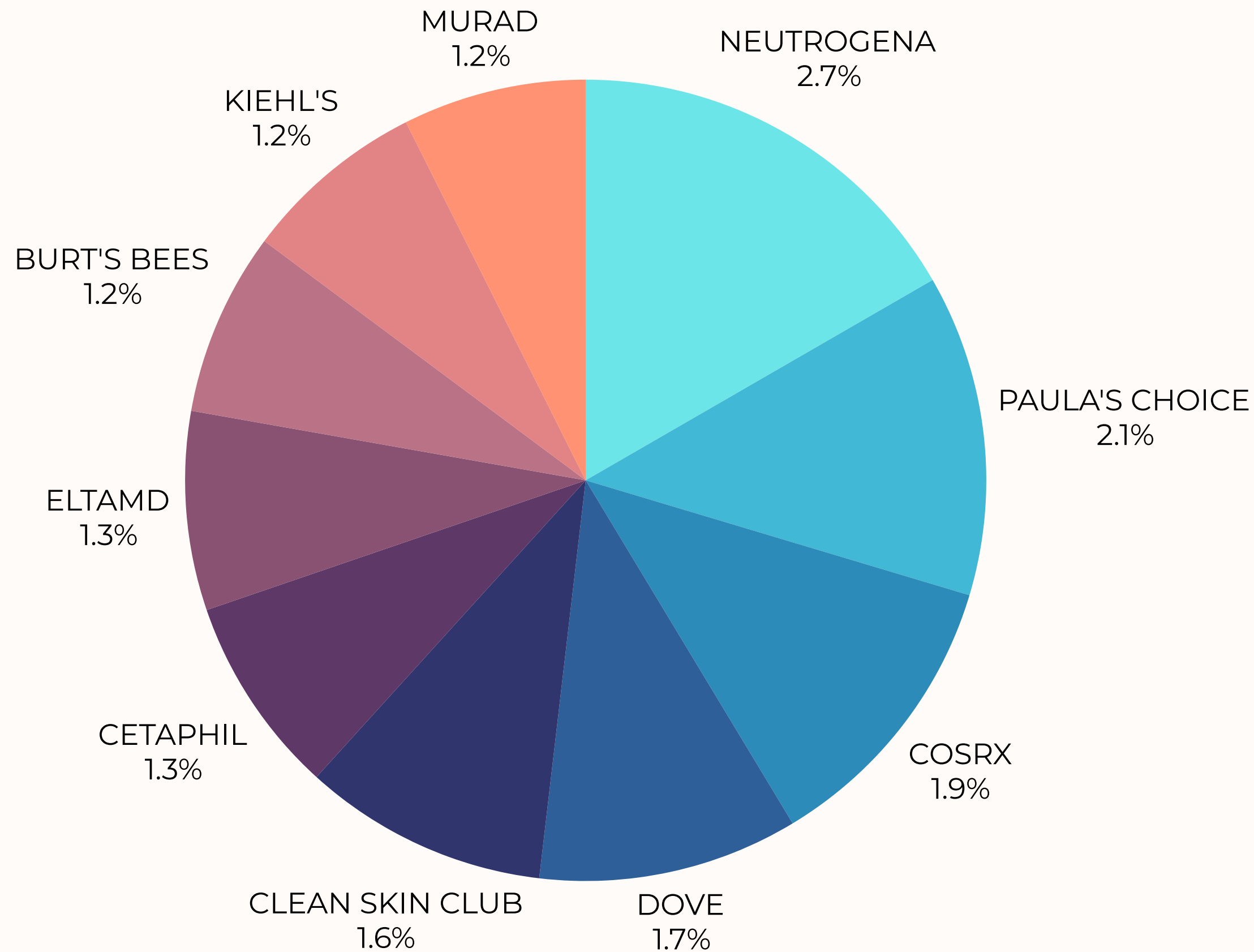
- Cerave: -2.1%
- COSRX: -1.6%
- EltamD: -1.3%

# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) peaked during Prime Day in July with strong increase from Q1 as brands leveraged the increased traffic on Amazon.

# Skincare Advertising Activity



- **The Top Brands represented 16% of all sponsored product activity** – see breakdown to the left.
- Dove and Clean Skin Club both saw Year over Year gains in both advertising share and sales share.



Product	Brand
Clean Skin Club Clean Towels XL	CLEAN SKIN CLUB
SimplyVital Collagen, Retinol & Hyaluronic Acid Cream 1.7 fl.oz.	SIMPLYVITAL
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant	PAULA'S CHOICE
Mighty Patch™ Original patch from Hero Cosmetics	MIGHTY PATCH
COSRX Snail Mucin 96% Power Repairing Essence 3.38 fl.oz	COSRX
EltaMD UV Clear Face Sunscreen SPF 46	ELTAMD
Kojic Acid Dark Spot Remover Soap Bars	VALITIC
COSRX Snail Mucin 92% Face Moisturizer, 3.52 Oz	COSRX
BIODANCE Bio-Collagen Real Deep Mask	BIODANCE

The Top 9 sponsored products represented 30% of total sponsorship share.

- **COSRX**
  - As sales share declines COSRX is trying to offset and regain share through paid placements.
- **Clean Skin Club**
  - Hold a commanding lead over the next most sponsored product with a 77% increase from the number 2 spot.

Product	Brand
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant-	PAULA'S CHOICE
Clean Skin Club Clean Towels XL	CLEAN SKIN CLUB
EltaMD UV Clear Face Sunscreen SPF 46	ELTAMD
Mighty Patch™ Original patch from Hero Cosmetics	MIGHTY PATCH
La Roche-Posay Toleriane Double Repair Face Moisturizer	LA ROCHE-POSAY
COSRX Snail Mucin 96% Power Repairing Essence 3.38 fl.oz	COSRX
Cerave Moisturizing Cream, Body and Face Moisturizer 19 Ounce	CERAVE
Kojic Acid Dark Spot Remover Soap Bars	VALITIC
CeraVe Daily Moisturizing Lotion for Dry Skin 19 Ounce	CERAVE

The Top 9 products represented 23.6% of total sales share.

- Clean Skin Club is closing the gap on Paula’s Choice with a 1.4% increase in share of sales while Paula’s Choice decreased 1.1% Year over Year.
- COSRX saw the biggest decrease at 1.4% Year over Year decline.

# Hair Care

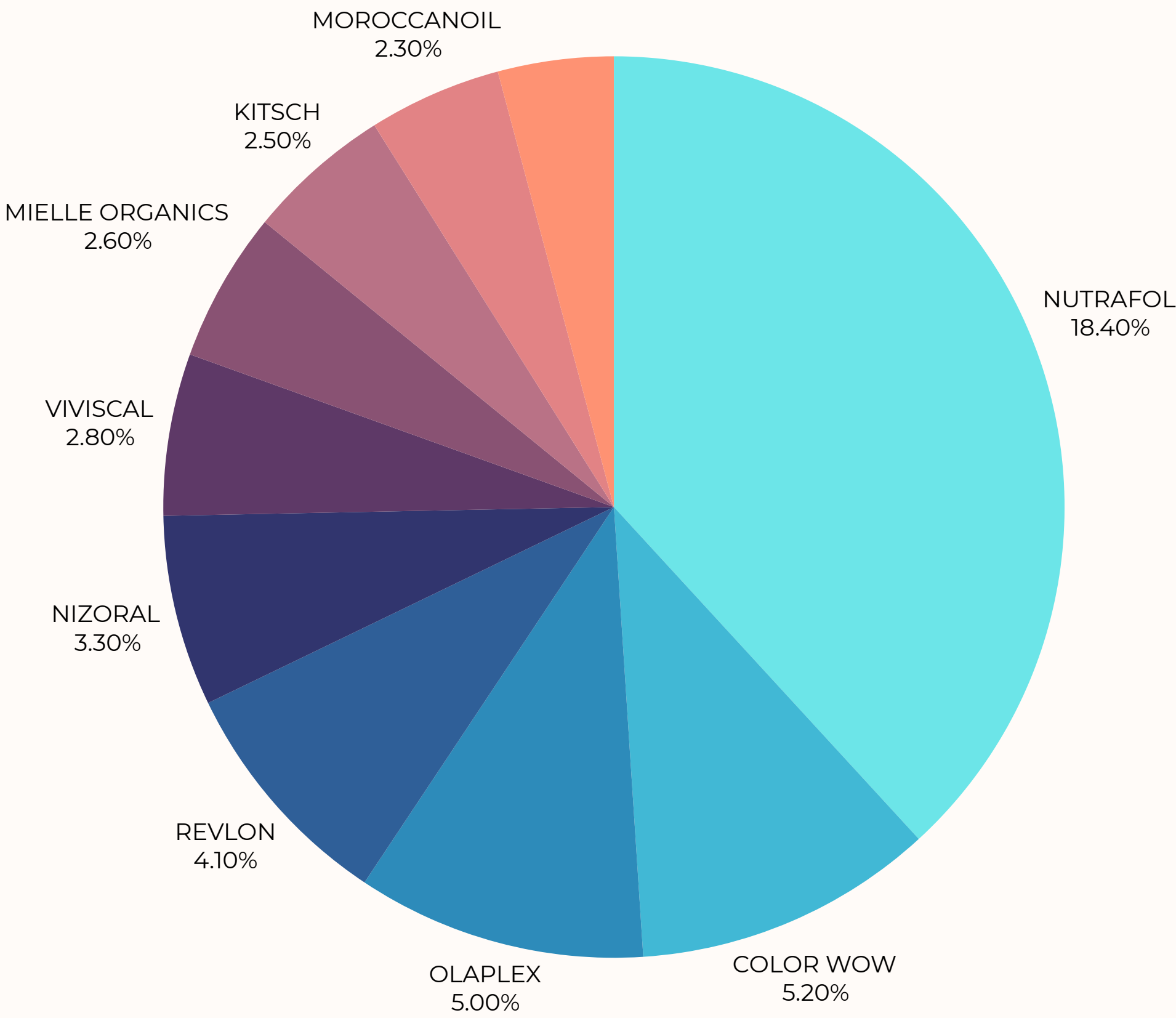
---

Top brands, items and performance  
in the Hair Care category for 2024



# Category Share of Sales

## Top Brands In Hair Care

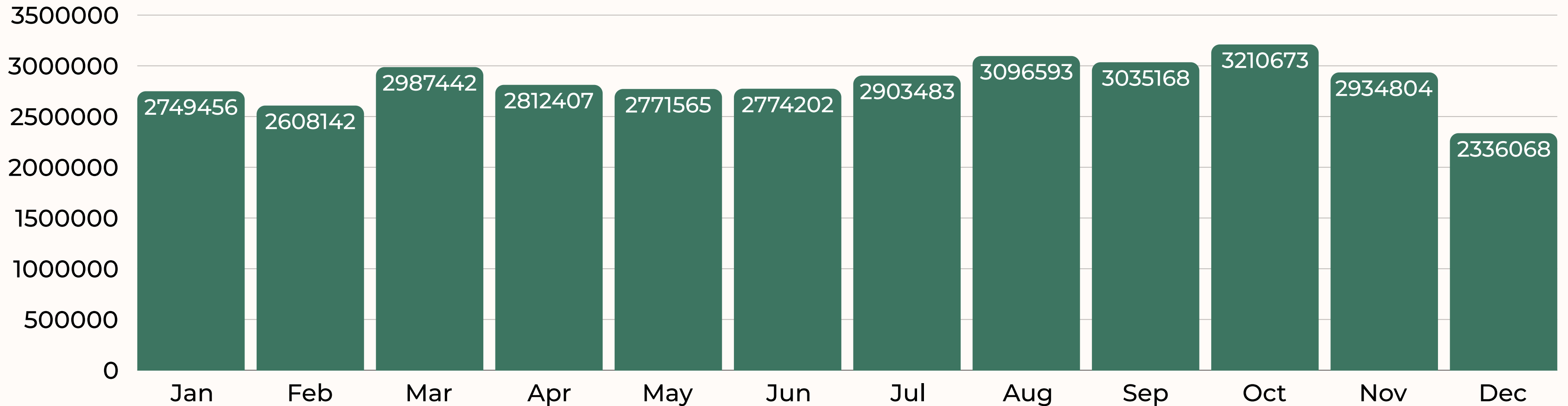


- Top brands in the category accounted for 48% of total sales. The average price point for the top 10 is \$42.71.

- Top Gainers:
  - Nutrafol: +1%
  - Color Wow: +1.3%
  - Nizoral: +0.8%
- Top Losers:
  - Olaplex: -4.1%
  - Revlon: -1.3%
  - Moroccan Oil: -0.3%



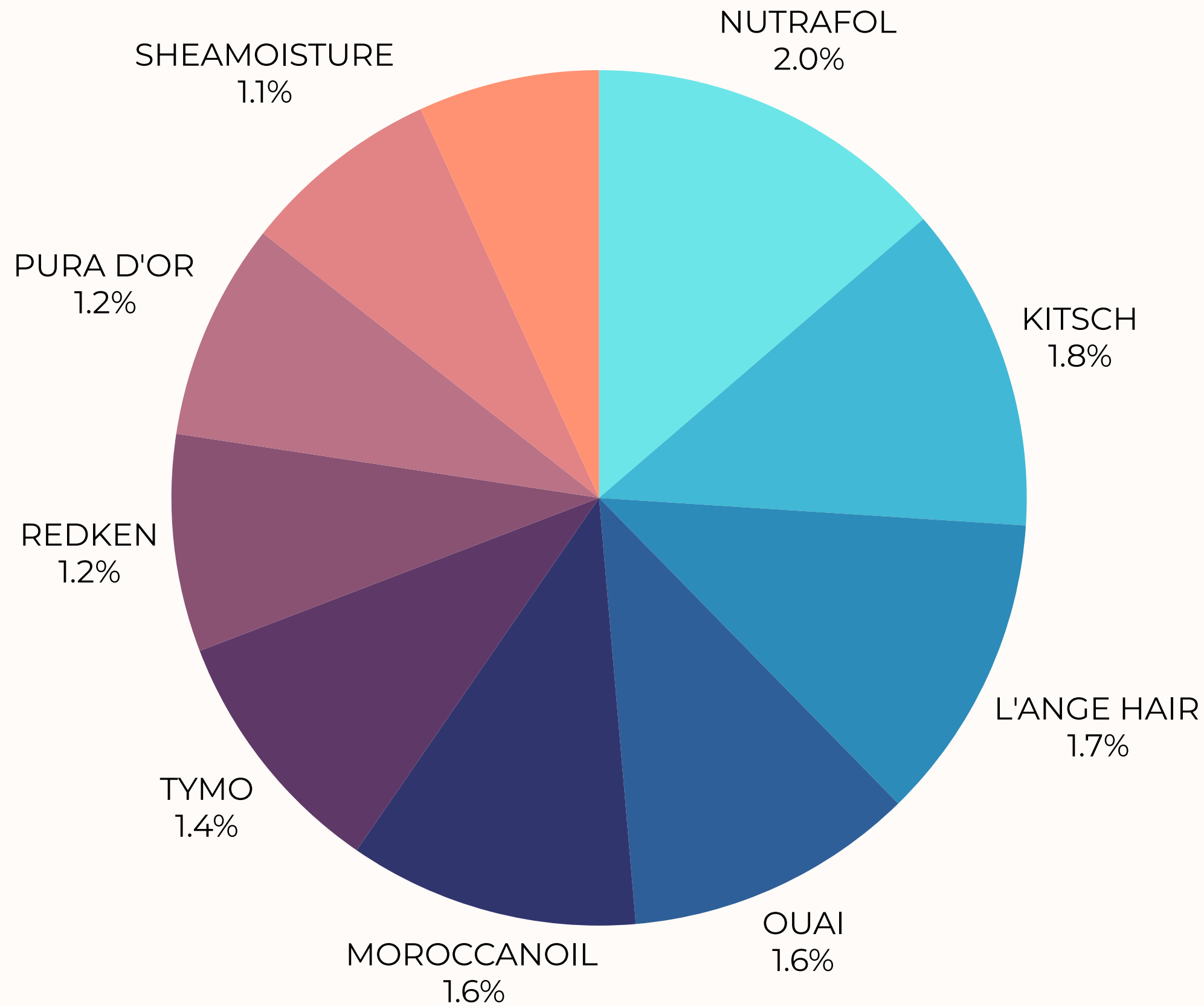
# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) peaked during Prime Day in October in a break from other categories which typically see peak sponsorship during the larger July prime day or in Q4 with holiday shopping.

# Hair Care Advertising Activity

---



- **The Top Brands represented 14.5% of all sponsored product activity** – see breakdown to the left.
- Nutrafol continues to lead the category a close race between the rest of the competitors.



Product	Brand
Mielle Organics Rosemary Mint Scalp & Hair Strengthening Oil for All Hair Types, 2 Ounce	MIELLE ORGANICS
OLOV For Man Beard Trimmer, 21 Piece All-in-One Mens Grooming Kit and Hair Clipper	OLOV FOR MAN
PURA D'OR Anti-Thinning Biotin Shampoo & Deep Moisturizing Conditioner Original Gold Label Set	PURA D'OR
Nizoral Anti-Dandruff Shampoo with 1% Ketoconazole, Fresh Scent, 7 Fl Oz	NIZORAL
Desire Deluxe Hair Chalk for Girls Makeup Kit of 10 Temporary Colour Pens Gifts	DESIRE DELUXE
Beachwaver B1 Rotating Curling Iron	THE BEACHWAVER CO.
Samnyte Hair Wax Stick 2.7 Fl Oz	SAMNYTE
Nutrafol Shampoo	NUTRAFOL
Le Duo Standard 360° Airflow Styler	L'ANGE HAIR

The Top 9 sponsored products represented 30% of total sponsorship share.

- **Nutrafol**
  - Interestingly we don't see Nutrafol supplements top the list, indicating their social spend and off Amazon strategy is driving huge volume for them.

Product	Brand
Women's Balance Hair Growth Supplements	NUTRAFOL
Women's Hair Growth Supplements	NUTRAFOL
COLOR WOW Dream Coat Supernatural Spray	COLOR WOW
Nizoral Anti-Dandruff Shampoo with 1% Ketoconazole, Fresh Scent, 7 Fl Oz	NIZORAL
Viviscal Hair Growth Supplements for Women	VIVISCAL
Nutrafol Men's Hair Growth Supplements	NUTRAFOL
Moroccanoil Treatment	MOROCCANOIL
Mielle Organics Rosemary Mint Scalp & Hair Strengthening Oil for All Hair Types, 2 Ounce	MIELLE ORGANICS
FHI Heat UNbrush Detangling Brush	FHI HEAT

The Top 9 products represented 32.7% of total sales share.

- **Supplements Dominate**
  - Nutrafol holds a commanding lead in the category with 11% share for their top product and 5% for their #2. Color Wow comes in at 3% highlighting the growth Nutrafol has seen.

# Makeup

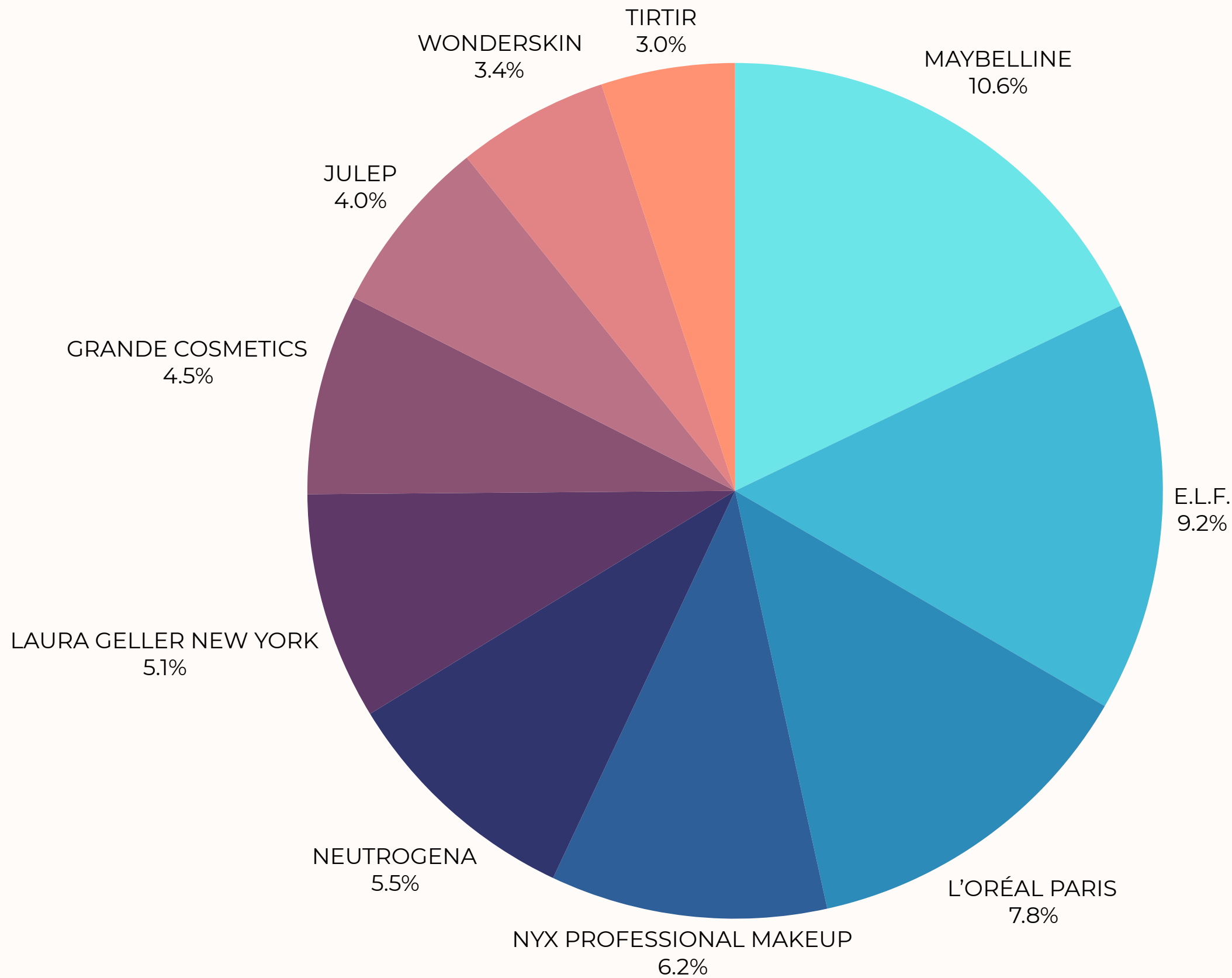
---

Top brands, items and performance  
in the Makeup category for 2024



# Category Share of Sales

## Top Brands In Makeup



- Top brands in the category accounted for 59% of total sales. The average price point for the top 10 is \$18.86.

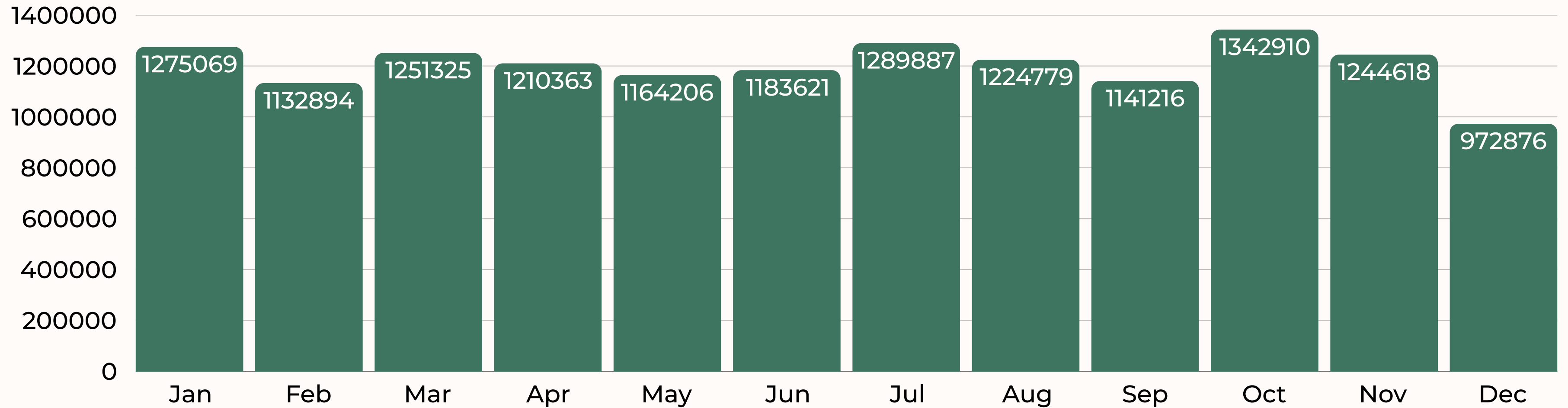
- Top Gainers:

- Wonderskin: +3.2%
- Laura Geller : +2.2%
- Neutrogena: +1.9%

- Top Losers:

- Maybelline: -5.9%
- NYX Professional: -4.4%
- Grande Cosmetics: -3.2%

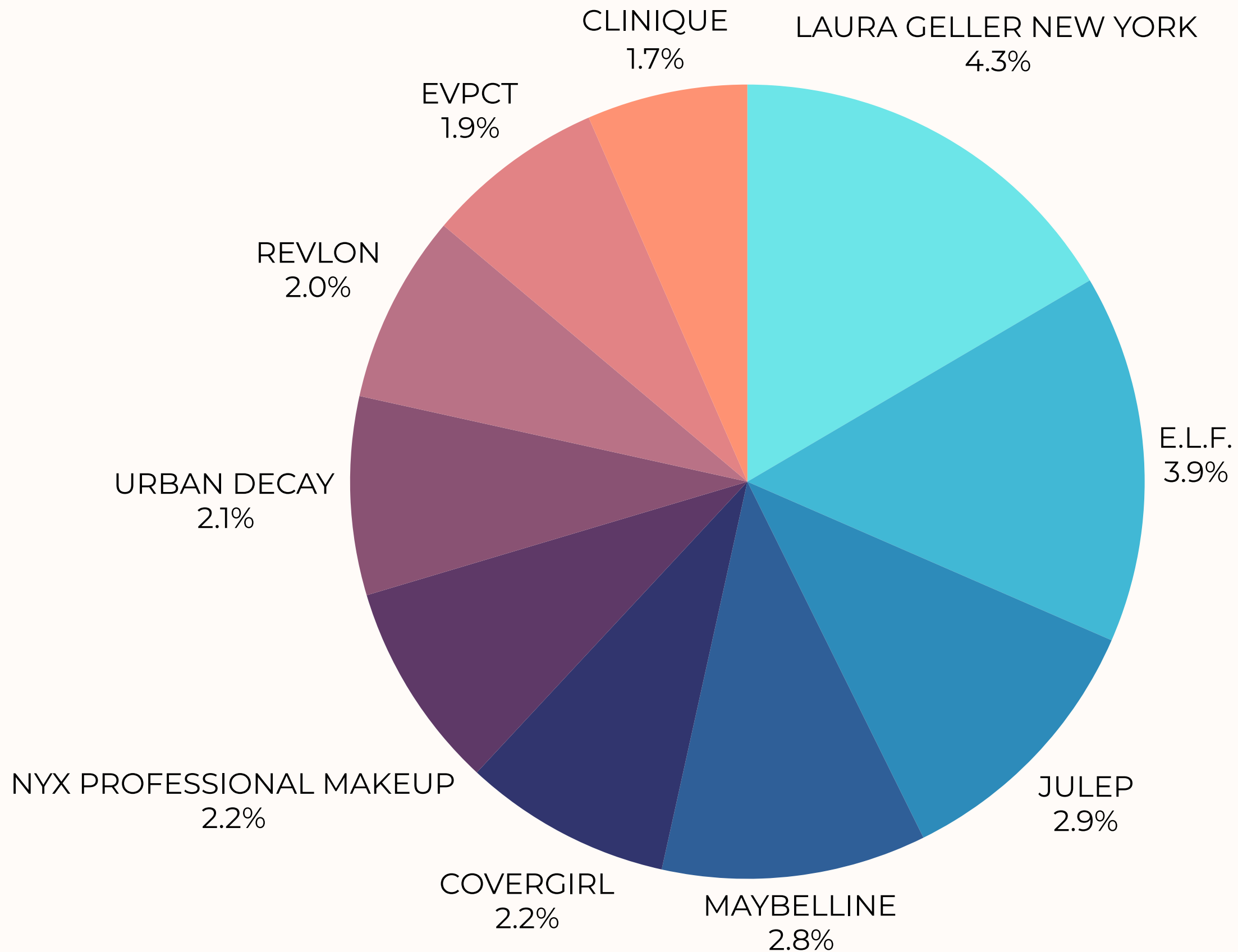
# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) were relatively consistent throughout the year with a peak around both Prime Days.

# Makeup Advertising Activity

---



- **The Top Brands represented 26.1% of all sponsored product activity** – see breakdown to the left.
- Laura Geller increased their sponsorship share by 153% year over year in an attempt to grown and stop any decrease in share of sales.



Product	Brand
Julep It's Balm: Tinted Lip Balm + Buildable Lip Color	JULEP
Julep Eyeshadow 101 Creme-to-Powder Waterproof Eyeshadow Stick	JULEP
M. Asam Magic Finish Make-Up Mousse (1.01 Fl Oz)	M. ASAM
Neutrogena Makeup Remover Wipes	NEUTROGENA
Lanc��me Lash Id��le Lash-Lifting & Volumizing Mascara	LANC��ME
Anua Heartleaf Pore Control Cleansing Oil	ANUA
LAURA GELLER NEW YORK Award-Winning Baked Balance-n-Brighten Color Correcting Powder Foundation - Medium	LAURA GELLER NEW YORK
LAURA GELLER NEW YORK Award-Winning Baked Balance-n-Brighten Color Correcting Powder Foundation - Fair	LAURA GELLER NEW YORK
Face Stick Crystal Collection Trio - Contour Stick Makeup Collection	OGEE

The Top 9 sponsored products represented 17.7% of total sponsorship share.

- All products are within 1% of each with Julep at 2.7% and Ogee at 1.7%. The category is hotly contested with one of the highest concentrations of sponsorship share among the top brands.

Product	Brand
Grande Cosmetics GrandeLASH-MD Lash Enhancing Serum	GRANDE COSMETICS
Julep Eyeshadow 101 Crème-to-Powder Waterproof Eyeshadow Stick	JULEP
Neutrogena Makeup Remover Wipes	NEUTROGENA
DRMTLGY Anti-Aging Tinted Moisturizer SPF 46	DRMTLGY
Anua Heartleaf Pore Control Cleansing Oil	ANUA
L'Oreal Paris Makeup True Match Lumi Glotion	L'ORÉAL PARIS
Wonderskin Wonder Blading Lip Stain Peel Off Masque	WONDERSKIN
Advanced Eyelash Serum Brow Enhancer (3mL)	TEREZ & HONOR
Maybelline Lash Sensational Sky High Washable Mascara Makeup	MAYBELLINE

The Top 9 products represented 25.2% of total sales share.

- **Top Products**
  - Large swings in top sellers with Grand Cosmetics decreasing 3.6% Year over Year while Wonderskin saw a 2.4% bump.

# Key Takeaways

## Market Performance & Brand Movements

---

- **Top Beauty Brands on Amazon:**

- **CeraVe (9.7%)** remains the dominant skincare brand, despite a decline in share (-1.5%).
- **Nutrafol (5.6%)** continues its rise (+1.9%), fueled by strong DTC awareness and cross-platform marketing.
- **La Roche-Posay (4.3%)** and **Clean Skin Club (4.2%)** are among the fastest-growing brands, increasing their market share through aggressive ad investments and effective content optimization.
- **Makeup & Hair Care Leaders:** Maybelline, E.L.F., and L'Oréal Paris hold strong positions, while Nutrafol continues to dominate hair care with an 18.4% market share.

# Key Takeaways

## Advertising & Competitive Landscape

---

- Paid sponsorship activity peaked during Prime Day (July), with lower-than-expected Q4 investment.
- Brands focusing on a few key products in their advertising strategy saw the strongest sales growth, rather than those spreading budgets thin.
- NYX Professional Makeup led in sponsored placements but has yet to translate this into significant market share gains.
- Competition is rising, particularly in skincare and fragrance, with newer brands leveraging paid ads to challenge category leaders.

# Key Takeaways

## Strategic Takeaways for 2025

---

- **Advertising Drives Market Share:** Brands with well-executed paid media strategies are outperforming those relying on organic sales.
- **Focused Budget Allocation Wins:** Prioritizing high-ROI products in advertising delivers better results than spreading ad spend across too many SKUs.
- **New Competitors Are Gaining Ground:** Skincare and fragrance categories are seeing increased competition from emerging brands that aggressively invest in advertising.
- **Amazon Strategy Must be Holistic:** Brands that integrate advertising, content optimization, and off-platform marketing will maintain long-term growth and market dominance.

# Our Channels

We collaborate with our brands to craft comprehensive strategies that break down silos, creating a **holistic, consumer-focused approach** across the entire e-commerce landscape.





# Why Choose Us?

1

## Beauty Expertise

We focus solely on the beauty and wellness sector and have gained a deep expertise in this niche.

2

## Full Service

We do it all for you. Navigo is a one-stop solution for all your Retail Media management needs.

3

## Data-Driven

We monitor industry, competitive, and brand-specific trends, using that data to inform our decisions and drive ROI.

4

## 100% Dedicated

Our model ensures we are 100% committed to growing your account - that's why 94% of our clients renew.



# LIP LINER STAY-N

Peel Off Lip Liner

- ✓ Water-resistant
- ✓ Smudge-proof
- ✓ Transfer-proof
- ✓ Long-wear, up to 12 hours!
- ✓ Safe nourishing ingredients



**fur**

*THOUGHTFULLY FORMULATED*  
*NATURALLY POWERED*

Clean beauty crafted with clean ingredients,  
to care for your most sensitive areas

**SHOP FUR**



**OVERSIZED DOE FOOT**  
CURVED TO HUG LIPS

**NON-STICKY FINISH**

**PLUMPS,  
BUT NEVER BURNS**

Shade: Velvet Daisy

LAWLESS

# Content drives performance

Our team of in-house creative designers works with our paid team to develop performance creative that moves the needle.



# Connecting the Dots Between Paid Performance and Growth

Using data to tell the story and drive  
decisions across channels.

Navigo

## Executive summary

Revenue

\$6.02K  
↑ 136.96%

Compared to Jan 26, 25 - Jan 31, 25

Cost

\$3.01K  
↑ 12.24%

Compared to Jan 26, 25 - Jan 31, 25

ROAS

2.00  
↑ 110.53%

Compared to Jan 26, 25 - Jan 31, 25

Conversions

62.96  
↑ 109.87%

Compared to Jan 26, 25 - Jan 31, 25

Conversion Rate

2.41%  
↓ -15.44%

Compared to Jan 26, 25 - Jan 31, 25

Clicks

2.08K  
↑ 52.24%

Compared to Jan 26, 25 - Jan 31, 25

CPA

\$47.76  
↓ -46.52%

Compared to Jan 26, 25 - Jan 31, 25

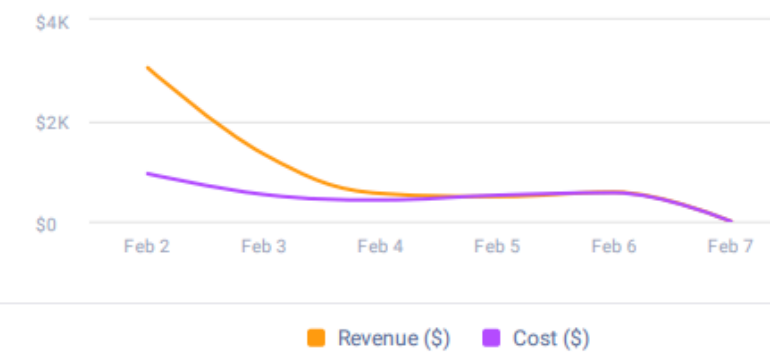
CPC

\$1.45  
↓ -26.40%

Compared to Jan 26, 25 - Jan 31, 25

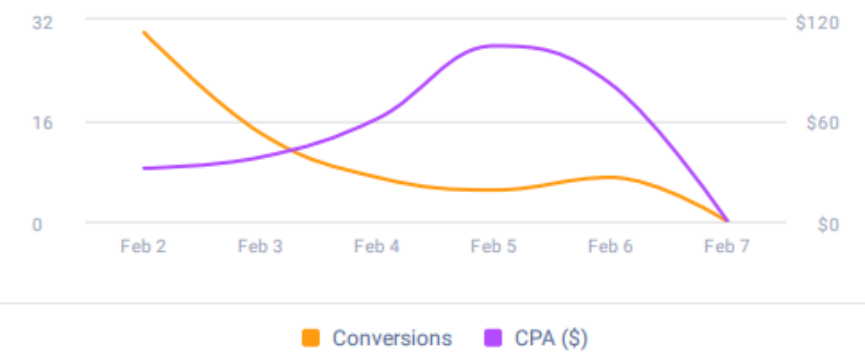
### Ad spend and revenue over time

2 metrics selected Daily



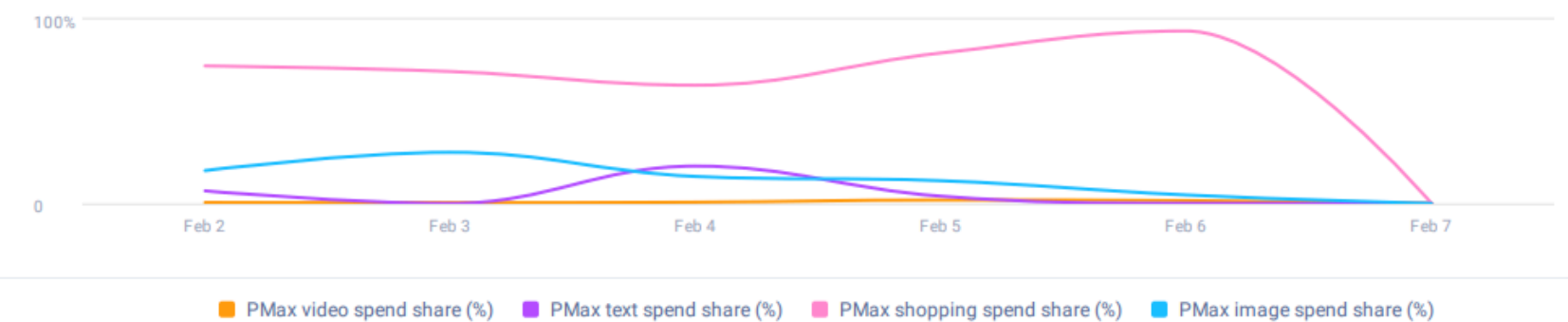
### Ad CPA and conversions over time

2 metrics selected Daily



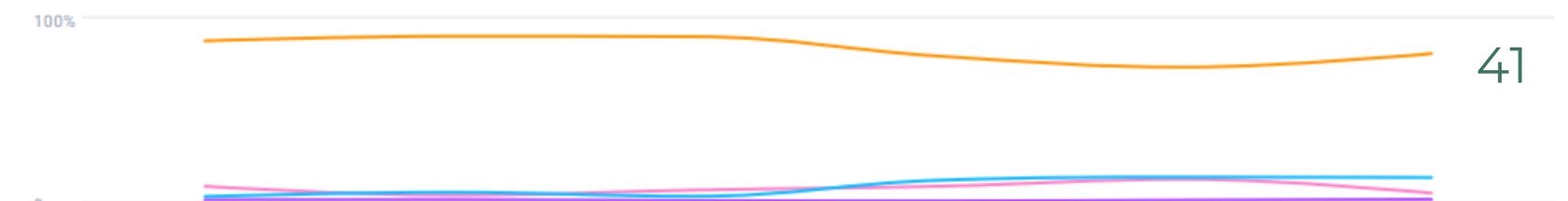
### Daily spend by asset type

4 metrics selected Daily

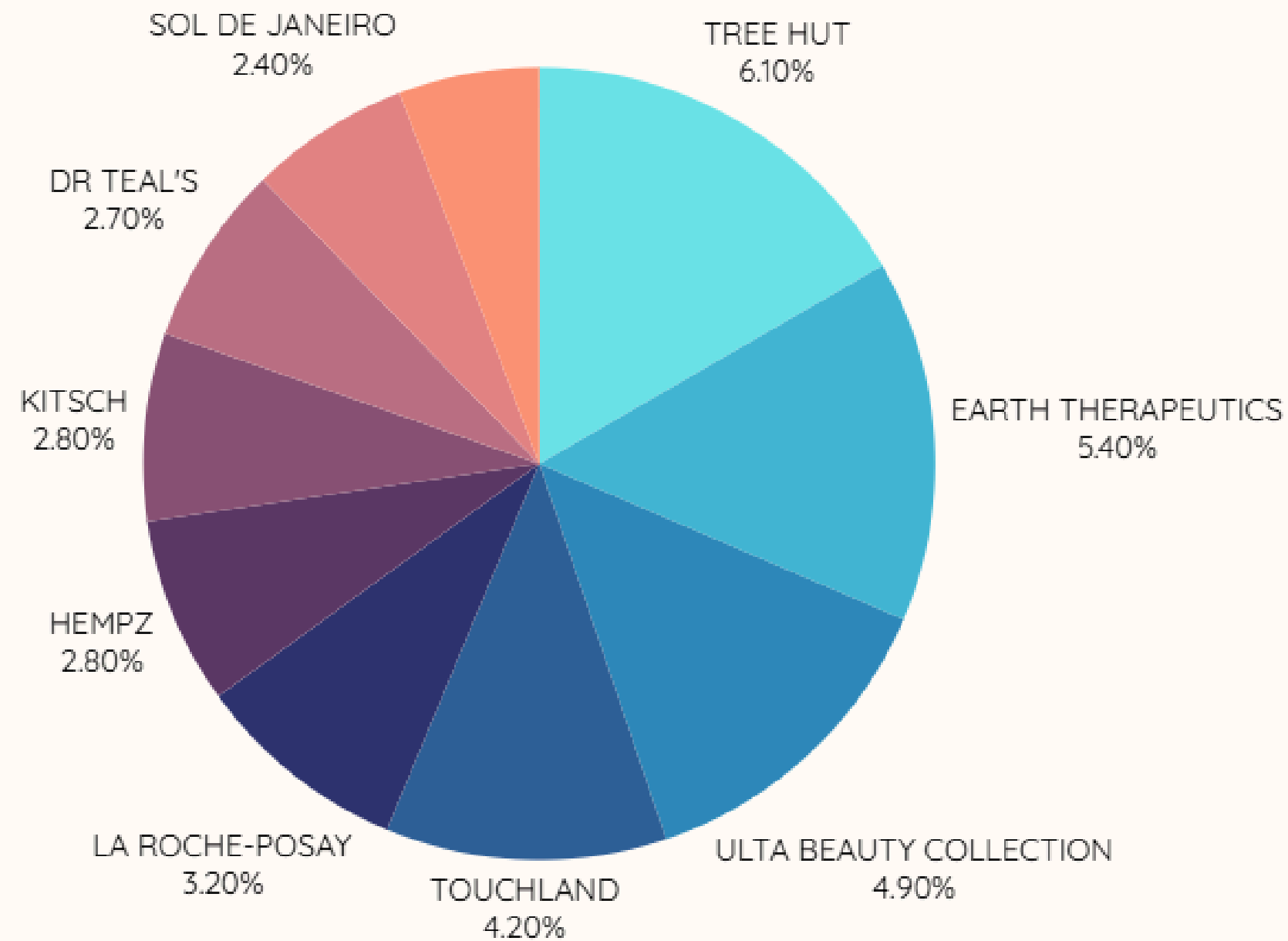


### Monthly spend by asset type

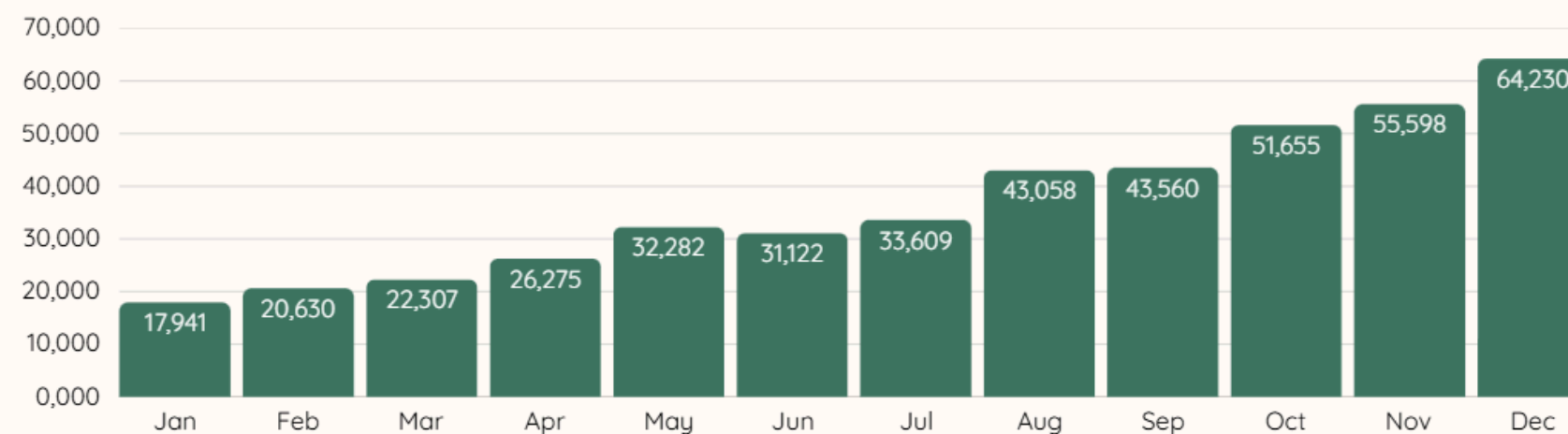
4 metrics selected Weekly



## Body Care Category Share of Sales



Advertising Activity Over Time



## Measuring impacts where the customer shops

Our unique data set gives you insight into how your brand is performing not just on your own site but other major channels like:

- Amazon
- Ulta.com
- Sephora.com

We measure key metrics and integrate into our process to understand Share of Sales, Search changes, Share of Advertising and more.

Navigo



Let's start our journey together.

Jacob St. John | Founder  
jacob@navigomarketing.com