

BEAUTY & PERSONAL CARE

Beauty Brand Playbook

Eleven questions beauty brands can answer with Carbon Arc, from competition to cohorts to channels to supply chain.

Summary

COMPETITION

- 01 Which brands are your customers actually comparing you against?
- 02 Who is taking share, and at whose expense?
- 03 Where is growth concentrated, and how stable is the leaderboard?
- 04 Who is winning attention, and with which cohorts?
- 05 Who owns share of voice, and where are they buying it?

COHORTS

- 06 Which retail channels give you exposure to the cohort you want?

CHANNELS

- 07 How does social virality convert, and on which channel?
- 08 What are consumers searching for before they buy?
- 09 How do leaders split their catalog across TikTok Shop and Amazon?
- 10 What actually resonates on each marketplace?

SUPPLY CHAIN

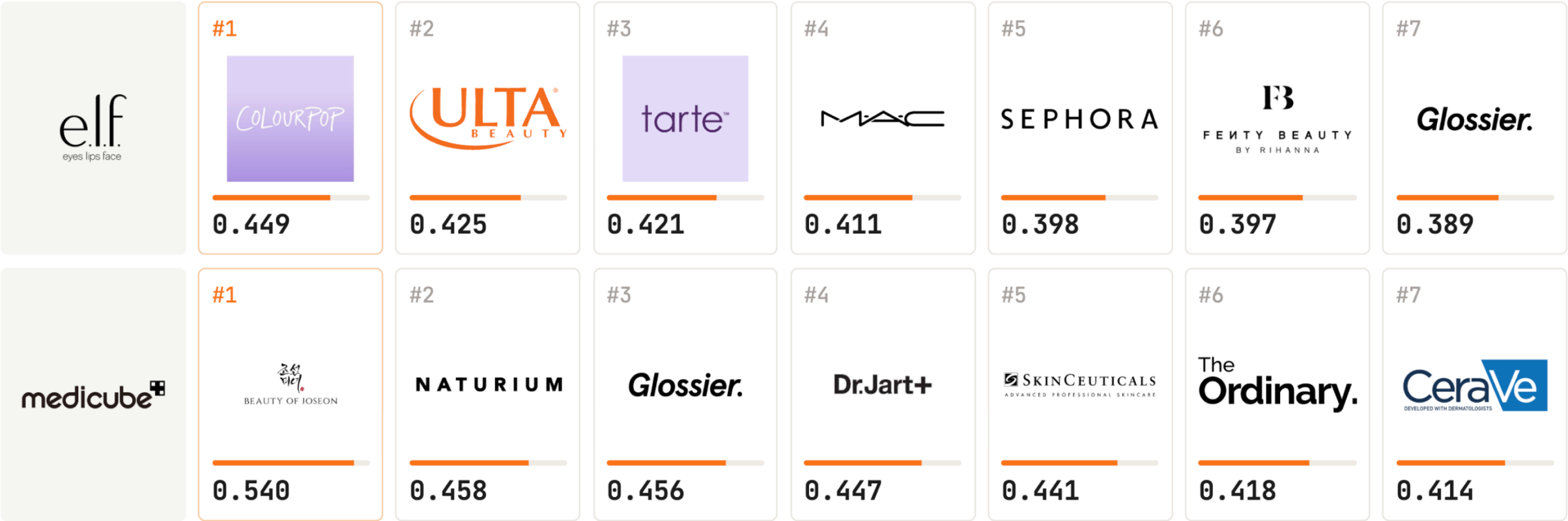
- 11 How are competitors responding to tariffs?

COMPETITION

Which brands are your customers actually comparing you against?

Most brands name their competitive set from instinct. Clickstream affinity derives it from where the same visitors actually go, ranked scored, and refreshed monthly.

CUSTOMER AFFINITY · CLICKSTREAM Rank by affinity score

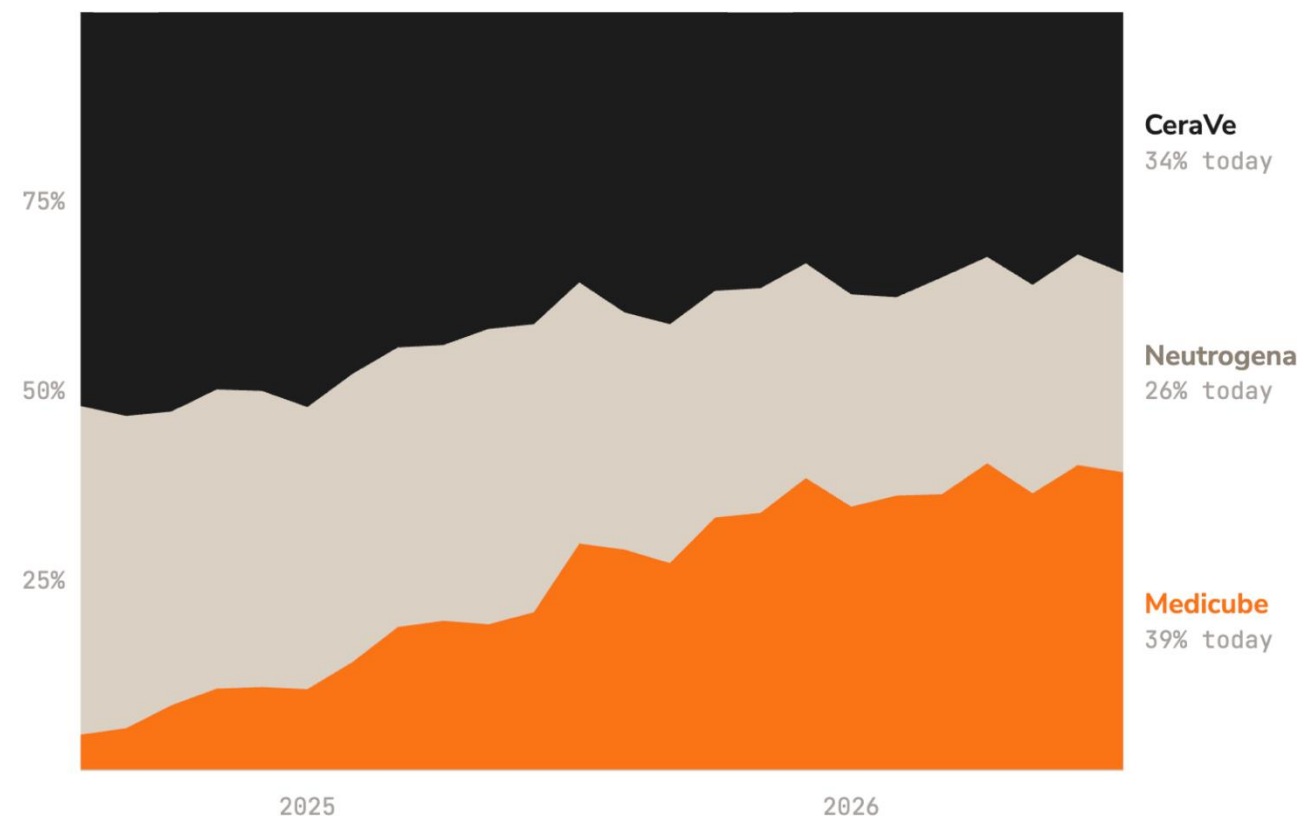


Who is taking share, and at whose expense?

The brand taking this category's share was not on most incumbents' competitive set in 2024. It is now roughly 40% of the three-brand pool, tracked monthly from outside the four walls: the challenger shows up in the data long before it shows up in the plan.

Share of three-brand Amazon revenue

Medicube vs. CeraVe vs. Neutrogena · monthly, Aug 2024 – Jul 2026



Two years of movement

Share in Aug 2024 vs. Jul 2026

■ **Medicube**

4.7% → **39.3%**

+34.6 pts, from unranked to co-leader

■ **CeraVe**

52.0% → **34.4%**

-17.6 pts, lost the majority position

■ **Neutrogena**

43.3% → **26.3%**

-17.0 pts, steady decline throughout

COMPETITION

Where is growth concentrated, and how stable is the leaderboard?

Hair loss products grew 96% year over year in July 2026, the only segment meaningfully beating TikTok Shop US overall at 76%. Leadership flipped in the process: Bare Anatomy went from roughly zero share to about 61% in eight months, displacing Root Labs, which held 87% as recently as August 2025.

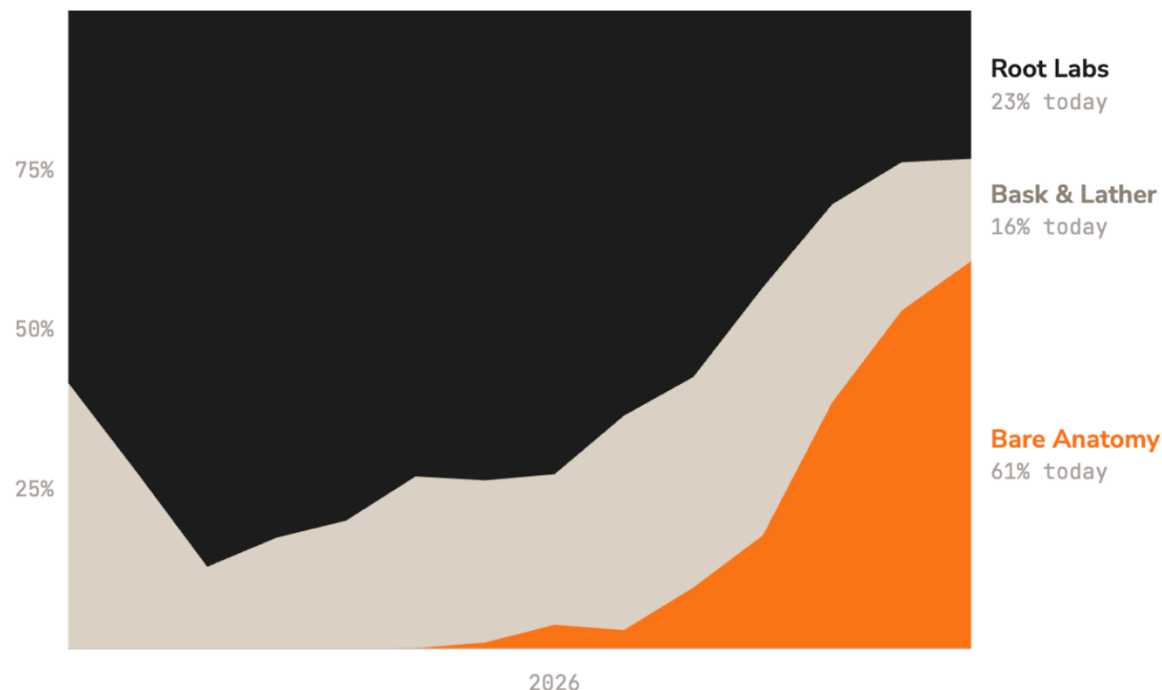
July 2026 revenue growth, year over year

By category, vs. the platform benchmark



Hair loss revenue share by seller

Monthly, Jun 2025 to Jul 2026

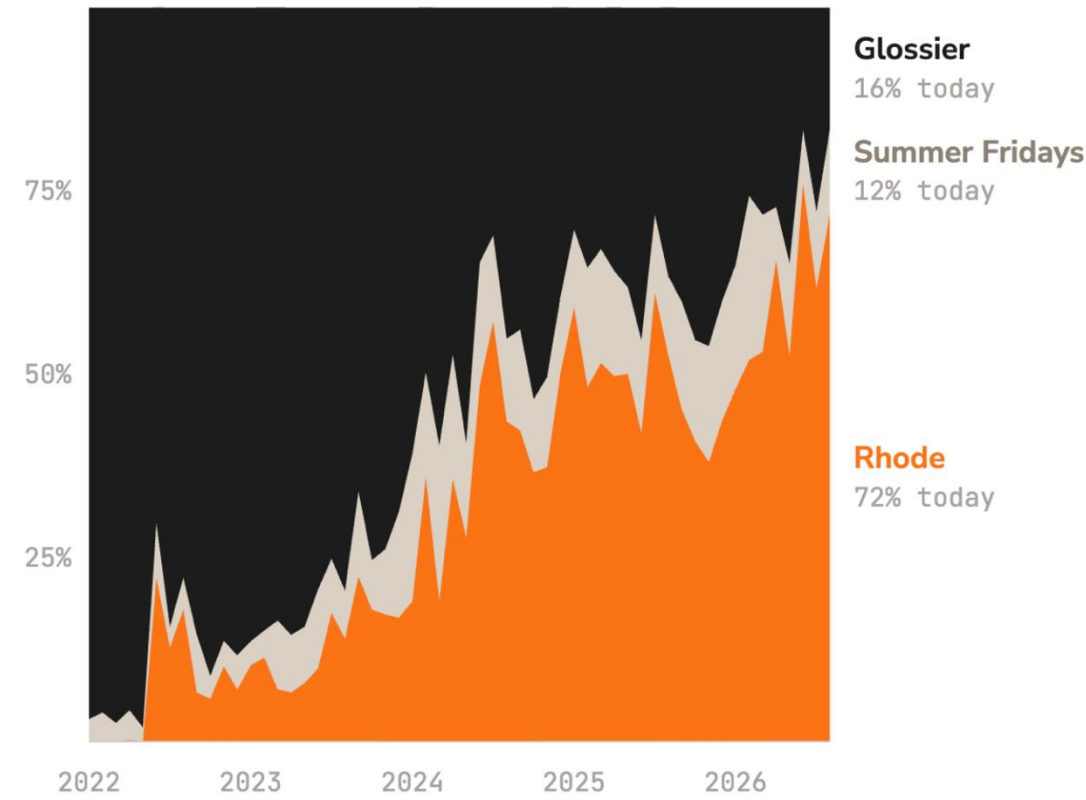


Who is winning attention, and with which cohorts?

Rhode went from zero to category leader in four years. The generational view shows why: Millennials still index highest, but Gen-Z and Gen-X interest has accelerated sharply since late 2025: a niche launch turned mass-market brand.

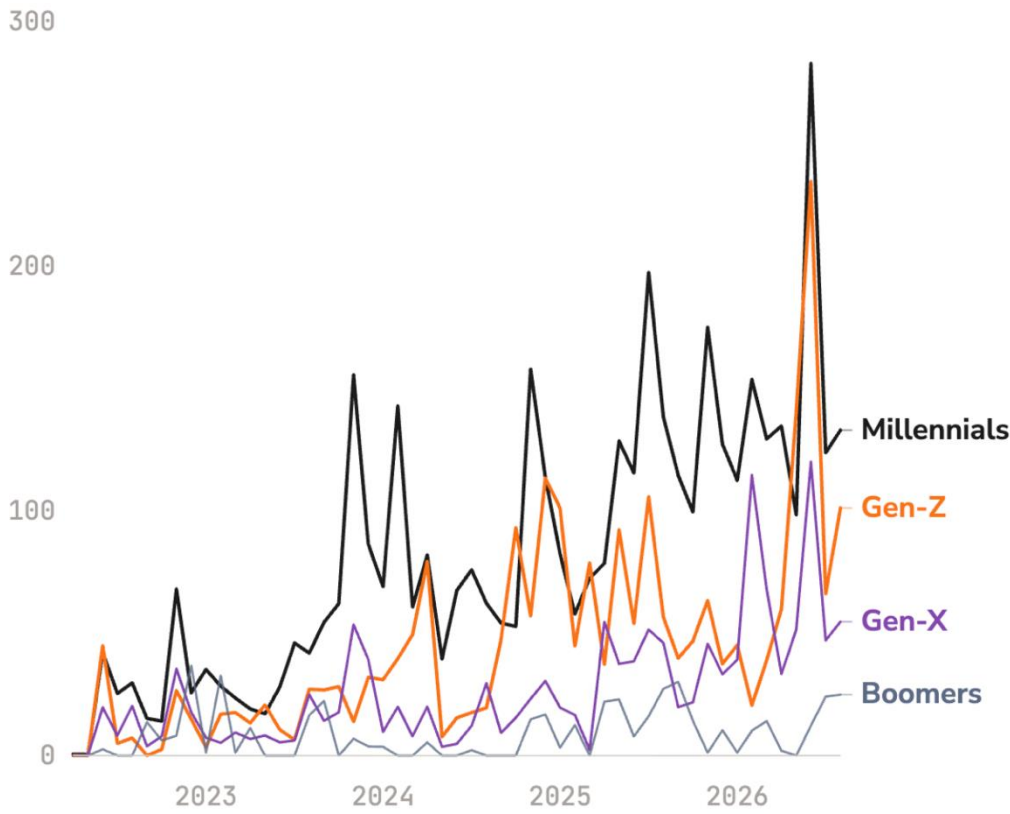
Share of clickstream traffic

Rhode vs. Glossier vs. Summer Fridays · monthly, 2022–2026



Rhode clicks by generation

Indexed monthly clicks per cohort

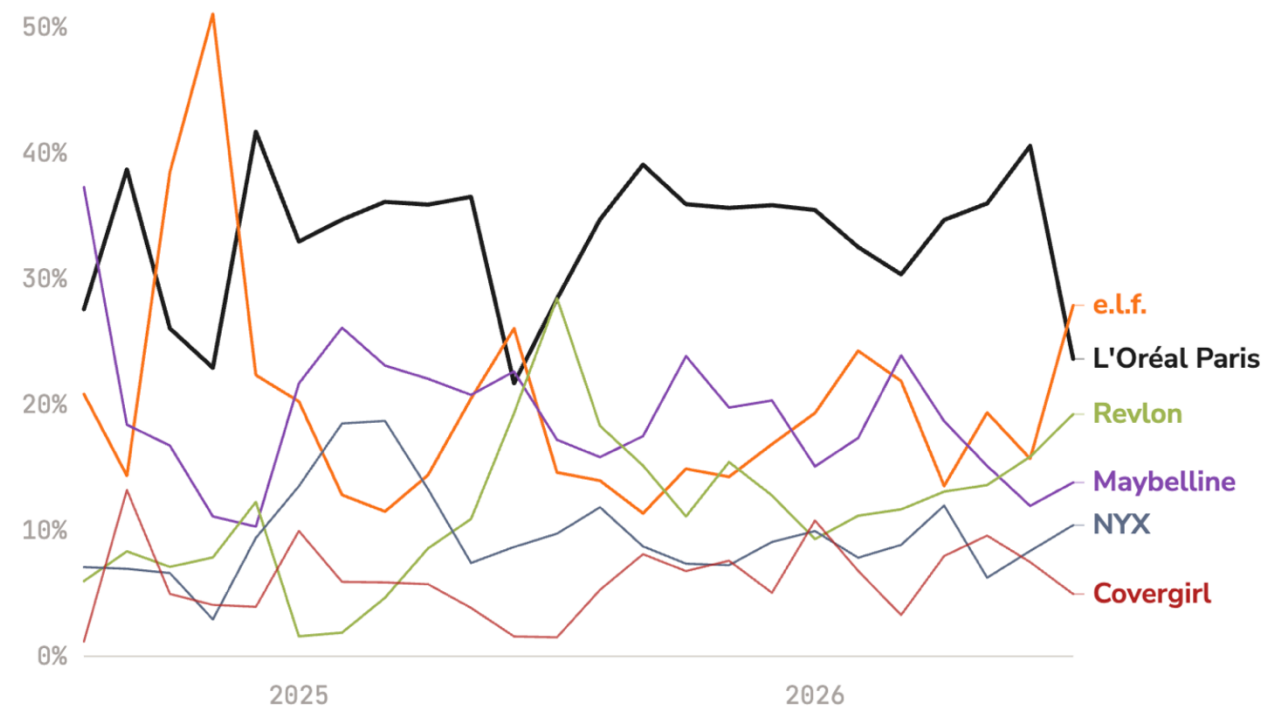


Who owns share of voice, and where are they buying it?

L'Oréal Paris holds 30–40% of category ad volume almost every month. Everyone else trades the remaining 60%. Channel strategy is where they diverge: e.l.f., Covergirl and Revlon all concentrate in OTT streaming — 41%, 33% and 39% of their impressions — while NYX and Maybelline lean on TikTok.

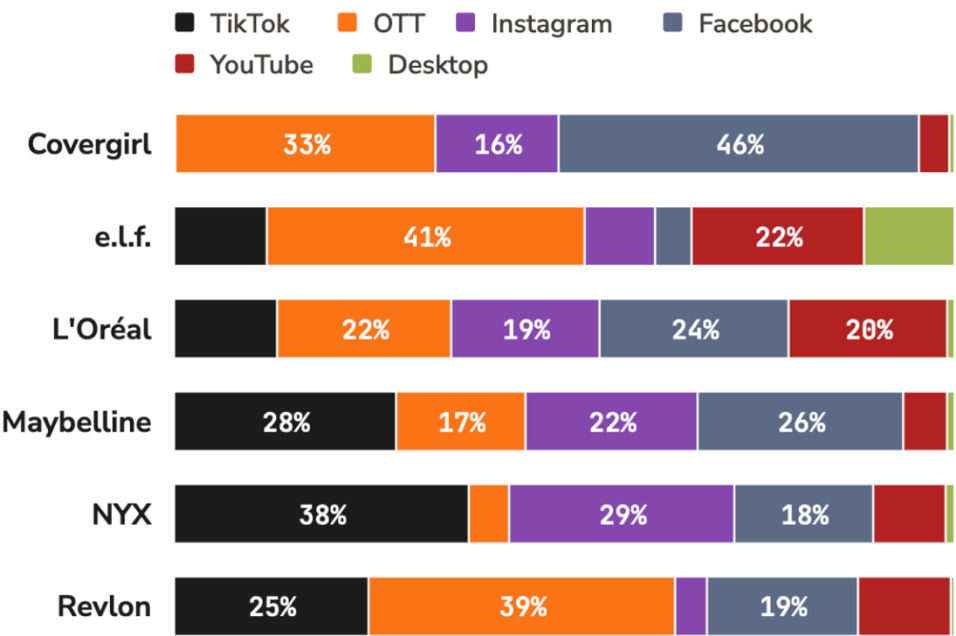
Monthly share of voice

Share of category ad volume · Aug 2024 – Jul 2026



Where each brand spends

Share of impressions by channel

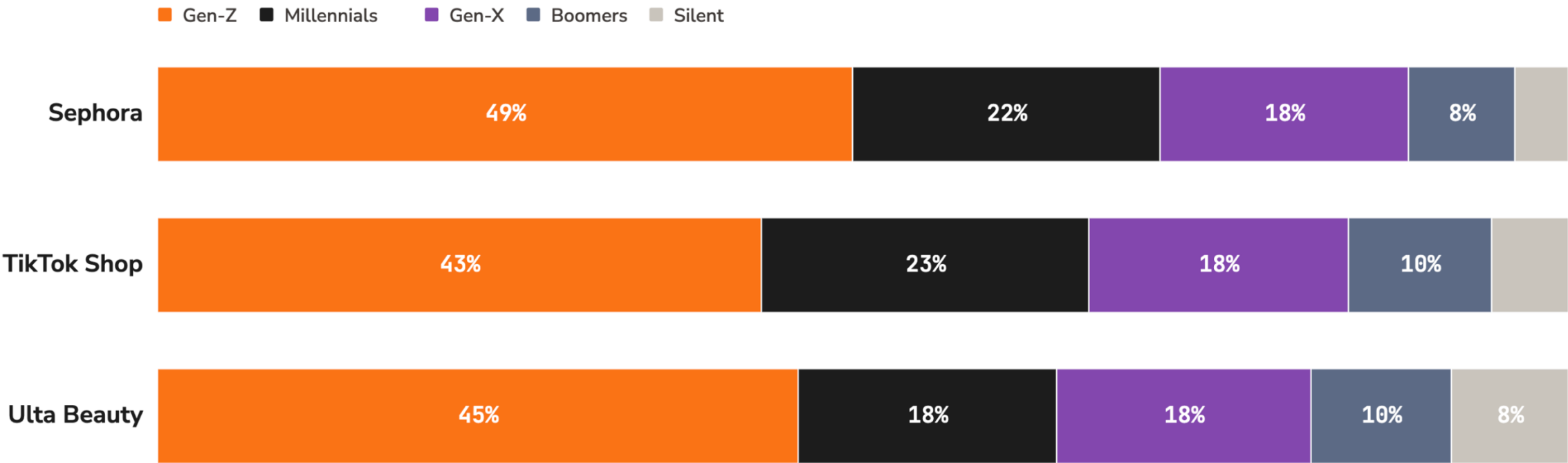


Which retail channels give you exposure to the cohort you want?

Assume TikTok Shop is a Gen-Z channel and you will over-index. It is the **least** Gen-Z dependent of the three: Gen-Z drives 43% of TikTok Shop beauty spend in 2026 YTD, below Ulta at 45% and Sephora at 49%. Millennials and Gen-X together account for 42%.

2026 YTD beauty spend by generation

Share of each retailer's beauty spend



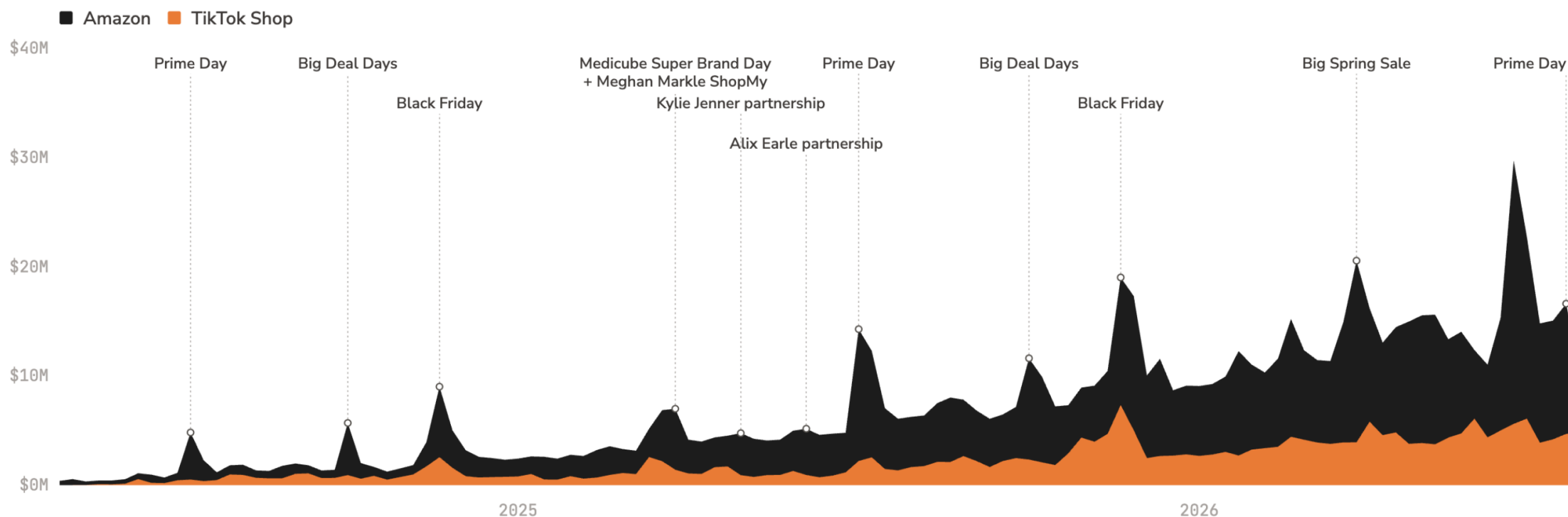
How does social virality convert, and on which channel?

For four months TikTok Shop ran ~51% of medicube's revenue, making it the acquisition channel. Since then the mix has held at roughly 30% TikTok / 70% Amazon for six straight quarters. That is a demand-generation funnel: creators build awareness, conversion lands disproportionately on Amazon.

~30%TikTok Shop
share of revenue**~70%**Amazon
share of revenue**6 qtrs**of a stable
channel mix

medicube weekly revenue, by marketplace

USD, weekly · May 2024 – Aug 2026



What are consumers searching for before they buy?

medicube is the only brand name in the top 25, ranking third at roughly 630k median weekly searches, beating every generic category term except lash clusters and press on nails.

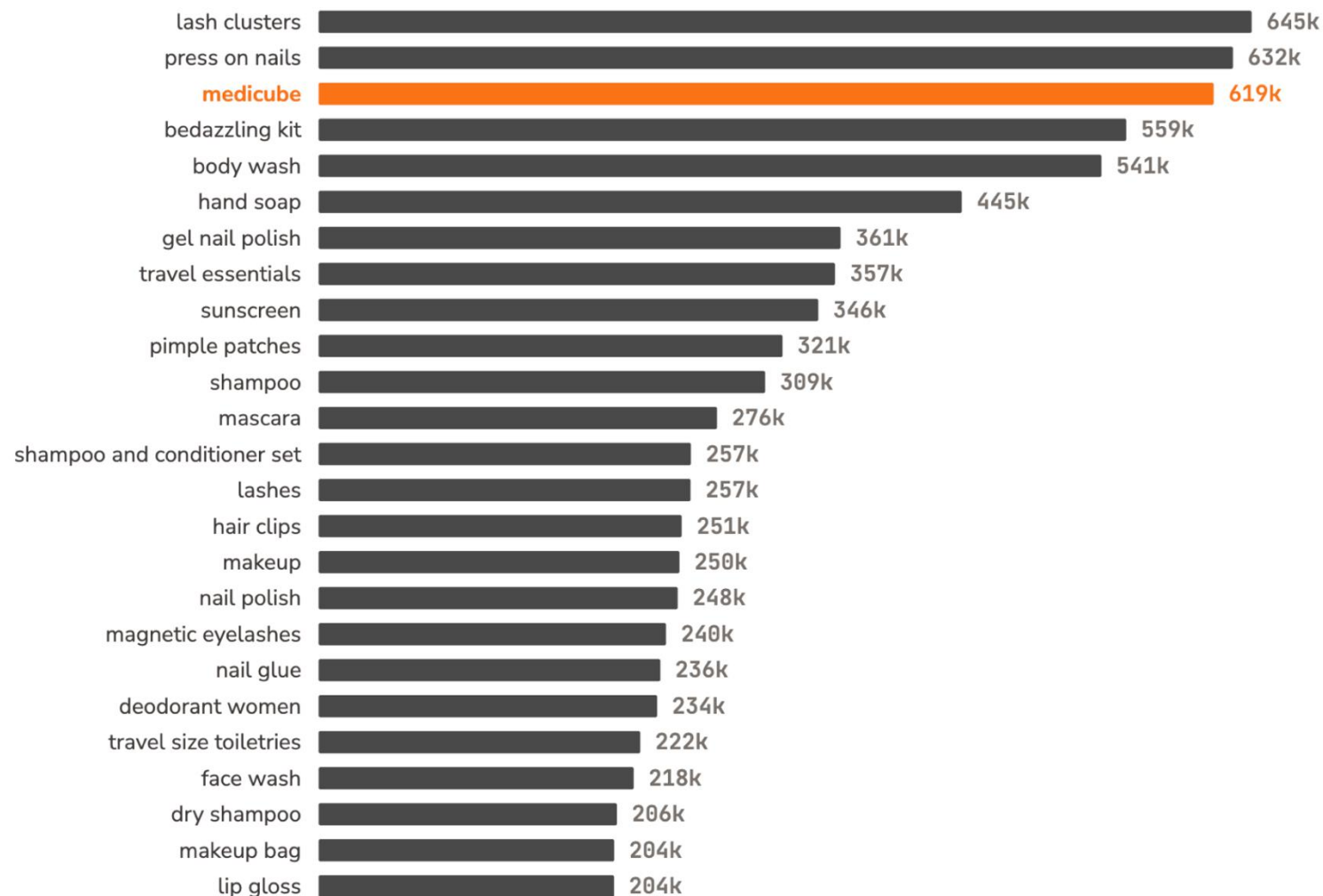
Unaided brand demand at that level is rare. It marks where K-beauty has taken share of consideration, not just share of shelf.

619k

median weekly searches for "medicube",
rank 3 of the top 25 beauty terms

Top beauty search terms, 2026 YTD

Median weekly search volume

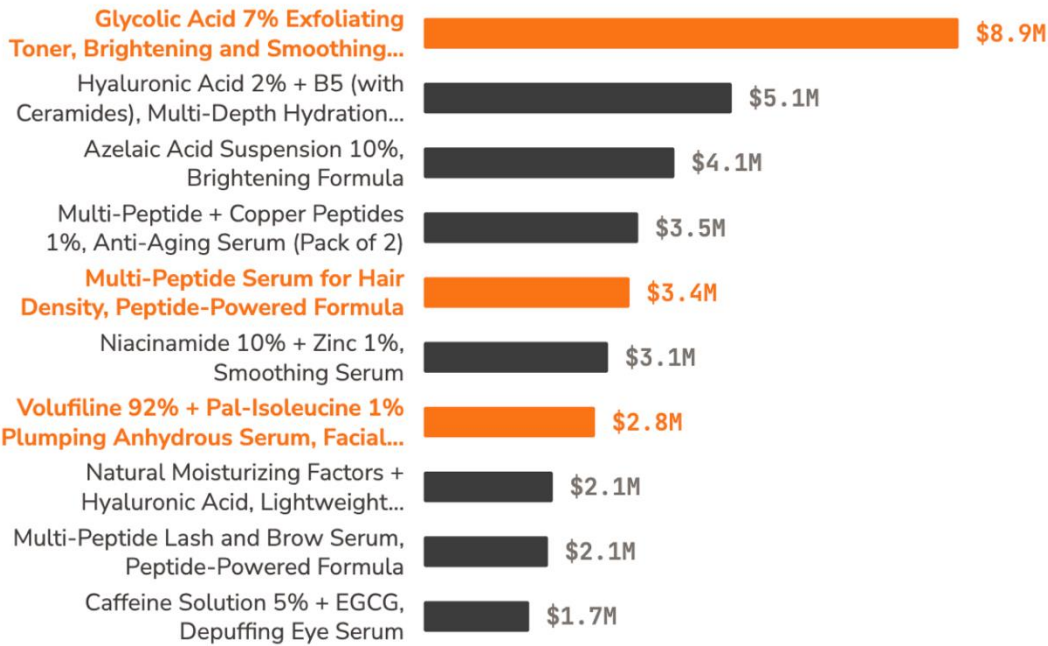


How do leaders split their catalog across TikTok Shop and Amazon?

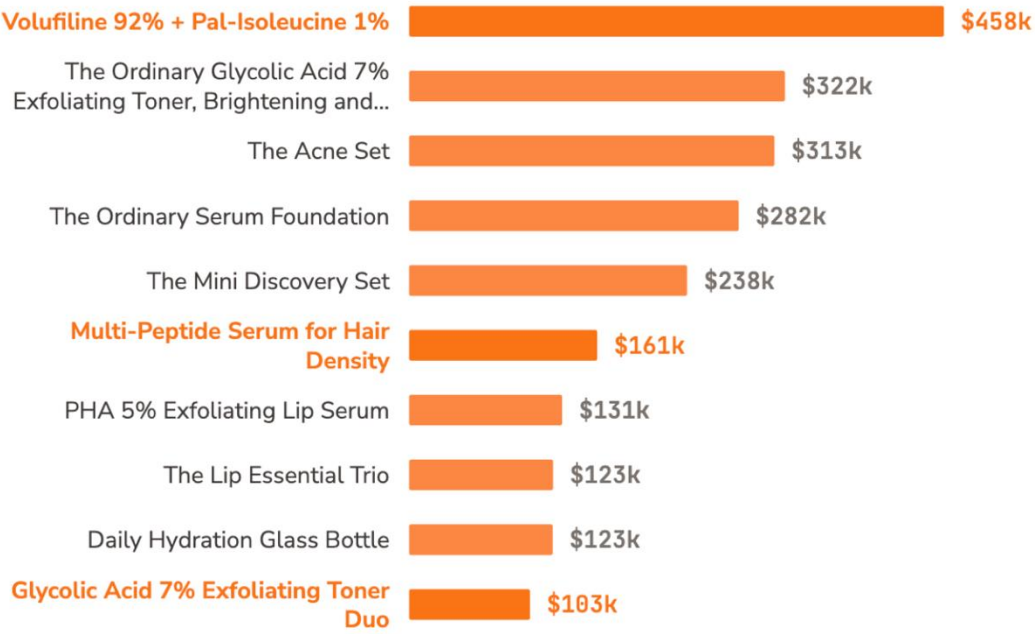
The Ordinary runs two different catalogs. On Amazon it leads with single-ingredient heroes shoppers already search by name. On TikTok Shop it leads with sets, trial kits and newness: products nobody searches for, but plenty discover.

3 / 10 top SKUs rank on both marketplaces

■ Amazon · top 10 SKUs revenue, USD



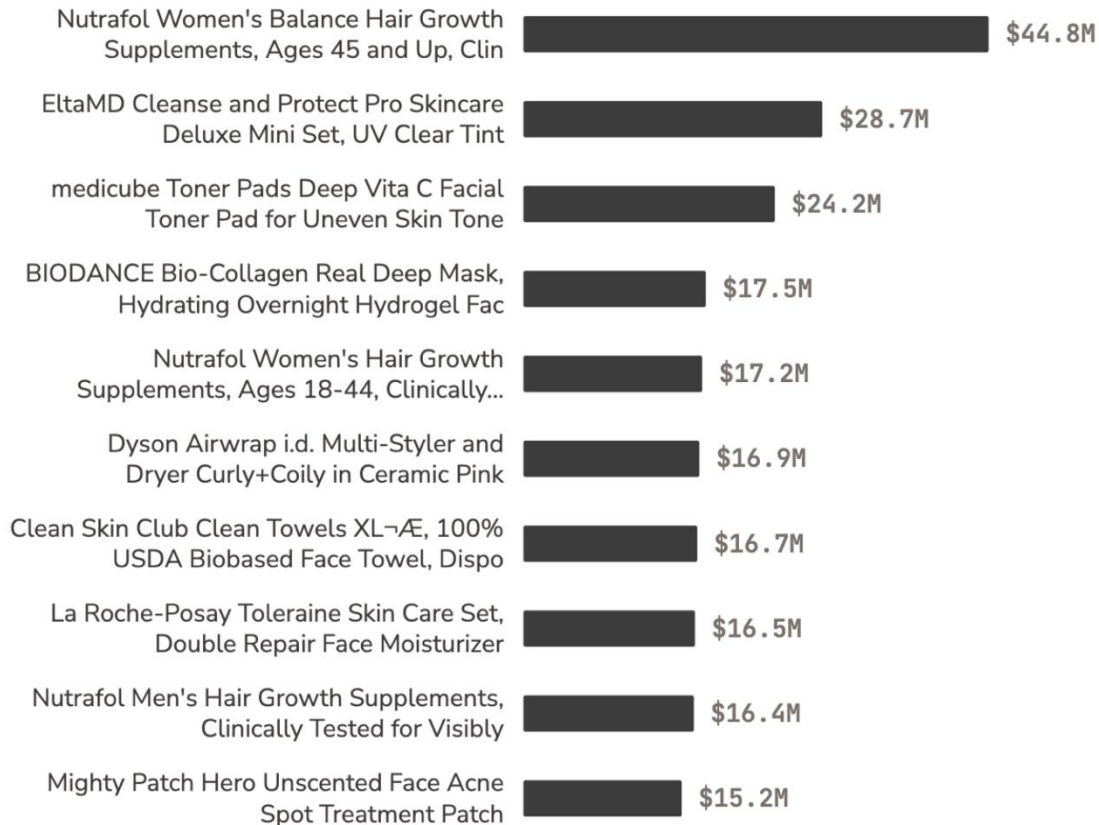
■ TikTok Shop · top 10 SKUs revenue, USD



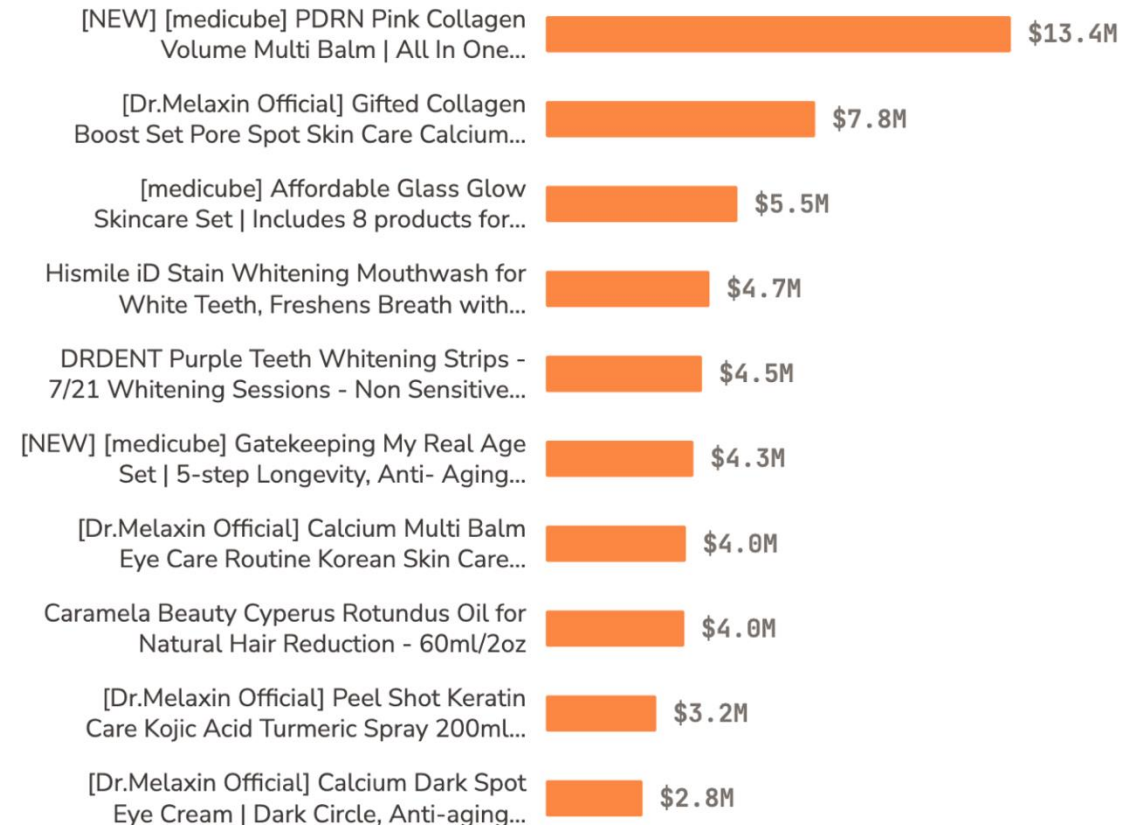
What actually resonates on each marketplace?

Amazon shoppers search for a fix: hair growth, acne, sun damage. TikTok shoppers buy into a trend: K-beauty bundles built on PDRN and collagen. Same category, different product entirely.

■ Amazon · best sellers revenue, USD



■ TikTok Shop · best sellers revenue, USD

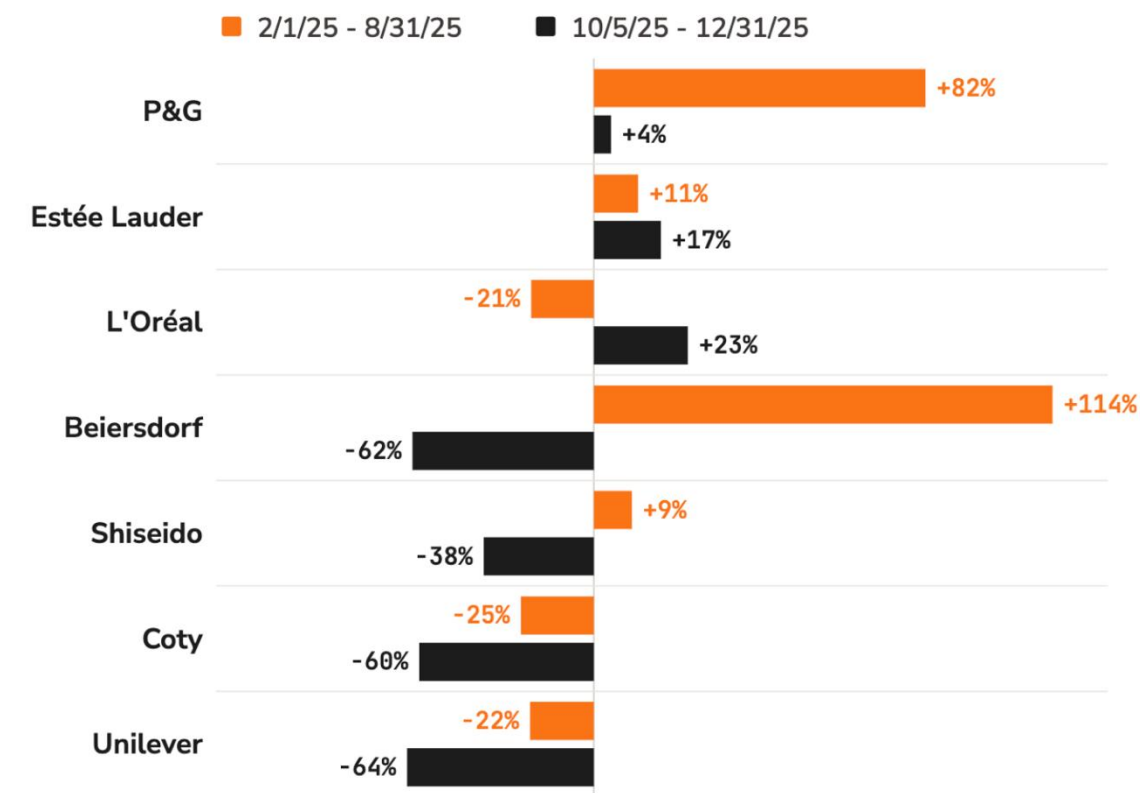


How are competitors responding to tariffs?

Trade Flows tracks competitor supply-chain moves as shipments clear customs. Beiersdorf and P&G raced tonnage in ahead of the tariff deadline, up 114% and 82%, then reversed hard in Q4. L'Oréal and Estée Lauder skipped the pull-forward entirely and imported after.

Change in tonnage imported

Year-over-year, by window



Change in shipment count

Year-over-year, by window

