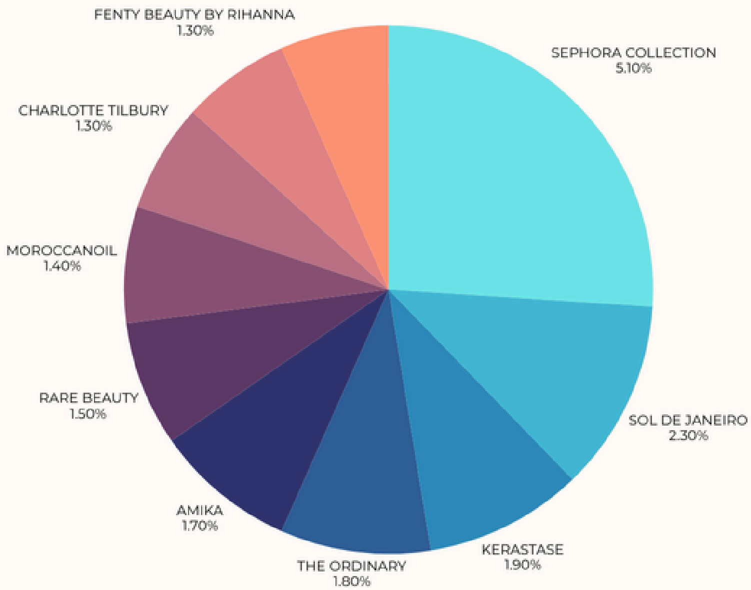
Inside Sephora Q2: Who's Spending, Who's Winning, and Why It Matters

Sephora's second quarter of 2025 was not a story of sweeping disruption. It was a quarter marked by steady recalibration. The brands that won did so through a combination of product strength, precise storytelling, and selective use of paid media.



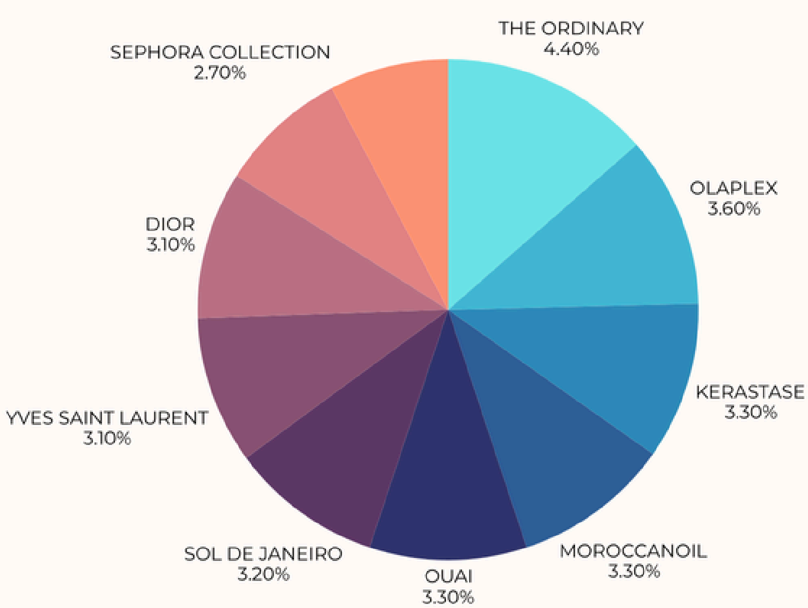
Category Share of Sales

Top Brands In Beauty

- Top brands in the category accounted for 19.6% of total sales.

- **Top Gainers:**
  - Sephora Beauty: +0.6%
  - Kesrastase: +0.4%
- **Top Losers:**
  - Rare Beauty: -0.6%
  - The Ordinary: -0.3%

This was not a quarter where flashy campaigns or trend-chasing led the pack. Instead, Sephora shoppers gravitated toward products that delivered clear results and formats that felt both personal and practical. From luxury fragrances to problem-solving body care, consumers showed a preference for familiarity and performance. What changed behind the scenes was how those products got discovered.



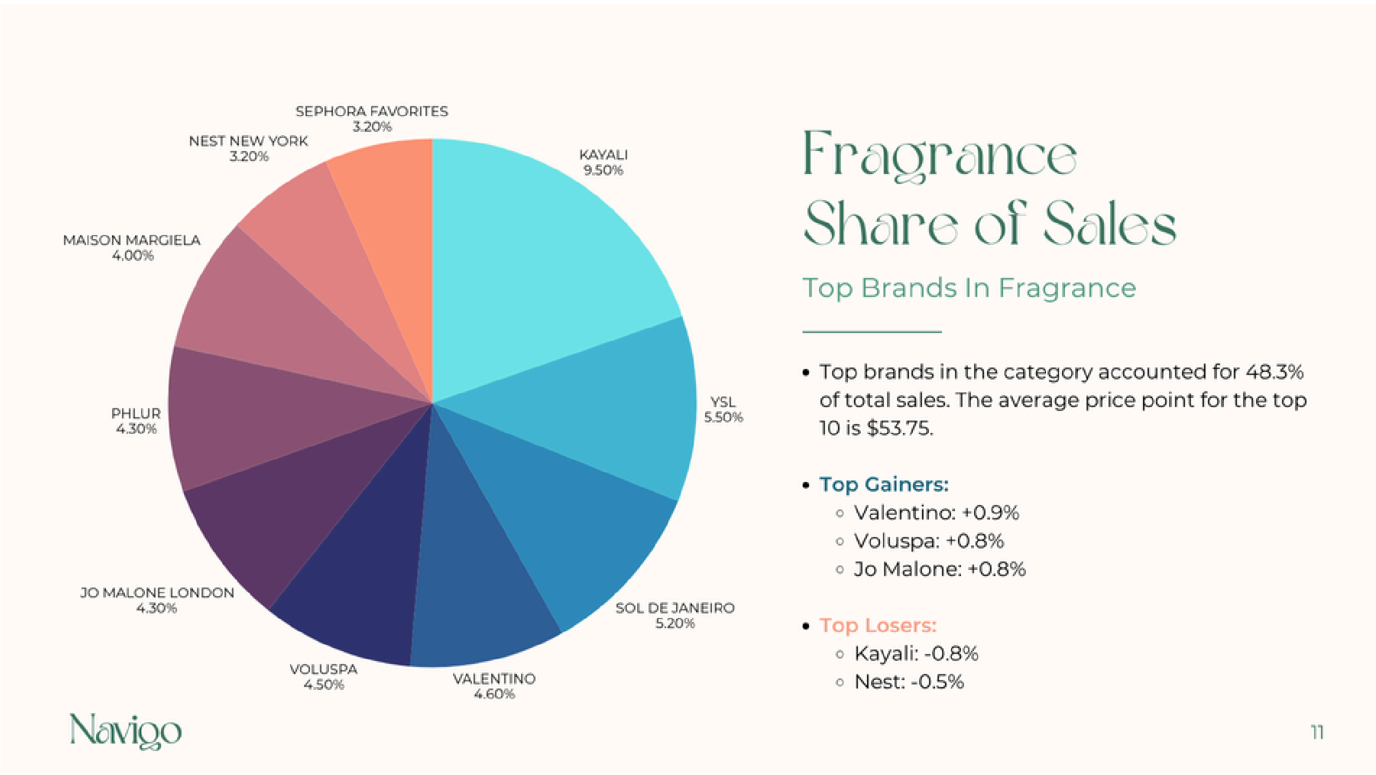
Beauty Advertising Activity

- **The Top Brands represented 32.5% of all sponsored product activity** – see breakdown to the left.

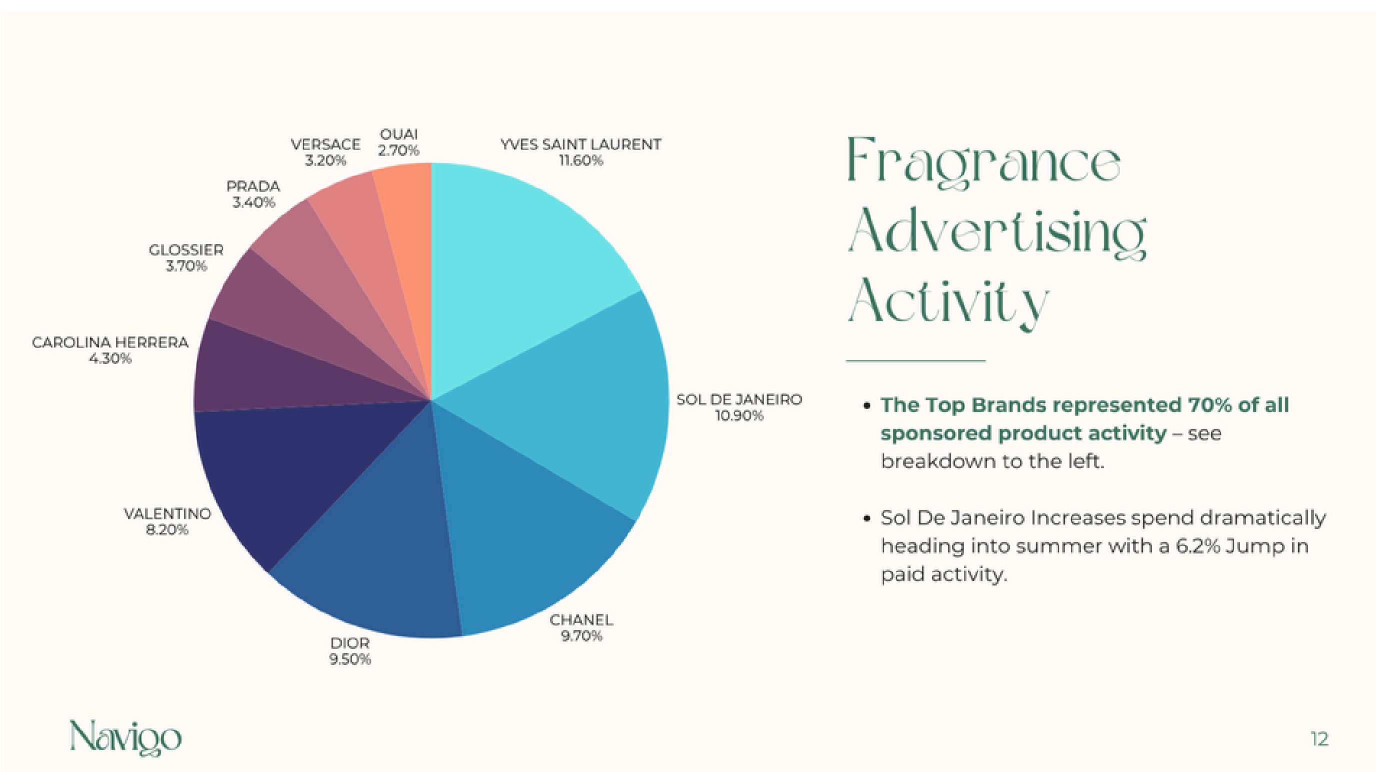
- The Ordinary jumped to the top with a 2.7% increase QoQ.
- **Major Changes:**
  - Moroccan Oil: +1.7%
  - Ilia: +2.2%
  - Amika: -1.8%
  - Bumble & Bumble: -1.8%

Fragrance: Familiar Names, Layered Strategies

In fragrance, it was the prestige names that claimed the majority of paid media. Chanel, Dior, YSL, and Valentino were among the top investors, and their SKUs reflected it with strong visibility on site.



Yet price accessibility and versatility mattered too. Sol de Janeiro's Cheirosa 40 Mist and Ouai's St. Barts Mist outperformed expectations thanks to lower price points and multi-use appeal. These products offered shoppers a way to participate in scent culture without a luxury price tag.



YSL's three-product presence in the top ten paid rankings also highlighted how a focused investment across formats can deliver sustained brand visibility. Meanwhile, Glossier You and Sephora's own fragrance samplers found traction through minimal media support, driven by word of mouth and strong gifting appeal.

Product	Brand
BLEU DE CHANEL Eau de Parfum	CHANEL
Cheirosa 40 Hair & Body Perfume Mist	SOL DE JANEIRO
Y Eau de Parfum with Fresh Geranium & Sensual Woods	YVES SAINT LAURENT
Uomo Born In Roma Intense Eau de Parfum with Vanilla & Vetiver	VALENTINO
Sauvage Eau de Parfum	DIOR
MYSLF Eau de Parfum with Fresh Accord & Warm Woods	YVES SAINT LAURENT
St. Barts Hair and Body Mist	OUAI
Libre Eau De Parfum with Orange Blossom & Lavender	YVES SAINT LAURENT
Donna Born In Roma Eau de Parfum with Bourbon Vanilla & Jasmine	VALENTINO
Glossier You Eau de Parfum	GLOSSIER

The Top 10 sponsored products represented 34.6% of total sponsorship share.

Fragrance saw concentrated paid investment in Q2, with CHANEL's BLEU DE CHANEL leading all sponsored activity at 4.9%. Sol de Janeiro's Cheirosa 40 and YSL's Y Eau de Parfum followed closely behind at 4.4% and 4.0% respectively. Notably, YSL placed three SKUs in the top ten, reflecting a broad investment across the brand's scent portfolio. Valentino also secured two spots, signaling competitive category support. The presence of Glossier You and OUAI's St. Barts Mist suggests growing traction for body mist and unisex formats alongside classic luxury edp launches.

The message here is simple. Fragrance is about emotional connection and sensory payoff, but consumers are also looking for ways to sample, layer, and explore without committing to full-size bottles every time.

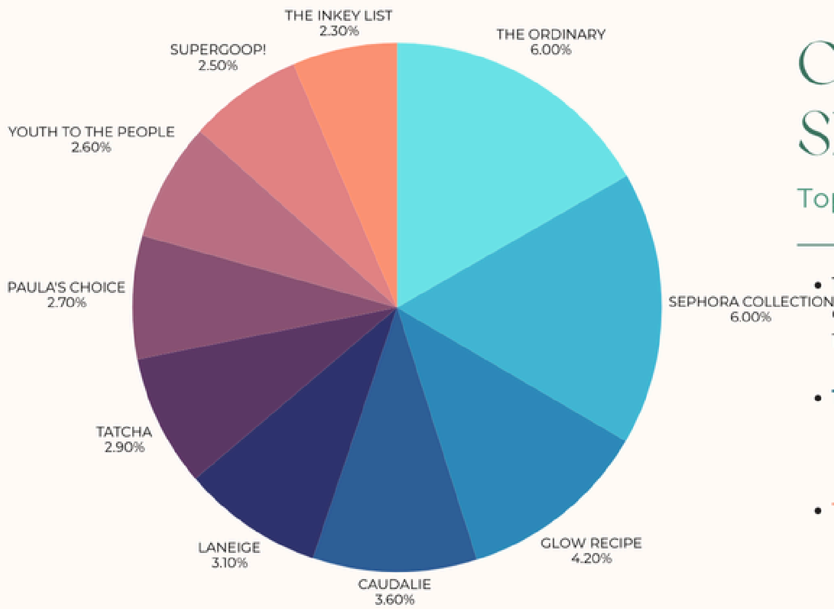
Product	Brand
VANILLA | 28 Eau de Parfum	KAYALI
Mini Donna Born in Roma & Donna Born in Roma Intense Perfume Set	VALENTINO
Mini Deluxe Perfume Sampler Set with Redeemable Voucher	SEPHORA FAVORITES
Glossier You Eau de Parfum	GLOSSIER
Cologne Sampler Set with Redeemable Voucher	SEPHORA FAVORITES
Mini Vanilla Skin Body & Hair Fragrance Mist	PHLUR
YUM BOUJEE MARSHMALLOW | 81 Eau de Parfum Intense	KAYALI
Donna Born In Roma Eau de Parfum with Bourbon Vanilla & Jasmine	VALENTINO
Flor Mistica Hair and Body Fragrance Mist	SOL DE JANEIRO
Mini Good Girl Blush Elixir with Vanilla & Patchouli	CAROLINA HERRERA

The Top 10 products represented 8.9% of total Sales share.

KAYALI's Vanilla | 28 led Q2 with 1.0% share of sales, backed by high keyword-level sponsorship. Sephora Favorites' Deluxe and Cologne Sampler sets followed at 0.8% each, despite no paid support. Glossier You also hit 0.8%, driven by heavy investment. VALENTINO, PHLUR, and SOL DE JANEIRO each had multiple SKUs contributing, highlighting the strength of both core and mini formats.

Skincare: Clear Benefits, Minimal Hype

Skincare's performance in Q2 centered on products with obvious benefits and ingredient-forward communication. Farmacy's Green Clean, The Ordinary's Niacinamide Serum, and Tatcha's Dewy Skin Cream were top performers both in spend and in shopper traction.

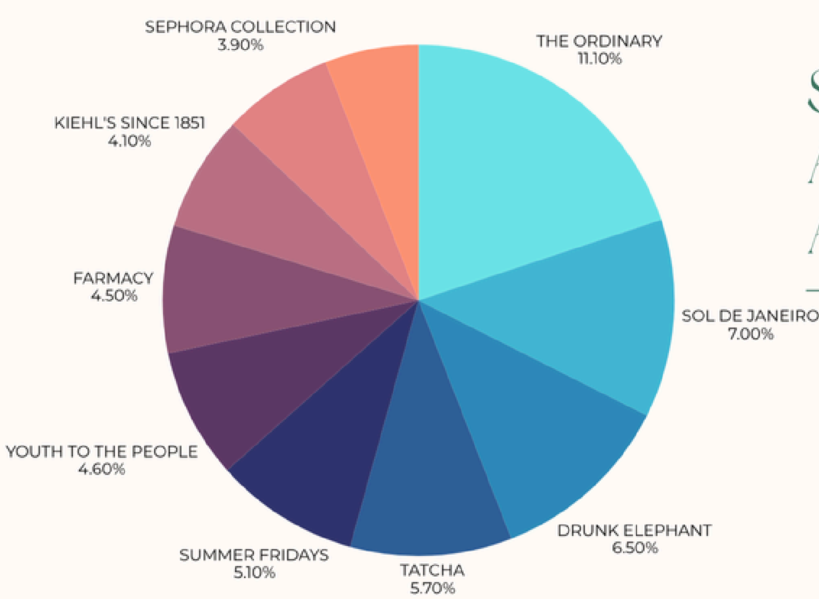


Category Share of Sales

Top Brands In Skincare

- Top brands in the category accounted for 35.9% of total sales. The average price point for the top 10 is $30.46.
- **Top Gainers:**
  - Sephora Collection: +0.5%
  - Laneige: +0.5%
- **Top Losers:**
  - The Ordinary -1%
  - Glow Recipe: -0.6%
  - Paula's Choice: -0.3%

What they have in common is clarity. These are SKUs with consistent packaging, consistent claims, and consistently positive reviews. They do not rely on trend cycles or seasonal positioning to maintain relevance.



Skincare Advertising Activity

- **The Top Brands represented 55.8% of all sponsored product activity** – see breakdown to the left.
- The Ordinary tried to offset declining share with a large increase in sponsorship (+6.3%).
- Farmacy pulled back by almost 50% (3.8%) from one of the top spots in Q1.

At the same time, emerging brands like Topicals and Tower 28 carved out share through category innovation and cultural resonance. They did not have the media weight of the larger players, but their positioning around skin concerns, inclusivity, and transparency connected with a new generation of shoppers.

Product	Brand
Green Clean Makeup Removing Cleansing Balm	FARMACY
Niacinamide 10% + Zinc 1% Serum for Oily Skin	THE ORDINARY
The Dewy Skin Cream Plumping & Hydrating Refillable Moisturizer	TATCHA
Lala Retroâ„¢ Nourishing Whipped Refillable Moisturizer	DRUNK ELEPHANT
Superfood Gentle Antioxidant Refillable Cleanser	YOUTH TO THE PEOPLE
Hydrating Hyaluronic Acid Face Masks	SEPHORA COLLECTION
ShadeDrops Mineral Milk Sunscreen SPF 30	SUMMER FRIDAYS
Brazilian Bum Bum Visibly Firming Refillable Body Cream with Caffeine-Rich GuaranÃ	SOL DE JANEIRO
Better Screenâ„¢ UV Serum SPF 50+ Facial Sunscreen with Collagen Peptide	KIEHL'S SINCE 1851
Super Serum Skin Tint SPF 40 Skincare Foundation	ILIA

The Top 10 sponsored products represented 28.3% of total sponsorship share.

FARMACY's Green Clean Cleansing Balm led paid activity in skincare with 3.7% of total sponsorship share. TATCHA, The Ordinary, and Drunk Elephant followed closely, each with over 3% share and more than 5,000 sponsored keywords. Sunscreen and SPF hybrids also saw strong investment, with Summer Fridays, Kiehl's, and ILIA all securing top ten spots.

It was also notable how many top-selling SKUs hovered around the $25 to $50 range. For a category known for its pricing extremes, this balance reflects growing consumer comfort with mid-range spend when the benefit is easy to understand.

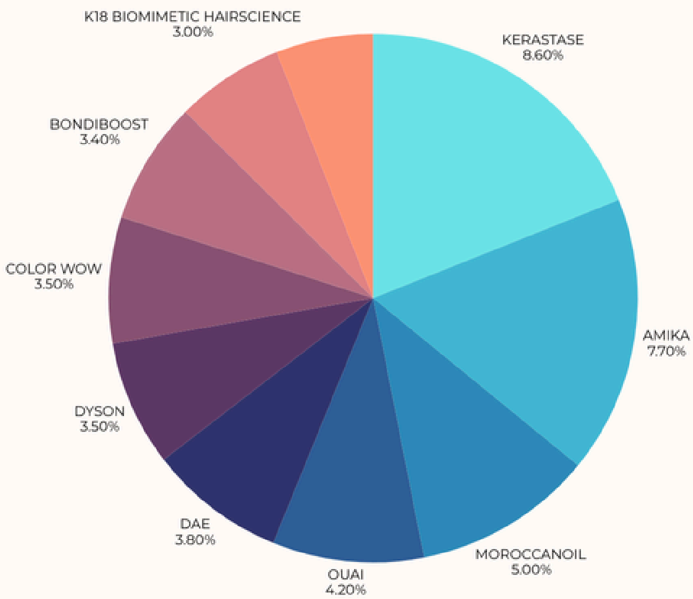
Product	Brand
Superfood Gentle Antioxidant Refillable Cleanser	YOUTH TO THE PEOPLE
SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY
The Dewy Skin Cream Plumping & Hydrating Refillable Moisturizer	TATCHA
Skin Perfecting 2% BHA Exfoliating Toner for Clear Skin	PAULA'S CHOICE
Faded Brightening Serum for Dark Spots and Discoloration (UNSCENTED)	TOPICALS
Glycolic Acid 7% Exfoliating and Brightening Daily Toner	THE ORDINARY
Niacinamide 10% + Zinc 1% Serum for Oily Skin	THE ORDINARY
Green Tea Enzyme Vitamin C Brightening + Exfoliating Toner Pads	INNISFREE
Hyaluronic Acid 2% + B5 Hydrating Serum with Ceramides	THE ORDINARY
Vinoperfect Brightening Dark Spot Serum Vitamin C Alternative	CAUDALIE

The Top 10 products represented 5% of total sales share.

Youth to the People's Superfood Cleanser led with 0.7% share, followed by Tower 28's SOS Daily Spray at 0.6%, despite no paid support. Tatcha's Dewy Skin Cream and three SKUs from The Ordinary each held 0.5% share, highlighting the power of affordable hero products. Serum, toner, and exfoliant formats dominated the list, with consistent performance across prestige and clinical-leaning brands.

Hair: Paid Heavy, Results Mixed

Hair care saw some of the highest levels of paid media activity across the board. DAE's Cactus Fruit 3-in-1 Styling Cream led both sponsored share and unit sales, proving that a single well-positioned product can carry a brand's digital momentum.



Category Share of Sales

Top Brands In Hair Care

- Top brands in the category accounted for 45.4% of total sales.
- **Top Gainers:**
  - Kerastase: +1.7%
  - Dyson+0.9%
  - DAE: +0.6%
- **Top Losers:**
  - Olaplex: -0.5%
  - Amika: -0.4%
  - Moroccan oil: -0.8%

Navigo

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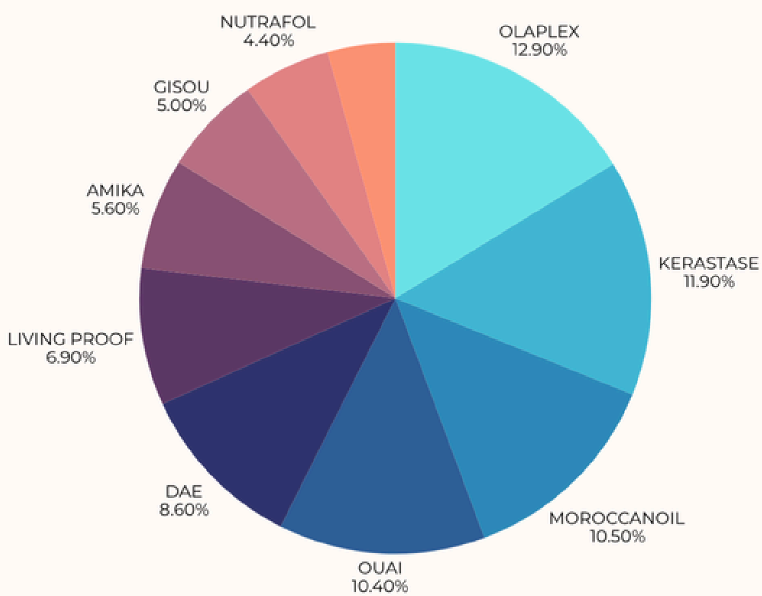
Olaplex remained a top spender and sustained performance across multiple SKUs. Its strength lies in its system-based approach and consumer familiarity. Kérastase also showed strong return on media spend, with Gloss Absolu and Nutritive 8H appearing consistently across charts.



Hair Care Advertising Activity

- **The Top Brands represented 79.6% of all sponsored product activity** – see breakdown to the left.
- Olaplex has dropped out of the top 10 by share of sales but still maintains the top paid placement with Kerastase jumping 5.4% to number 2.
- Moroccan Oil also tried to offset decreases by increasing spend 7.3%.

Navigo

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What set the hair category apart was its efficiency. Many of the top spenders also saw corresponding returns in sales. There was less wasted media than in other categories, likely due to strong repeat behavior and format loyalty.

Product	Brand
Cactus Fruit 3-in-1 Styling Cream	DAE
No.4 Bond Maintenance Shampoo	OLAPLEX
Detox Shampoo	OUAI
Moroccanoil Treatment Hair Oil	MOROCCANOIL
No.5 Bond Maintenance Conditioner	OLAPLEX
Gloss Absolu All In One Anti-Frizz Spray	KERASTASE
No. 7 Bonding Frizz Reduction & Heat Protectant Hair Oil	OLAPLEX
Nutritive 8H Magic Night Serum Hydrating Treatment for Dry Hair	KERASTASE
Honey Gloss Ceramide Therapy Hydrating Hair Mask	GISOU
Cactus Fruit 3-in-1 Styling Cream with Taming Wand	DAE

The Top 10 sponsored products represented 31.8% of total sponsorship share.

Olaplex led total haircare sponsorship in Q2 with 12.9% share, placing three products in the top 10 SKUs. Kérastase followed closely at 11.9%, backed by Gloss Absolu and Nutritive 8H. Moroccanoil, OUAI, and DAE also ranked in the top five brand spenders, with DAE's Cactus Fruit Styling Cream topping individual SKU investment at 4.9%. Overall, spend was concentrated in bond-building, smoothing, and oil-based styling products, with newer entries like Gisou and Nutrafol carving out notable paid presence.

Still, brands that rely too heavily on media without product differentiation risk long-term margin strain. Hair is crowded. Shoppers will not hesitate to switch if something else looks easier to use, better for their texture, or more sensorial.

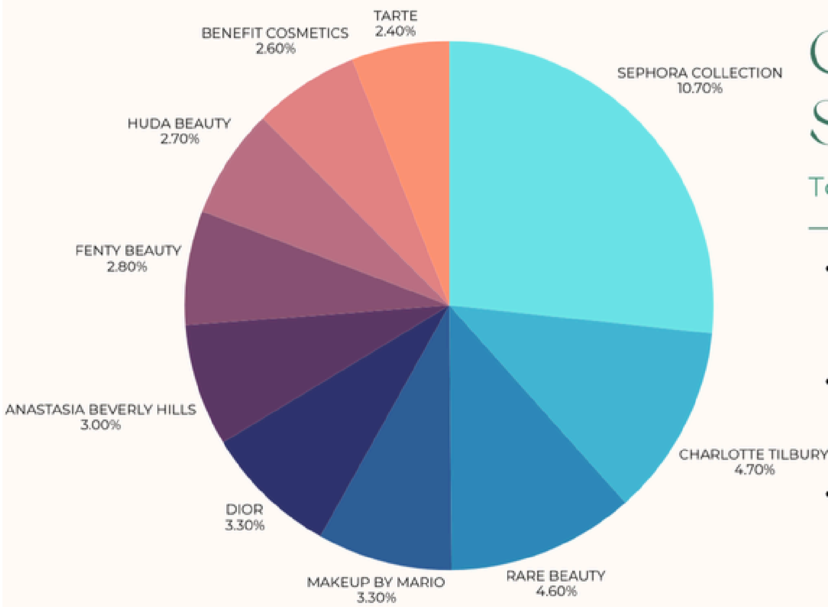
Product	Brand
Cactus Fruit 3-in-1 Styling Cream with Taming Wand	DAE
Airwrap IDâ„¢ Multi-Styler and Dryer for Straight to Wavy Hair	DYSON
Nutritive 8H Magic Night Serum Hydrating Treatment for Dry Hair	KERASTASE
Mini Leave-In Molecular Repair Hair Mask	K18 BIOMIMETIC HAIRSCIENCE
Cactus Fruit 3-in-1 Styling Cream	DAE
Dream Coat Supernatural Treatment Spray for Frizzy Hair	COLOR WOW
Mini Elixir Ultime Hydrating Hair Oil	KERASTASE
Gloss Absolu Glaze Drops Anti-Frizz Hair Oil	KERASTASE
Leave-In Molecular Repair Hair Mask	K18 BIOMIMETIC HAIRSCIENCE
Mini Honey Infused Hair Oil	GISOU

The Top 10 products represented 5.4% of total sales share.

DAE captured the top spot with 0.8% share of sales, driven by strong performance from both its Cactus Fruit styling SKUs. Dyson's Airwrap followed closely at 0.7%, highlighting demand for high-ticket tools even with lower unit velocity. Kérastase landed three products in the top 10, reflecting its 11.9% share of total paid activity. K18, Gisou, and Color Wow rounded out the leaderboard with competitive placement across mini and treatment formats, underscoring continued interest in high-efficacy, styling-adjacent haircare.

Makeup: The Skinification Effect Holds

Makeup in Q2 was about ease, comfort, and hybrid performance. Armani's Luminous Silk Foundation and Ilia's Super Serum Skin Tint led the paid activity, but what sold best were products that felt like skincare with a tint.



Category Share of Sales

Top Brands In Makeup

- Top brands in the category accounted for 40% of total sales. The average price point for the top 10 is $28.
- **Top Gainers:**
  - Sephora Beauty: +1.4%
  - Charlotte Tilbury: +0.1%
- **Top Losers:**
  - Rare Beauty: -1.3%
  - Makeup By Mario: -0.5%

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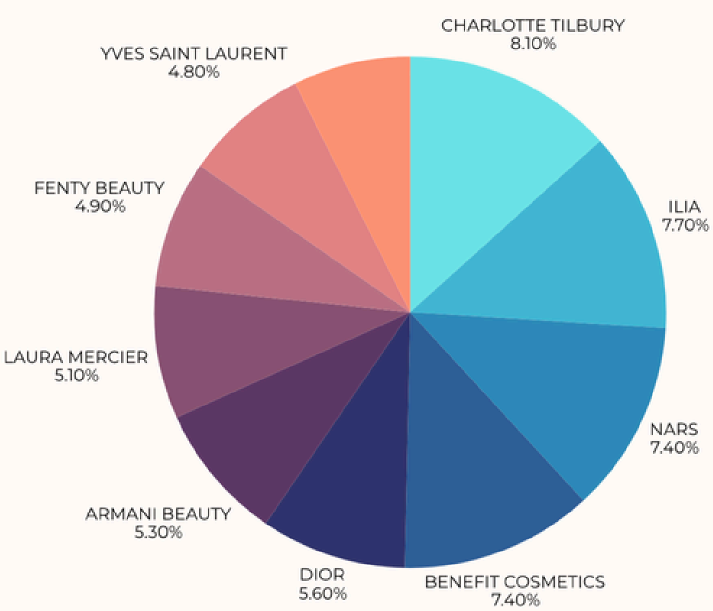
Minimalist branding and skin-friendly claims carried Ilia and Rare Beauty through the quarter. Meanwhile, classics like Benefit's Benetint and NARS's Radiant Creamy Concealer maintained strong conversion due to product familiarity and utility.



Makeup Advertising Activity

- **The Top Brands represented 60.8% of all sponsored product activity** – see breakdown to the left.
- Ilia jumped to the number two spot with a 7.7% increase in paid activity.
- Benefit and Laura Mercier both pulled back substantial spend.

Navigo

Tower 28 and Sephora Collection also earned share with strategic entry price points and multitasking formats. Across all tiers, consumers leaned into complexion products that promise glow, hydration, and a flexible finish.

Product	Brand
Luminous Silk Natural Glow Foundation	ARMANI BEAUTY
Super Serum Skin Tint SPF 40 Skincare Foundation	ILIA
Limitless Lash Lengthening Clean Mascara	ILIA
Airbrush Flawless Finish Refillable Setting Powder	CHARLOTTE TILBURY
Light Reflecting Advanced Skincare Medium Coverage Foundation	NARS
Eye Tint Long-Lasting Liquid Eyeshadow	ARMANI BEAUTY
Radiant Creamy Concealer with Hydrating Medium Coverage	NARS
Benetint Liquid Lip + Cheek Blush Stain	BENEFIT COSMETICS
Long-Wear Tinted Moisturizer Natural Dewy SPF 30 with Hyaluronic Acid	LAURA MERCIER
Gimme Brow+ Tinted Volumizing Eyebrow Gel	BENEFIT COSMETICS

The Top 10 sponsored products represented 24.6% of total sponsorship share.

Armani Beauty led paid support in cosmetics this quarter, with Luminous Silk Foundation topping the list at 3.3% sponsorship share and Eye Tint close behind. ILIA followed with strong investment across both complexion and mascara, reflecting a push on clean hero SKUs. Charlotte Tilbury, NARS, and Benefit also appeared multiple times, supporting a mix of base, eye, and multi-use products with targeted spend across refillable, clean, and iconic formats.

Navigo

This was not a quarter for colorful palettes or seasonal launches. It was about products that live in everyday routines and that shoppers feel confident using again and again.

Product	Brand
BACKSTAGE Glow Face Palette	DIOR
Lip Butter Balm Treatment for Hydration + Nourishing Shine	SUMMER FRIDAYS
Master MattesÂ® Eyeshadow Palette: The Original	MAKEUP BY MARIO
Mini Color Shifter Strange Botanicals Eyeshadow Palette	SEPHORA COLLECTION
Cream Lip Stain 10HR Liquid Lipstick	SEPHORA COLLECTION
Soft Pinch Liquid Blush	RARE BEAUTY BY SELENA GOMEZ
ShineOn Lip Jelly Hydrating Non-Sticky Lip Oil	TOWER 28 BEAUTY
Benetint Liquid Lip + Cheek Blush Stain	BENEFIT COSMETICS
Major Headlines Double-Take Powder Blush Duo	PATRICK TA
Soft Pinch Tinted Lip Oil Stain	RARE BEAUTY BY SELENA GOMEZ

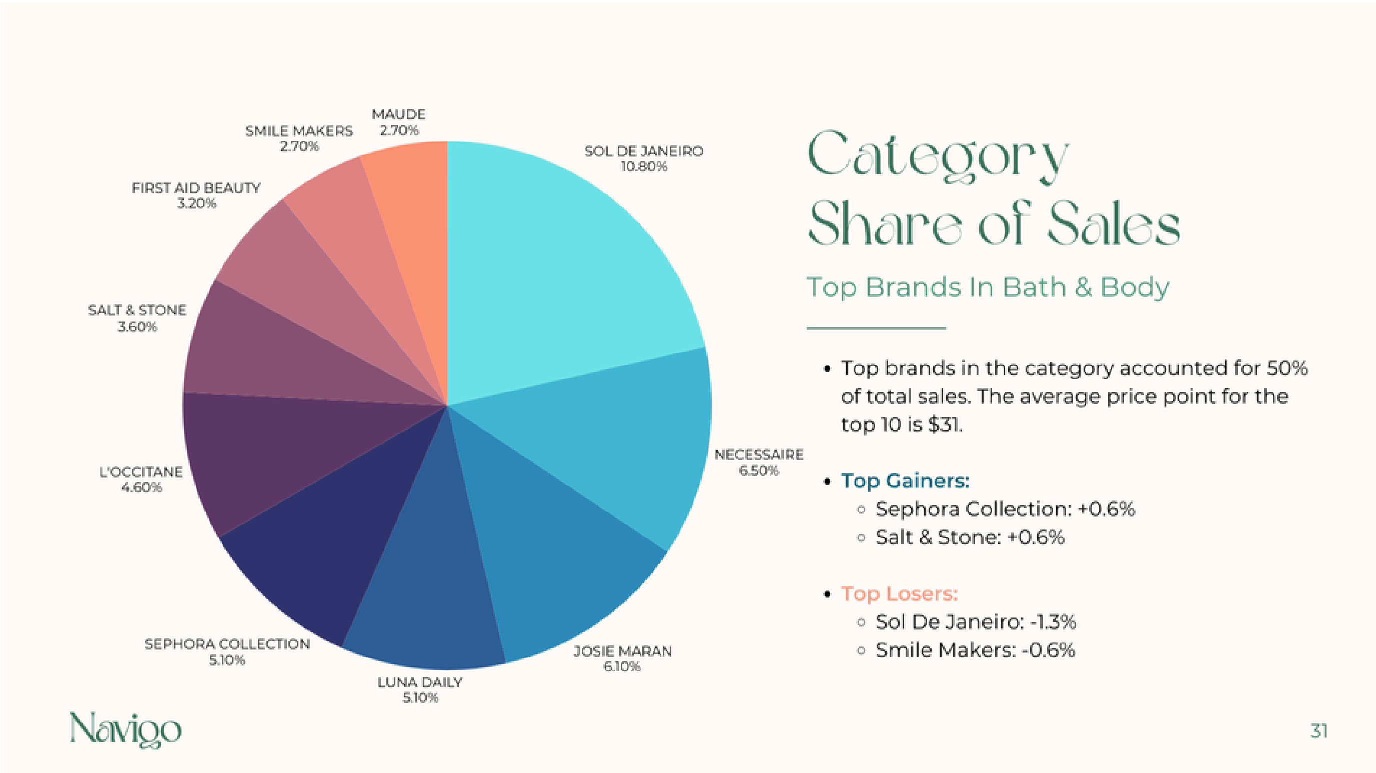
The Top 10 products represented 4.5% of total sales share.

Dior's Backstage Glow Face Palette and Summer Fridays' Lip Butter Balm led Q2 with 0.6% share each, despite minimal to no paid support. Eye and lip categories dominated the top sellers, with standout SKUs from Sephora Collection, Rare Beauty, and Tower 28. Makeup by Mario's Master Mattes Palette also made the list with improved BSR and light paid backing, while Benefit's Benetint held its ground as a top-selling multi-use hero.

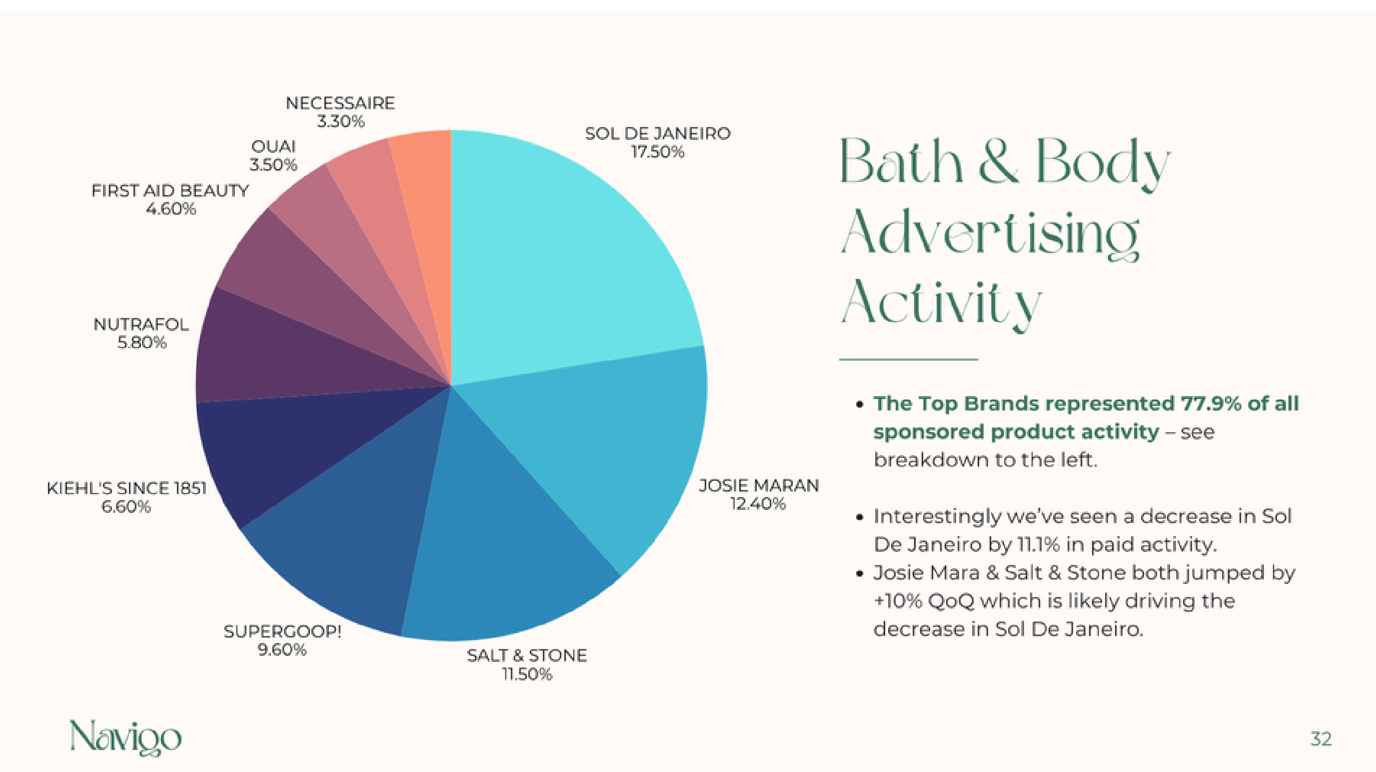
Navigo

Bath & Body: Function Joins Fragrance

Bath and body showed the most balanced dynamic between scent-driven indulgence and solution-based utility. Sol de Janeiro remained the category leader, with multiple SKUs showing up in both paid and performance charts.



Josie Maran's body butters performed well in sales with less aggressive spend, and First Aid Beauty's KP Scrub confirmed that body care with clinical claims is gaining steam.



Topicals' High Roller tonic and Luna Daily's prebiotic spray both broke into the conversation without major media support. Their rise reflects a changing consumer mindset—one that treats the body like an extension of skincare, not an afterthought.

Product	Brand
Brazilian Bum Bum Visibly Firming Refillable Body Cream with Caffeine-Rich GuaranÃ	SOL DE JANEIRO
Delicia Drench Shower Oil Moisturizing Cleansing Oil	SOL DE JANEIRO
Ultimate Strength Hand Salve	KIEHL'S SINCE 1851
Glowscreen SPF 40 Sunscreen with Hyaluronic Acid + Niacinamide	SUPERGOOP!
Jet Lag Mask + Moisturizer	SUMMER FRIDAYS
Vanilla Vibezzz - Whipped Argan Oil Refillable Firming Body Butter Jar	JOSIE MARAN
Golden Hour (Amber, White Musk) - Whipped Argan Oil Refillable Firming Body Butter	JOSIE MARAN
Santal & Vetiver Extra-Strength Aluminum-Free Deodorant	SALT & STONE
KP Bump Eraser Body Scrub with 10% AHA â€" Body Exfoliant for Keratosis Pilaris	FIRST AID BEAUTY
Unseen Sunscreen Invisible Broad Spectrum SPF 50 PA +++	SUPERGOOP!

The Top 10 sponsored products represented 38.2% of total sponsorship share.

Sol de Janeiro dominated paid investment in bath and body, with Brazilian Bum Bum Cream and Delicia Drench Shower Oil accounting for over 12% combined share of sponsorship. Kiehl's Ultimate Strength Hand Salve followed at 5.3%, while Supergoop, Summer Fridays, and Josie Maran rounded out the leaderboard with strong support behind SPF, masks, and body butters. The category showed focused spend on moisturizing, firming, and sun-protecting hero SKUs.

This is the only category where format innovation and education can still create outsized returns. Sensory experience matters, but ingredients and texture are becoming just as important.

Product	Brand
Vanilla Vibezzz - Whipped Argan Oil Refillable Firming Body Butter Jar	JOSIE MARAN
High Roller Ingrown Hair Tonic with AHA and BHA	TOPICALS
The Mini Everywhere Spray-to-Wipe - With Prebiotics + Vitamins C&E, Omegas 3 & 6 for Dry Skin	LUNA DAILY
KP Bump Eraser Body Scrub with 10% AHA â€" Body Exfoliant for Keratosis Pilaris	FIRST AID BEAUTY
Nourishing Foot Mask in Coconut + Lavender	SEPHORA COLLECTION
Brazilian Bum Bum Visibly Firming Refillable Body Cream with Caffeine-Rich GuaranÃ	SOL DE JANEIRO
Power Mist Hydrating Hand Sanitizer	TOUCHLAND
Nourishing and Protective Shea Butter Hand Cream	L'OCCITANE
Delícia Drench™ Jet Set	SOL DE JANEIRO
Beija Flor™ Jet Set	SOL DE JANEIRO

The Top 10 products represented 8.6% of total sales share.

Bath and body sales were led by Josie Maran's Vanilla Vibezzz and Topicals' High Roller tonic, each capturing 0.9% share. Luna Daily's Mini Everywhere Spray and First Aid Beauty's KP Bump Eraser also performed strongly with minimal paid support. Sol de Janeiro had four SKUs in the top 10, including Brazilian Bum Bum Cream, showcasing broad consumer demand across formats. Sephora Collection and Touchland rounded out the list, signaling continued momentum in foot masks and hand sanitizers.

Conclusion: Winning Means More Than Visibility

Sephora’s Q2 did not reward brands simply for showing up. The clearest lesson was that paid media works best when it supports a product that consumers already understand and trust. It is no longer enough to dominate impressions. Brands must close the loop between visibility and relevance.

Hero SKUs performed best when paired with clear claims, thoughtful positioning, and an efficient media mix. Emerging brands found success by focusing on education, inclusivity, and addressing overlooked needs.

As competition continues to rise, the path forward is not about spending more. It is about being clearer, sharper, and more consistent with how you serve your shopper.