

Navigo

MARKETING

Amazon Q3: 2025 Review



Executive Summary

Advertising Activity in the Beauty and Personal Care category decreased 14.5% percent quarter over quarter, and organic visibility increased by 14.7% percent.

Hero SKUs were the main drivers of success. Brands like Nutrafol, Medicube, 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.

Key Takeaways

Market Performance & Brand Movements

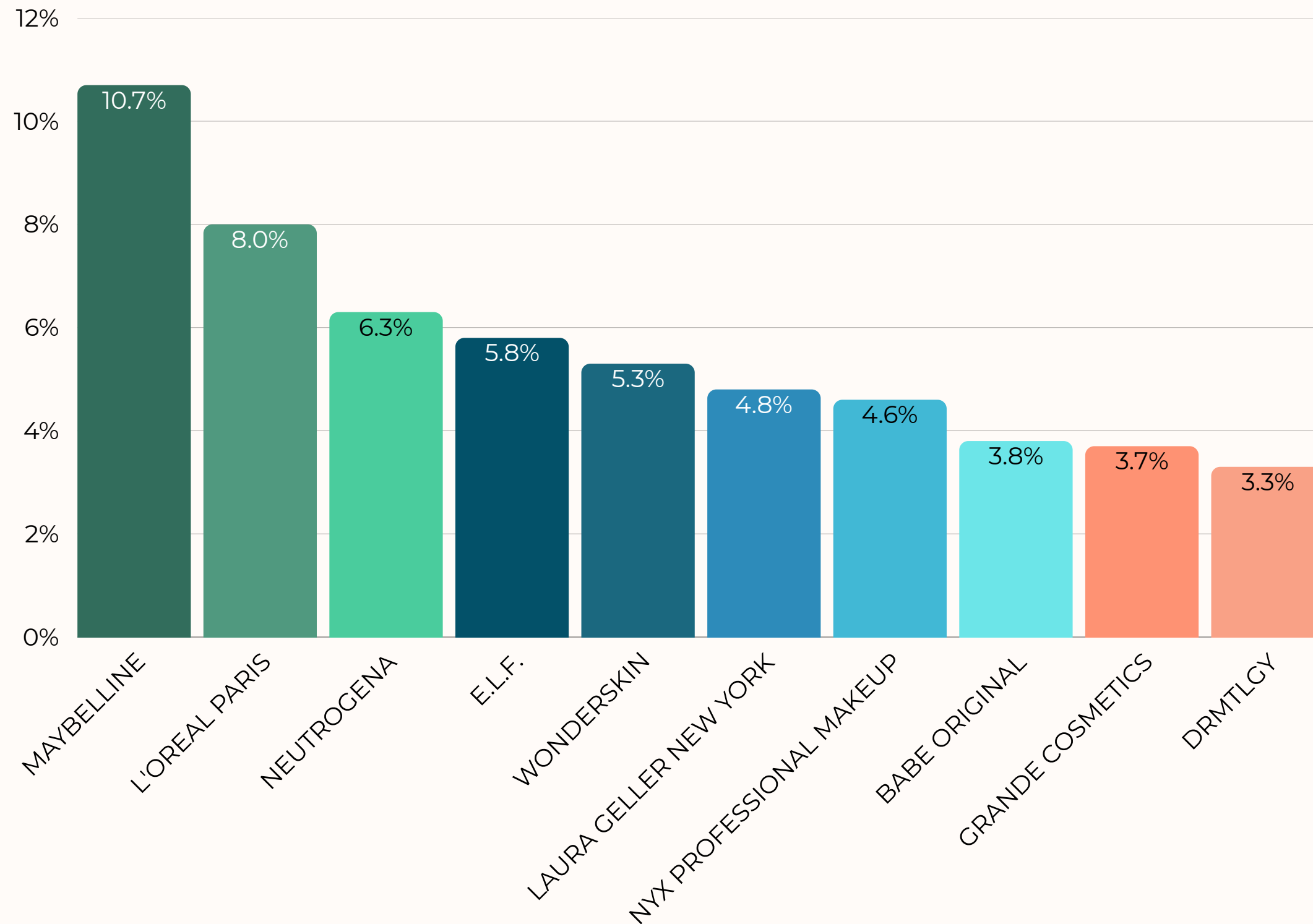
- Q3 revealed a shift in how beauty brands are showing up on Amazon. While advertising activity across Beauty and Personal Care categories pulled back, organic visibility grew, showing the importance of strong SEO and content strategies.
- Performance was driven by a clear set of hero SKUs, brands that leaned into their top products with sharp positioning, optimized PDPs, and strong social proof saw the greatest results. Nutrafol, Medicube, and several challenger fragrance brands like Lattafa and Phlur stood out for their ability to combine strong media strategy with products consumers trust.
- At the same time, legacy leaders like Versace, CeraVe, and Maybelline lost share as competition intensified and new entrants gained ground. The balance between disciplined advertising investment and conversion-focused content proved to be the winning formula this quarter.

Makeup

Top brands, items and performance in the Makeup category for Q3 2025



Makeup Share of Sales



Top Movers

Increases

- Babe Original: 1.1%
- Wonderskin: 1.1%
- Clinique: 0.9%
- Covergirl: +0.6%

Decreases

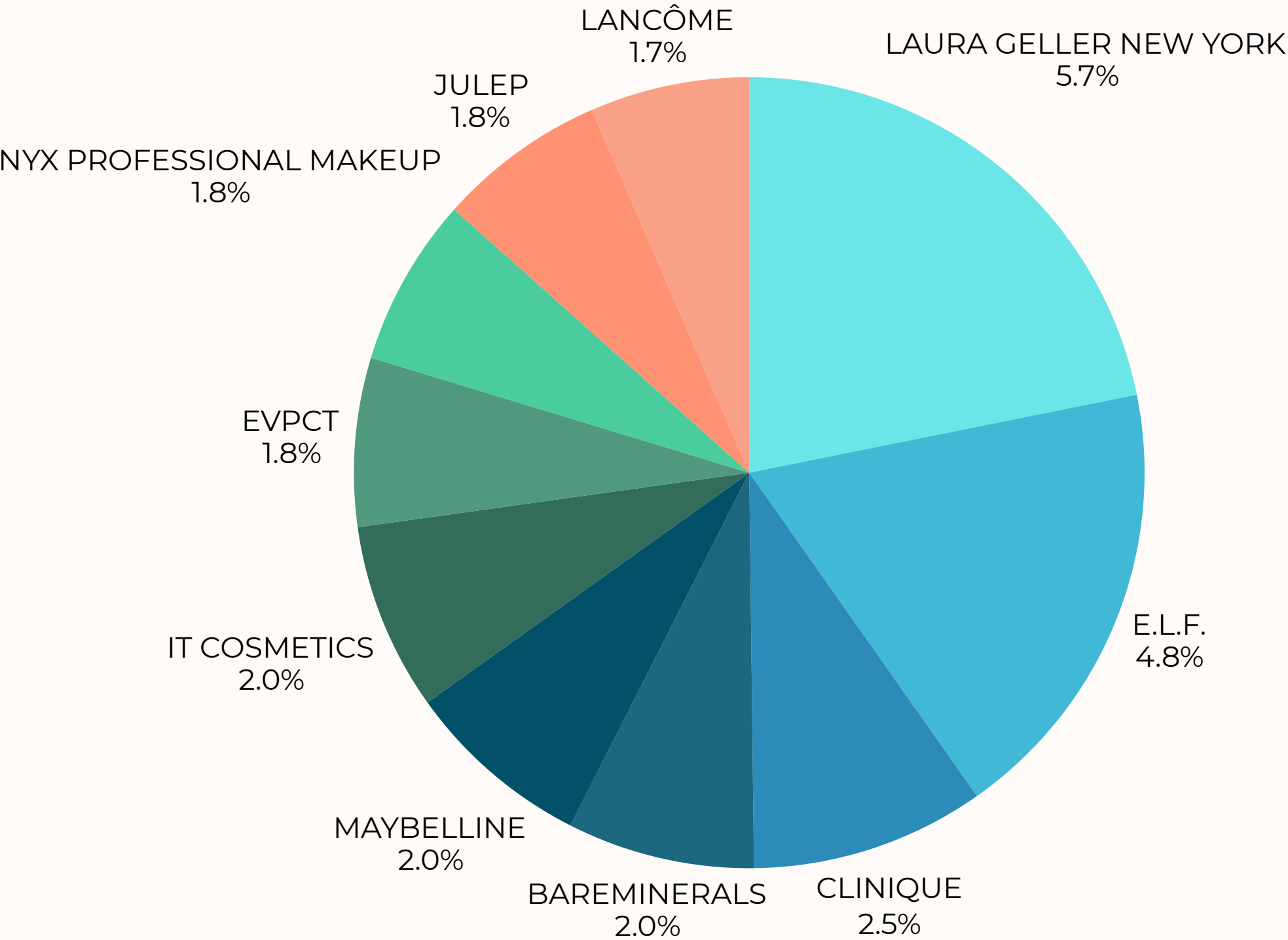
- TirTir: -2.6%
- Anua: -1.6%
- ELF: -1.6%
- Maybelline: -1.2%

Makeup Advertising Activity

Top 10 Brands Share



Year over Year Change

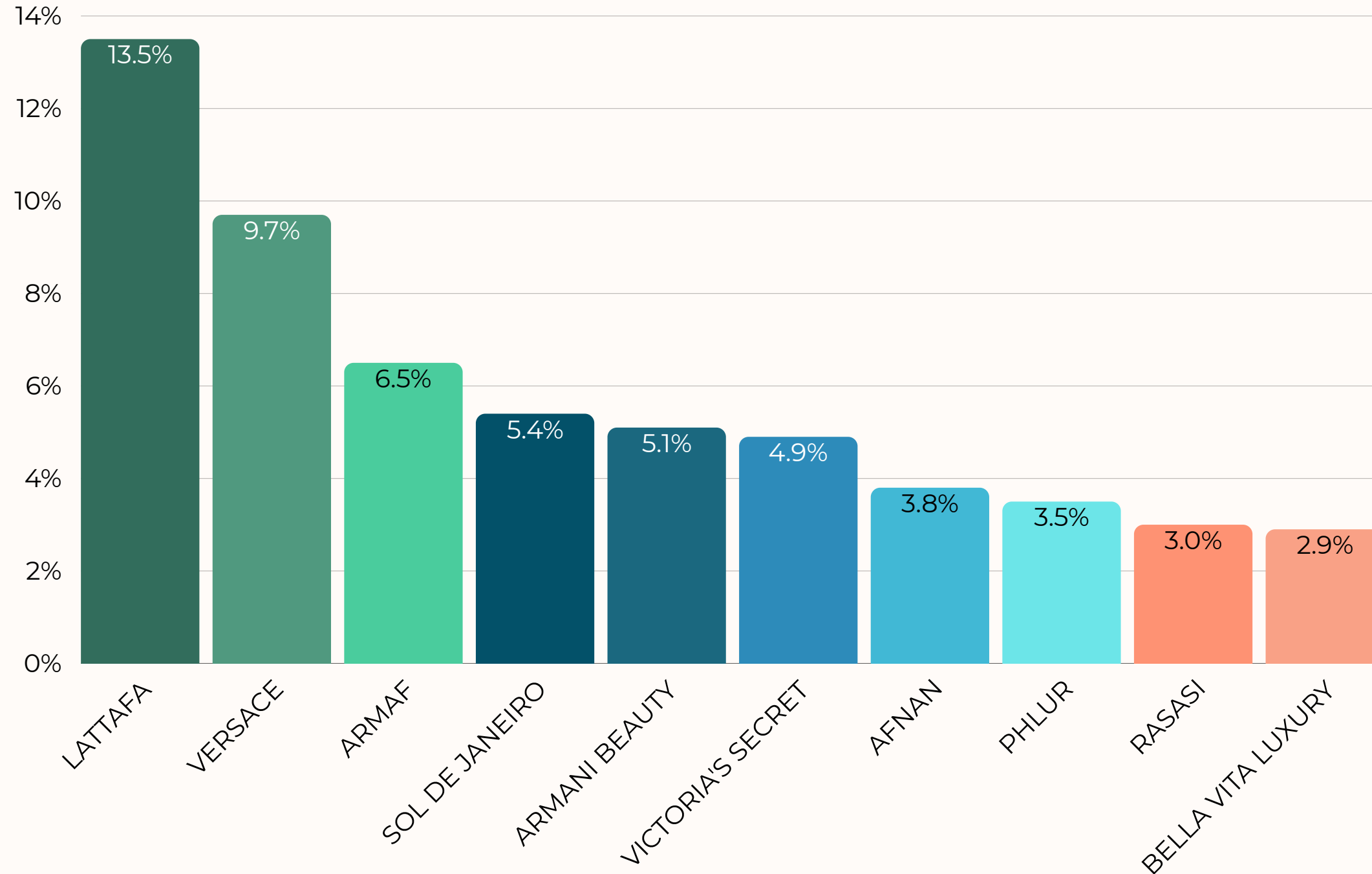


Fragrance

Top brands, items and performance in the Fragrance category for Q3 2025



Fragrance Share of Sales



Top Movers

Increases

- Lataffa: +3.4%
- Phlur: +3.2%
- Armaf: +2.2%
- Rasasi: +2%

Decreases

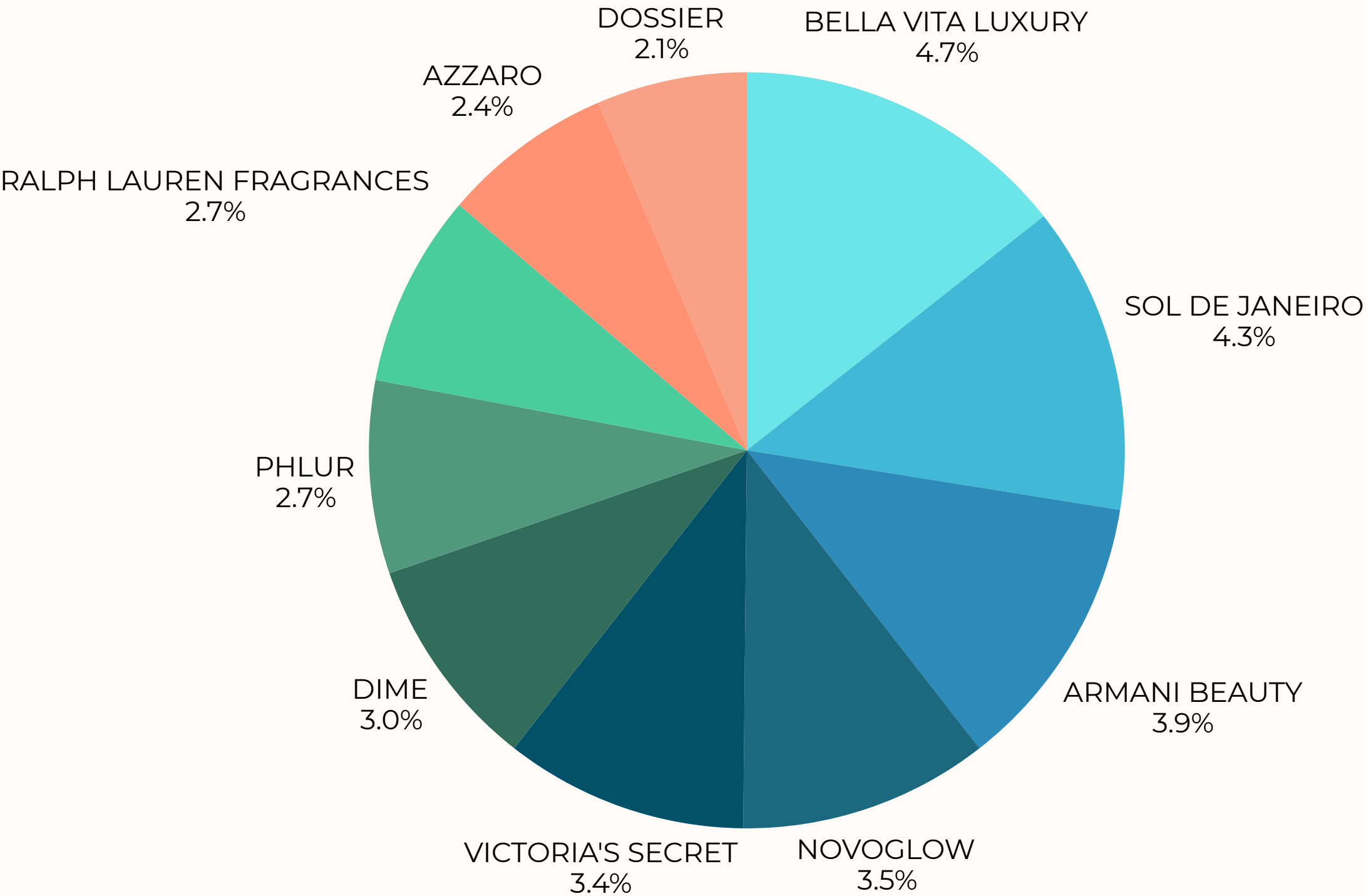
- Versace: -4.7%
- Dolce&Gabbana: -3.4%
- JP Gaultier: -1.9%
- Cupids: -1.9%

Fragrance Advertising Activity

Top 10 Brands Share



Year over Year Change

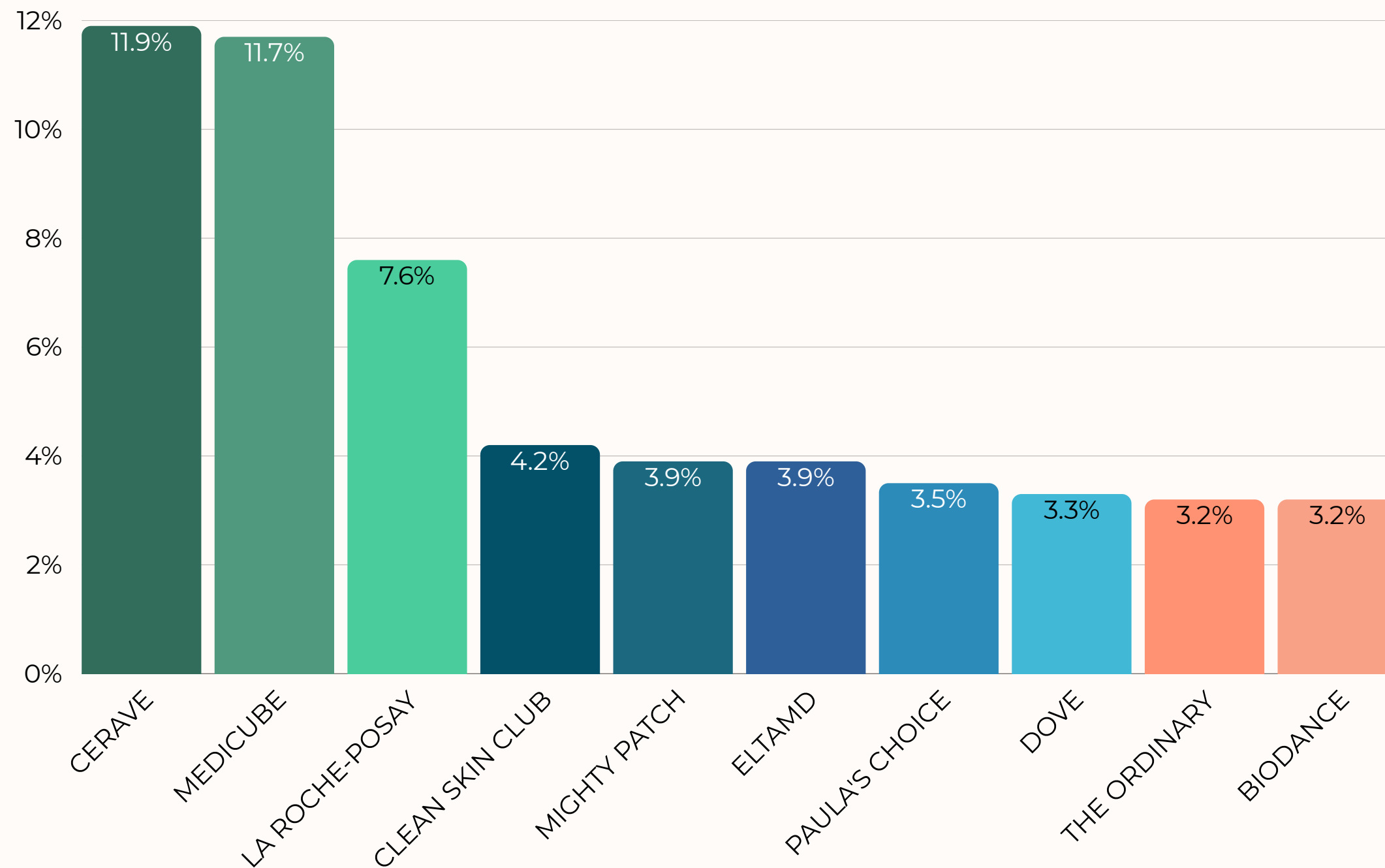


Skincare

Top brands, items and performance in the Skincare category for Q3 2025



Skincare Share of Sales



Top Movers

Increases

- Medicube: +11.7%
- Mrs. Meyers: +1.8%
- Method: +1.4%
- Bio-Oil: +1.2%

Decreases

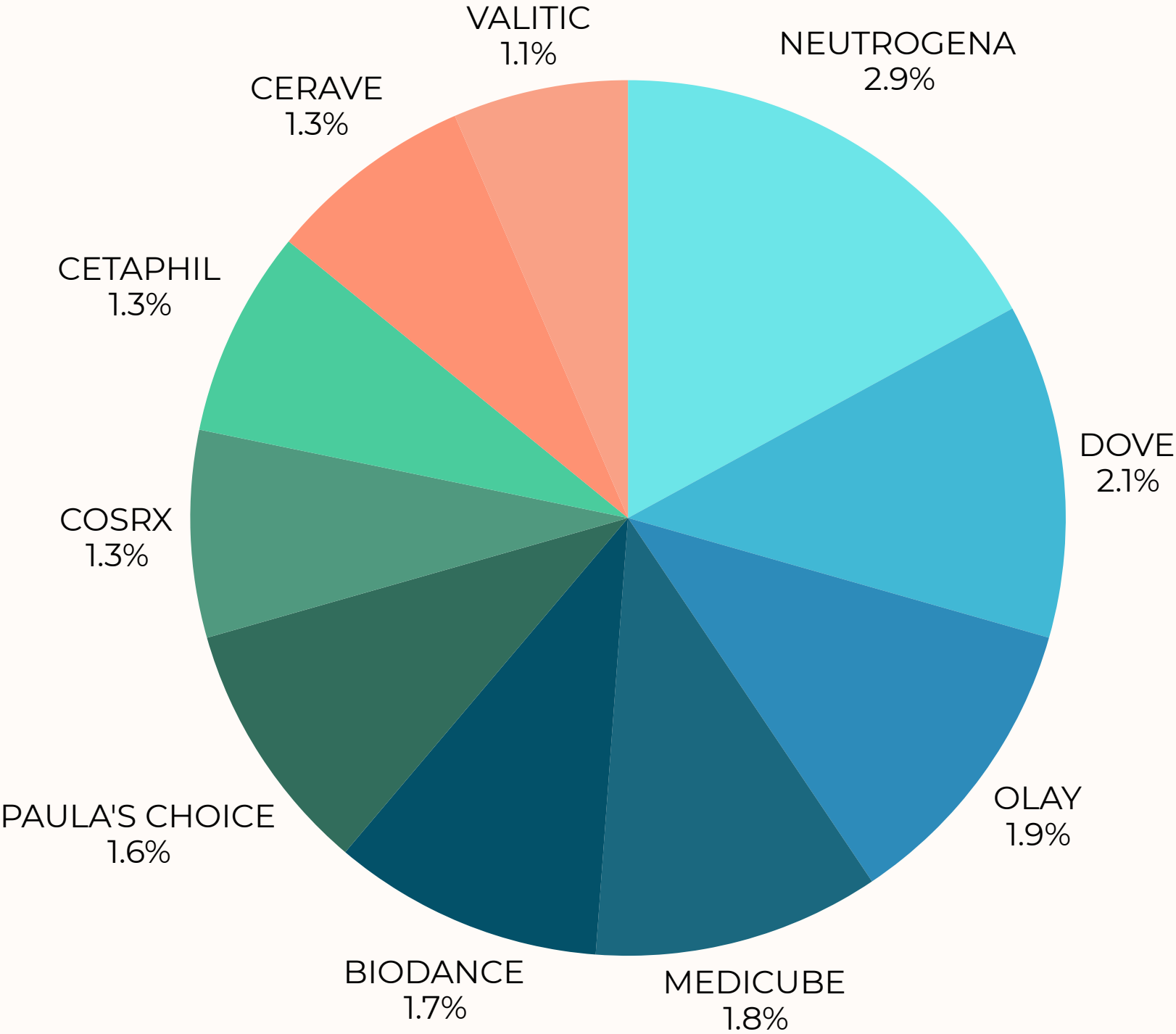
- Cerave: -4.8%
- Cosrx: -3%
- Paula's Choice: -1.6%
- Eltamd: -1.4%

Skincare Advertising Activity

Top 10 Brands Share



Year over Year Change

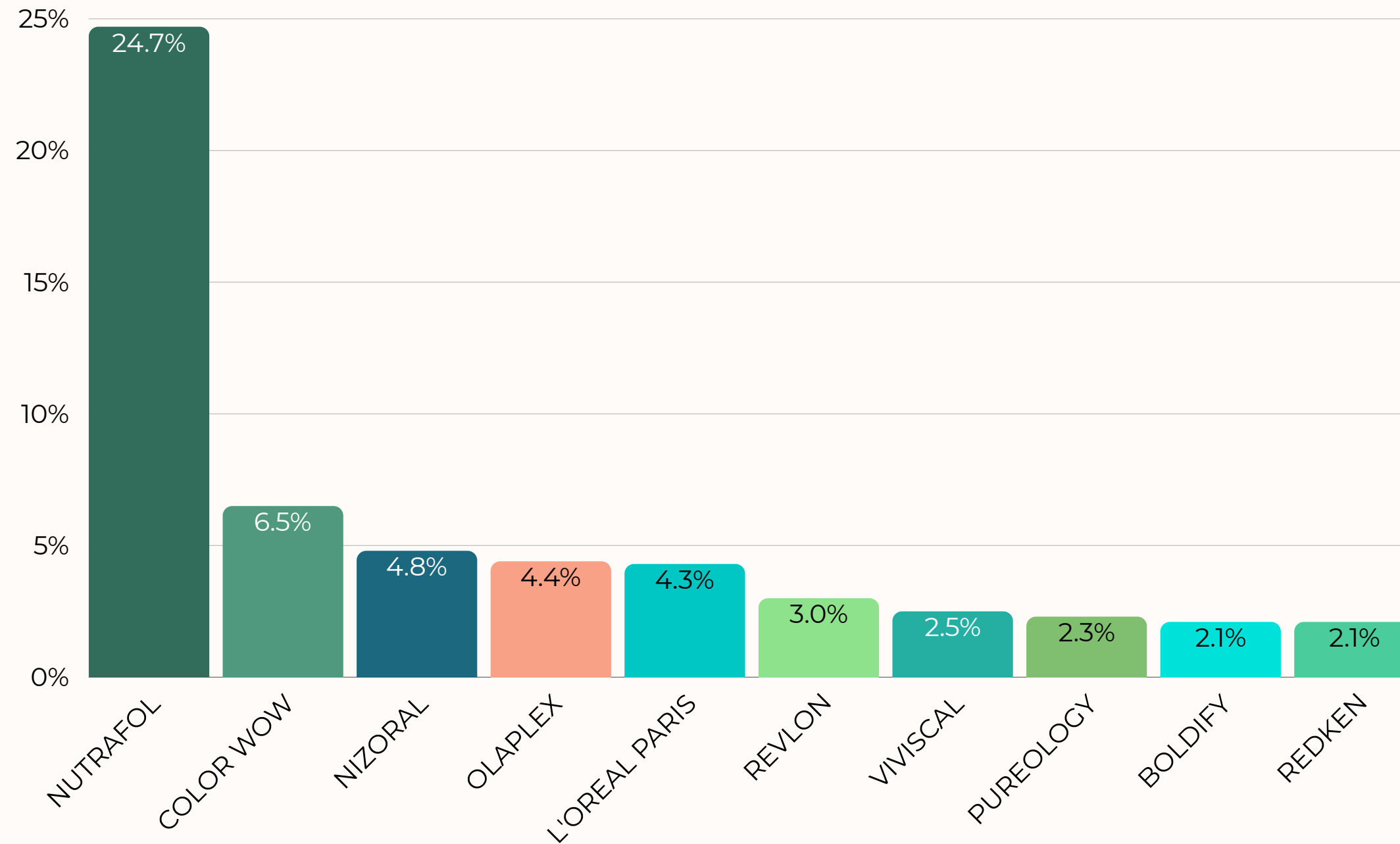


Hair Care Amazon

Top brands, items and
performance in the Hair
Care category for Q3 2025



Hair Care Share of Sales



Top Movers

Increases

- Nutrafol: +5.8%
- Pureology: +1%
- Loreal Paris: +1%
- Pantene: +0.9%

Decreases

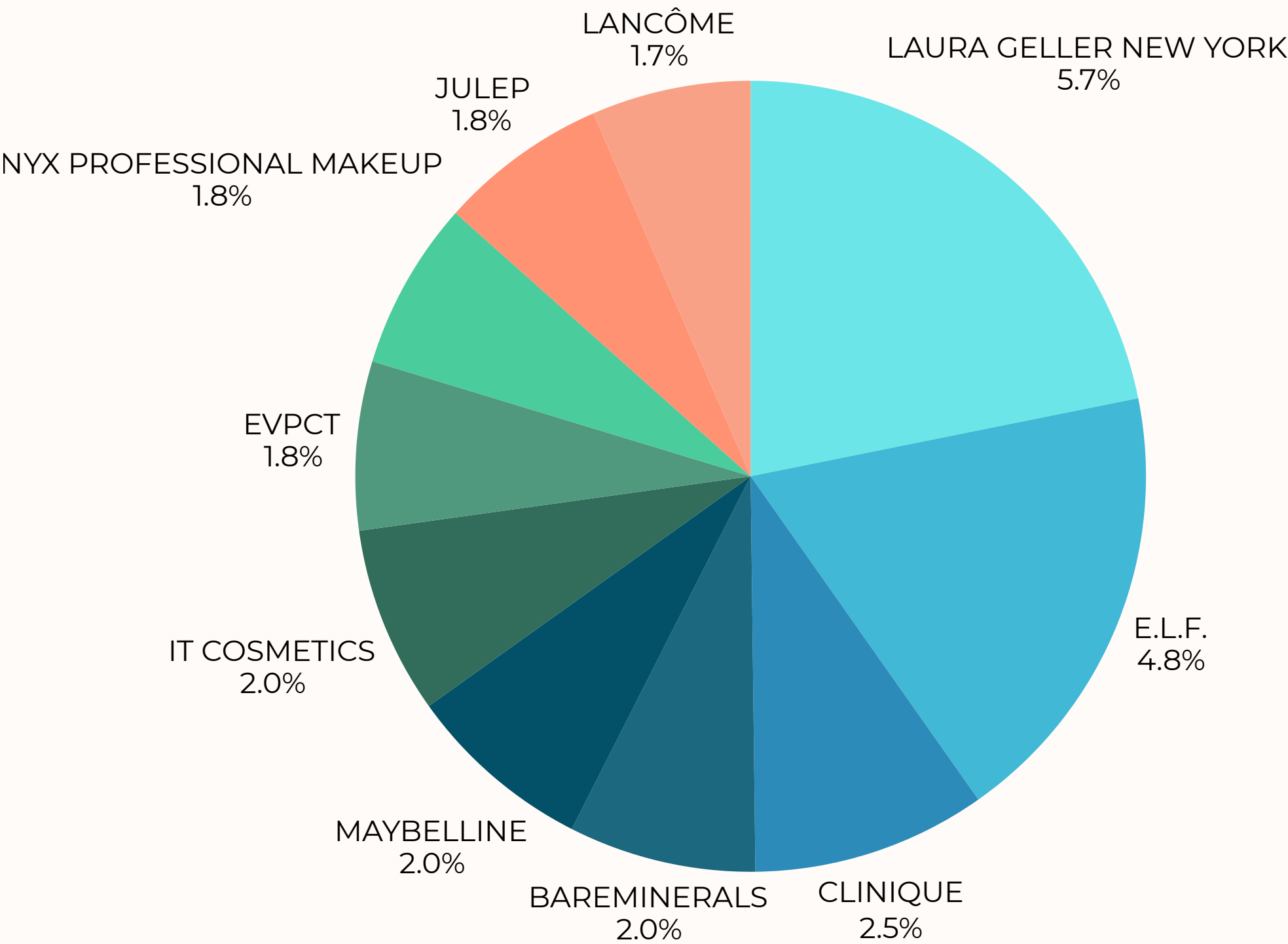
- Mielle Organics: -1.5%
- Olaplex: -1.4%
- Native: -1.4%
- FHI Heat: -1.2%

Makeup Advertising Activity

Top 10 Brands Share



Year over Year Change



Looking Ahead

Q3 2025 Outlook & Emerging Risks

- As we move into Q4, the engines of growth remain clear: hero SKUs and disciplined assortments will continue to define the winners. But the environment for discovery and conversion is evolving quickly.
- Discovery is no longer limited to Amazon's search bar. With tools like ChatGPT shaping product recommendations and guiding shoppers toward solutions, brands must ensure their positioning and messaging are consistent and discoverable beyond traditional retail search. Optimized product content and clear value storytelling will be critical as consumers increasingly rely on AI to surface choices.
- On the conversion side, the launch of Ulta's marketplace represents a major new channel. It's not just about distribution, it's about building credibility and unlocking conversion in an environment where beauty authority and trust run deep. Brands that adapt quickly and align their Amazon playbooks with Ulta's emerging marketplace strategy will stand out during peak holiday moments.
- Looking ahead, success will come from blending paid and organic visibility, AI-era discovery readiness, and cross-marketplace conversion strategies, while maintaining pricing discipline and margin control to protect profitability.



Who We're Built For

We partner with beauty brands ready to invest in cross-channel growth, companies that have strong product-market fit but untapped audiences. Our model is especially valuable for **brands looking to simplify their partner ecosystem**, reduce complexity, and see measurable, unified results.



Let's start our journey together.

Jacob St. John, Founder

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