



Sephora Summer Sale 2025: Who Won, Who Lost, and What It Means for Prime Day

The Sephora Summer Sale has become one of the key mid-year benchmarks for beauty brands. This year, the event quietly launched on June 26 and ran through July 8, a full 13 days, slightly longer than in past years and timed strategically to wrap around Amazon Prime Day. While the promotion didn't carry splashy headlines, it drew plenty of shopper engagement and revealed some clear shifts in category momentum and retail channel dynamics.

At Navigo, we analyzed performance across 330 brands on Sephora.com during the final seven days of the sale (July 2–8), comparing results to the same stretch last year (July 4–10). We looked at sales share, search visibility, and sponsorship activity to get a real sense of which brands are building equity, and which may be overspending just to hold position.

A Tougher Environment for Visibility

Across most categories, visibility was down. Organic search performance dropped significantly in skincare, hair, and makeup, down between 12% and 25%, while sponsorship activity across the board fell 14.6% year over year.

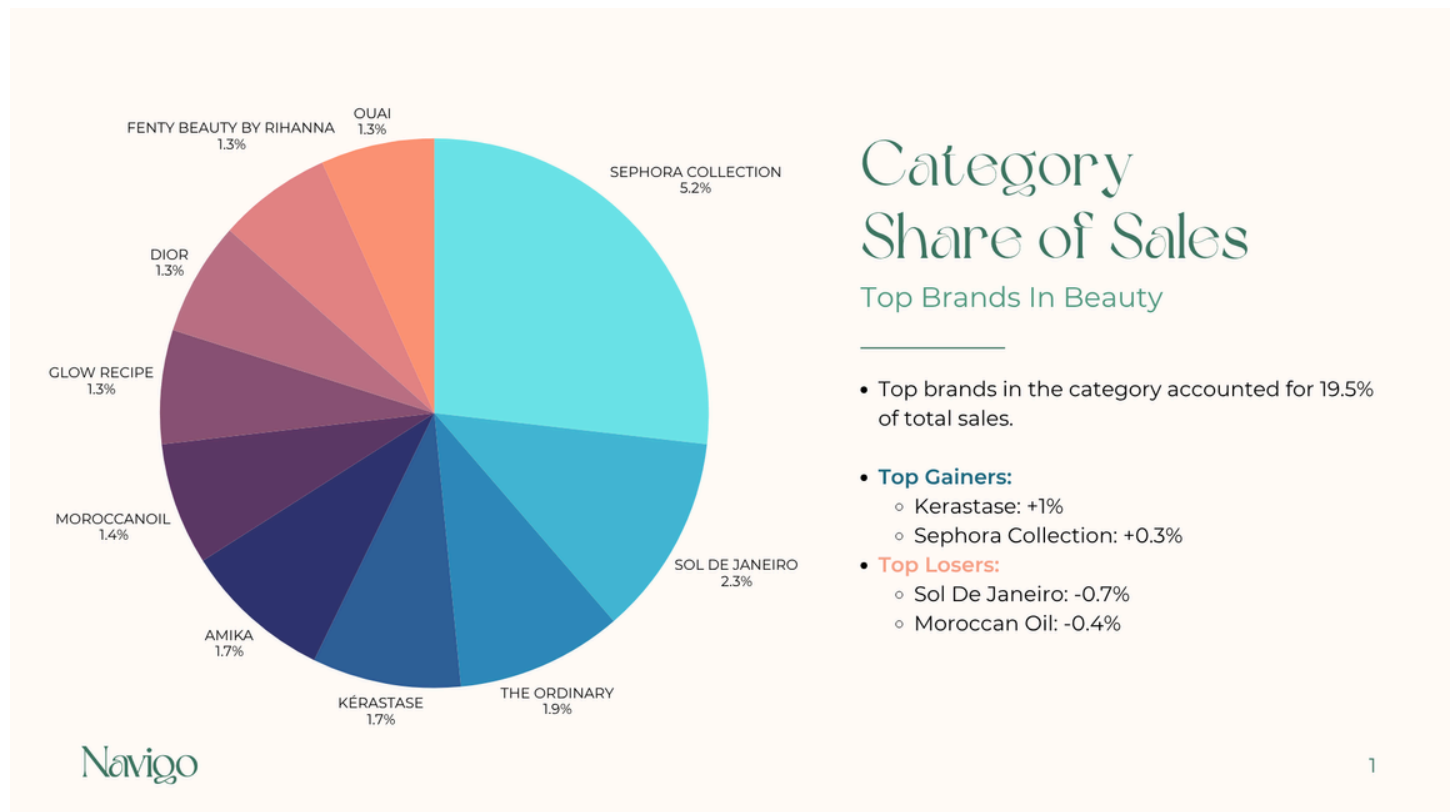
Makeup brands in particular took a hit, with visibility declining nearly 25% and sales softening alongside it. Even brands that invested in paid placements didn't necessarily see a return. The gap between sponsorship and performance widened, and the brands that rose to the top were the ones who didn't just rely on media dollars to drive results.



Brands That Delivered

Sephora Collection continued to dominate, growing its share of total sales to 5.2%. Kérastase posted the strongest gain among top brands, increasing share by a full point and cementing its position with both paid and organic presence.

Dior also held steady with a well-balanced showing across visibility and sales. These brands didn't necessarily overperform, but they executed with consistency across pricing, product, and promotion.



Brands That Slipped

Sol de Janeiro, usually a top-five fixture, lost 0.7 percentage points of share despite visible paid investment. The Ordinary, Amika, and Moroccanoil all posted similar declines in sales share without enough organic momentum to offset it. These aren't brand failures so much as signs of saturation, strong SKUs that may need

refreshed positioning or broader assortment support to sustain growth.

Products That Clearly Won

Summer Fridays' Lip Butter Balm and Tower 28's SOS Spray both made the bestseller list again, although their share of sales dipped slightly year over year. But several newer products stood out not just as emerging players but as clear winners. DAE's Cactus Fruit Styling Cream, Kayali's Vanilla 28, and Paula's Choice BHA Toner all posted gains without being heavily promoted. These are SKUs that shoppers are clearly seeking out, and they're converting without needing to be over-merchandised.

Bigger Picture: Efficiency Over Exposure

The story this year wasn't just about who spent the most. It was about which brands could hold or grow their share in a lower-sponsorship environment, where consumer intent was harder to influence. In many cases, the brands that performed best were those that focused on core product appeal, kept their pricing tight, and

prioritized SEO and PDP fundamentals over splashy creative or discounting.

Looking Ahead to Prime Day

The fact that Sephora extended this sale longer than in previous years, and allowed it to overlap directly with Prime Day, isn't a coincidence. It's a signal that these calendar tentpoles are becoming less about short spikes and more about capturing longer waves of intent.

Consumers are shopping across platforms, over a longer window, and with a higher bar for value and trust.

For brands in the middle of Prime Day, the Sephora event serves as a reminder: your ability to win isn't about dominating a single channel or bidding up one keyword. It's about building the right retail infrastructure, finding conversion at the SKU level, and investing in the right tactics based on where your shopper is in the journey.

Navigo partners with beauty brands to do exactly that. If you're looking to strengthen your strategy, or make sure you're not one of the brands on the decline, we should talk.

