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AMAZON BUILDS ITS K-BEAUTY ADVANTAGE

ALICE MANNERS

PUBLISHED AUGUST 30, 2026



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RETAIL, TREND, PRODUCTS

Key Takeaways:

- Amazon is shifting from beauty conversion toward curated discovery.
- K-beauty sales outpaced Amazon's wider beauty categories in 2026.
- Exclusives position Amazon closer to Sephora and Ulta Beauty.

Amazon's role in beauty has historically been weighted toward transaction rather than discovery. Its growing investment in K-beauty suggests the retailer is increasingly looking to play both roles.

Amazon Beauty has expanded its dedicated Korean Beauty storefront this August, bringing together hundreds of new products alongside trend edits, ingredient spotlights, and exclusive US launches from brands including Medicube, Laneige, Mamonde, and HaruHaru Wonder. Behind the merchandising push sits considerably greater scale: More than 1,200 K-beauty brands and 20,000 products are now available across Amazon's US store. Market Defense, a marketplace management data company, estimates the marketplace now accounts for roughly 44% of US K-beauty spending. Korean beauty exports to the US reached $1.45 billion in the first half of 2026, up 41.5% year over year (YoY) and accounting for 20.7% of the country's total cosmetics exports.

The storefront is organized by ingredients, concerns, routines, and trends, giving shoppers a way to navigate a category where unfamiliar brands and similar-looking products can easily blur together. More significantly, it represents Amazon borrowing the discovery architecture of specialty beauty retail. Sephora and Ulta Beauty have traditionally created value by editing, categorizing, and contextualizing products for consumers. Amazon is increasingly doing the same.

That matters as the competitive gap between the two retail models narrows. While specialty retailers have expanded assortments and invested in the convenience and breadth associated with marketplaces, Amazon is moving in the opposite direction, adding more curation and guidance to a platform historically built around search and conversion. In K-beauty, where discovery is particularly important, the result is an Amazon experience that increasingly resembles the way consumers shop specialty beauty.

K-Beauty Is Outpacing the Wider Beauty Market

The scale of K-beauty's growth on Amazon helps explain why the retailer is investing further in the category. "K-beauty is becoming a much bigger part of the US beauty market, and the data backs that up," Dave Karlsven, SVP, Partnerships & Growth at Market Defense, told BeautyMatter.

Korean facial skincare sales on Amazon reached $818 million in the first half of 2026, up 80% from $456 million during the same period in 2025, according to

Perpetua Prism data provided by Front Row. That was roughly three times the growth rate of Amazon's overall facial skincare category, which increased 27%.

Korean haircare followed a similar trajectory, growing 51% to $103 million, compared with 16% growth for haircare overall. K-Beauty generated an estimated $172 million in sales during Prime Day week in 2026, up 38% from $124 million the previous year. Outpacing Amazon's overall skincare category, it grew 4%, and makeup increased 12% over the same period.

Market Defense estimates K-beauty brands represented 10.5% of Amazon Beauty searches during Prime Day 2026, up from 6.5% a year earlier. Korean brands also occupied 38% of Amazon's top 100 skincare products during the event, including seven of the top 10. The numbers make the commercial case for Amazon's investment clear. The more interesting question is what the retailer can do with that demand beyond simply converting it into sales.

From Social Discovery to Amazon Search

Amazon's opportunity in K-beauty is also tied to how consumers discover the category. While social media may introduce shoppers to the latest Korean ingredient, product, or routine, Amazon's search bar increasingly captures what happens next: the point at which curiosity begins to translate into product research and purchase intent.

Front Row's internal data shows Amazon search volume for PDRN increased 740% between Q2 2025 and Q2 2026, while searches for Volufiline rose 723% over the same period. The growth is increasingly extending from ingredients to specific brands; Medicube averaged roughly 2 million Amazon searches per month year to date, up approximately 48% YoY, according to data shared by Market Defense. During Prime Day, searches for the brand reached approximately 4.3 million, compared with 1.2 million the previous year.

K-beauty is also taking up a growing share of beauty search activity on the platform. Korean brands accounted for 10.5% of Amazon Beauty searches during Prime Day 2026, up from 6.5% in 2025, and generated nearly 19% of the YoY increase in Beauty search volume during the event.

Amy Rudgard, SVP of Client Strategy at Market Defense, said to BeautyMatter, "Shoppers are searching for what they want the product to do before they've

settled on a brand." She went on to say, "K-beauty, built around specific ingredients and formulations, maps directly onto that search pattern."

That does not mean Amazon is replacing TikTok or other social platforms as a trend engine. Instead, its role sits further down the funnel, where consumers move from encountering an unfamiliar ingredient or format to comparing the products and brands that offer it.

Rudgard points to hair tools as an example of how that journey can play out. After Wavytalk built awareness for its Thermal Brush through thousands of influencer and hairstylist partnerships on TikTok, branded searches began trending on Amazon in late 2023. Demand eventually grew large enough for Amazon to create a dedicated Thermal Brush category, while competing brands, including Amika and Ella Bella, ultimately also benefited from increased searches for the format.

"What makes Amazon distinct from other places people discover products is that shoppers tend to arrive ready to purchase," Rudgard said. Consumers may encounter the trend elsewhere, but Amazon can see that interest materialize through branded and unbranded searches as shoppers narrow down what they want.

Turning Search Signals into Merchandising

That purchase-ready search behavior gives Amazon a real-time view into which ingredients, brands, and formats are gaining traction. The refreshed Korean Beauty storefront effectively feeds those signals back into merchandising, turning an otherwise vast assortment into trend-led edits, ingredient spotlights, and routines designed to guide consumers through the category.

Amazon said it maintains a "high bar" for inclusion, prioritizing highly rated products and formulations that align with consumer-preferred ingredients and trends. The resulting assortment mixes established bestsellers with newer launches and exclusives, spanning skincare, makeup, haircare, nails, tools, and wellness.

Vanessa Kuykendall, Chief Engagement Officer at Market Defense, compared the strategy to a buyer responding to trends by determining what earns space on an endcap, gondola, or homepage.

“A buyer curates around what's trending, so if smoky eyes is the moment, that's what shows up on the endcaps and gondolas in store or the homepage online,” Kuykendall told BeautyMatter. “Amazon is doing the same thing with destinations like K-beauty.”

For Amazon, the challenge is not recreating the physical beauty counter online. It is reducing the friction created by its own scale. Curation gives the retailer greater control over what shoppers encounter between entering the platform and choosing a product, rather than leaving that journey entirely to search rankings and individual product pages.

“Amazon has always won on conversion, since nobody handles the last mile the way Amazon does,” Kuykendall said. “What's changing is that Amazon is now helping shoppers decide, not just checkout.”

Joshua Fulmer, Executive Creative Director at Market Defense, pointed to Amazon data showing that shoppers who visit a brand store purchase 54% more frequently and have a 71% higher order value. New-to-brand shoppers who visit a store are also 63% more likely to convert, a particularly relevant metric for Korean brands still building awareness among US consumers.

For Korean brands, improving discovery on Amazon has value beyond making the marketplace easier to browse. If Amazon can shape what consumers consider, it gains influence earlier in the shopping journey.

Exclusivity Brings Amazon Closer to Specialty Beauty

The strategy inevitably puts Amazon into closer competition with the retailers that have traditionally owned beauty discovery in the US. This is indicated in the fact that several products from brands, including Haruharu, Laneige, Medicube, and Mamonde, featured in the refreshed storefront are “US Amazon exclusives,” giving the retailer first access to launches rather than positioning it as another distribution point once products are already established.

That matters in a market where exclusivity has long been one of the tools Sephora and Ulta Beauty use to differentiate their assortments and give consumers a reason to shop with them specifically. Amazon's development of its own pipeline

of exclusive K-beauty launches brings an element of that specialty retail playbook to a platform built around scale, convenience, and fast fulfillment.

Amazon's K-beauty push did not emerge overnight. Years of building its assortment and marketplace infrastructure since the launch of K-beauty on Amazon in 2025 meant the retailer was already primed when K-beauty entered its current 2.0 growth phase. What has changed is the caliber of launches now coming to the platform."We're seeing exclusive launches of Amorepacific brands like Mamonde going direct from Korea to Amazon," Kuykendall said.

She argues that Amazon can leverage its existing relationships with Korean beauty companies to negotiate greater access, trading exposure for established brands and products for launches that have yet to reach the US market. "That's smart of them to give themselves that ability to make a deal."

"Sephora and Ulta [Beauty] are also making exclusivity deals, so everyone's moving forward at probably an equal pace," Kuykendall said. "The difference is Amazon doesn't have to consider store placement the way they do, which raises the question of whether that lets Amazon move faster."

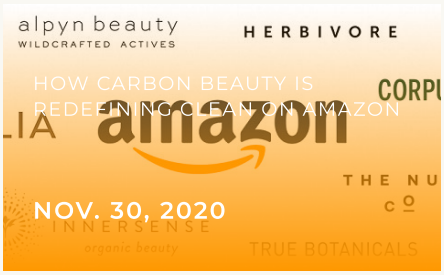
A New Route into the US Market

Korean brands have already disrupted the traditional US beauty distribution sequence. Rather than building around exclusivity with a single specialty retailer, many of the category's fastest-scaling brands have pursued broad distribution across Amazon, Sephora, Ulta Beauty, and other channels simultaneously. For emerging brands, Amazon adds another advantage: the ability to enter digitally, build demand, and accumulate reviews without securing limited physical shelf space.

Kuykendall notes that this reverses the pre-pandemic dynamic between stores and Amazon, when consumers typically discovered products in stores and used Amazon primarily for replenishment. Amazon is not replacing Sephora or Ulta Beauty; physical stores still offer testing, services, human expertise, and an experiential environment that a digital marketplace cannot replicate. Instead, the distinction between what each retailer offers within the beauty journey is becoming less defined.

For K-beauty brands, the route to scale in the US no longer runs from social virality to specialty retail and, eventually, Amazon replenishment. By combining curation and education with exclusives, conversion, and fulfillment, Amazon is making a case for inserting itself much earlier in that journey and potentially keeping consumers within the ecosystem from discovery all the way through repeat purchase.

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