

AMAZON CATEGORY SNAPSHOTS

Beauty & Personal Care

Book a demo

What are shoppers saying about Beauty & Personal Care products?

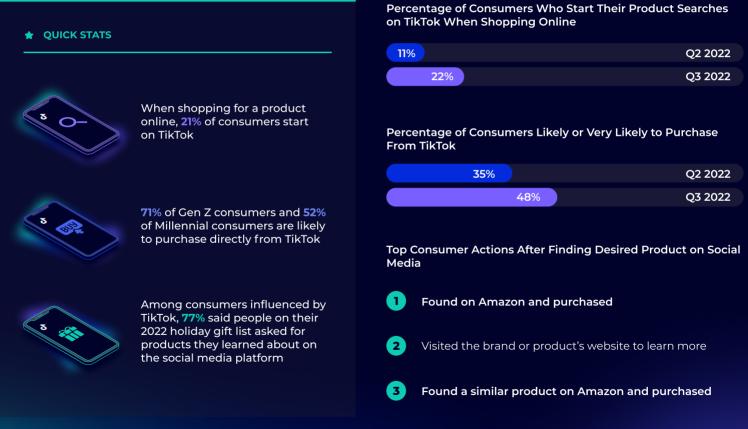
With a multitude of economic factors, viral trends, and growing platforms shaping ecommerce, how are consumers shopping for Beauty & Personal Care products and what does it mean for your brand?

What shoppers are saying





In late 2019, TikTok became the most downloaded mobile app in the world. Less than four years later, it is quickly becoming one of the most influential social channels in ecommerce.



What are shoppers searching for?

Top Keywords: Beauty & Personal Care

Keyword	Search Volume Black Friday - Cyber Monday 2021	Search Volume Black Friday - Cyber Monday 2022	% Change YoY
Makeup	176,103	247,455	↑ 40.5 %
Makeup brushes	104,365	145,555	↑ 39.5 %
Makeup organizer	128,346	137,475	↑ 7.1%
Makeup bag	76,948	117,308	↑ 52.5 %
Hair clips	88,936	113,891	↑ 28.1 %
Gel nail polish	89,713	113,866	↑ 26.9 %
Press on nails	66,616	102,287	↑ 53.6 %
Gifts	71,017	87,553	↑ 23.3%
Lip gloss	48,143	80,449	↑ 67.1 %
Dyson airwrap	75,925	76,616	↑ 0.9%
Travel essentials	7,062	75,745	↑ 972.6 %
Lashes	69,067	75,452	↑ 9.2 %
Skin care	47,947	74,993	↑ 56.4 %
Hair dryer	78,183	71,298	↓ 8.8 %
Perfumes for women	74,833	71,188	↓ 4.9 %
Sanrio	35,732	70,520	↑ 97.4 %
Bath and body works	59,377	68,775	↑ 15.9%
Nail kit	62,522	64,730	↑ 3.5 %
Claw clips	24,249	63,383	↑ 161.4 %
Nail polish	62,008	62,290	↑ 0.5 %
Curling iron	58,061	62,191	↑ 7.1%

7

Top Beauty & Personal Care Keywords with Growing Search Volume

The following keywords experienced the highest YoY growth in search volume in the overall Beauty & Personal Care category.

Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY
Polvo de hadas 👩	35	35,359	↑ 100,926%
La roche-posay 👌	35	10,355	↑ 29,486 %
Mielle rosemary oil	35	8,615	↑ 24,514%
Artego hair products	35	5,799	↑ 16,469%
Beauty of joseon sunscreen	42	6,254	↑ 14,791 %
Make up organizers and storage	111	14,344	↑ 12,823 %
Preppy skin care	35	4,419	↑ 12,526 %
Drunk elephant bronzer drops	200	21,357	↑ 10,579 %
Hairo	35	3,637	↑ 10,291 %





 Drunk elephant bronzer drops
 20M+ TikTok Views

*Note: "TikTok views" refer to the number of views on TikTok videos returned when the specified keyword was searched on December 28, 2022

4

Top Beauty & Personal Care Keywords with Declining Search Volume

The following keywords experienced the greatest YoY decline in search volume in the overall Beauty & Personal Care category.

Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY
Burts bees chapstick	20,971	1,086	↓ 94.8 %
Teen girls gift ideas	25,828	2,030	↓ 92.1 %
Urban decay eyeshadow palette	7,812	1,043	√ 86.7 %
Burts bees gift set	7,320	1,076	↓ 85.3 %
Small gifts for women	19,533	3,223	↓ 83.5 %
Dr. squatch	11,882	2,037	↓ 82.9 %
Grande lash md lash growth serum	7,041	1,403	↓ 80.1 %
Shaving kit	13,917	2,944	↓ 78.9 %
Peter thomas roth instant firmx eye	6,858	1,482	√ 78.4 %

*Note: Black Friday - Cyber Monday 2021 represents the date range of November 25, 2021 - November 29, 2021. Black Friday - Cyber Monday 2022 represents the date range of November 24, 2022 - November 28, 2022.

Beauty & Personal Care Trends by Sub-Category

While the majority of consumers are buying less across the board, self/personal care products are among those consumers are *least* likely to cut back on. <u>Jungle Scout Cobalt</u> data shows that several sub-categories within Beauty & Personal Care on Amazon have experienced 30%+ YoY revenue and unit sales growth.

Market Growth by Sub-Category (All Brands)

Report Date: Dec 28, 2021 - Dec 28, 2022

Compared to previous year

Sub-Category	Revenue	% YoY Change	Unit Sales	% YoY Change
Foot, Hand & Nail Care	\$1.1B	↑ 37%	70.1M	↑ 40%
Fragrance	\$753.8M	↑ 53%	16.5M	↑ 48%
Hair Care	\$2.5B	↑ 39%	87.1M	↑ 38%
Makeup	\$896.2M	↑ 46%	71.4M	↑ 45%
Bath & Personal Care	\$821.9M	↑ 38%	47.9M	↑ 30%
Shave & Hair Removal	\$1.4B	↑ 40%	54.9M	↑ 32%
Skin Care	\$2.1B	↑ 38%	105M	↑ 35%
Tools & Accessories	\$947.6M	↑ 37%	39.4M	↑ 37%
Oral Care	\$1.7B	↑ 40%	80.9M	↑ 37%

*Revenue and unit sales numbers are estimates based on 1.8 billion Amazon data points regularly measured by Jungle Scout

Market Share for Sub-Category Leaders



Sub-Category Spotlight: Foot, Hand & Nail Care

Total search volume for all keywords containing "nail" within Beauty & Personal Care category Black Friday -Black Friday -Year-Over-Year Cyber Monday 2021 Cyber Monday 2022 Change 1,227,411 1,355,095 **10.4%** Search Volume. Search Volume. % Change Keyword Black Fri -Black Fri -YoY Cyber Mon 2021 Cyber Mon 2022 Gel nail polish 89,713 113.866 **1 26.92%** Press on nails 66,616 102.287 **↑ 53.55%** Nail kit 62.522 64.730 **1 3.53%** Nail polish 62,008 62,290 **1 0.45%** Nail drill 45.592 45.619 **↑ 0.06%** 45.259 Nails 35,733 **1 26.66%** Gel nail polish kit 36.372 42.980 **18.17%** with uv light Fake nails 43,116 36,468 **↓** 15.42% Acrylic nail kit 41,302 35,166 **↓ 14.86**% Polygel nail kit 27.827 30,544 **↑ 9.76%**

Q Nails

Keyword Trends:



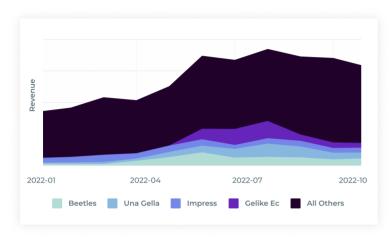
Size of the prize



INSIGHTS

- The press-on nails market is growing, with a 169% YoY revenue increase.
- Unit sales of press-on nails across all brands increased 151%.
- The number of ASINs in this segment increased by 233%.
- The number of brands competing in this segment increased by 69%.

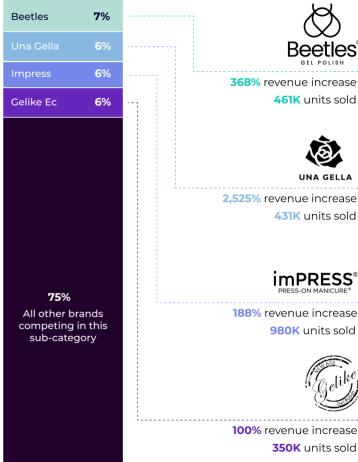
Market growth



★ INSIGHTS

- The top 4 brands in the category make up 25% of the market share while the other 333 make up the remaining 75%.
- Revenue for both 1P and 3P sellers has increased (by 49% and 162%, respectively).
- The top 4 brands in the category own 189 of the available ASINs, while all other brands combined own 6,553, indicating that 3% of the ASINs in this category are responsible for nearly 25% of the revenue.

Market Share for Sub-Category Leaders





188% revenue increase

980K units sold



100% revenue increase 350K units sold

Keyword Trend	ds: (Q Perfu	ime	
Total search volum within the Beauty a			erfume"
Black Friday - Cyber Monday 2021	Black Frida Cyber Monday		ar-Over-Year Change
400,731	539,696		↑ 34.7%
Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY
Perfumes for women	74,833	71,188	↓ 4.9 %
erfume	38,969	56,012	↑ 43.7 %
riana grande erfume	21,328	24,665	↑ 15.7 %
ctoria secret erfume	14,316	22,592	↑ 57.8 %
erfumes for men	23,399	22,164	↓ 5.3 %
erfume organizer	8,111	13,342	↑ 64.5 %
illie eilish perfume	2,072	12,119	↑ 484.9%
ol de janeiro erfume	348	11,207	↑ 3,120.4%
iana grande cloud rfume	4,870	10,699	↑ 119.7 %
ath and body orks perfume	4,106	9,764	↑ 137.8 %



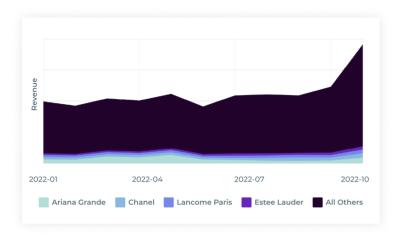
Size of the prize



INSIGHTS

- The women's perfume market is growing, with a **58%** YoY revenue increase.
- Unit sales of women's perfume across all brands increased **49%**.
- The number of ASINs in this segment increased by 18%.
- The number of brands competing in this segment increased by 5%.

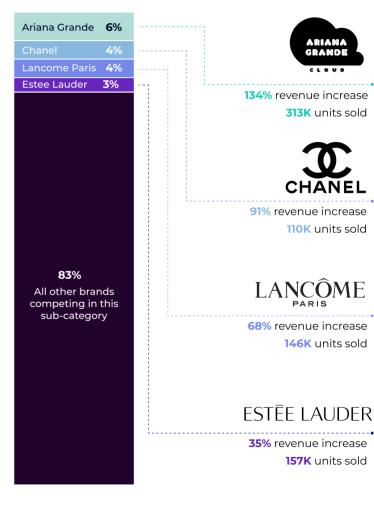
Market growth



***** INSIGHTS

- The median price for women's perfume products increased 18% YoY.
- The top 4 brands in the category make up 17% of the market share while the other 545 make up the remaining 83%.
- Revenue for both 1P and 3P sellers has increased (by 236% and 260%, respectively).
- The top 4 brands in the category own 241 of the available ASINs, while all other brands combined own 4,969, indicating that 5% of the ASINs in this category are responsible for approximately 12% of the revenue.

Market Share for Sub-Category Leaders





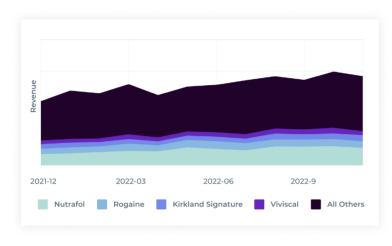
Led by Ariana's Cloud, these perfume products took over TikTok — and Amazon searches — in 2022.



*Data from TikTok search results page, as viewed on December 28, 2022

🔊 Sub-Cat	egory Spo	tlight: Ha	ir Care	
Keyword Tren	ds: Q Hair			Product Trend: Hair Growth Products & Supplements
Total search volum the Beauty & Perso	ne for all keyword onal Care Catego	ds containing "h rv	air" within	\$471.7M Revenue 11.2M Units Sold 1.9K Competing Brands
Black Friday - Cyber Monday 2021	Black Frida Cyber Monday 2,023,29	y - Ye	ar-Over-Year Change ↑ 14.2%	Report date range: Dec 27, 2021 - Dec 27, 2022 Comparing to previous year Size of the prize
Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY	
Hair clips	88,936	113,891	↑ 28.06%	
Hair dryer	78,183	71,298	↓ 8.81 %	
Dyson hair dryer	65,144	51,358	↓ 21.16 %	
Hair straightener	52,785	49,485	↓ 6.25%	2022-01 2022-02 2022-04 2022-06 2022-08 2022-10 2022-12
Hair extensions	29,664	40,548	↑ 36.69%	Brands ASINs Unit Sales Revenue
Wigs for black women human hair	41,968	39,933	↓ 4.85 %	
Hair ties	36,379	37,416	↑ 2.85 %	 The hair growth products market is growing, with a 44% YoY revenue.
Heatless hair curler	18,928	31,767	↑ 67.83%	 increase. Unit sales of hair growth products across all brands increased 38%.
Lace front wigs human hair	35,703	30,711	↓ 13.98%	 The number of ASINs in this market increased by 19%. The number of brands competing in this market increased by 21%.

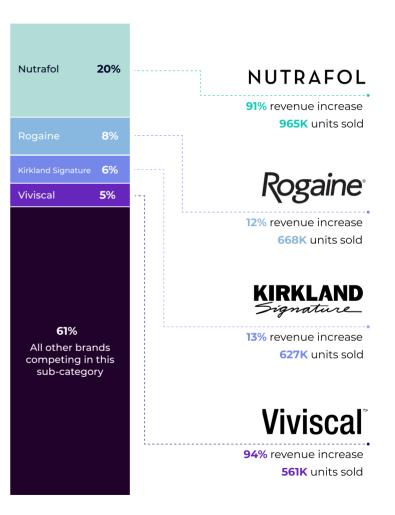
Market growth



★ INSIGHTS

- The top 4 brands in the category make up **39%** of the market share while the other 1,896 make up the remaining **61%**.
- Revenue for 1P sellers has decreased by 7% while revenue for 3P sellers has increased 28%.
- The top 4 brands in the category own 188 of the available ASINs, while all other brands combined own 6,154, indicating that 3.5% of the ASINs in this category are responsible for nearly 40% of the revenue.

Market Share for Sub-Category Leaders





These hair care products went viral on TikTok in 2022. How did it impact sales on Amazon?











Amazon Revenue



Units Sold on Amazon

21,329 (up 120% YoY)





Views on TikTok



Amazon Revenue



Units Sold on Amazon

790,427 (up 132% YoY)



Color Wow Dream Coat Anti-Humidity Hair Treatment





Views on TikTok

227M+*

Amazon Revenue



Units Sold on Amazon

425,204 (up 148% YoY)

*Data from TikTok search results page, as viewed on December 28, 2022

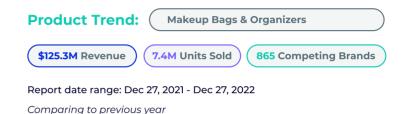
Sub-Category Spotlight: Makeup

Keyword Trends:

Q Makeup

Total search volume for all keywords containing "makeup" within the Beauty & Personal Care Category

Black Friday - Cyber Monday 2021	Black Frida Cyber Monday		ar-Over-Year Change
894,286	1,108,314		↑ 23.9%
Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY
Makeup	176,103	247,455	↑ 40.5%
Makeup brushes	104,365	145,555	↑ 39.5%
Makeup organizer	128,346	137,475	↑ 7.1%
Makeup bag	76,948	117,308	↑ 52.5%
Makeup mirror	40,047	27,000	↓ 32.6 %
Makeup kit	33,526	23,720	↓ 29.3 %
Korean makeup	5,697	21,209	↑ 272.3 %
Highlighter makeup	13,580	20,470	↑ 50.7 %
Makeup brush set	7,036	16,314	↑ 131.9%
Elf makeup	6,298	13,990	↑ 122.1%

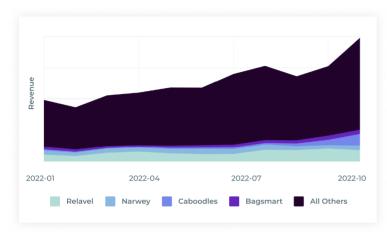


Size of the prize



- The makeup bags and organizers market is growing, with a 63% YoY revenue increase.
- Unit sales of makeup bags and organizers across all brands increased 60%.
- The number of ASINs in this market increased by 74%.
- \cdot The number of brands competing in this market increased by 40%.

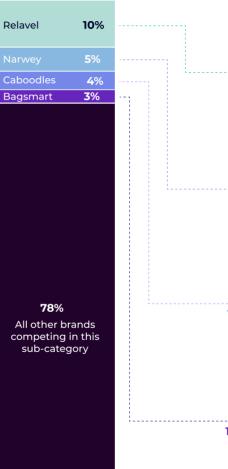
Market growth



★ INSIGHTS

- The top 4 brands in the category make up 22% of the market share while the other 861 make up the remaining 78%.
- Revenue for both 1P and 3P sellers has increased (by 167% and 269%, respectively).
- The top 4 brands in the category own 336 of the available ASINs, while all other brands combined own 6,654, indicating that 5% of the ASINs in this category are responsible for over 25% of the revenue.

Market Share for Sub-Category Leaders





54% revenue increase 404K units sold



29% revenue increase 498K units sold

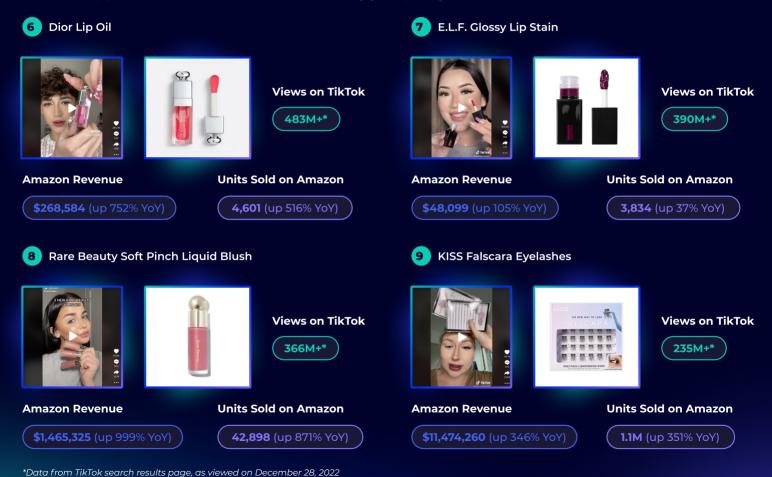
101% revenue increase 163K units sold

BAGSMART

150% revenue increase 232K units sold



These makeup products rose to TikTok fame in 2022 — and enjoyed triple-digit revenue increases on Amazon as a result.



Sub-Category Spotlight: Shave & Hair Removal

Keyword Trends: Q Shaver Total search volume for all keywords containing "shaver" within the Beauty & Personal Care Category



Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY
Shavers for men	9,477	7,718	↓ 18.6 %
Electric shavers for men	5,657	5,687	↑ 0.5 %
Norelco shavers for men	6,477	5,151	↓ 20.5%
Shaver	6,055	4,989	↓ 17.6 %
Skull shaver	6,299	4,719	↓ 25.1%
Head shavers for bald men	2,904	3,730	↑ 28.4 %
Electric shaver	6,950	3,146	↓ 54.7 %
Head shaver	4,467	2,988	↓ 33.1%
Pitbull skull shaver	234	2,644	↑ 1,029.9%
Andis shaver	2,235	2,291	↑ 2.5%

Viral Superstars

Even as searches in the shave and hair removal category declined overall YoY, this product's TikTok fame helped fuel a 1,000%+ increase in searches on Amazon, along with a 30%+ revenue increase.



Skull Shaver Pitbull



*Data from TikTok search results page, as viewed on December 28, 2022

(eyword Tr	ends: (९ ः	Skin	
ll keywords co ersonal Care o	ontaining "skin' category	' within the Bea	uty &
Black Friday - Cyber Monday 20	Black Frie 21 Cyber Mond		Over-Year hange
250,527	349,28	9 (*)	59.4 %
Keyword	Search Volume, Black Fri - Cyber Mon 2021	Search Volume, Black Fri - Cyber Mon 2022	% Change YoY
Skin care	47,947	74,993	↑ 56.4 1%
Face mask skin care	31,695	38,866	↑ 22.63 %
Skin tag remover	17,844	27,053	↑ 51.61%
Skincare	11,834	21,867	↑ 84.78 %
Korean skin care	9,476	21,104	↑ 122.71 %
Face masks skincare	14,296	15,834	↑ 10.76%
Skin care products	9,481	14,659	↑ 54.6 1%
Ordinary skin care products	7,397	11,186	↑ 51.22%
Facial skin care products	14,987	7,850	↓ 47.62 %
Skin care set	5,585	7,581	↑ 35.74%

at a man . Co at l'arb to

A - I. **A**

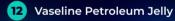
Viral Superstars

These long-standing skin care brands stole the spotlight on TikTok in 2022.



11

The rest of the second se	
Views on TikTok	1.1B+*
Amazon Revenue	\$7,353,258 (up 46% Yoy
Units Sold on Amazon	568,774 (up 77% YoY)





Views on TikTok Amazon Revenue 278M+*

Units Sold on Amazon

642,877 (up 92% YoY)

*Data from TikTok search results page, as viewed on December 28, 2022

Key Takeaways

As we embark on yet another unique year in the world of ecommerce, the data shows that Beauty & Personal Care brands are wellpoised to seize opportunities to drive brand awareness and growth both on Amazon and beyond:

1

While consumer spending overall has declined, spending on Beauty & Personal Care products has steadily increased.

2

The majority of Beauty & Personal Care sub-categories on Amazon experienced YoY growth of 30+% from December 2021 - December 2022.

3

For many sub-categories, YoY revenue variance was larger than that of unit sales, indicating that prices may be increasing for existing products, higher-priced items may be entering and gaining traction in those markets, and/or shoppers may be buying more multi-packs of Beauty & Personal Care products.

4

Social media has a powerful impact on product trends in Beauty & Personal Care, giving brands a unique opportunity to leverage social platforms and influencers to increase sales and brand awareness.

90-Day Amazon Search Trends

Q Keyword: **Tik tok gifts**

Q Keyword: Tik tok must haves 2022

October 6, 2022 - January 4, 2023

90-Day Search Volume Trend 144%

90-Day Search Volume Trend 1688%

Strategies for Beauty & Personal Care Brands in 2023

- Lean into social media trends: The power of social media channels like TikTok is only becoming clearer. Expanding your brand presence to these increasingly popular shopping platforms and seeking out opportunities to work with influencers can help you drive awareness and revenue both on and off of Amazon.
- Q Focus on high-performing products: Consumers and brands alike remain cost-conscious. As you look for ways to reduce expenses while still driving sales, carefully track how your products are performing and focus promotional efforts on reliable best sellers.
- Track keyword trends: As consumers' spending priorities shift and new trends emerge and fade, consistent keyword research will be crucial to keeping up with demand and beating out competitors.
- Offer deals & bundles: While consumers are prioritizing beauty and personal care products as they cut costs elsewhere, price is still a highly influential factor in purchase decisions. Offering deals and bundling complementary products can help incentivize shoppers to choose your brand over a competitor.

Methodology

The data included in this category report was gathered using Jungle Scout Cobalt, an industry-leading market intelligence and product insights platform powered by nearly 2 billion Amazon data points; and Jungle Scout Data Cloud, which provides a 360-degree view of the Amazon marketplace through bulk data on sales estimates, keyword search volume, product trends, and more.

Important note: This data represents the U.S. marketplace for specified date ranges and filter parameters (i.e., minimum/ maximum revenue, excluded unavailable products, and more). Some percentages have been rounded to the nearest whole number.

For more resources to help you grow, manage, and optimize your ecommerce business, visit our <u>Free</u> <u>Resource Library</u>.

About Jungle Scout Enterprise

Jungle Scout

Jungle Scout Cobalt is an industry-leading product insights and market intelligence platform that helps enterprise brands and agencies dominate their markets. With robust data on market share, category trends, competitor insights, product performance, and more, Cobalt enables you to uncover ecommerce insights and opportunities that were previously unseen.

DATA CLOUD

Jungle Scout Data Cloud empowers ecommerce businesses with an unrestricted, 360degree view of the Amazon marketplace by providing bulk data on category-level sales estimates, historical search volume, hourly brand share of voice data, and more. Data Cloud offers endless flexibility that allows businesses to fuel growth by integrating Jungle Scout's industry-leading data into their own internal systems and processes.

API

The Jungle Scout API gives ecommerce businesses direct access to critical Amazon insights at regular intervals and the ability to integrate Cobalt data into their internal systems and tools to build custom reporting dashboards.

Learn more about how Jungle Scout Cobalt can help you win the Amazon channel.

Book a demo



Looking for an advertising solution to help you make the most of your ecommerce data?

Downstream by Jungle Scout helps brands and agencies dive deep into advertising data to drive results at an enterprise scale. In addition to Shelf Intelligence — which provides insights like search share of voice, average rank, and more on top-ranking brands for specific keywords — Downstream empowers brands with automation, customizable reporting dashboards, and more. With Downstream, ecommerce businesses unlock the power to reach their full potential on Amazon and Walmart.