Navigo
MARKETING

Amazon Q2: 2025 Review

Executive Summary

Q2 2025 was marked by continued economic headwinds that led to more cautious consumer behavior. Search volume in the Beauty and Personal Care category declined 16 percent quarter over quarter, and organic visibility fell by 9.9 percent. This suggests a softening in discovery and engagement across the category.

Sponsorship activity remained essentially flat, rising just 0.3 percent. Brands maintained their paid media presence but did so with more control and selectivity. The market rewarded those who prioritized efficiency and performance over sheer scale.
Hero SKUs were the main drivers of success. Brands like Nutrafol, EltaMD, and Clean Skin Club leaned into their top products using clear positioning, optimized PDPs, and high social proof. The strongest performers showed alignment between media strategy, pricing, and conversion-focused content.

Looking ahead, brands with disciplined assortments, tested creative, and clear margin control are best positioned to outperform during key shopping moments like Prime Day.

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.

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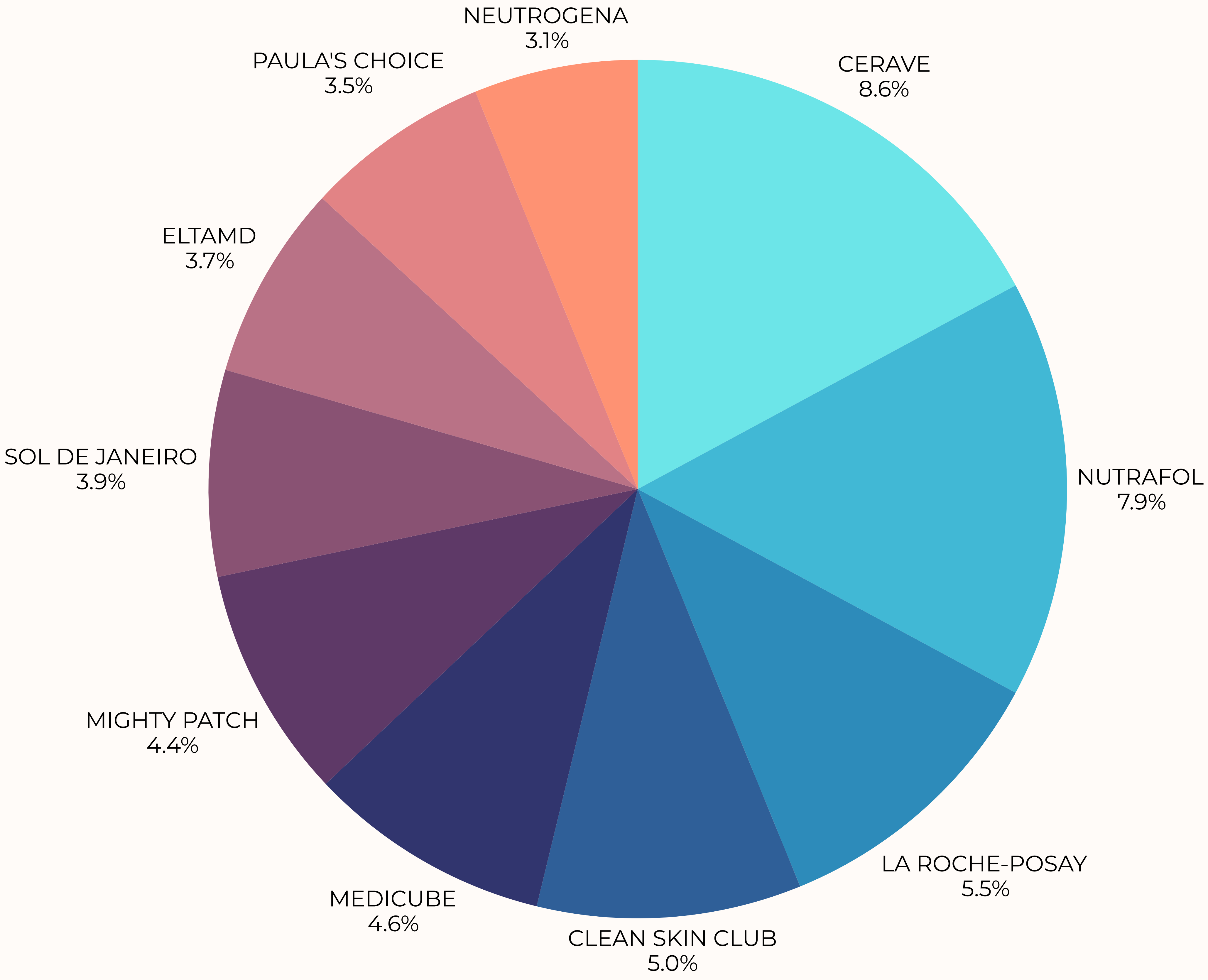
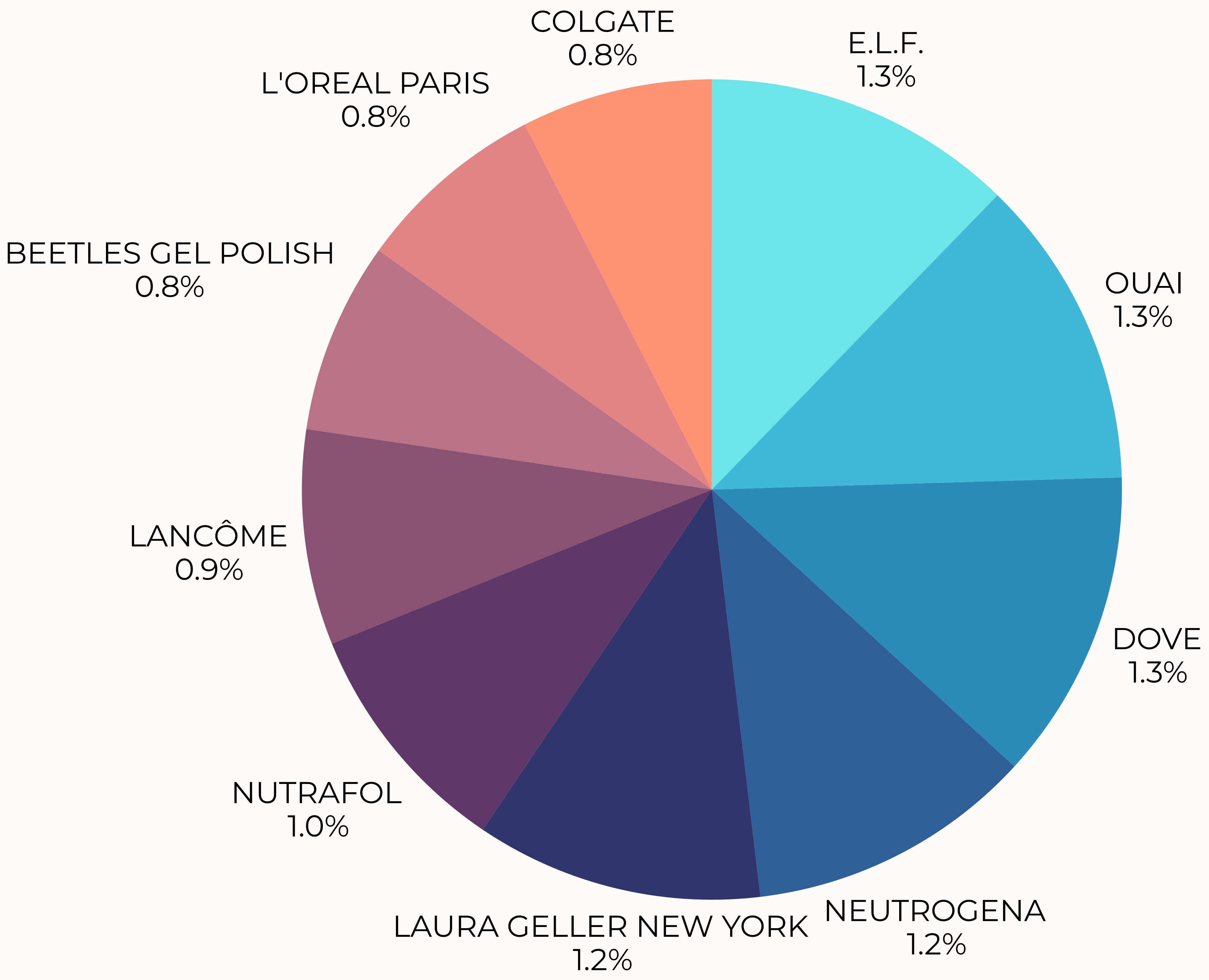
Top brands, items and performance in the Beauty category for Q2 2025



Category Share of Sales

Top Brands In Beauty

- Top brands in the category accounted for 50% of total sales.
- **Top Gainers:**
  - Sol De Janeiro: +1.5%
  - EltaMD: +2.6%
  - MEDICUBE: +1.5%
- **Top Losers:**
  - La Roche-Posay: -1.0%
  - Nutrafol: -0.3%



Beauty Advertising Activity

- **The Top Brands represented 10.9% 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	CLEAN SKIN CLUB
SimplyVital Collagen, Retinol & Hyaluronic Acid Cream 1.7 fl.oz.	SIMPLYVITAL
Colgate Total Whitening Toothpaste (4 Pack)	COLGATE
Aquasonic Black Series Ultra Whitening Toothbrush	AQUASONIC
Crest 3DWhite Brilliance Toothpaste (2 Pack)	CREST
Colgate Optic White Overnight Whitening Pen	COLGATE
OUAI Fine Shampoo and Conditioner Set	OUAI
Philips Sonicare ProtectiveClean 5300 Toothbrush	PHILIPS SONICARE
Herbal Essences Argan Oil Repair Shampoo & Conditioner	HERBAL ESSENCES
SUNUV UV LED Nail Lamp	SUNUV

The Top 10 sponsored products represented 23.3% of total sponsorship share.

Clean Skin Club led Q2 with 5.4% total sponsorship share, more than double the next highest brand. SimplyVital, Colgate (Total + Optic White), and Aquasonic followed, each maintaining 2–3% share across placements. Other top performers—OUAI, Crest 3DWhite, Philips Sonicare, Herbal Essences, and SUNUV—clustered around 1.6%, indicating a competitive long tail behind the category leader.

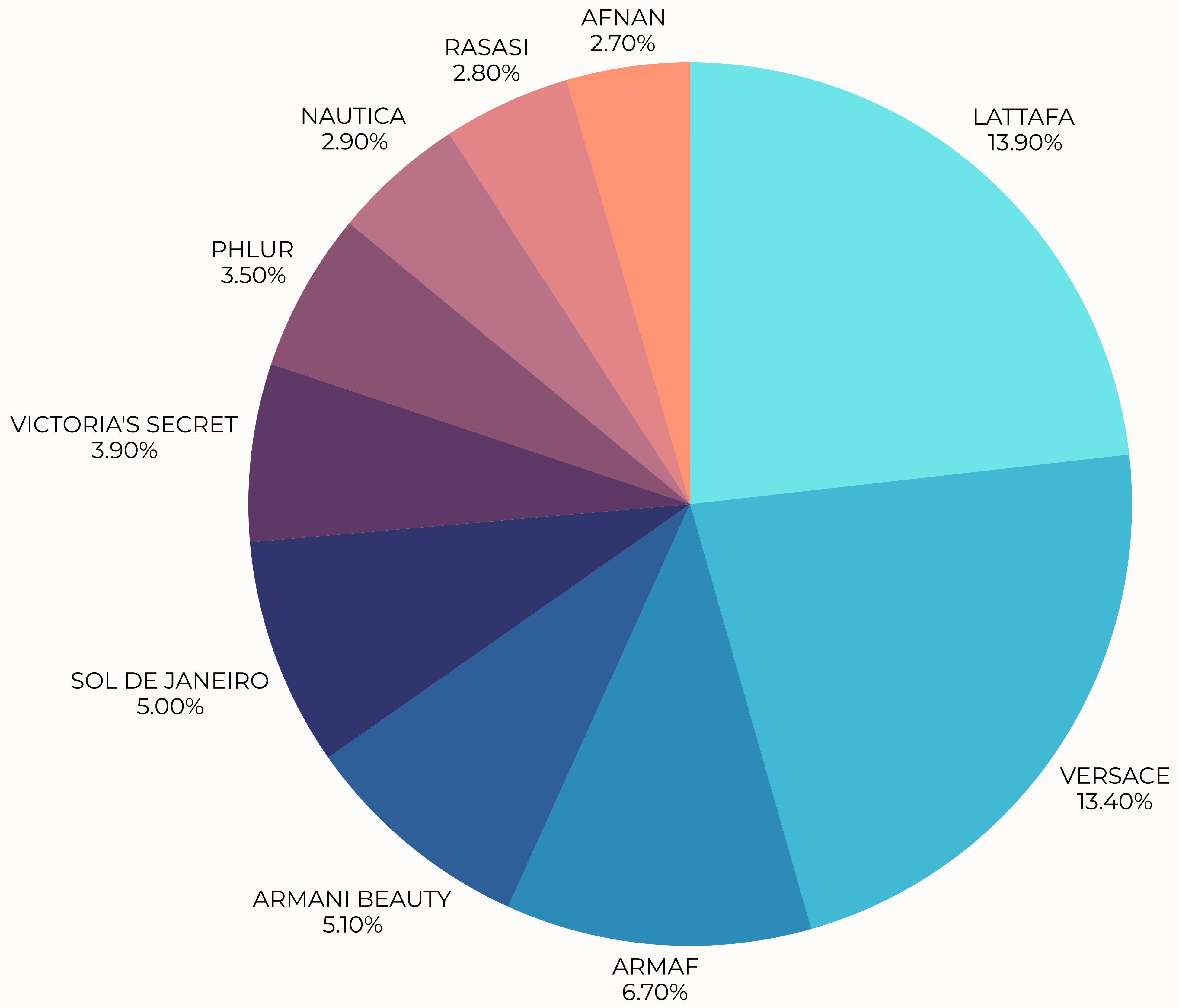
Product	Brand
Nutrafol Women's Balance Hair Growth Supplements, Ages 45 and Up,	NUTRAFOL
Clean Skin Club Clean Towels XL™, 100% USDA Biobased Face Towel 50 Ct, 1 Pack	CLEAN SKIN CLUB
Mighty Patch™ Original patch from Hero Cosmetics (36 Count)	MIGHTY PATCH
EltaMD UV Clear Face Sunscreen SPF 46	ELTAMD
La Roche Posay Toleriane Double Repair Face Moisturizer	LA ROCHE-POSAY
Sol de Janeiro Hair & Body Perfume Mist	SOL DE JANEIRO
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant	PAULA'S CHOICE
BIODANCE Bio-Collagen Real Deep Mask 34g x4ea	BIODANCE
Medicube Zero Pore Pads 2.0	MEDICUBE
Wonderskin Wonder Blading Lip Stain Peel Off Masque	WONDERSKIN

The Top 10 products Sales share.

Nutrafol dominated Q2 with 7.8% share on high AOV and velocity, nearly 3 points ahead of Clean Skin Club (5.0%), which continues to scale with efficient price-to-volume balance. Hero’s Mighty Patch and EltaMD both held strong at 3–4%, the latter buoyed by price and margin. BIODANCE was the only brand with upward movement in rank (+5), but still sits under 3% share. Most leaders saw flat or declining trend lines, with EltaMD (+2.6%) and Sol de Janeiro (+1.2%) bucking the category stagnation.

Fragrance

Top brands, items and performance in the Fragrance category for Q2 2025



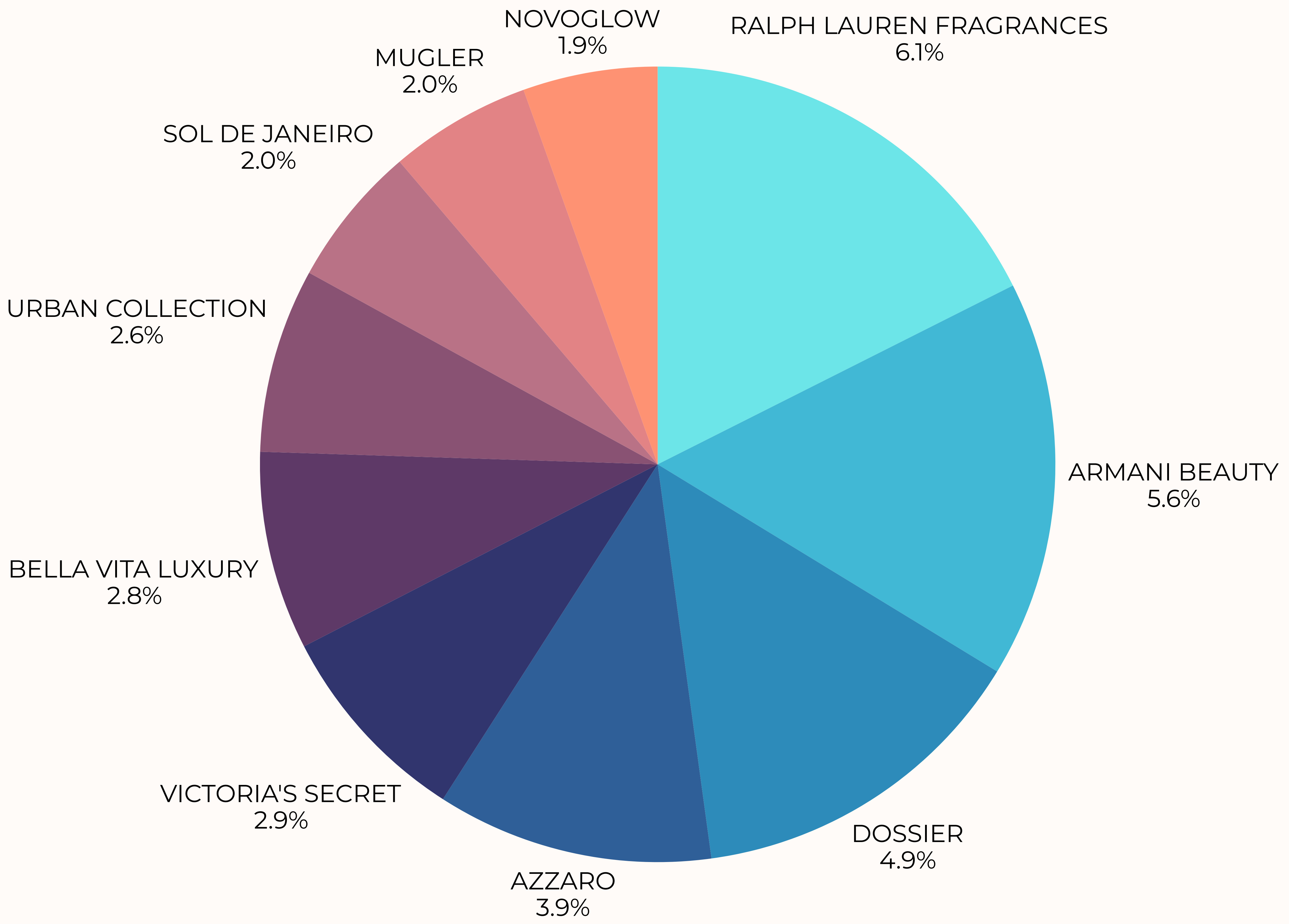
Fragrance Share of Sales

Top Brands In Fragrance

- Top brands in the category accounted for 59.9% of total sales. The average price point for the top 3 is $36.4.

- **Top Gainers:**
  - Armaf: +1.6%
  - Phlur: +1.5%

- **Top Losers:**
  - Lattafa: -0.9%
  - Versace: -0.3%



Fragrance Advertising Activity

- **The Top Brands represented 34.7% of all sponsored product activity** – see breakdown to the left.

- Ralph Lauren has jumped to the top of this list but has yet to enter the top 10 brands by share of sales.
- Victoria’s Secret has also seen a 2.3% drop in share of sponsorship correlating to their decrease in sales share.

Product	Brand
Armani Beauty Acqua² - Eau de Toilette Cologne for Men	ARMANI BEAUTY
BellaVita Luxury Women's Perfume Gift Set (4x20ml)	BELLA VITA LUXURY
Romance - Eau de Parfum Women's Perfume	RALPH LAUREN FRAGRANCES
Vanilla Skin Body Mist Hair & Body Mist Fragrance	PHLUR
Lancome La Vie Est Belle Eau de Parfum	LANCÃ”ME
Sol de Janeiro Hair & Body Perfume Mist	SOL DE JANEIRO
Honey Oud Eau de Parfum (3.4 fl. oz.)	BELLA VITA LUXURY
Dime Beauty 7 Summers Perfume for Women	DIME
Viva La Juicy Eau De Parfum	JUICY COUTURE
Azzaro The Most Wanted Parfum	AZZARO

The Top 10 sponsored products represented 22.8% of total sponsorship share.

Armani Beauty led fragrance sponsorship in Q2 at 3.4%, with BellaVita and Romance close behind at 2.9%—each showing strong multi-placement investment. Vanilla Skin, Lancôme, and Sol de Janeiro clustered around 2.1%, with Sol notably active across all placements. Honey Oud and Dime Beauty trailed with <2% share despite niche positioning. Azzaro showed the highest Sponsored Product share among bottom-tier SKUs, suggesting a focused push on conversion-heavy slots.

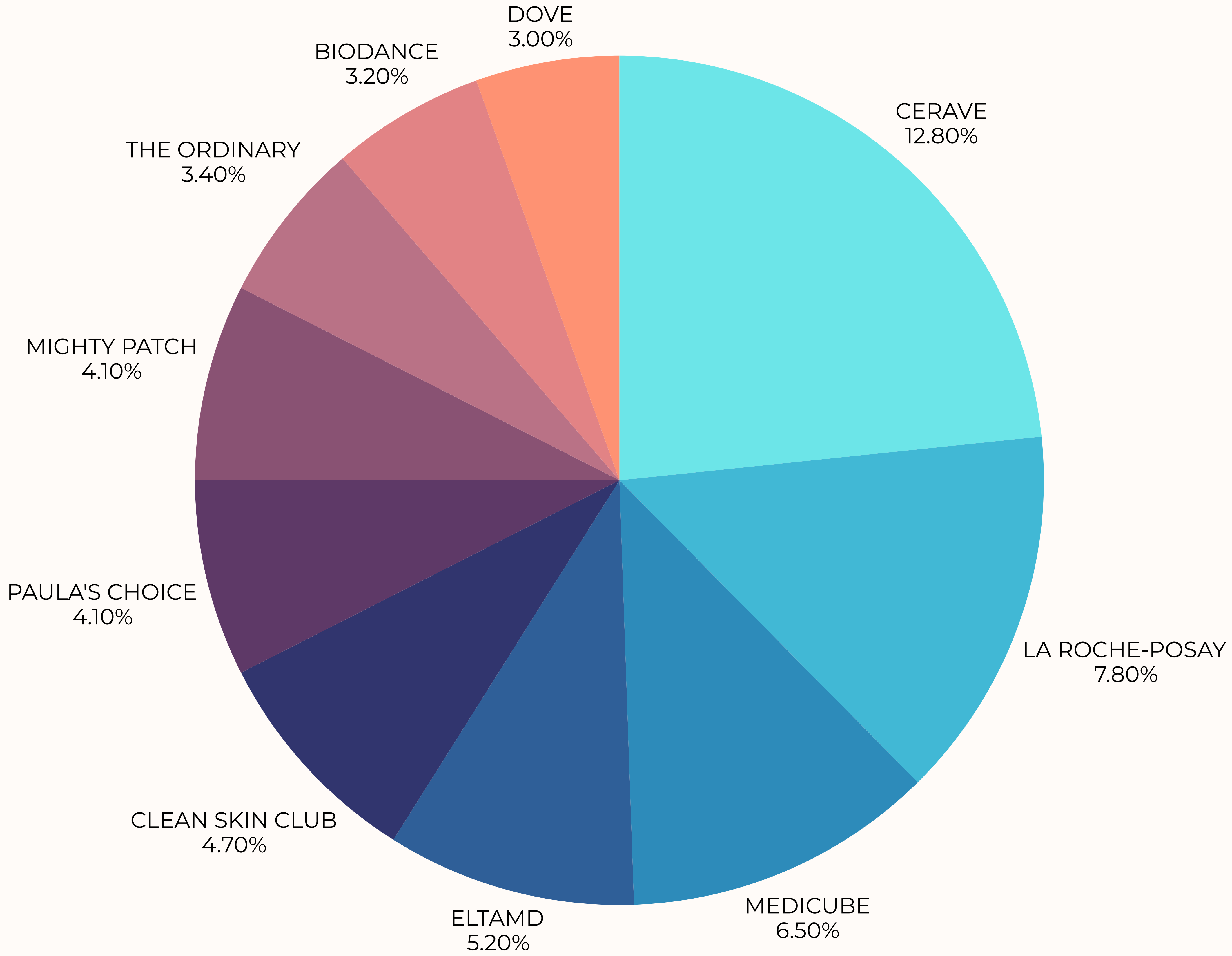
Product	Brand
Armani Beauty Acqua - Eau de Toilette Cologne for Men	ARMANI BEAUTY
Sol de Janeiro Hair & Body Perfume Mist	SOL DE JANEIRO
Versace Eros for Men 3.4 oz Eau de Toilette Spray	VERSACE
Vanilla Skin Body Mist Hair & Body Mist Fragrance	PHLUR
Lattafa Yara - Eau de Parfum Long Lasting Fragrance for Women, 3.40 Ounce / 100 ml	LATTAFA
RASASI Hawas For Men Eau De Parfum Spray 100ML	RASASI
Versace The Dreamer for Men 3.4 oz Eau de Toilette Spray	VERSACE
Lattafa Khamrah Eau de Parfum Long-Lasting Fragrance for Unisex, 3.40 Ounce / 100 ml	LATTAFA
Versace Bright Crystal by Versace for Women 3.0 oz Eau de Toilette Spray	VERSACE
Afnan 9 PM For Men Eau De Parfum, 3.4 Fl. Oz	AFNAN

The Top 10 products represented 31.8% of total Sales share.

Armani Beauty and Sol de Janeiro led Q2 fragrance sales, holding 4.7% and 4.6% share respectively—Armani on high AOV, Sol via volume velocity. Versace Eros and Vanilla Skin followed with 3.5–3.6%, though Vanilla saw an 8-rank slide despite stronger YoY growth. Lattafa and Rasasi continued to gain traction in the value fragrance segment, each above 2.5% share. Versace's multiple SKUs show depth but fragmented sales, while Afnan and Khamrah closed the list with emerging but niche presence.

Skincare

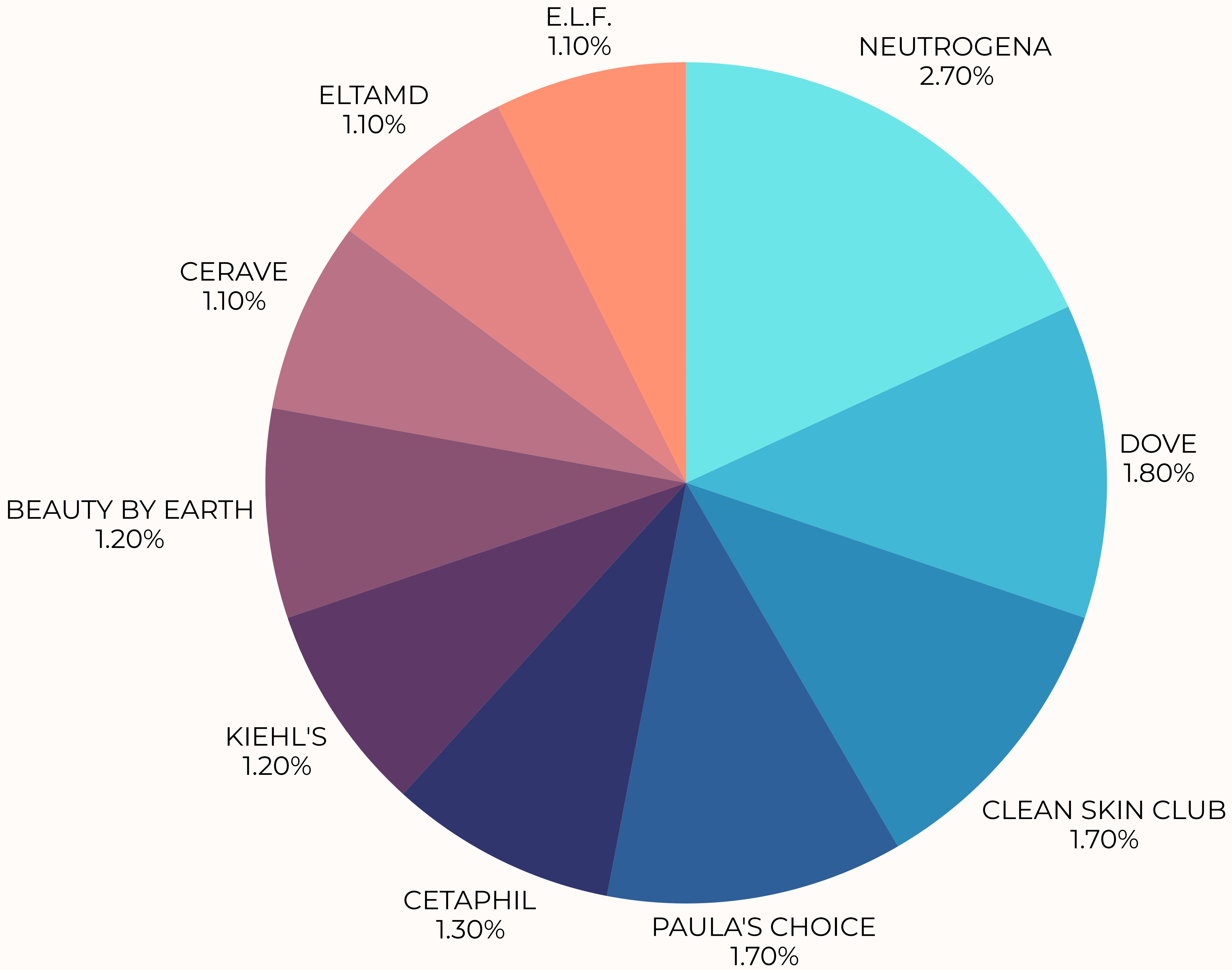
Top brands, items and performance in the Skincare category for Q2 2025



Category Share of Sales

Top Brands In Skincare

- Top brands in the category accounted for 54.8% of total sales. The average price point for the top 10 is $29.69.
- **Top Gainers:**
  - EltaMD: +2.2%
  - Medicube: +1.7%
- **Top Losers:**
  - Cerave: -2%
  - La Roche Posay: -1.1%



Skincare Advertising Activity

- **The Top Brands represented 14.9% of all sponsored product activity** – see breakdown to the left.

- Neutrogena jumped 0.8% QoQ to the number 1 spot
- Both EltaMD and Elf saw between 0.2-0.3% gains

Product	Brand
Clean Skin Club Clean Towels XL	CLEAN SKIN CLUB
SimplyVital Collagen, Retinol & Hyaluronic Acid Cream	SIMPLYVITAL
TruSkin Vitamin C Serum For Face	TRUSKIN NATURALS
EltaMD UV Daily SPF 40 Tinted Face Sunscreen Moisturizer	ELTAMD
VALITIC Kojic Acid Dark Spot Remover Soap Bars with Vitamin C	VALITIC
EltaMD UV Clear Face Sunscreen SPF 46	ELTAMD
BIODANCE Bio-Collagen Real Deep Mask	BIODANCE
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant	PAULA'S CHOICE
PURITO Sun Day Adventure Korean Sunscreen 1.69 fl.oz	PURITO
Beauty by Earth Self Tanner Moisturizing Self Tanning Lotion	BEAUTY BY EARTH

The Top 10 sponsored products represented 28.6% of total sponsorship share.

Clean Skin Club dominated skincare ad spend in Q2 with 8.9% share, more than double the next brand, anchored by aggressive upper-funnel and retargeting placements. SimplyVital held the #2 spot with 4.6%, continuing its broad-based push. TruSkin, EltaMD, and VALITIC trailed at ~2%, showing efficient spend distributions across placements. BIODANCE skewed heavier into consideration slots, while Paula's Choice and PURITO both leveraged leaner, more targeted investment strategies under 2%.

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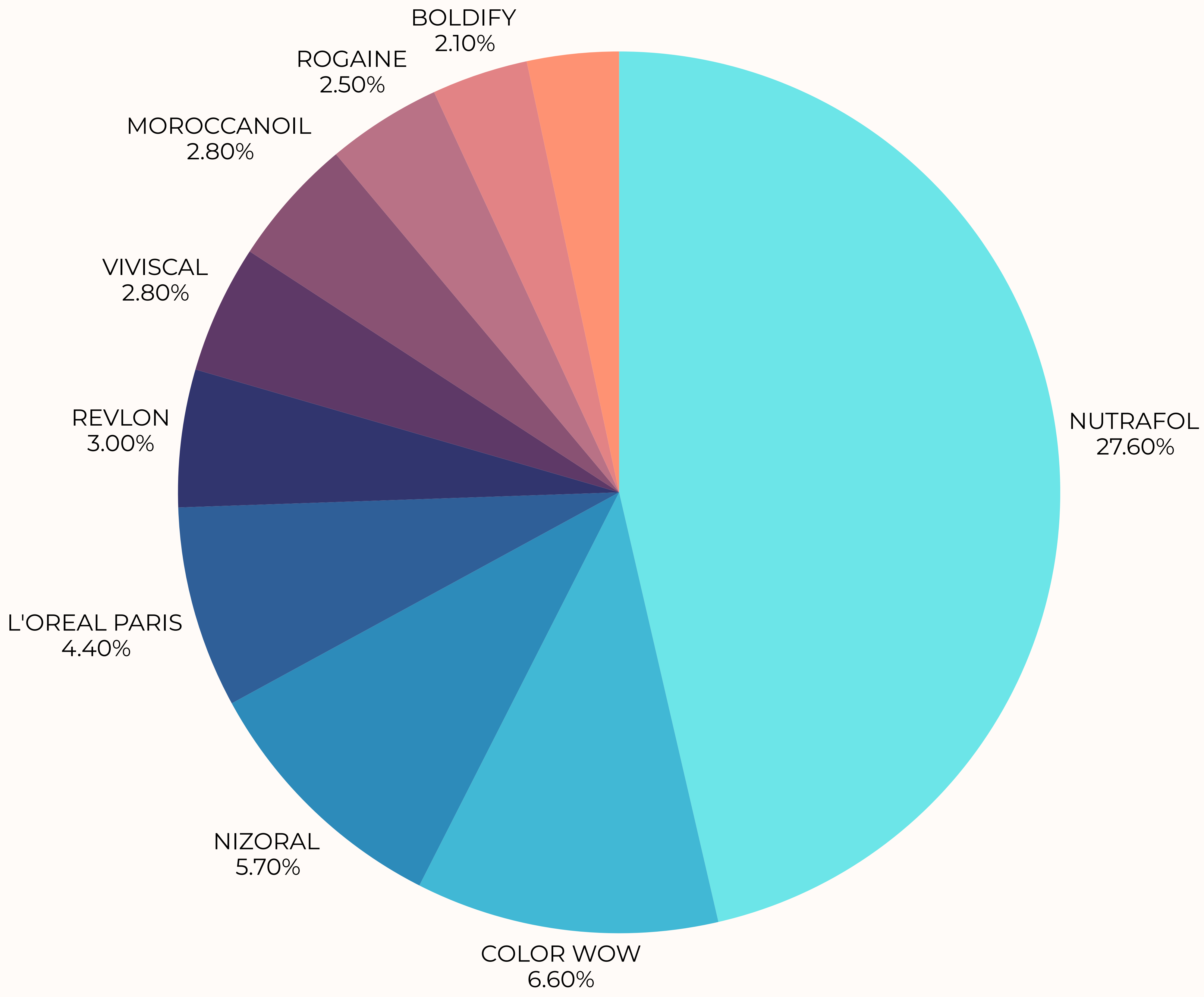
Product	Brand
Clean Skin Club Clean Towels	CLEAN SKIN CLUB
EltaMD UV Clear Face Sunscreen SPF 46	ELTAMD
Paula's Choice SKIN PERFECTING 2% BHA Liquid Salicylic Acid Exfoliant-Facial Exfolian	PAULA'S CHOICE
La Roche Posay Toleriane Double Repair Face Moisturizer	LA ROCHE-POSAY
Mighty Patch Original patch from Hero Cosmetics	MIGHTY PATCH
BIODANCE Bio-Collagen Real Deep Mask	BIODANCE
Medicube Zero Pore Pads 2.0, Dual-Textured Facial Toner Pads	MEDICUBE
CeraVe Moisturizing Cream, Body and Face Moisturizer for Dry Skin	CERAVE
Neutrogena Makeup Remover Wipes	NEUTROGENA
VALITIC Kojic Acid Dark Spot Remover Soap Bars with Vitamin C, Retinol, Collagen	VALITIC

The Top 10 products represented 34% of total sales share.

- Clean Skin Club led Q2 skincare sales at 4.7%, continuing its dominance with high volume at an accessible price point. EltaMD followed closely at 4.6%, leaning on premium AOV and derm-backed positioning. Paula's Choice, La Roche-Posay, and Mighty Patch each held 4.1%—a tight cluster of high-converting, specialty-driven SKUs. BIODANCE and Medicube trailed slightly at 2.9–3.2%, with strong K-beauty momentum. CeraVe, Neutrogena, and VALITIC each landed around 2.1%, rounding out the long tail of consistent mass-market performers.

Hair Care Amazon

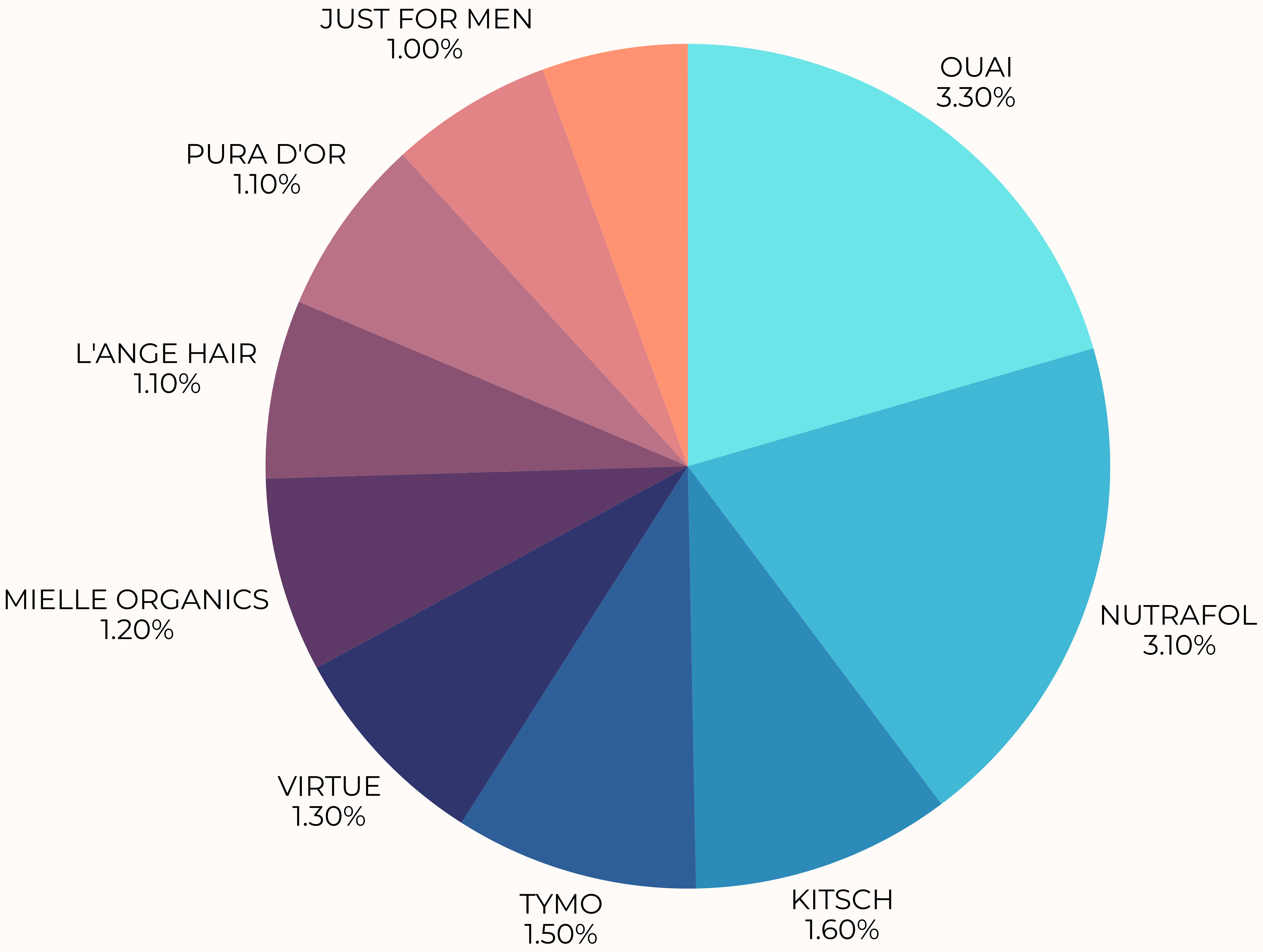
Top brands, items and performance in the Hair Care category for Q2 2025



Category Share of Sales

Top Brands In Hair Care

- Top brands in the category accounted for 59.5% of total sales.
- **Top Gainers:**
  - Nutrafol: +2.9%
  - Color Wow: +0.8%
  - Nizoral: +0.9%
- **Top Losers:**
  - Boldify: -0.4%
  - Mielle Organics: -0.2%



Hair Care Advertising Activity

- **The Top Brands represented 16.1% of all sponsored product activity** – see breakdown to the left.
- OUAI has outpaced Nutrafol with sponsorship activity. This is a great highlight of spend within platform vs outside awareness and how effective Nutrafol has been at building that awareness.

Product	Brand
OUAI Fine Shampoo and Conditioner Set	OUAI
Herbal Essences Argan Oil Repair Shampoo & Conditioner Set	HERBAL ESSENCES
Shampoo, Cleanse and Hydrate Hair and Scalp	NUTRAFOL
Nutrafol Women's Hair Growth Supplements, Ages 18-44	NUTRAFOL
Conditioner, Physician-formulated for Thinning Hair	NUTRAFOL
Nutrafol Women's Balance Hair Growth Supplements	NUTRAFOL
Huron Hair Duo | Nourishing Shampoo & Conditioner Set for Men	HURON
Women's Balance Hair Growth Supplements, Ages 45 and Up	NUTRAFOL
OUAI Curl Cream - Curl Defining Cream for Hydrated, Shiny Curls	OUAI
PURA D'OR Anti-Thinning Biotin Shampoo & Deep Moisturizing Conditioner Original Gold Label Set	PURA D'OR

The Top 10 sponsored products represented 21.6% of total sponsorship share.

OUAI led Q2 hair care sponsorship at 3.1%, with Herbal Essences close behind at 3.0%, both leveraging balanced top- and mid-funnel spend. Physician-formulated shampoos and conditioners followed—particularly the 1.3%/2.5% SKU pair pushing thinning-hair claims. Nutrafol showed a lighter ad push relative to its sales dominance, with multiple SKUs in the 2.0–2.2% range. PURA D'OR and OUAI Curl rounded out the list under 2%, while Huron stood out for an outsized share of Sponsored Products activity vs. total.

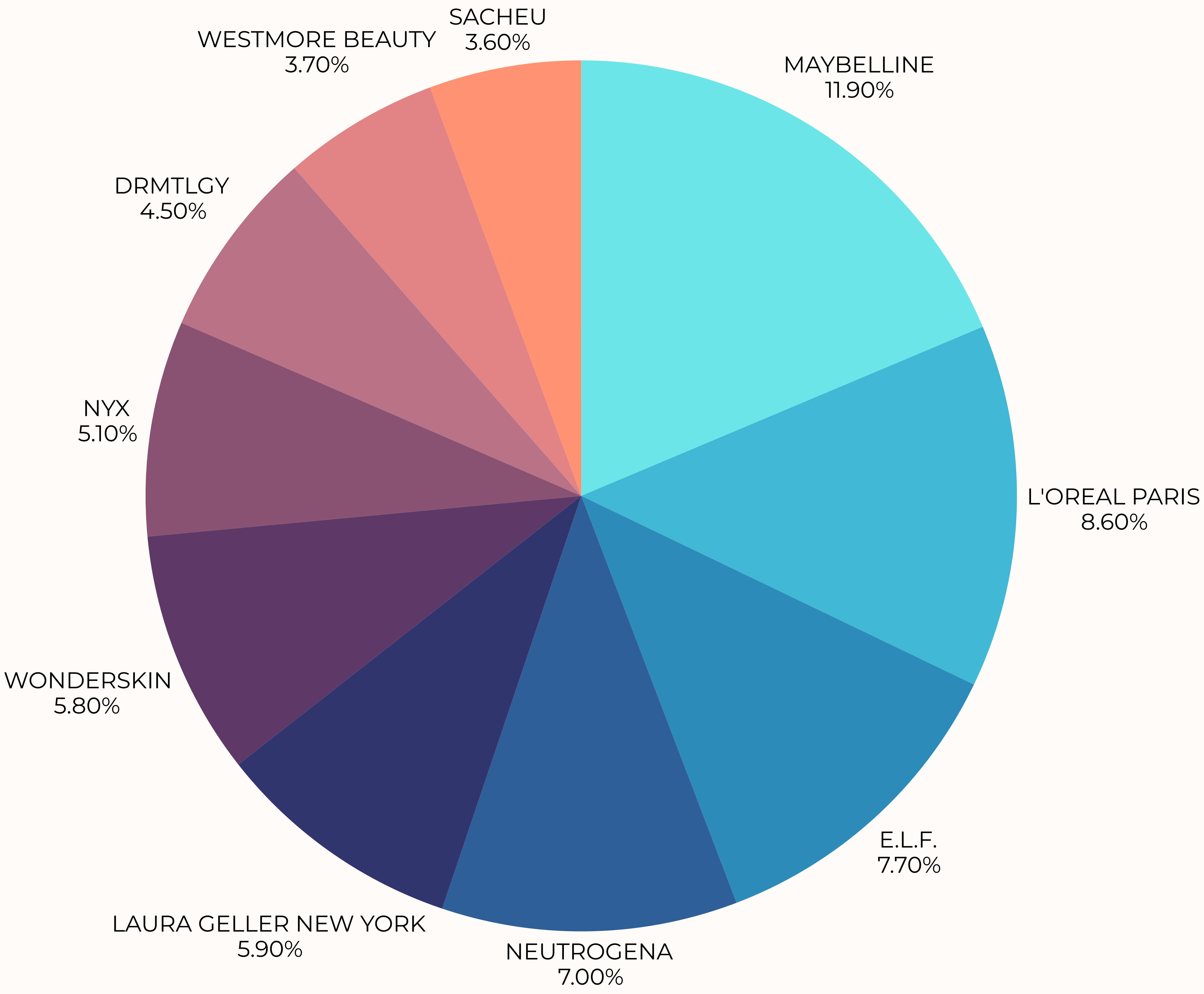
Product	Brand
Nutrafol Women's Balance Hair Growth Supplements, Ages 45 and Up	NUTRAFOL
Nutrafol Women's Hair Growth Supplements, Ages 18-44	NUTRAFOL
Nutrafol Men's Hair Growth Supplements	NUTRAFOL
Nizoral Anti-Dandruff Shampoo with 1% Ketoconazole, Fresh Scent, 7 Fl Oz	NIZORAL
COLOR WOW Dream Coat Supernatural Spray	COLOR WOW
Viviscal Hair Growth Supplements For Women	VIVISCAL
REVLON One-Step Volumizer Hair Dryer and Styler	REVLON
Men's Rogaine 5% Minoxidil Foam for Hair Regrowth	ROGAINE
Moroccanoil Treatment	MOROCCANOIL
Anti-Dandruff Shampoo with 1% Ketoconazole, Fresh Scent, 14 Fl Oz	NIZORAL

The Top 10 products represented 46.8% of total sales share.

Nutrafol swept Q2 with a combined 27.5% share across its women's and men's SKUs, clearly dominating the hair growth segment. Its Balance SKU alone drove 16.5%, followed by the Women's Core (6.3%) and Men's (4.7%) formulas. Nizoral ranked next at 3.8%, anchored by consistent shampoo velocity. COLOR WOW, Viviscal, and REVLON each held 2.7–3.3% share, while Rogaine and Moroccanoil trailed closely behind. Despite steep rank loss, Nizoral's 14oz anti-dandruff variant still contributed nearly 2% on its own.

Makeup

Top brands, items and performance in the Makeup category for Q2 2025



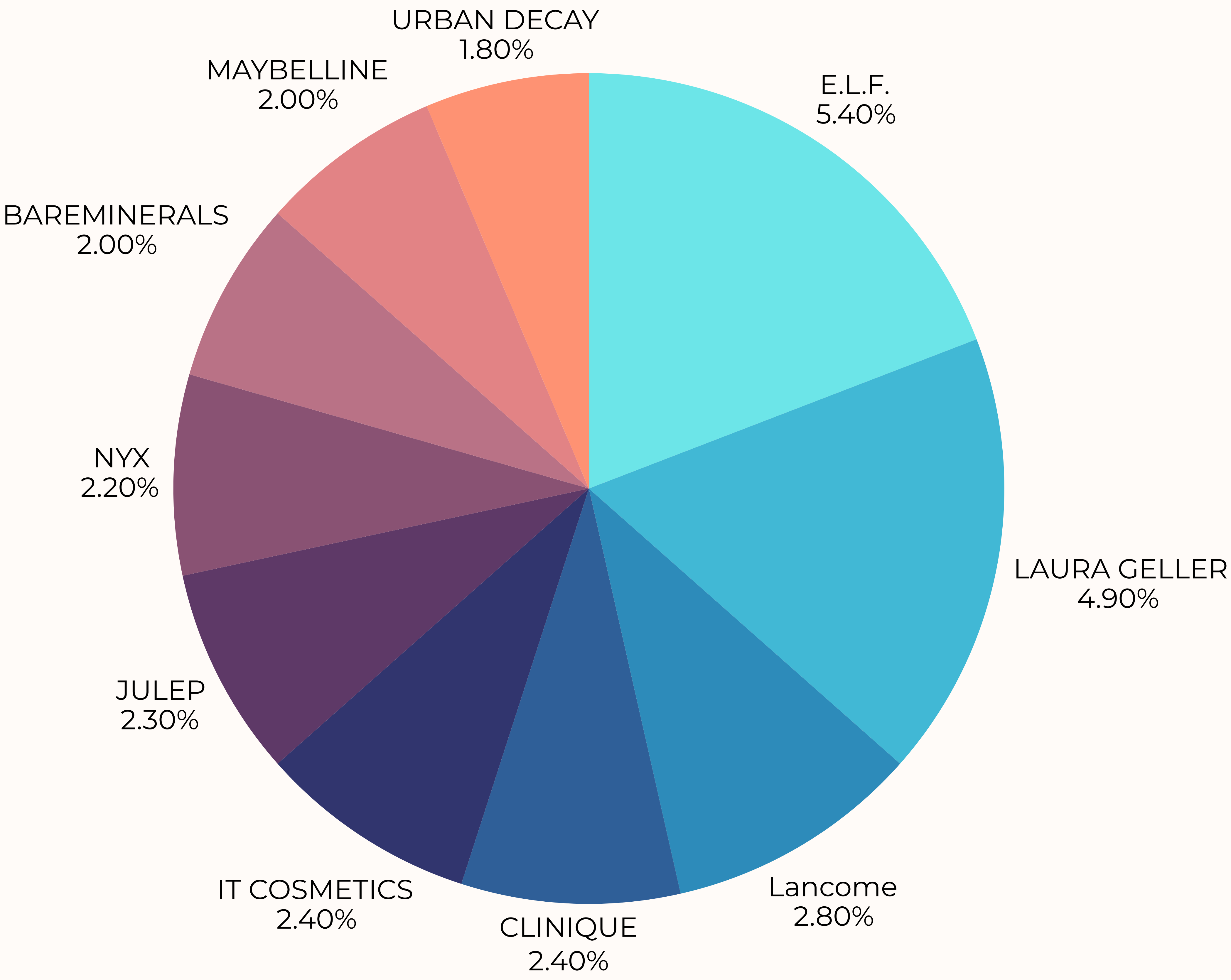
Category Share of Sales

Top Brands In Makeup

- Top brands in the category accounted for 63.8% of total sales. The average price point for the top 10 is $22.01.

- **Top Gainers:**
  - Sacheu: +0.5%
  - Drmtlgy: +1.5%

- **Top Losers:**
  - ELF: -2.4%
  - NYX: -1.4%
  - Laura Geller: -0.4%



Makeup Advertising Activity

- **The Top Brands represented 28.2% of all sponsored product activity** – see breakdown to the left.
- Elf still dominates sponsorship despite significant loss in total share of sales.
- Maybelline continues to outperform their sponsorship share with strong organic performance.

Product	Brand
Lancome Lash-Lifting & Volumizing Mascara	Lancome
bareMinerals Original Loose Powder Foundation SPF 15	BAREMINERALS
Sacheu Lip Liner Stay-N Peel Off Lip Stain	SACHEU
LAVONE Eyebrow Pencil Makeup Kit	LAVONE
e.l.f. Power Grip Primer, Gel-Based & Hydrating Face Primer	E.L.F.
Prime Prometics PrimeLash Mascara	PRIME PROMETICS
IT Cosmetics Superhero Mascara	IT COSMETICS
LAURA GELLER NEW YORK Serum Blush Tint	LAURA GELLER NEW YORK
Urban Decay All Nighter Waterproof Makeup Setting Spray	URBAN DECAY
bareMinerals Gen Nude Highlighting Blush, 2-in-1 Blush	BAREMINERALS

The Top 10 sponsored products represented 19% of total sponsorship share.

Lancome and bareMinerals topped Q2 with 2.4% and 2.3% total sponsorship share respectively, driven by steady presence in Sponsored Products and upper-funnel placements. Sacheu and LAVONE both pushed hard into mid-funnel with 2.1% share, the former also leaning on retargeting. e.l.f. and IT Cosmetics landed in the 1.8–1.9% range, showing consistent but modest multi-placement execution. Urban Decay and Laura Geller trailed with targeted efforts under 1.7%, while PrimeLash mascara stood out for a strong Sponsored Display bet despite lighter overall spend.

Product	Brand
Wonderskin Wonder Blading Lip Stain Peel Off Masque	WONDERSKIN
Neutrogena Makeup Remover Wipes	NEUTROGENA
DRMTLGY Anti-Aging Tinted Moisturizer SPF 46	DRMTLGY
Westmore Beauty Body Coverage Perfector	WESTMORE BEAUTY
Grande Cosmetics GrandeLASH-MD Lash Enhancing Serum	GRANDE COSMETICS
Anua Heartleaf Pore Control Cleansing Oil	ANUA
LAURA GELLER NEW YORK Award-Winning Baked Balance-n-Brighten Color Correcting Powder Foundation	LAURA GELLER NEW YORK
Sacheu Lip Liner Stay-N Peel Off Lip Stain	SACHEU
Babe Original Lash Serum	BABE ORIGINAL
Maybelline Lash Sensational Sky High Washable Mascara Makeup	MAYBELLINE

The Top 10 products represented 36.2% of total sales share.

Wonderskin led Q2 with 5.8% sales share on strong conversion and broad reach. Neutrogena wipes and DRMTLGY SPF moisturizer followed with 4.5–4.6% share, anchoring drugstore and derm-led care respectively. Westmore and Grande Cosmetics held 3.5% each, despite limited SKU depth. Anua and Laura Geller both showed strong midpack performance at ~3.2–3.3%, while Sacheu appeared in both sales and sponsorship leaderboards—indicating successful full-funnel deployment. Babe Original and Maybelline rounded out the list just above 2.5%.

Key Takeaways

Market Performance & Brand Movements

- **Consumer attention is harder to earn**
  - Search volume dropped 16 percent and organic visibility declined nearly 10 percent. Shoppers are more selective, and brands must fight harder to be seen.
- **Paid media is non-negotiable, but smarter**
  - Sponsorship levels held steady, reflecting a pivot to precision. Brands are maintaining presence but shifting to performance-led spend anchored in proven SKUs.
- **Hero products are driving disproportionate returns**
  - Across categories, top-performing SKUs like Nutrafol supplements, EltaMD SPF, and Clean Skin Club towels dominated both sales and ad impact. Focused assortments are outperforming broad catalogs.
- **Differentiation is shifting toward function and trust**
  - Dermatologist-backed, multifunctional, and benefit-led products are winning. Price alone is not moving volume—credibility and clarity are.
- **Operational clarity is a growth lever**
  - The best results came from brands with tight coordination across media, content, pricing, and inventory. As CPCs rise and demand softens, execution discipline is a competitive advantage.

Looking Ahead

Q3 2025 Outlook & Emerging Risks

- Prime Day will favor brands that focus on fewer, better bets. Hero SKUs with tested content, clean margins, and built-in demand will be best positioned to cut through.
- Tariff uncertainty continues to cloud inventory planning. Brands relying on overseas production should finalize pricing and promotion strategies early to avoid margin compression.
- Organic visibility is declining while paid competition intensifies. Success will depend on disciplined media execution, with efficient Sponsored Product and Display usage leading the charge.
- Consumers are still spending, but with higher expectations. Functional, credible, and premium-positioned products are capturing share, while commoditized offers are losing ground.
- Cross-channel synergy is becoming a differentiator. Brands that align DTC traffic, influencer support, and off-Amazon awareness will outperform in-platform-only strategies.

Major Difference

Q1 to Q2

- Top 5 Major Differences Between Q1 and Q2 2025 – Amazon Beauty & Personal Care
- Consumer discovery dropped significantly
- Search volume declined 16 percent quarter over quarter and organic visibility fell nearly 10 percent. In Q1, shoppers were more actively browsing and exploring. In Q2, consumer behavior shifted toward faster, more deliberate purchase decisions. Brands relying on organic visibility or passive demand capture saw traffic softness.
- Ad budgets leveled off but efficiency became critical
- In Q1, ad activity rose 8.7 percent across the category. In Q2, sponsorship volume flattened with just a 0.3 percent increase. Instead of cutting back entirely, brands focused their budgets more tightly. Top performers concentrated spend on proven SKUs and avoided speculative testing.
- Breakout brands gained ground while legacy brands held flat or declined

Major Difference

Q1 to Q2

- Emerging players like EltaMD, Medicube, and Sol de Janeiro gained share by pairing clear product value with tactical execution. By contrast, larger incumbents such as La Roche-Posay and CeraVe lost share or held flat, especially where their assortments lacked promotional energy or creative refresh.
- Hero SKUs became the growth engine
- Q2 made it even more clear that growth is coming from top performers, not entire portfolios. Clean Skin Club's Clean Towels, Medicube's Pore Pads, and EltaMD's UV Clear all dominated on both sales share and ad visibility. These SKUs were supported by content that converted and ad strategies built around them, not broad campaigns.
- Economic pressure changed how shoppers converted
- In Q1, the consumer mindset was more optimistic and category-wide interest was higher. Q2 brought macro uncertainty and tariff headlines that made shoppers more cautious. Brands with simple messaging, clear functional benefits, and pricing alignment performed best. High-intent shoppers were still converting, but only when the path was direct.

Navigo MARKETING

Let's start our journey together.

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