

Amazon US Mass vs Premium Beauty

May 2026

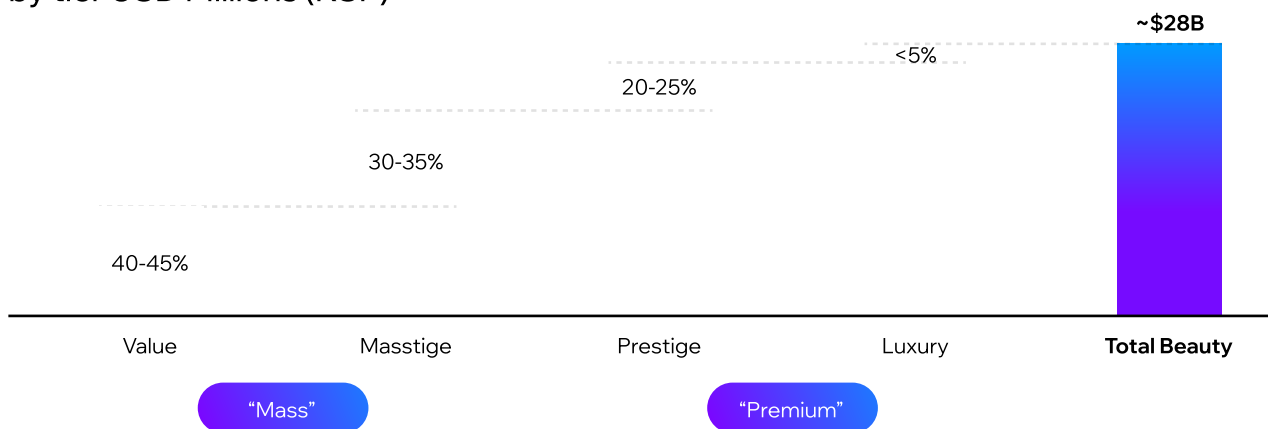
On Amazon, Beauty GMV is concentrated in value & masstige tiers

Beauty on Amazon can be segmented into 4 tiers: Value, Masstige, Prestige, and Luxury

1. Value	ASP generally <\$18 (varies by segment)	<ul style="list-style-type: none"> • Accessible, price-led positioning • Competes on affordability and broad reach
2. Masstige	ASP generally \$18-\$40 (varies by segment)	<ul style="list-style-type: none"> • “Affordable prestige” positioning • Differentiated claims (e.g., derm-backed, transparency)
3. Prestige	ASP generally \$40-\$100 (varies by segment)	<ul style="list-style-type: none"> • Prestige-led brand positioning • Strong equity, differentiated claims, channel strategy
4. Luxury	ASP generally \$100+ (varies by segment)	<ul style="list-style-type: none"> • Explicit luxury positioning (heritage, design, exclusivity) • Price reinforces status and brand authority

1. Includes skincare, haircare, cosmetics, fragrance, personal care, accessories, etc.;
 2. Represents 80% of Beauty GMV on Amazon, excludes long-tail; Source: Pattern

Amazon US Beauty¹ Sales² Share 2025, by tier USD Millions (RSP)



Mass skincare leads search volume; cosmetics branded search grows fastest across segments

Non-Exhaustive

Amazon US Beauty Sales, by segment,
2024-25 USD Millions (RSP)

Amazon US Beauty Sales Share 2025, by tier USD Millions (RSP)



Key Insights:

- Skincare is largest, and fastest growing segment at \$10B+ in 2025, driven in part by K-beauty surge (e.g., Medicube)
- 'Masstige' positioned makeup brands are surging, while premium slightly declines

