

# Navigo

MARKETING

# Why Partner With Navigo?

We Drive Growth for Beauty Brands on Amazon

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- **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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# Beauty & Personal Care Overview

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

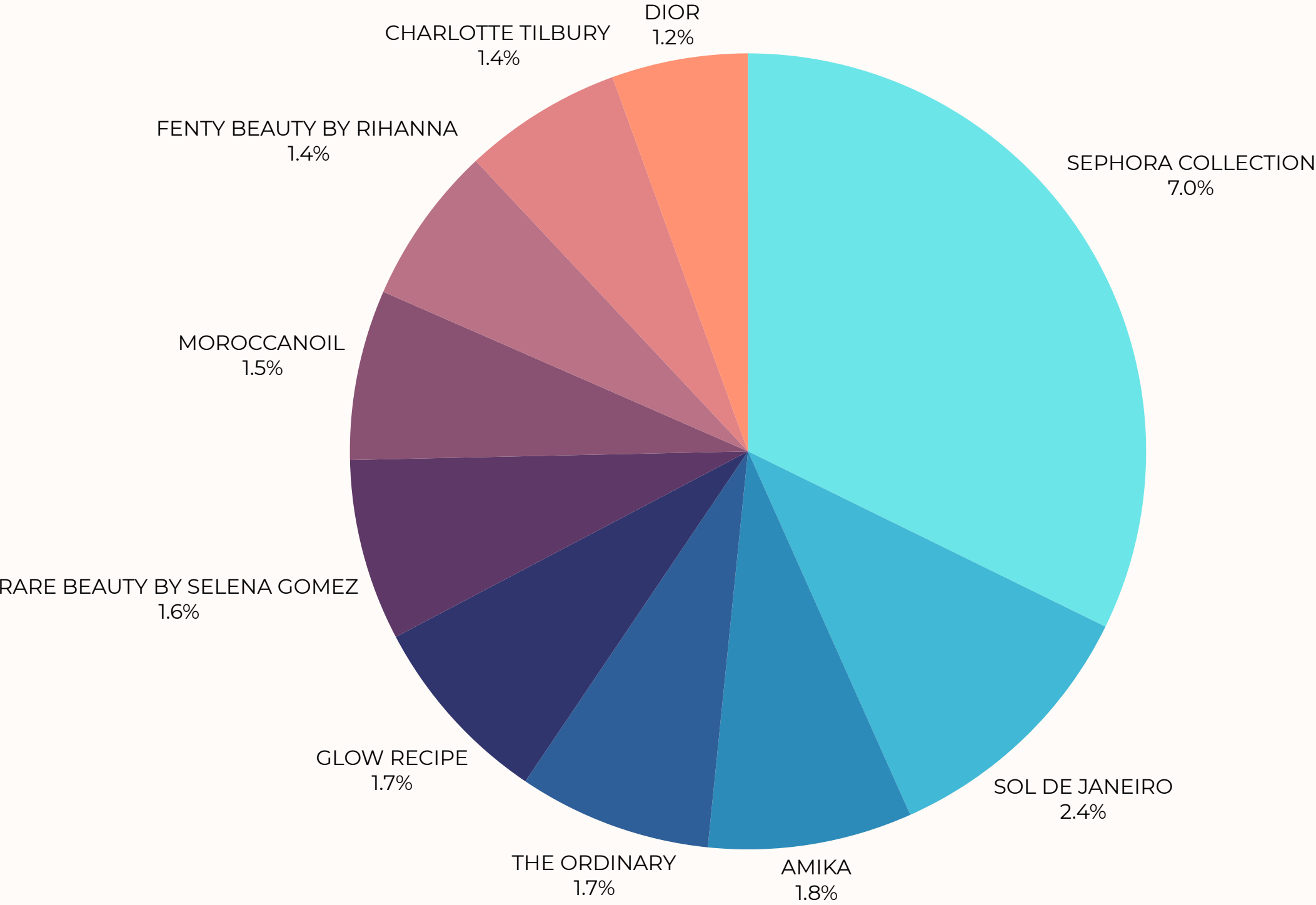




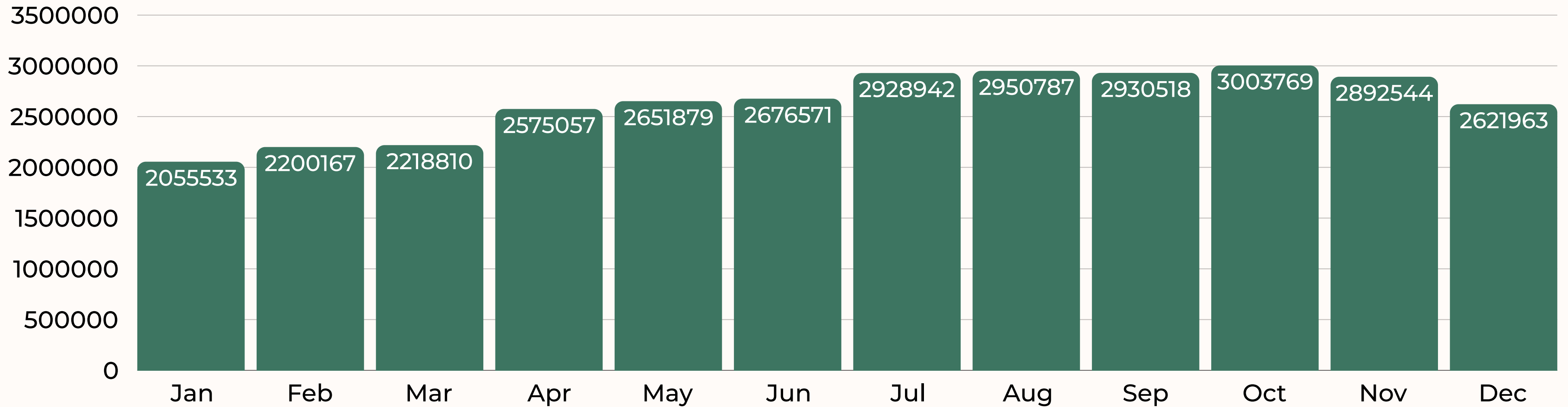
# Category Share of Sales

## Top Brands In Beauty

- Top brands in the category accounted for 22% of total sales.



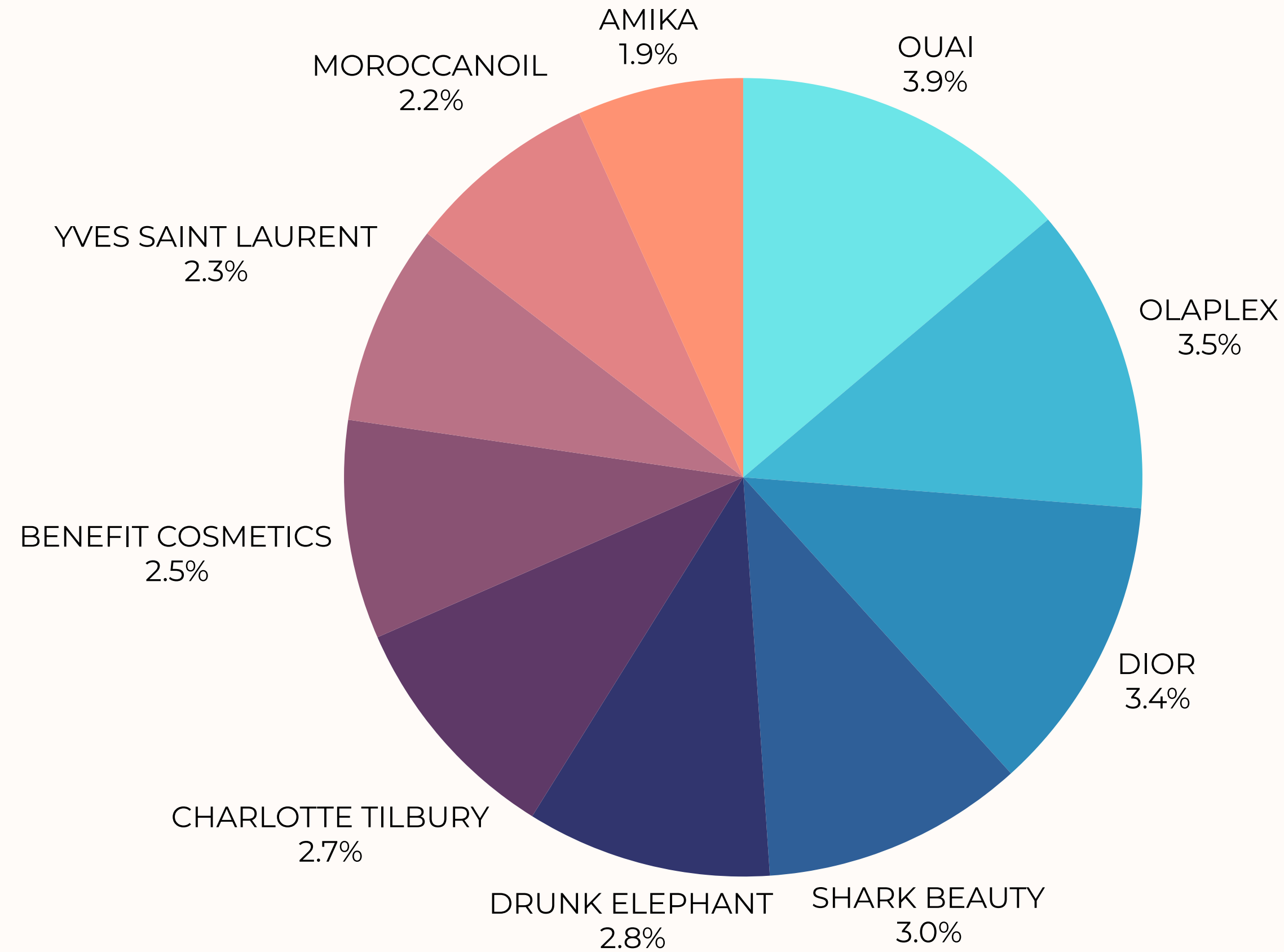
# Advertising Activity Over Time



- Sponsorship activity (Paid Ads) saw steady increases throughout the year with slight dip in December.

# Beauty Advertising Activity

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- **The Top Brands represented 28% of all sponsored product activity** – see breakdown to the left.
- As Sephora continues to increase paid placements across their site we expect to see higher investment from both legacy brands and exclusive brands.

Product	Brand
No. 4 Bond Maintenance™ Strengthening Hair Repair Shampoo	OLAPLEX
B-Hydra™ Intensive Hydration Serum with Hyaluronic Acid	DRUNK ELEPHANT
The Dewy Skin Cream Plumping & Hydrating Refillable Moisturizer	TATCHA
Lala Retro™ Nourishing Whipped Refillable Moisturizer	DRUNK ELEPHANT
Detox Shampoo	OUAI
No. 7 Bonding Frizz Reduction & Heat Protectant Hair Oil	OLAPLEX
No. 6 Bond Smoother Frizz Control Styling Hair Cream	OLAPLEX
D-Bronzi™ Bronzing Drops with Peptides	DRUNK ELEPHANT
The Rice Wash Skin-Softening Cleanser	TATCHA

The Top 9 sponsored products represented 16.8% of total sponsorship share.

- Olaplex heavily invested in Sephora advertising throughout the year, trying to hold onto market share.



Product	Brand
Lip Butter Balm for Hydration & Shine	SUMMER FRIDAYS
SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY
Power Mist Hydrating Hand Sanitizer	TOUCHLAND
Superfood Gentle Antioxidant Refillable Cleanser	YOUTH TO THE PEOPLE
Mini SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY
Airwrap™ Multi-Styler Complete Long	DYSON
ShineOn Lip Jelly Hydrating Non-Sticky Lip Gloss	TOWER 28 BEAUTY
Bom Dia Bright™ Jet Set	SOL DE JANEIRO
Watermelon Glow Niacinamide Dew Drops Serum	GLOW RECIPE

The Top 9 products represented 1.9% of total Sales share.

- **Tower 28** has strong share of sales across the categories they compete in.
- Diverse breakdown of brands and types of products that are the top performers in their respective categories.

# Fragrance

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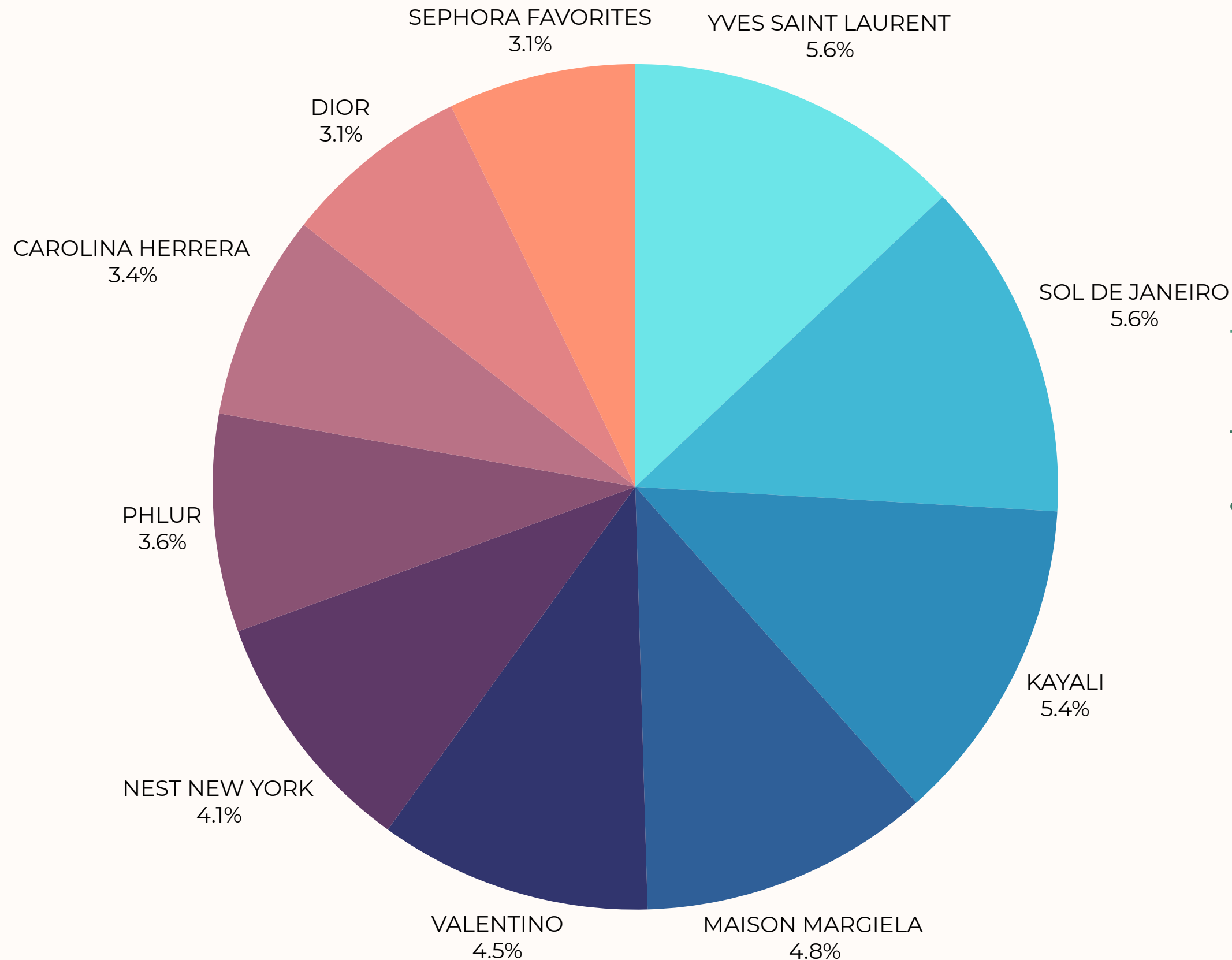
Top brands, items and performance  
in the Fragrance category for 2024



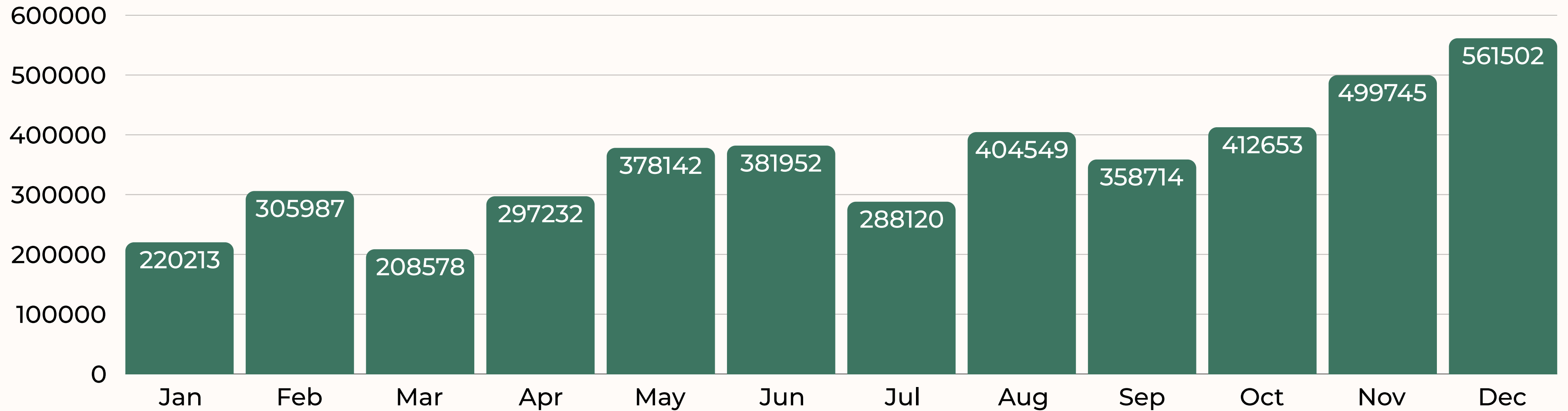
# Fragrance Share of Sales

## Top Brands In Fragrance

- Top brands in the category accounted for 43.3% of total sales. The average price point for the top 10 is \$58.19.



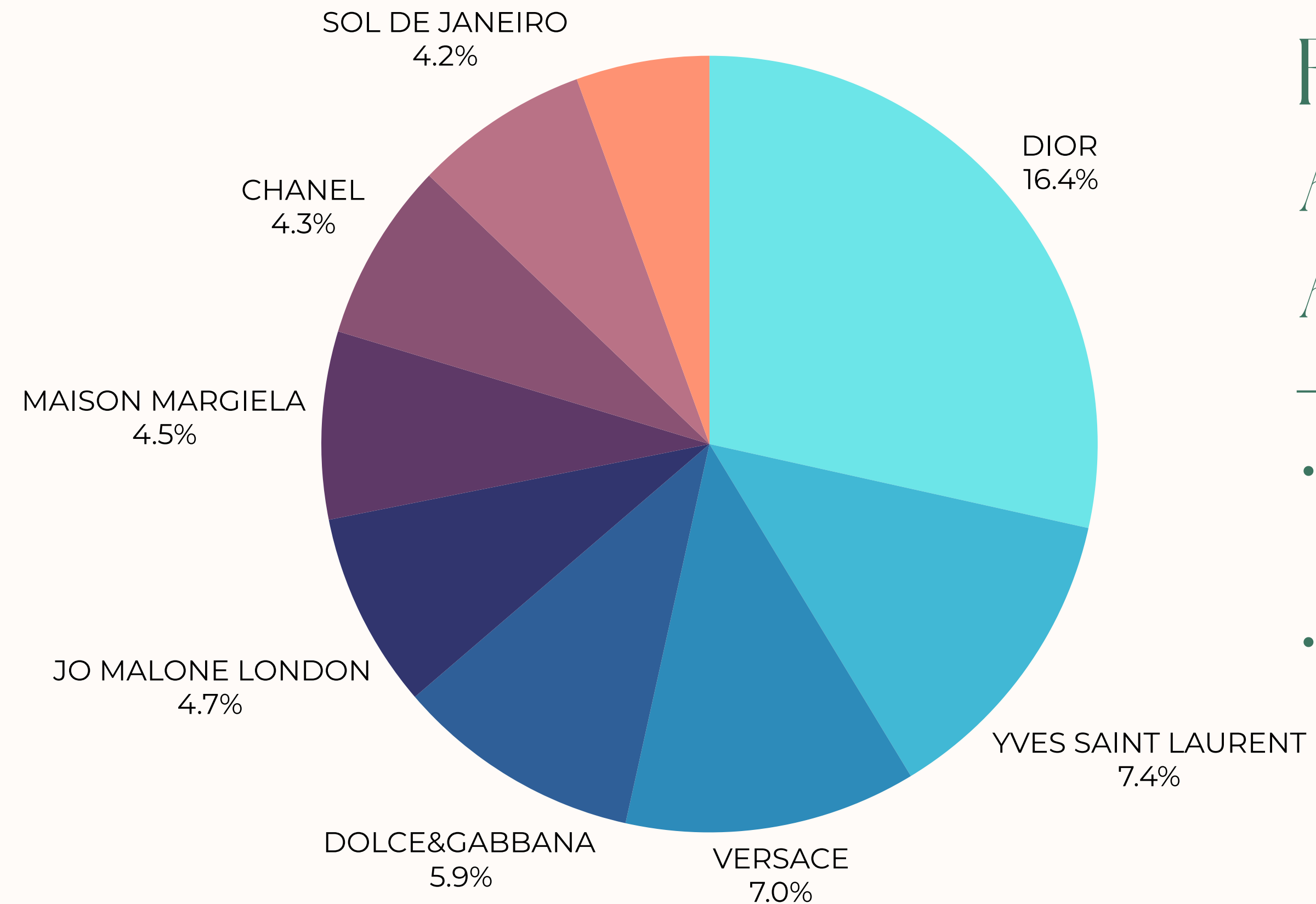
# Advertising Activity Over Time



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

# Fragrance Advertising Activity

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- **The Top Brands represented 61.5% of all sponsored product activity** – see breakdown to the left.
- Major players like Dior, YSL and Versace dominate the paid placements with Dior standing out by more than double.



Product	Brand
Sauvage Eau de Toilette	DIOR
Sauvage Eau de Parfum	DIOR
Wildflower Honey Infused Hair Perfume	GISOU
Miss Dior Eau de Parfum	DIOR
Sauvage Elixir	DIOR
Sauvage Deodorant Stick	DIOR
Miss Dior Blooming Bouquet	DIOR
Eros Eau de Toilette	VERSACE
Cheirosa 40 Hair & Body Perfume Mist	SOL DE JANEIRO

The Top 9 sponsored products represented 27.7% of total sponsorship share.

- **Dior** Completely dominates the top sponsored product list as they push to bolster their Sephora presence.

Product	Brand
Glossier You Eau de Parfum	GLOSSIER
Mini Good Girl & Good Girl Blush Elixir Perfume Set	CAROLINA HERRERA
Donna Born In Roma Eau de Parfum	VALENTINO
Mini Cheirosa 59 Delicia Hair & Body Perfume Mist	SOL DE JANEIRO
Mini Donna Born in Roma & Donna Born in Roma Intense Perfume Set	VALENTINO
Mini Black Opium & Libre Eau de Parfum Set	YVES SAINT LAURENT
VANILLA   28 Eau de Parfum	KAYALI
Cheirosa 62 Bum Bum Hair & Body Perfume Mist	SOL DE JANEIRO
VANILLA   28 Eau de Parfum Travel Spray	KAYALI

The Top 9 products represented 7.1% of total Sales share.

- Despite a heavy concentration in advertising efforts for top brands there is strong representation across brands when looking at the top selling products.

# Skincare

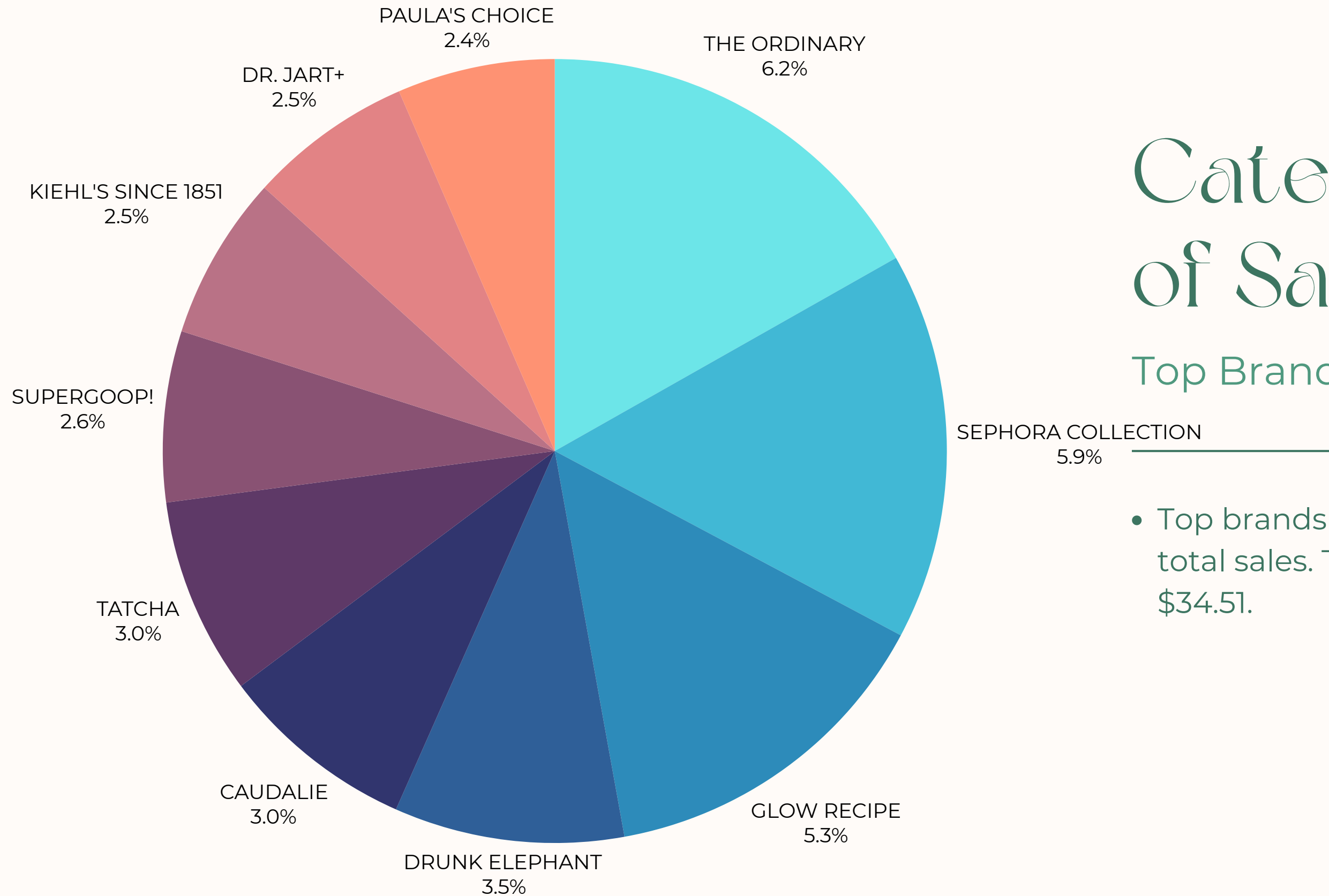
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Top brands, items and performance  
in the Skincare category for 2024



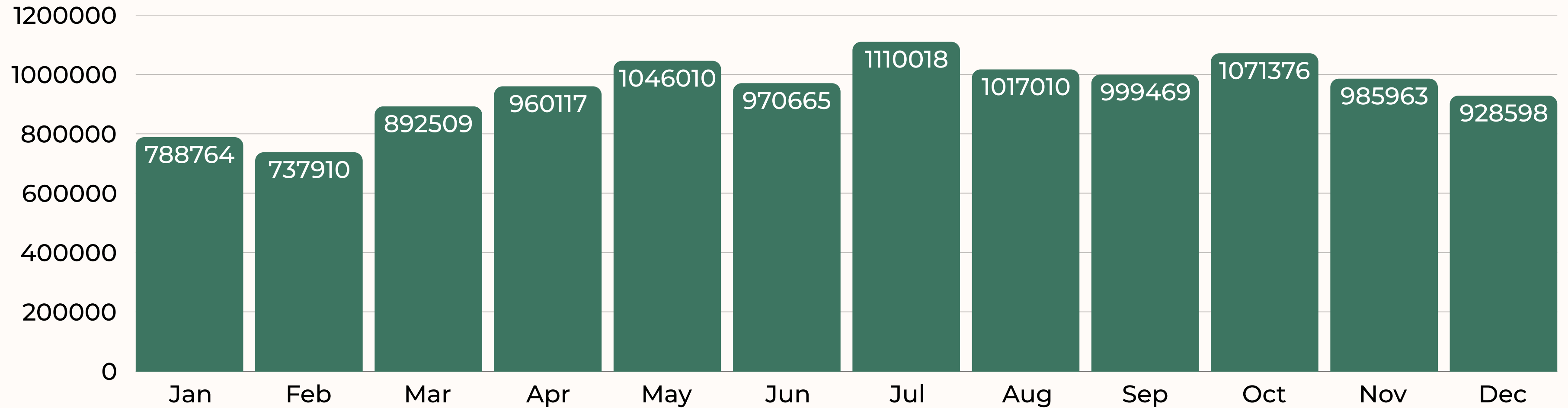
# Category Share of Sales

## Top Brands In Skincare



- Top brands in the category accounted for 36.8% of total sales. The average price point for the top 10 is \$34.51.

# Advertising Activity Over Time

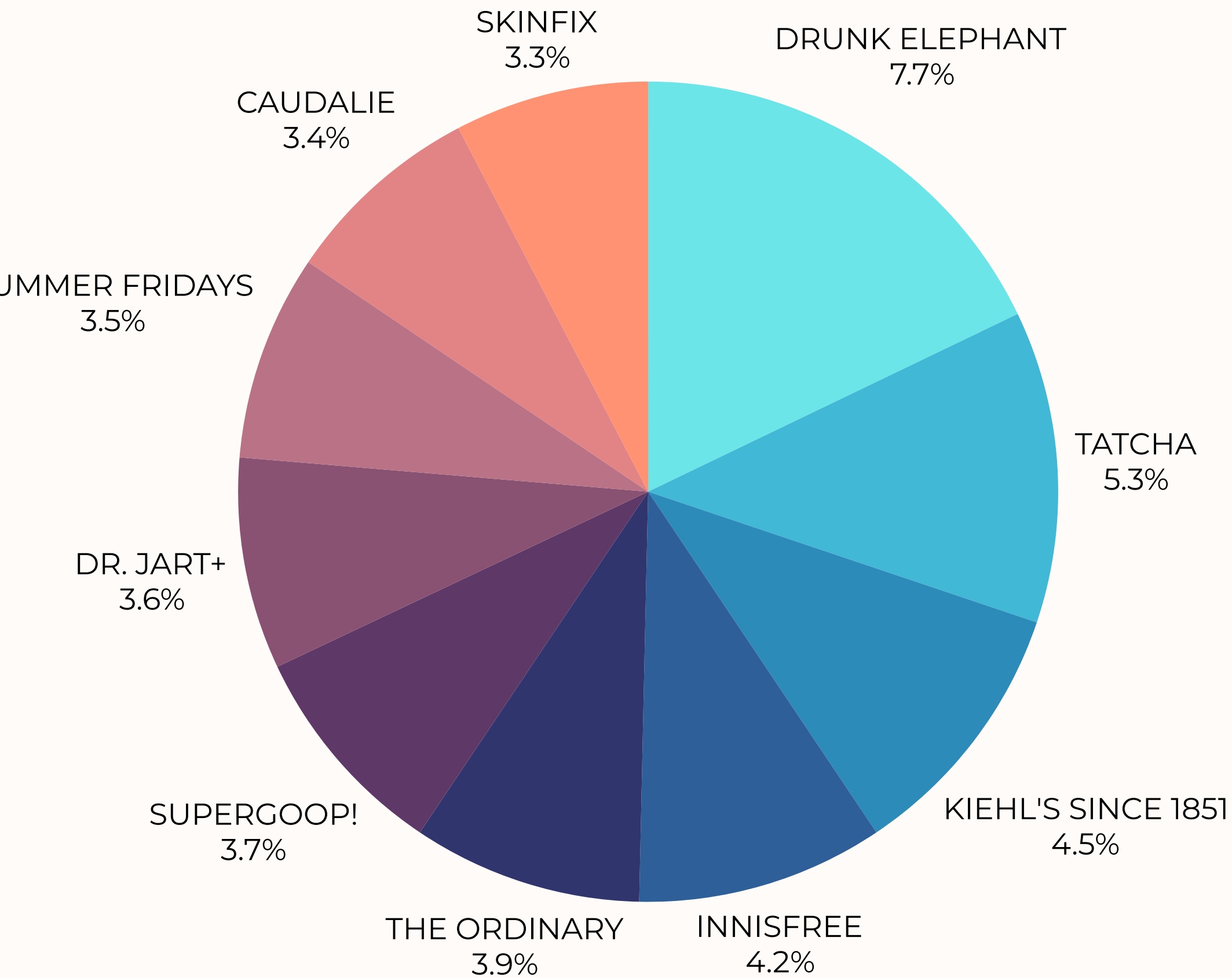


- Sponsorship activity (Paid Ads) remained steady in the back half of 2024 following overall trends across Sephora.com



# Skincare Advertising Activity

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- **The Top Brands represented 43% of all sponsored product activity** – see breakdown to the left.
- Drunk Elephant and Tatcha are clear leaders in advertising activity across the category.

Product	Brand
B-Hydra™ Intensive Hydration Serum with Hyaluronic Acid	DRUNK ELEPHANT
The Dewy Skin Cream Plumping & Hydrating Refillable Moisturizer	TATCHA
Lala Retro™ Nourishing Whipped Refillable Moisturizer	DRUNK ELEPHANT
D-Bronzi™ Bronzing Drops with Peptides	DRUNK ELEPHANT
The Rice Wash Skin-Softening Cleanser	TATCHA
Daily UV Defense Invisible Broad Spectrum SPF 36 Sunscreen	INNISFREE
Better Screen™ UV Serum SPF 50+ Facial Sunscreen with Collagen Peptide	KIEHL'S SINCE 1851
Ultra Facial Refillable Moisturizing Cream with Squalane	KIEHL'S SINCE 1851
Hyaluronic Acid 2% + B5 Hydrating Serum	THE ORDINARY

The Top 9 sponsored products represented 21.7% of total sponsorship share.

- Drunk Elephant and Tatcha have focused their advertising dollars on top products and are both capturing strong share.

Product	Brand
Superfood Gentle Antioxidant Refillable Cleanser	YOUTH TO THE PEOPLE
SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY
Watermelon Glow PHA + BHA Pore-Tight Toner	GLOW RECIPE
The Dewy Skin Cream Plumping & Hydrating Refillable Moisturizer	TATCHA
Hyaluronic Acid 2% + B5 Hydrating Serum	THE ORDINARY
Glycolic Acid 7% Exfoliating Toner	THE ORDINARY
Niacinamide 10% + Zinc 1% Oil Control Serum	THE ORDINARY
Mini SOS Daily Rescue Facial Spray with Hypochlorous Acid	TOWER 28 BEAUTY
B-Hydra™ Intensive Hydration Serum with Hyaluronic Acid	DRUNK ELEPHANT

The Top 9 products represented 4.7% of total sales share.

- The Ordinary is the most represented brand despite not having a top advertised product as they continue to drive value for their customers.

# Hair Care

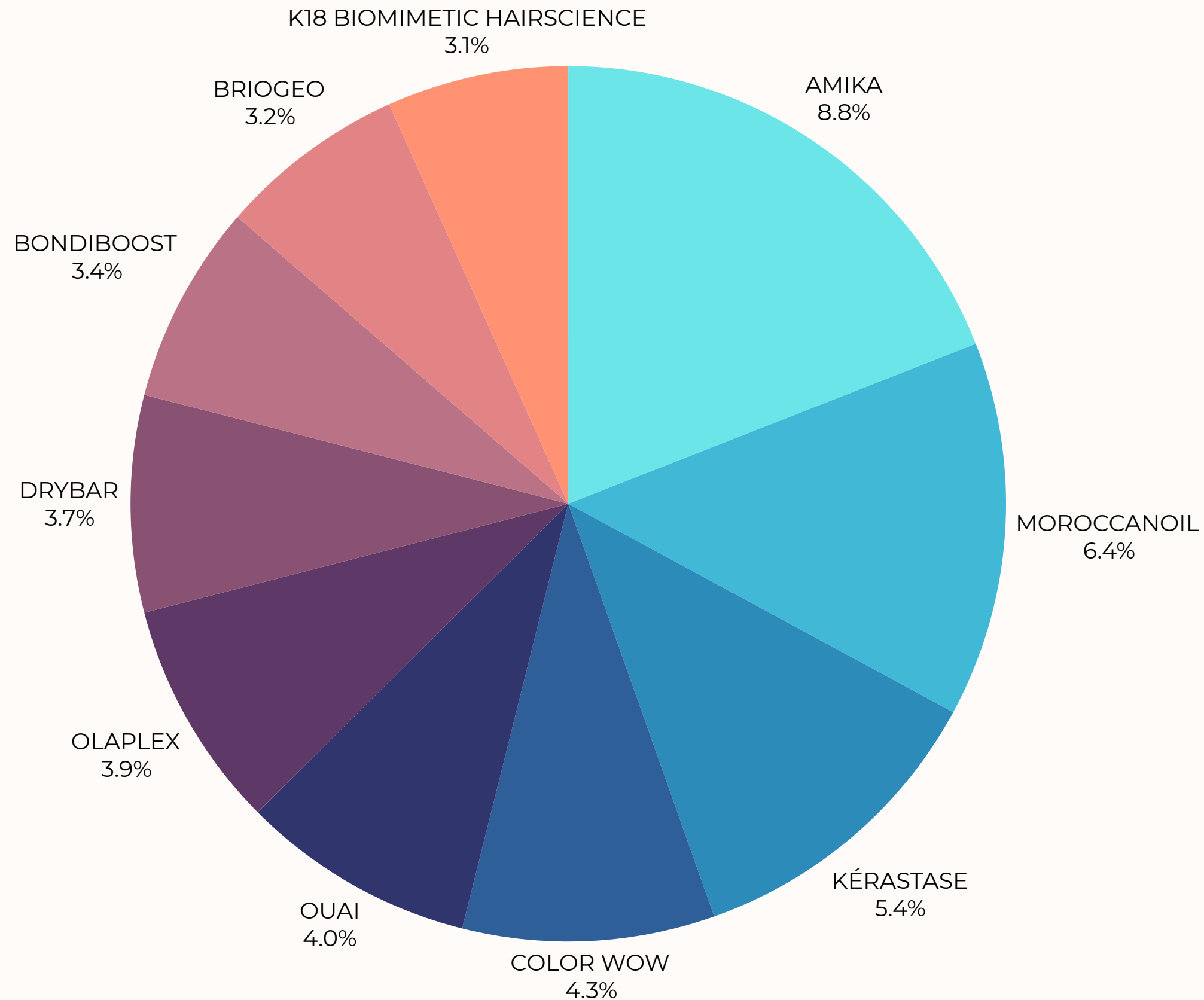
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Top brands, items and performance  
in the Hair Care category for 2024



# Category Share of Sales

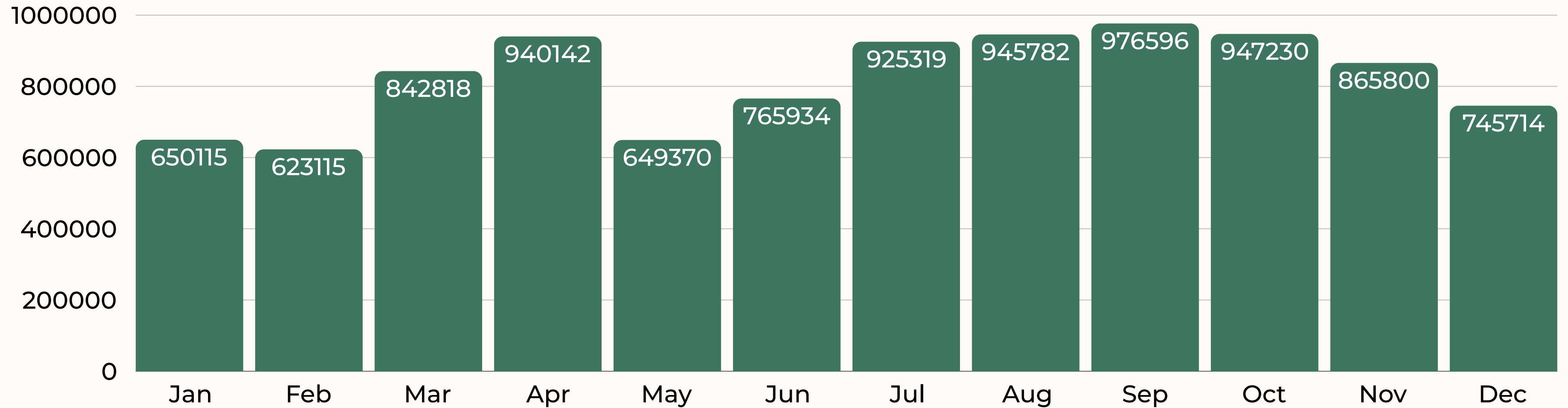
## Top Brands In Hair Care



- Top brands in the category accounted for 46% of total sales. The average price point for the top 10 is \$38.29.



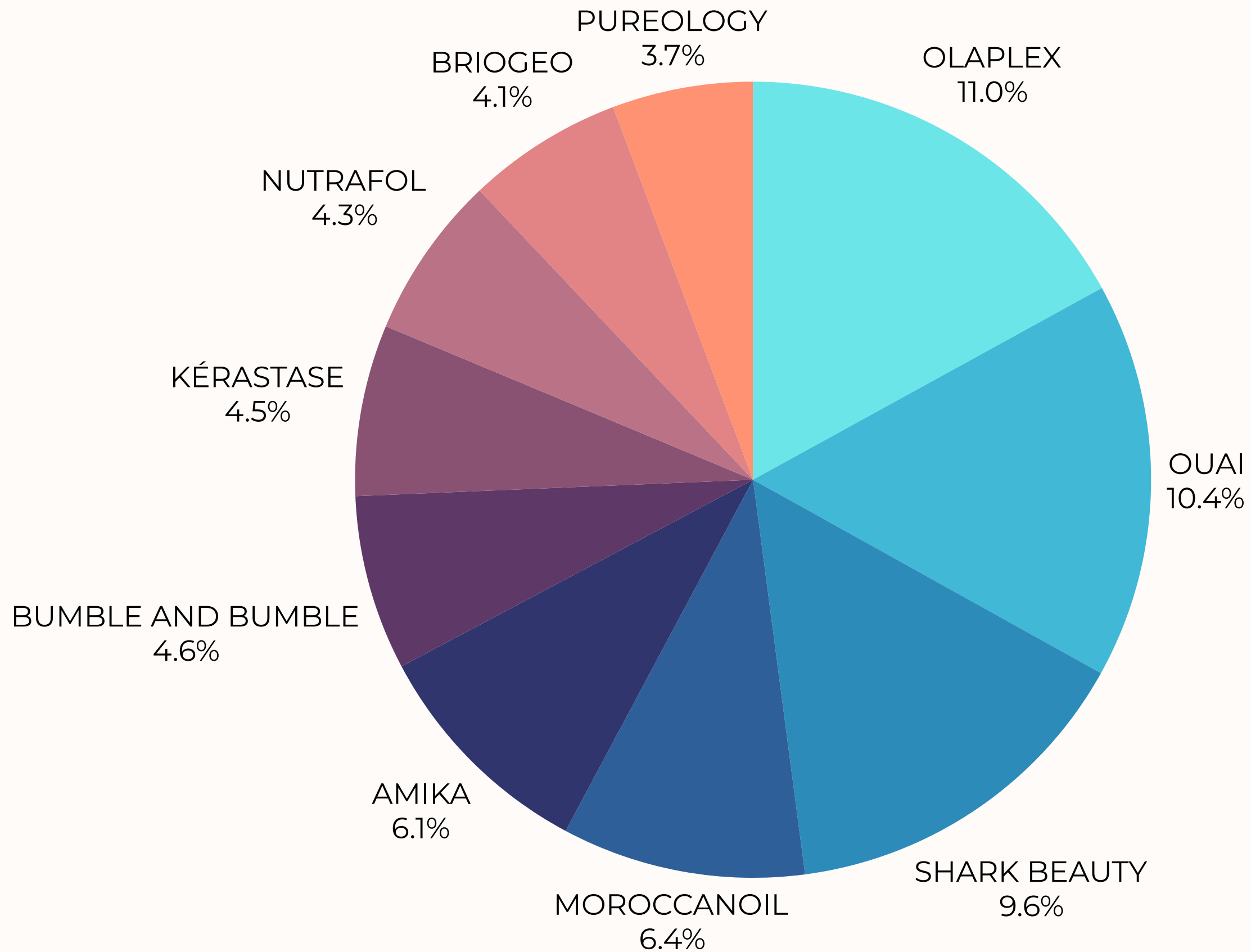
# Advertising Activity Over Time



- Advertising activity was sporadic across Sephora.com in the hair care category, loosely following overall trends and key promotional periods.

# Hair Care Advertising Activity

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- **The Top Brands represented 65% of all sponsored product activity** – see breakdown to the left.
- Olaplex and OUAL are closely contesting the number 1 and 2 spots as Olaplex faces slipping market share and headwinds across channels.

Product	Brand
No. 4 Bond Maintenance™ Strengthening Hair Repair Shampoo	OLAPLEX
Detox Shampoo	Ouai
No. 7 Bonding Frizz Reduction & Heat Protectant Hair Oil	OLAPLEX
No. 6 Bond Smoother Frizz Control Styling Hair Cream	OLAPLEX
FlexStyle® Hair Blow Dryer & Multi-Styler	SHARK BEAUTY
SmoothStyle™ Heated Comb + Blow Dryer Brush	SHARK BEAUTY
No. 4C Bond Maintenance™ Deep Clean Clarifying Shampoo	OLAPLEX
Root Purifier Scalp Shampoo for Thinning Hair	NUTRAFOL
Women's Lightweight Thickening-Hair Serum for Thinning Hair	NUTRAFOL

The Top 9 sponsored products represented 21.7% of total sponsorship share.

- **Olaplex** is supplementing traffic with heavy investment across the category as they fight off both Ouai and Nutrafol which are winning brands on Amazon.

Product	Brand
Mini Leave-In Molecular Repair Hair Mask	K18 BIOMIMETIC HAIRSCIENCE
Mini Honey Infused Hair Oil	GISOU
Dream Coat Supernatural Spray Anti-Frizz Treatment	COLOR WOW
FlexStyle® Hair Blow Dryer & Multi-Styler	SHARK BEAUTY
Soulfood Nourishing Hair Mask	AMIKA
Airwrap™ Multi-Styler Complete Long	DYSON
No. 4 Bond Maintenance™ Strengthening Hair Repair Shampoo	OLAPLEX
No. 5 Bond Maintenance™ Strengthening Hair Repair Conditioner	OLAPLEX
Cactus Fruit 3-in-1 Styling Cream	DAE

The Top 9 products represented 5.4% of total sales share.

- **K18** has continued its success with their hair masks following the brands explosive growth over the last few years.

# Makeup

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

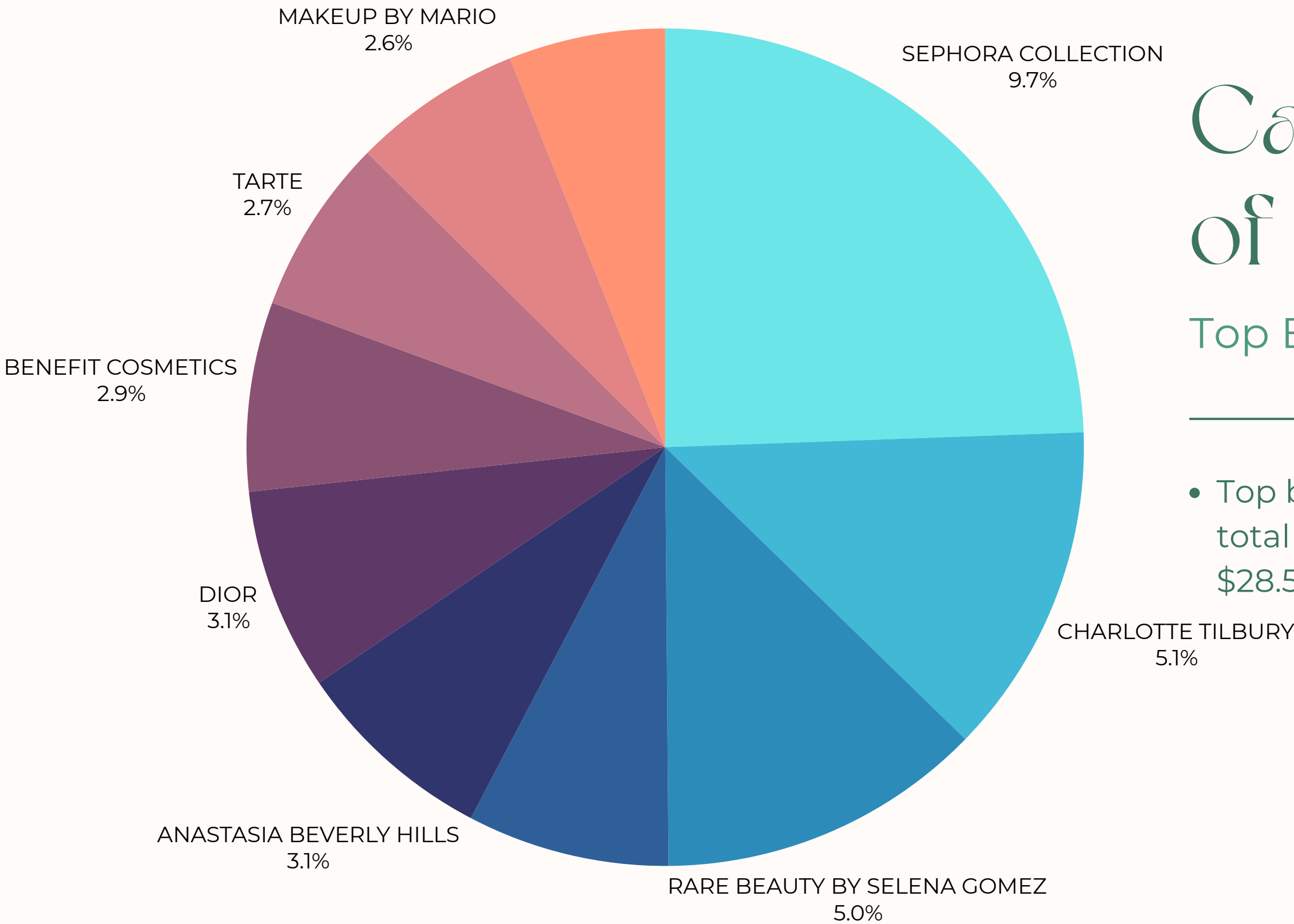




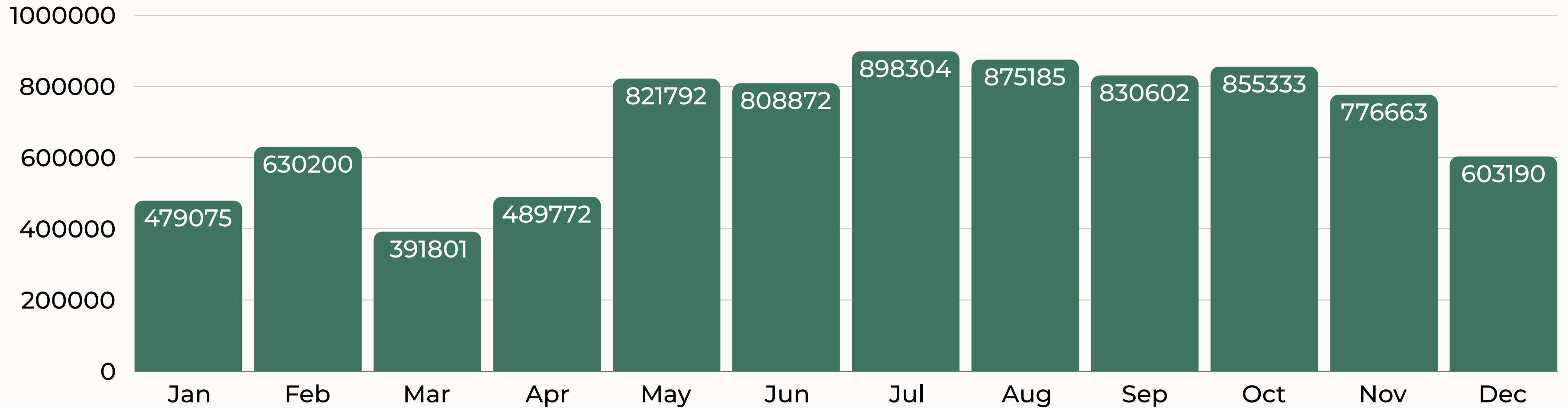
# Category Share of Sales

## Top Brands In Makeup

- Top brands in the category accounted for 40% of total sales. The average price point for the top 10 is \$28.57.



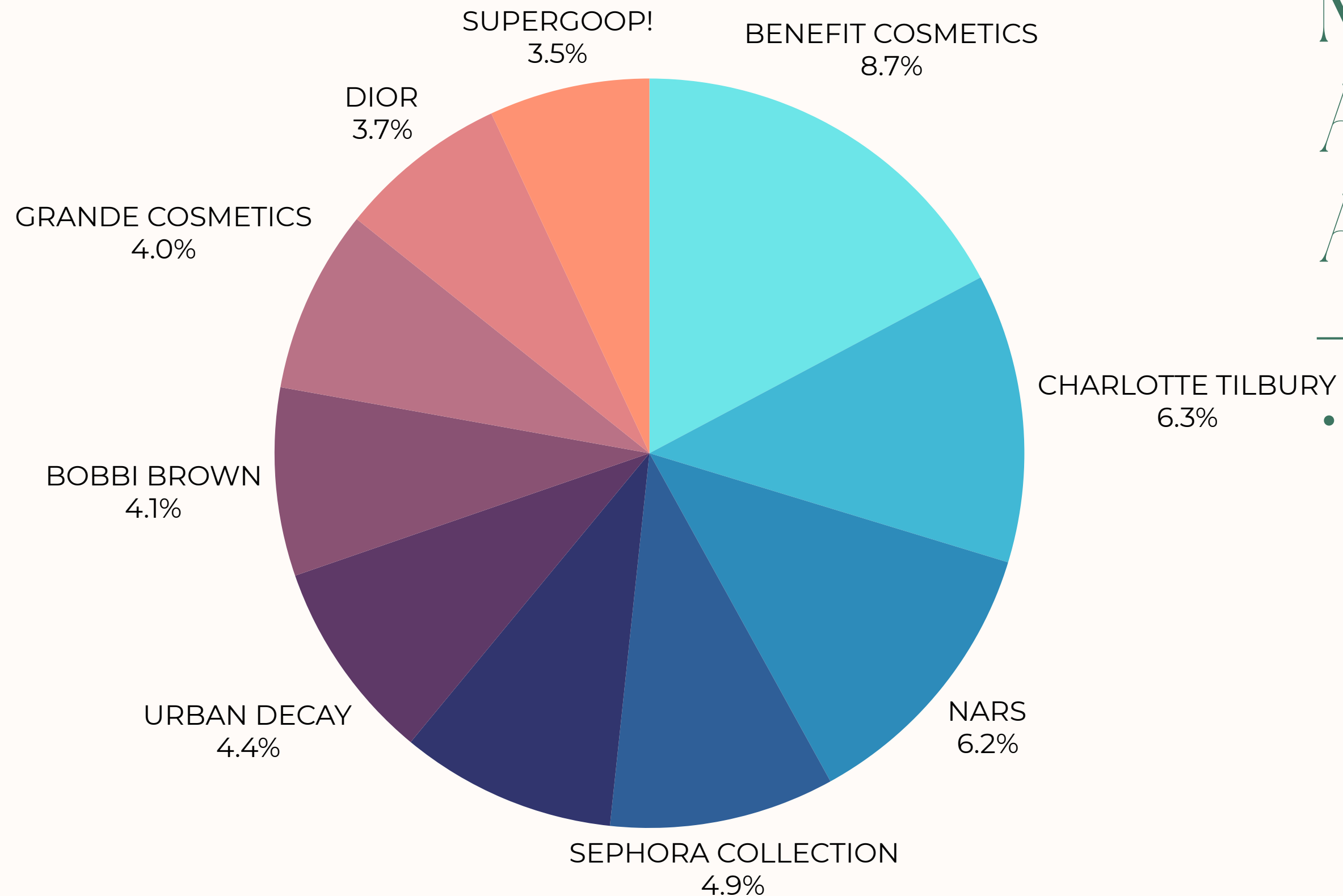
# Advertising Activity Over Time



- Advertising activity was sporadic across Sephora.com in the makeup category, loosely following overall trends and key promotional periods.

# Makeup Advertising Activity

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- **The Top Brands represented 51% of all sponsored product activity** – see breakdown to the left.

Product	Brand
D-Bronzi™ Bronzing Drops with Peptides	DRUNK ELEPHANT
Glowscreen SPF 40 Sunscreen with Hyaluronic Acid + Niacinamide	SUPERGOOP!
24-HR Brow Setter Clear Brow Gel with Lamination Effect	BENEFIT COSMETICS
GrandeLASH - MD Lash Enhancing Serum	GRANDE COSMETICS
Precisely, My Brow Pencil Waterproof Eyebrow Definer	BENEFIT COSMETICS
Unseen Sunscreen Invisible Broad Spectrum SPF 40 PA +++	SUPERGOOP!
Airbrush Flawless Waterproof Setting Spray	CHARLOTTE TILBURY
Lash Clash Extreme Volume Mascara	YVES SAINT LAURENT
Watermelon Glow Niacinamide Dew Drops Serum	GLOW RECIPE

The Top 9 sponsored products represented 18.6% of total sponsorship share.

- Sephora’s most sponsored makeup products highlight the fusion of skincare and beauty, with SPF, brows, and glow-enhancing formulas leading the charge.

Product	Brand
BACKSTAGE Glow Face Palette	DIOR
Lip Butter Balm for Hydration & Shine	SUMMER FRIDAYS
Soft Pinch Liquid Blush	RARE BEAUTY BY SELENA GOMEZ
Soft Pinch Tinted Lip Oil Stain	RARE BEAUTY BY SELENA GOMEZ
Cream Lip Stain 10HR Liquid Lipstick	SEPHORA COLLECTION
ShineOn Lip Jelly Hydrating Non-Sticky Lip Gloss	TOWER 28 BEAUTY
Super Serum Skin Tint SPF 40 Skincare Foundation	ILIA
Mini Soft Pinch Liquid Blush	RARE BEAUTY BY SELENA GOMEZ
Precious Gemstones Mid-Size Eyeshadow Palette	SEPHORA COLLECTION

The Top 9 products represented 4.4% of total sales share.

- Sephora’s top organically selling makeup products emphasize effortless beauty, with Rare Beauty’s viral blush and lip oil, hydrating lip products, and hybrid skincare-makeup formulas like ILIA’s Super Serum Skin Tint leading the way.

# Bath & Body

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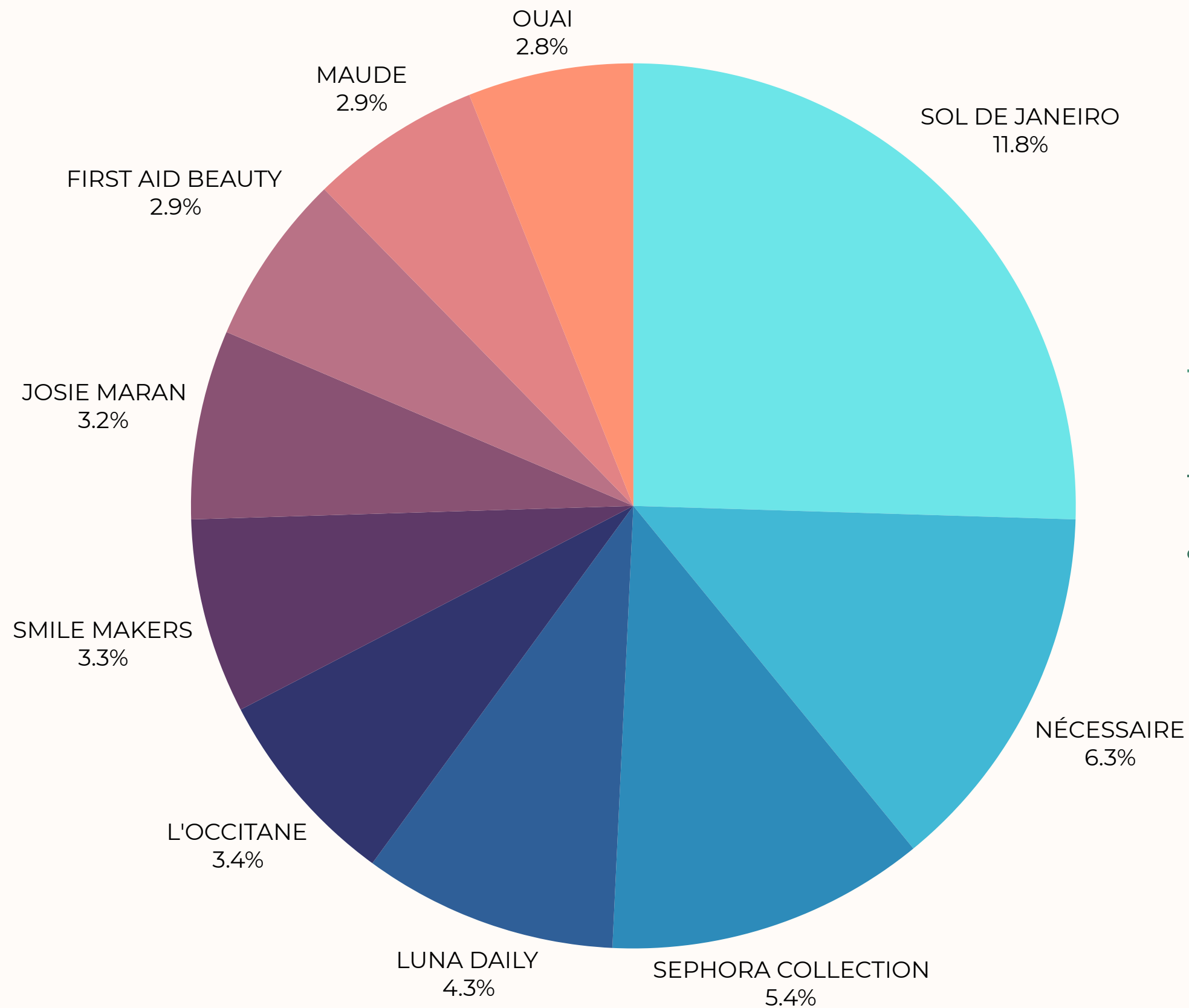
Top brands, items and performance  
in the Makeup category for 2024



# Category Share of Sales

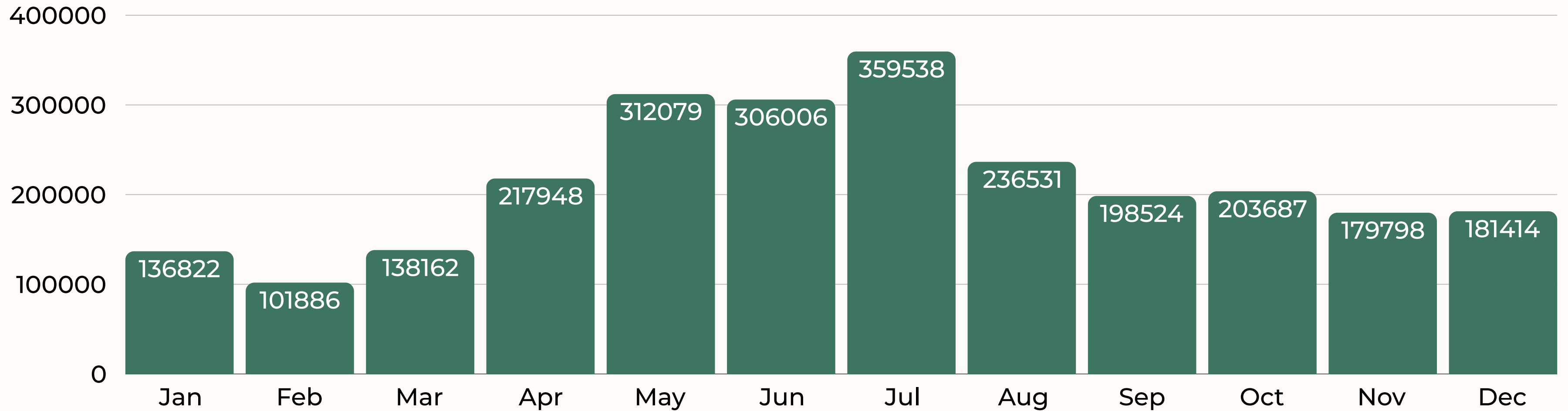
## Top Brands In Bath & Body

- Top brands in the category accounted for 46% of total sales. The average price point for the top 10 is \$30.26.



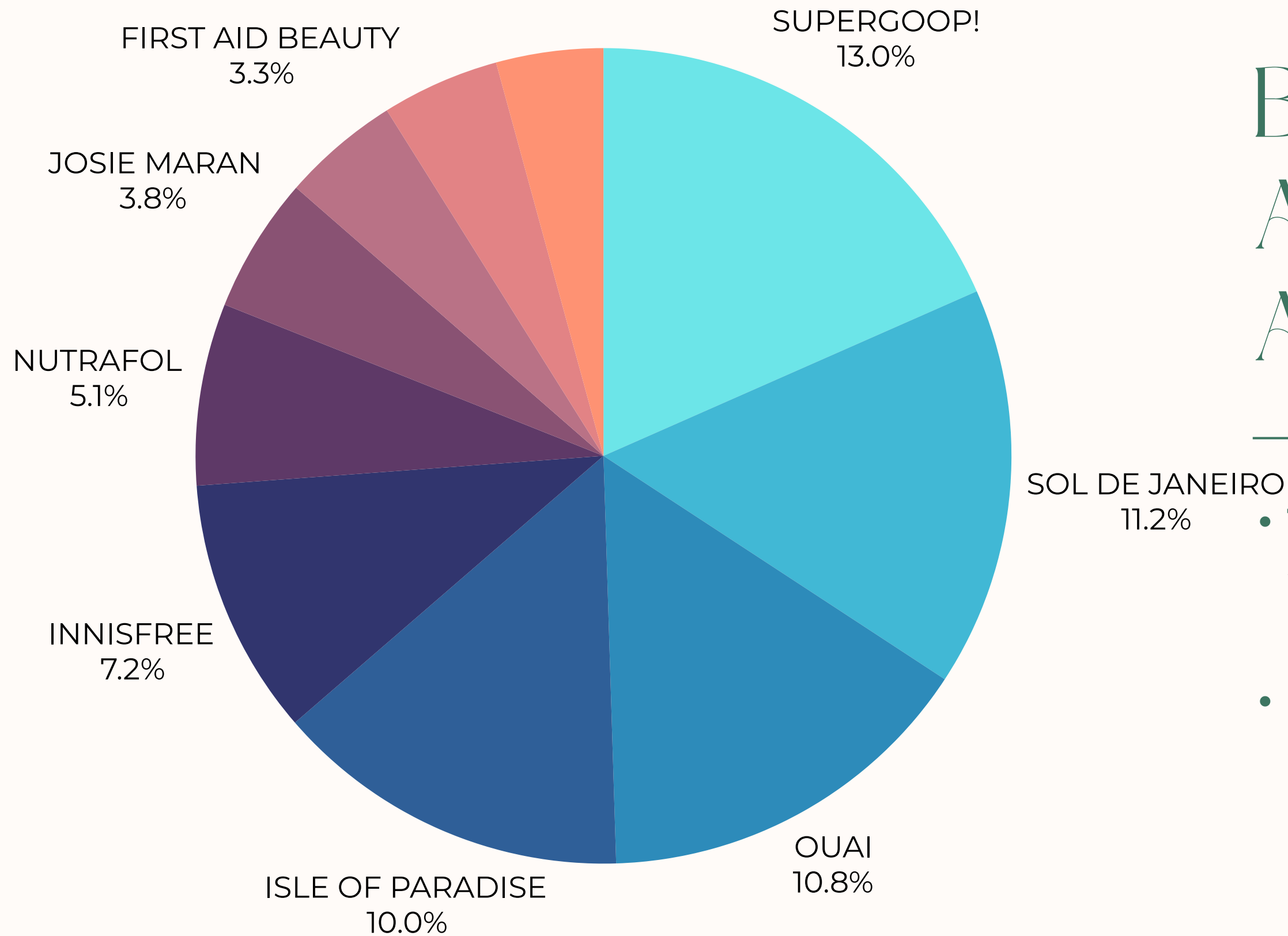


# Advertising Activity Over Time



- Advertising activity peaks during summer months as brands focus on the key seasonal period.

# Bath & Body Advertising Activity



- **The Top Brands represented 51% of all sponsored product activity** – see breakdown to the left.
- Sephora's top-sponsored brands emphasize sun protection, luxury body care, and clean beauty, with Supergoop! leading SPF innovation, Sol de Janeiro and Ouai driving body trends, and Isle of Paradise and Innisfree investing heavily in visibility.

Product	Brand
Daily UV Defense Invisible Broad Spectrum SPF 36 Sunscreen	INNISFREE
St. Barts Gentle Body Wash	Ouai
Glowscreen SPF 40 Sunscreen with Hyaluronic Acid + Niacinamide	SUPERGOOP!
St. Barts Moisturizing Body Cream	Ouai
Unseen Sunscreen Invisible Broad Spectrum SPF 40 PA +++	SUPERGOOP!
Sauvage Deodorant Stick	DIOR
Brazilian Bum Bum Visibly Firming Refillable Body Cream with Caffeine-Rich Guaranà	SOL DE JANEIRO
The Silk Sunscreen SPF 50 Weightless Mineral Sunscreen	TATCHA
Daily UV Defense Mineral Sunscreen Broad Spectrum SPF 45	INNISFREE

The Top 9 sponsored products represented 30.1% of total sponsorship share.

- Sephora’s top-sponsored bath and body products spotlight the dominance of SPF and luxury body care, with Supergoop!, Innisfree, and Tatcha leading in sun protection, while Ouai, Sol de Janeiro, and Dior elevate body care with indulgent, high-performance formulas.

Product	Brand
Bom Dia Bright™ Jet Set	SOL DE JANEIRO
Brazilian Bum Bum Visibly Firming Refillable Body Cream with Caffeine-Rich Guaranà	SOL DE JANEIRO
Beija Flor™ Jet Set	SOL DE JANEIRO
KP Bump Eraser Body Scrub with 10% AHA – Body Exfoliant for Keratosis Pilaris	FIRST AID BEAUTY
Power Mist Hydrating Hand Sanitizer	TOUCHLAND
High Roller Ingrown Hair Tonic with AHA and BHA	TOPICALS
Nourishing Foot Mask in Coconut + Lavender	SEPHORA COLLECTION
Brazilian Play Moisturizing Shower Cream-Gel	SOL DE JANEIRO
Nourishing and Protective Shea Butter Hand Cream	L'OCCITANE

The Top 9 products represented 7.7% of total sales share.

- Sephora’s top organically selling bath and body products highlight the dominance of Sol de Janeiro’s cult-favorite body care, alongside targeted treatments like First Aid Beauty’s KP scrub, Topicals’ ingrown hair tonic, and everyday essentials from Touchland and L’Occitane.

# 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

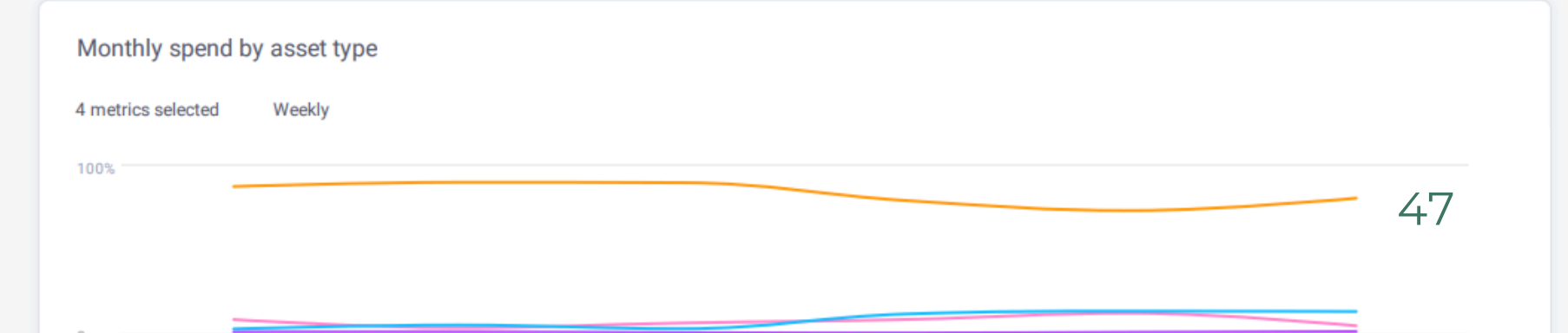
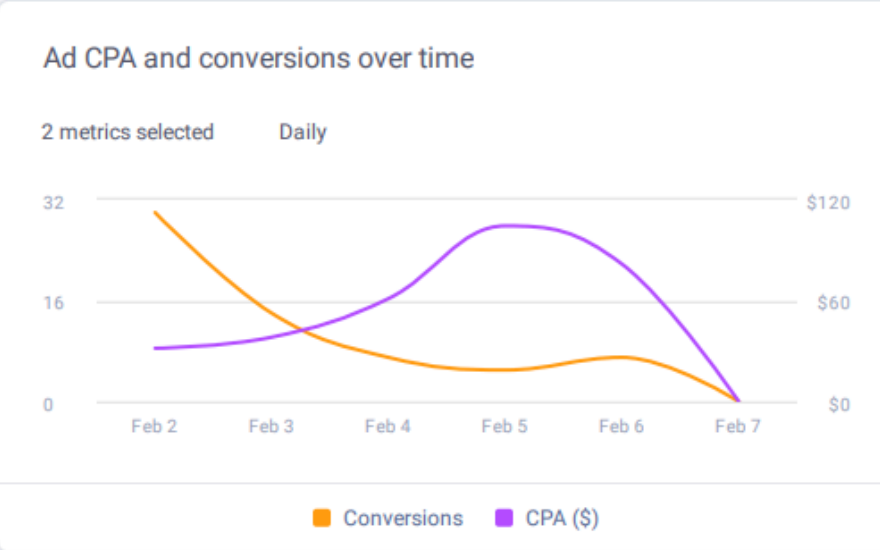
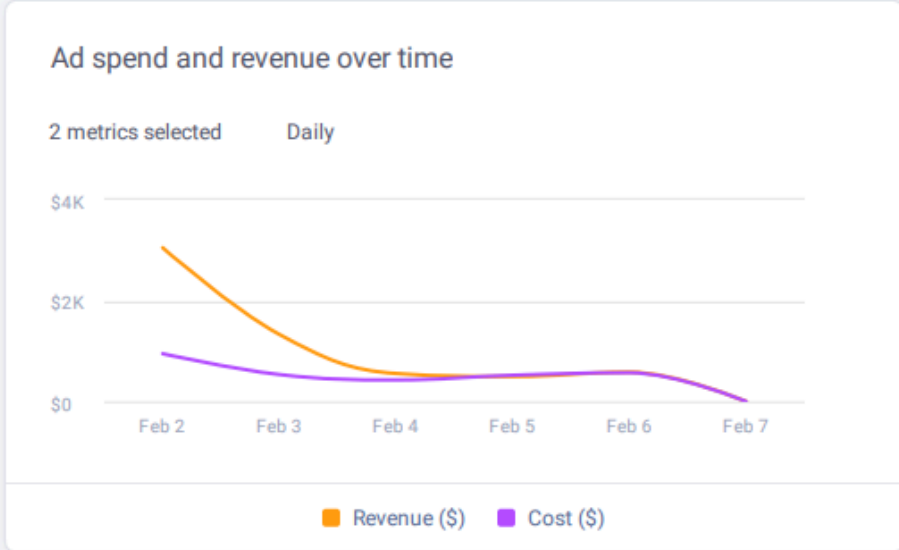
Our team of in-house creative designers works with our paid team to develop performance creative that moves the needle.



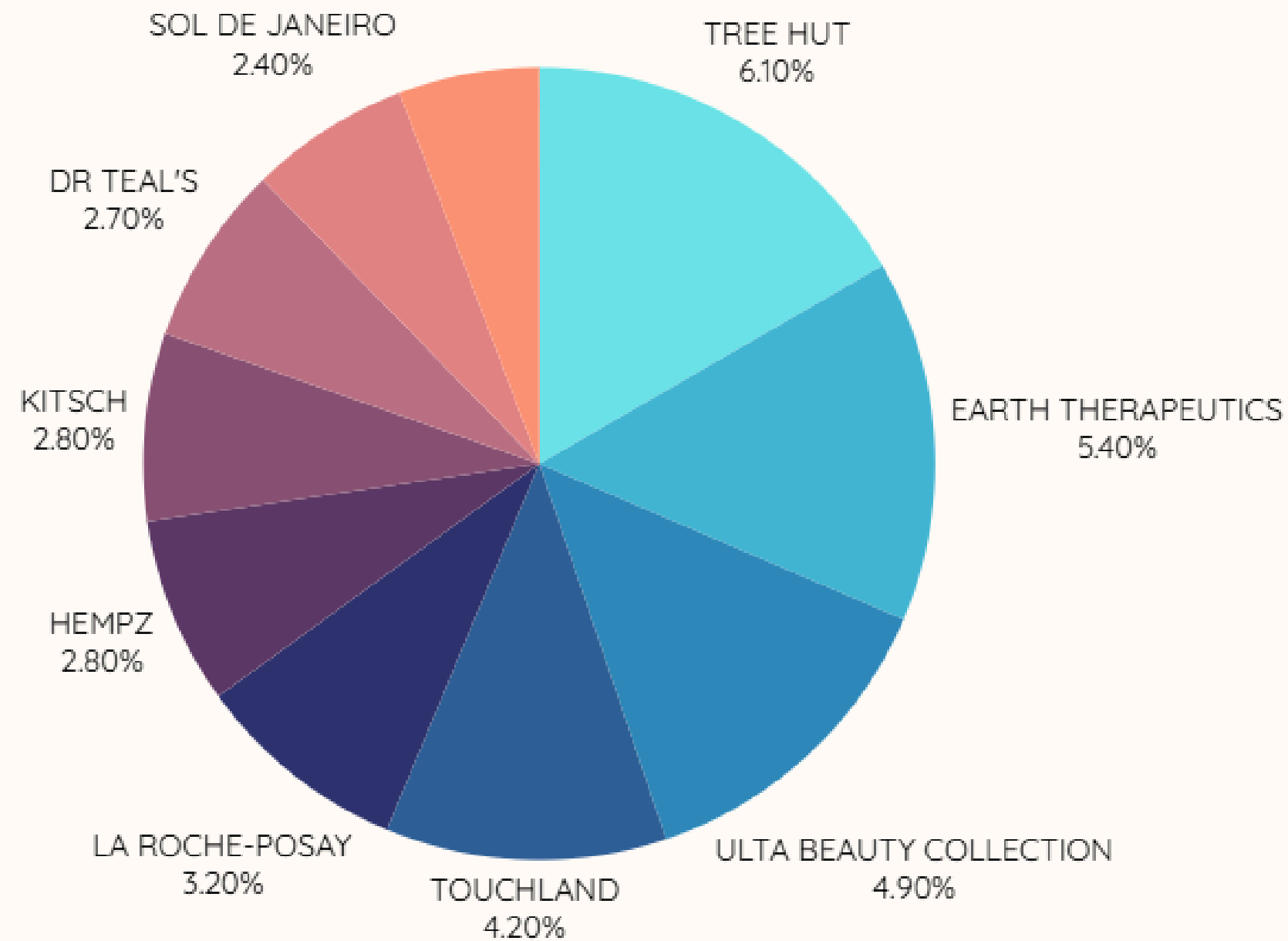
# Connecting the Dots Between Paid Performance and Growth

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

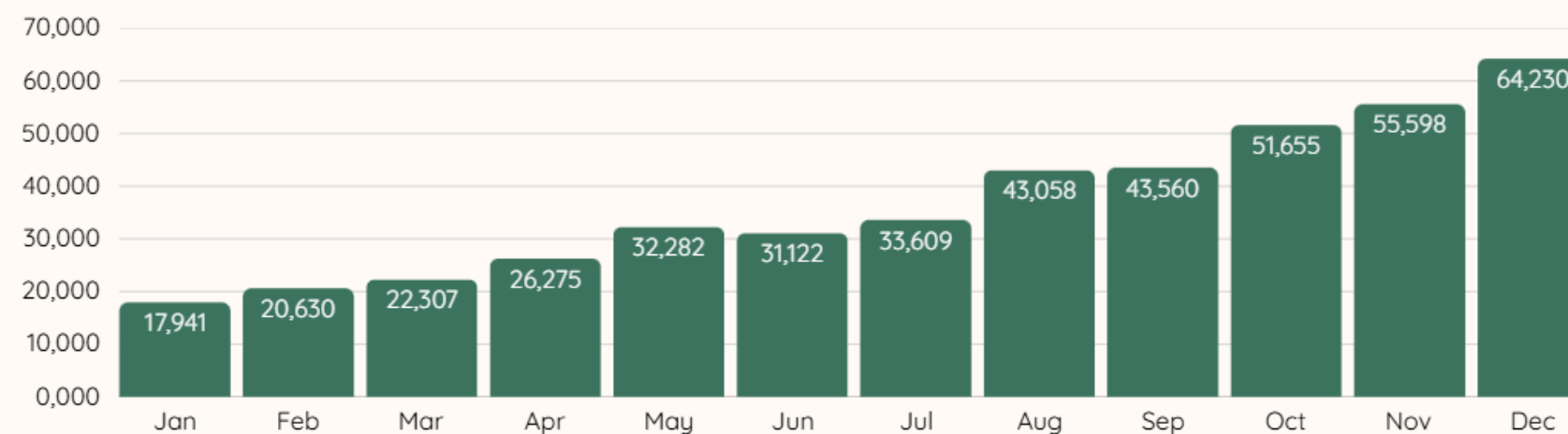
## Executive summary



## 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.

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