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PRIME DAY 2026 WAS WON LONG BEFORE THE DISCOUNTS BEGAN

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PUBLISHED JULY 16, 2026



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FINANCE, TREND, RETAIL

Key Takeaways:

- Prime Day rewarded brands building demand long before discounts ever launched.

- K-beauty, makeup, and AI reshaped Amazon's evolving beauty shopping landscape.
- Beauty growth slowed, but stronger brands captured increasingly intentional consumer spending.

Amazon Prime Day has always been a barometer of consumer spending. Still, this year's event suggested something more consequential: Beauty's biggest shopping moment is becoming less about discounts and more about brand equity.

Beauty remained Amazon's largest department during Prime Day, with sales increasing 7.6% year over year, according to NielsenIQ. Purchase frequency climbed 13%, buyer penetration reached 84%, and almost 90% of beauty products sold cost less than $30, reinforcing beauty's position as one of the few affordable luxuries consumers continue to prioritize despite ongoing economic uncertainty.

Yet beneath those headline figures, growth is becoming harder won. Overall Prime Day e-commerce sales increased 9% this year, down sharply from 30.3% growth in 2025, despite Adobe's forecast of total online spending of $26.3 billion across the four-day event, which would have surpassed the combined spend of Black Friday and Cyber Monday last year.

Prime Day at a Glance

- Health & Beauty remained Amazon's #1 department.
- Beauty sales increased 7.6% year over year.
- Beauty purchase frequency rose 13%.
- Amazon beauty buyer penetration reached 84%, up one percentage point year over year.
- Consumers bought an average of 1.5 beauty products per order.
- Around 90% of beauty units sold cost less than $30, with the majority priced below $15.
- Overall Prime Day e-commerce sales grew 9%, down from 30.3% in 2025.

Front Row's data paints a similarly measured picture. While beauty remained resilient, category growth reached just 1% compared with last year's event.

"This year's Prime Day tells a clear story: shoppers were being more deliberate with their spending," Emily Safian-Demers, Vice President of Consumer Insights at Front Row, told BeautyMatter. "Categories tied to replenishable goods, everyday

essentials, and self-care saw the biggest gains, while consumers pulled back on big-ticket and purely discretionary purchases."

Rather than signaling weakness, the results suggest Amazon has entered a more mature phase. Marketplace growth is no longer driven simply by more shoppers; it is increasingly driven by brands competing for share in an ever-more-crowded beauty landscape.

Discovery Is Moving Beyond Amazon

Perhaps the biggest shift this Prime Day wasn't what consumers bought; it was how they got to checkout.

For years, Amazon rewarded brands that invested in marketplace optimization, competitive pricing, and advertising. Increasingly, however, consumers are reaching Amazon with a shopping list already in mind, having discovered products through TikTok, creator recommendations, earned media, and, increasingly, AI-powered shopping assistants.

Market Defense found beauty search volume surged 71% during Prime Day week, but more tellingly, branded searches overtook generic discovery. Rather than searching for "mascara" or "vitamin C serum," shoppers increasingly searched for the brands they already wanted to buy. The #1 beauty search term wasn't a category at all; it was "Medicube."

Jason Weilenmann, Senior Vice President of Marketplace Performance at Front Row, believes that the shift is fundamentally reshaping how brands approach major retail moments.

"Consumers are increasingly using both on- and off-site AI assistants to enhance their customer journey, where much of the consumer decision-making process starts before a customer ends up on Amazon," he told BeautyMatter.

"More and more, we see AI assistants condensing the consideration phase, while TikTok remains the awareness and emotional layer. The halo impact TikTok creates for Amazon, especially in beauty, drives a measurable conversion advantage for shoppers who arrive on the marketplace with higher and pre-influenced purchasing intent."

How Beauty Discovery Shifted

- Beauty searches increased 71% during Prime Day week.
- One in five beauty purchases began with a branded search, up from 17.4% last year.
- Medicube was Amazon's most-searched beauty term, surpassing generic category searches.
- Data from Pattern also clearly shows branded search intent: Medicube averaged #2, Anua #42, Sol de Janeiro #57, Biodance #152, and Laneige jumped from about #3,755 to #280.
- Adobe forecasted that AI-driven traffic to retail sites will increase 103% during Prime Day.
- 85% of shoppers who have used AI for shopping said it improved their experience.
- Market Defense also found that AI-referred traffic rose 98.3% year over year and converted at rates 5.0% higher than email or paid search.

For beauty brands, the implications are significant. Prime Day is no longer won solely through sharper discounts or stronger marketplace execution. It's increasingly won months in advance by building enough awareness that consumers search for a brand by name when the deals finally arrive.

The Winners: K-Beauty, Makeup, and Hair Tools

If Prime Day offered a snapshot of where beauty demand is heading, it pointed firmly toward K-beauty, makeup, and hair tools. Rather than one defining trend, shoppers spread their spending across categories that combined performance, familiarity, and social momentum.

While skincare has dominated industry conversation for much of the past decade, this year's event suggested consumers are broadening their baskets. NielsenIQ found Cosmetics & Nails gained share during Prime Day, driven by eye makeup and lip products, while Front Row reported makeup grew 12% year over year, comfortably outperforming skincare, which grew 4%.

K-beauty also continued its rise from a niche trend to a marketplace heavyweight. Medicube retained its position as Amazon's top beauty brand during Prime Day, reflecting the growing influence of Korean skincare brands that have successfully translated TikTok buzz into sustained consumer demand.

Beauty's Best-Selling Products

- Shark FlexStyle Air Multi-Styler & Drying System
- Dyson Airwrap i.d. Multi-Styler
- Nutrafol Women's Balance Hair Growth Supplements
- Medicube Toner Pads
- Biodance Sheet Mask

Category Performance

- Makeup grew 12% year over year.
- Skincare grew 4%.
- Cosmetics & Nails gained market share, led by eye makeup and lip products.
- Hair tools delivered the largest category lift across beauty, increasing by 145%.
- According to Pattern, SPF and hair devices were deal-triggered categories. “Sunscreen” peaked at #37 on Day 1, while hair tools such as hair dryers, curling irons, blow dryers, and straighteners all climbed sharply.

K-Beauty's Momentum

- Medicube held the #1 overall beauty position for the second consecutive Prime Day.
- Medicube's beauty sales share increased from 9.3% to 13.23%.
- Korean beauty brands accounted for 10.5% of all beauty searches, up from 6.5% in 2025.
- Pattern found K-beauty brands including Medicube, Anua, Biodance, Laneige, and Beauty of Joseon surged simultaneously, showing shoppers arrived with specific K-beauty brands already in mind.
- K-beauty generated almost 20% of Prime Day's total beauty search growth.
- #PDRN generated 460 million TikTok views over the past year.

Haircare Shifts

- Native Coconut & Vanilla Shampoo overtook Olaplex as the top-selling shampoo.
- Nutrafol became the #2 best-selling haircare product.
- Redken and Biolage gained market share, while Olaplex, Color Wow, and Pureology lost ground.
- Searches for scalp massagers rose 274%, scalp oil 159%, and scalp treatments 154%.

Today's Prime Day winners aren't simply riding viral moments. They're converting sustained consumer awareness into marketplace leadership, whether through K-

beauty's continued momentum, prestige hair tools, or makeup brands that have remained culturally relevant long after the initial social buzz.

Prime Day Is Becoming a Customer Acquisition Strategy

As Prime Day matures, brands are rethinking what success looks like. Rather than chasing short-term sales spikes, many are using the event to acquire customers they can retain well beyond the four days of discounts.

"We expected sharper discipline from consumers due to some of the macro volatility and other retailers having competing events," Weilenmann said. "We saw and worked with brands to sharpen their promotional participation in favor of more surgical opt-in that included tighter promotional planning to protect margin, more concentrated budgets, and a focus on driving new-to-brand acquisition versus capturing in-demand traffic with existing brand affinity."

The shift reflects a broader change in how Prime Day fits into the retail calendar. Rather than treating it as a stand-alone event, brands are increasingly viewing it as the starting point for customer relationships that extend into the holiday season.

"We're seeing preparation start earlier and earlier to have a strong event in Q4, with customers acquired in the summer maturing to come back for future purchases," Weilenmann said. "The future-retention loyalty built by participating in summer will help facilitate brands' performance in the fall and winter."

How Brands Are Adapting

- Promotional strategies became more targeted, with brands protecting margins through selective discounting.
- Marketing budgets were concentrated on acquiring new-to-brand customers rather than on existing demand.
- Post-event strategies now focus on abandoned cart recovery, re-engaging non-converters during future shopping events, and moving new customers into subscription programs where appropriate.
- Adobe expects Buy Now, Pay Later to account for $2.04 billion in Prime Day spending.
- Mobile is forecast to drive 54.2% of online sales, generating $14.2 billion in revenue.
- Social media is expected to be the fastest-growing traffic source (+15% year over year), while influencer content converts shoppers nearly 10 times better than social media overall.

Prime Day is becoming less about winning a four-day promotion and more about building a customer journey that begins with discovery, converts on Amazon, and continues through repeat purchases long after the event ends.

The New Rules of Prime Day

Prime Day remains one of beauty's most influential retail moments, but this year's event suggests the rules of marketplace success are changing. Amazon is no longer generating effortless growth simply by attracting more shoppers. Instead, brands are competing for increasingly intentional consumers who often know exactly what they want before they ever reach the platform.

Market Defense describes it as the end of Amazon's "easy growth era." The report found that last year's breakout searches—including neck-lift tape, tattoo cover-up makeup, and tooth-repair kits—had disappeared from this year's rankings, highlighting how quickly viral products can lose momentum without broader brand building behind them.

Pattern's search data also suggests Prime Day has become increasingly brand led rather than category led. Generic skincare terms were largely absent from the highest-ranking beauty searches, replaced instead by brands such as Medicube, Anua, Sol de Janeiro, Biodance, and Laneige. Rather than discovering products on Amazon itself, shoppers are increasingly arriving with purchase intent already formed through TikTok, creator content, and AI-assisted search, turning Prime Day into a demand-capture event rather than a demand-generation one.

The brands maintaining their positions, by contrast, were those that consistently invested beyond Amazon on social media and in physical retail doors. Medicube strengthened its dominance in skincare; Tarte overtook Maybelline to become the leading makeup brand by sales share; and prestige fragrance continued to perform, with Armani Beauty claiming the top fragrance position and Lancôme entering the category's top 10. Professional haircare also reshuffled, with Redken and Biolage gaining share while Olaplex, Color Wow, and Pureology slipped.

Prime Day's Biggest Takeaways

- Amazon is shifting from a marketplace driven by category discovery to one led by brand discovery.

- Viral products are proving increasingly short-lived without broader brand investment.
- AI is emerging as one of e-commerce's fastest-growing acquisition channels.
- TikTok continues to influence beauty purchasing long before consumers arrive on Amazon.
- Winning Prime Day now depends as much on year-round brand building as on promotional strategy.

For beauty executives, the message is clear. Prime Day is no longer simply a retail event; it has become a measure of how effectively brands build awareness, earn consumer trust, and create demand before the discounts begin. The strongest performers aren't just winning four days of sales; they're winning the months of consideration that come before them.

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