



Prime Day 2025 Recap: Growth, Profitability, and Category Shakeups

Prime Day looked a little different this year. With four days instead of two, the event stretched consumer attention and made urgency harder to capture. Day 1 started strong, followed by a dip on Days 2 and 3, then a rebound on Day 4. Despite the diluted format, our brands outperformed, and did it profitably.

Portfolio Performance

We don't just track top-line growth, we care about what's left after you spend. This year, our portfolio delivered across the board:

- Sales up 97.5% YoY
- Net profit up 196%
- SKU margin up 17%
- ROAS up 18%
- Sessions up 156%

When we strip out a few outliers, the numbers were even stronger:

- Sales up 115%
- Net profit up 232%
- ROAS up 26%
- Sessions up 184%

The message here is clear: you can run a Prime Day strategy that drives incremental sales, attracts new-to-brand customers, and still protects your margin. We're not chasing volume at all costs.

Category Performance Across Our Brands

Makeup saw the largest year-over-year jump in sales, largely driven by the launch of *About-Face* during Prime Day. Skincare and Hair Care also delivered. Bath & Body was one of the few to return a positive ROAS, with lower session growth but highly efficient conversion.

Category	Sales Growth	Sessions Growth	ROAS Change	ASP
Makeup	+378%	+601%	-19%	\$24
Skincare	+204%	+113%	-13%	\$25
Hair Care	+241%	+96%	+5.3%	\$24
Bath & Body	+225%	+23%	+12%	\$32
Wellness	+144%	+95%	-1%	\$21

Most brands in our portfolio saw daily sales increases between 200% and 1100% during the 4-day event. On Day 1 alone, unit shipments were up as much as 1120% for top performers.

What Happened in the Broader Market

The Beauty & Personal Care category on Amazon saw one of the most aggressive reshuffles we've tracked to date. Sponsorship activity rose 44.8%, and organic visibility increased 56.7% YoY. The winners weren't always the top spenders.

Medicube Took the Lead

Medicube has been climbing steadily since Q1, but Prime Day cemented their lead. They captured 9.3% of sales share among the top 100 bestselling items, nearly double the next closest brand (Nutrafol at 5.3%). That kind of gap is rare in a fragmented category like beauty.

What's more, Medicube wasn't among the top brands in paid sponsorship. They won by sustaining organic momentum, leveraging hero SKUs, and showing up across the funnel with compelling, high-converting assets.

For the first time in years, Cosrx's Snail Mucin didn't crack the top 10. The product has been a mainstay in Amazon's beauty bestsellers—often holding its ground even outside of peak events. Its absence signals more than just a dip in Prime Day execution. We're likely seeing fatigue with legacy hero SKUs that haven't evolved their PDPs or promotional hooks to match changing consumer expectations.

The New Top 10

Brand	Share of Sales	Change YoY
Medicube	9.3%	+9.3 pts
Nutrafol	5.3%	+3.4 pts
Cerave	5.1%	+0.5 pts
La Roche-Posay	5.0%	+3.4 pts
Sol de Janeiro	4.9%	-0.3 pts
Clean Skin Club	3.4%	+0.1 pts
EltaMD	3.3%	-0.6 pts
Mighty Patch	3.0%	+0.4 pts
Laneige	3.0%	-1.9 pts
Biodance	2.9%	-1.0 pts

Nutrafol and La Roche-Posay both gained share, proving that premium and dermatologist-backed brands are still resonating when supported by solid PDPs and paid strategy. Meanwhile, Laneige and Biodance saw sharp declines despite strong individual SKU performance, likely due to a lack of depth beyond hero items.

Who Lost Ground

Brands like Dove, Cosrx, Grande Cosmetics, and Pureology all saw notable year-over-year declines in share of sales. They weren't absent from the event, Dove in particular had a heavy paid presence, but they failed to convert at the same rate as emerging players. This underscores a key point: volume alone isn't enough. Paid needs to be efficient, content needs to be on point, and the promotion has to match audience expectations.

Final Word

Prime Day 2025 reinforced what we've been seeing all year: the brands that win are the ones with focused SKUs, clear messaging, and efficient media. You don't need to discount your way to the top. With the right planning, you can grow profitably, even in a longer, more diluted retail event.

If you're interested in what this means for your brand heading into Q4, let's talk.

