

EchoTik

TikTok analysis tool

Southeast Asia Beauty & Personal Care Category Market Report

TikTok Shop Market Report: SEA (2024-2025)



www.echotik.ai

Product Selection Influencer Discovery Find TikTok Shop View The Data



EchoTik's
official website



EchoTik's
official account

Scope of statistical data: Jul 2024- Jun 2025

NOTICES

Data Notice

1. Statistical Period: July 2024 - June 2025

2. Research Scope:

Analyzing TikTok Shop E-commerce Data from Short Videos and Livestreams in Key Markets (TH, PH, VN, ID) with Focus on Beauty & Personal Care Category

3. Data Source:

Data Source: Non-exhaustive, anonymized data from EchoTik (third-party TikTok analytics platform).

4. Disclaimer:

Disclaimer: Findings are reference only due to inherent data limitations.

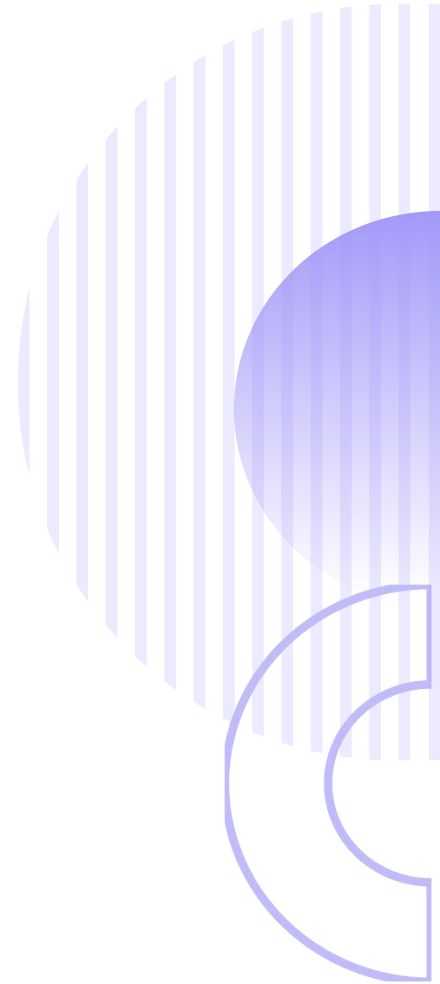
Copyright Notice

Unless specified, all content (images, tables, text) is copyrighted © EchoTik. Data sources include but are not limited to public information and market research.

Any use must comply with applicable laws and third-party rights. Reproduction, quoting, or publication requires prior written consent from EchoTik. Unauthorized modifications are prohibited.

This report originates from EchoTik. Violators will bear legal liability.

For full data: <https://echotik.ai>





SEA market

**Annual Performance and Trend Analysis:
Beauty & Personal Care Category**



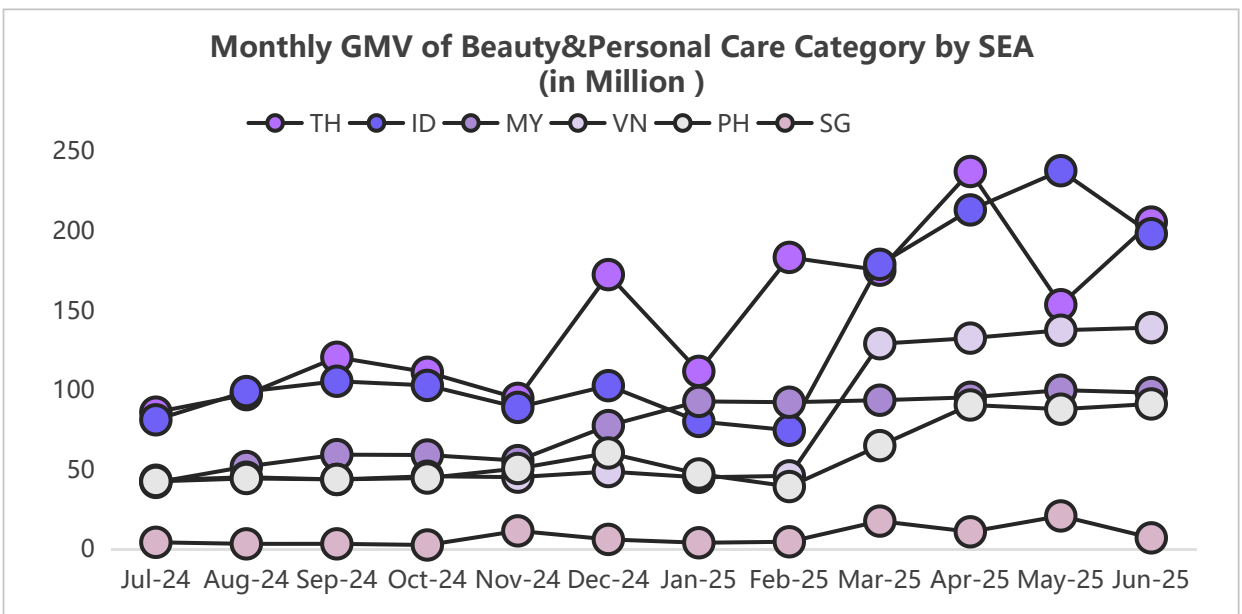
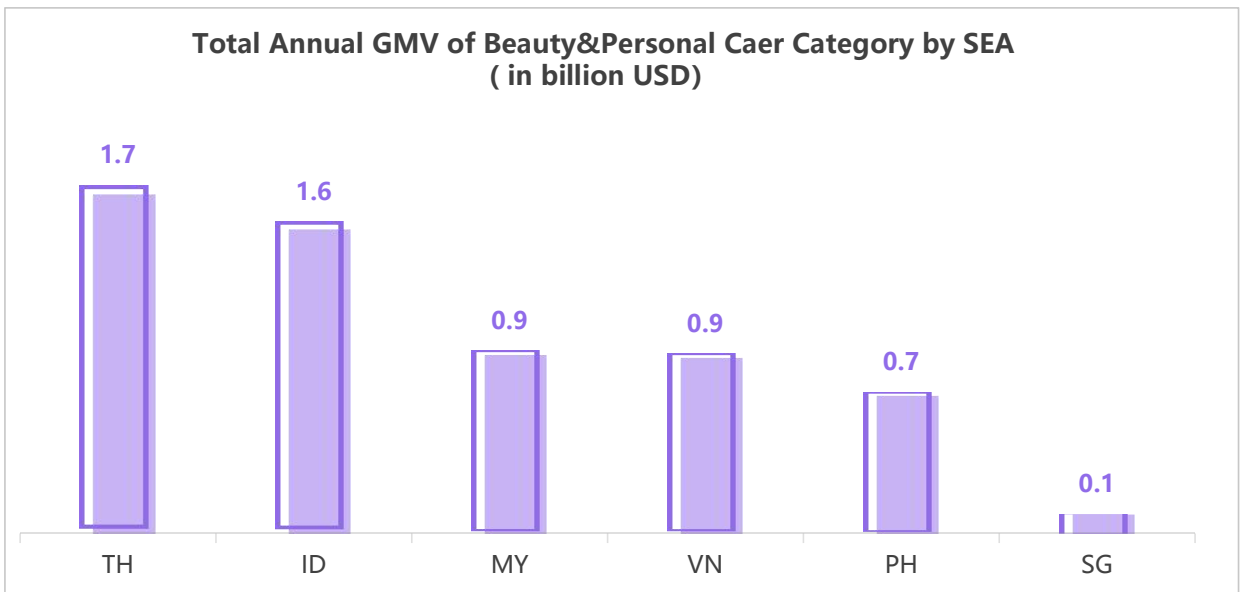
CHAPTER ONE

SEA market-Beauty& Personal Care

Total GMV Hits \$5.9B

Th and ID Lead Southeast Asian Market

- As a pillar category in Southeast Asia, beauty & personal care leverages its large user base and strong social attributes to maintain a clear scale advantage and robust growth in 2025. Over the past year, regional GMV remained strong, with Thailand leading at over \$1.7 billion, followed closely by Malaysia & Indonesia at nearly \$1.6 billion.
- Monthly growth reflects country-specific patterns, fluctuating with promotional events. Thailand recorded a double sales peak in April, with monthly GMV approaching \$200 million. Indonesia, the Philippines, and Vietnam show similar growth trends, consistently ranking as the top category across sites.





TH Market

**Annual Performance and Trend Analysis:
Beauty & Personal Care Category**

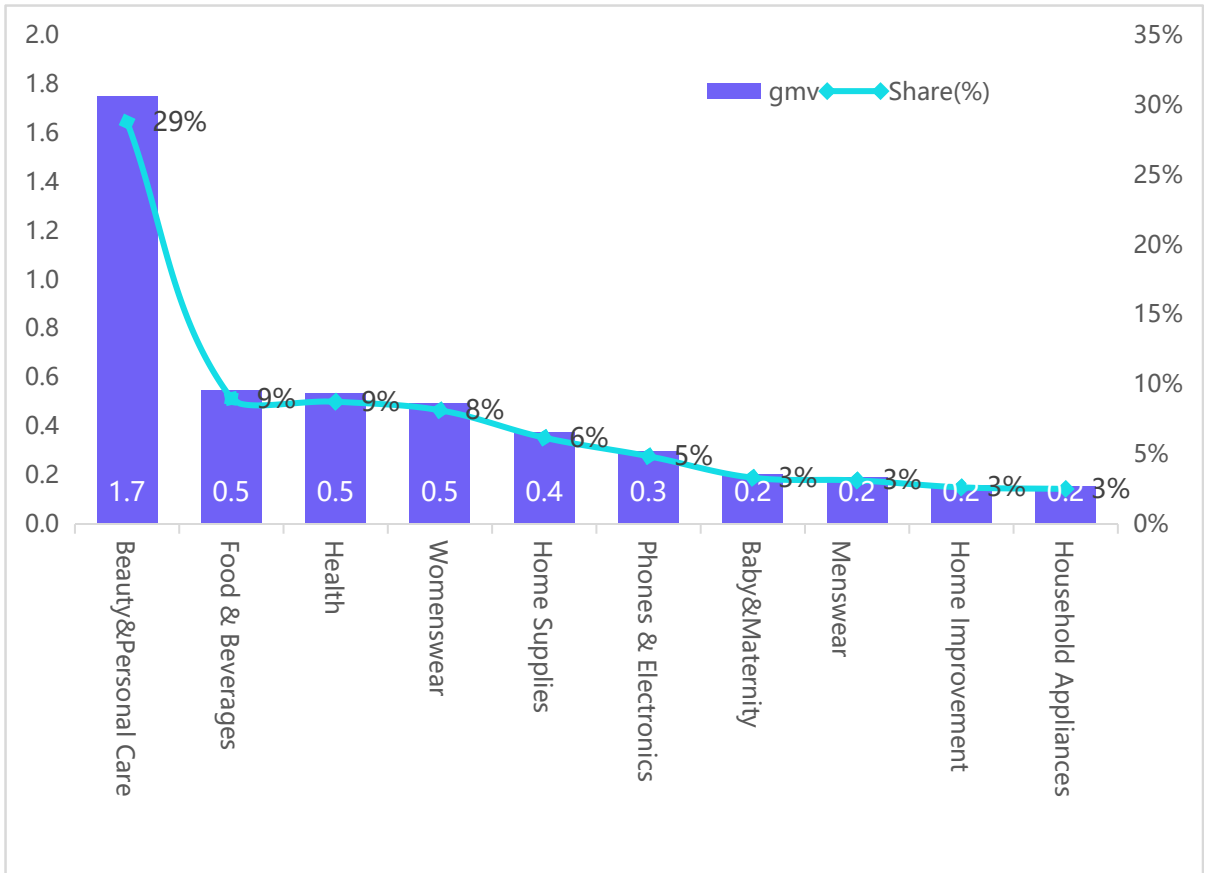


2 CHAPTER TWO

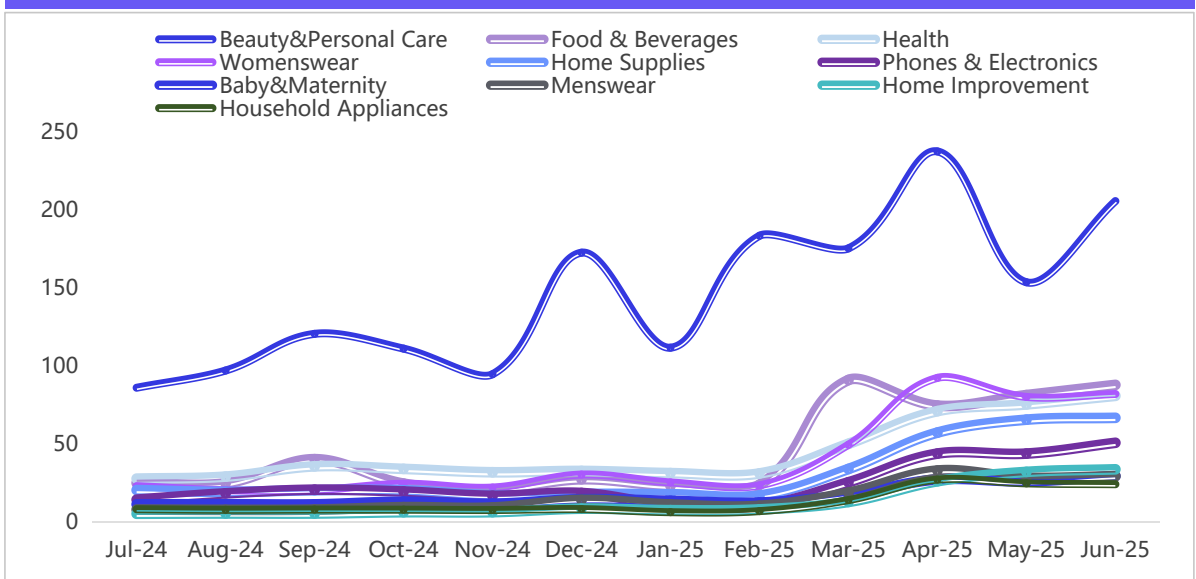
TH Market-Top 10 Categories Performance

High GMV Concentration in Top 10;
Beauty & Personal Care Leads at 36%

Top 10 GMV in TH Market: Past 12 Months (in billions)



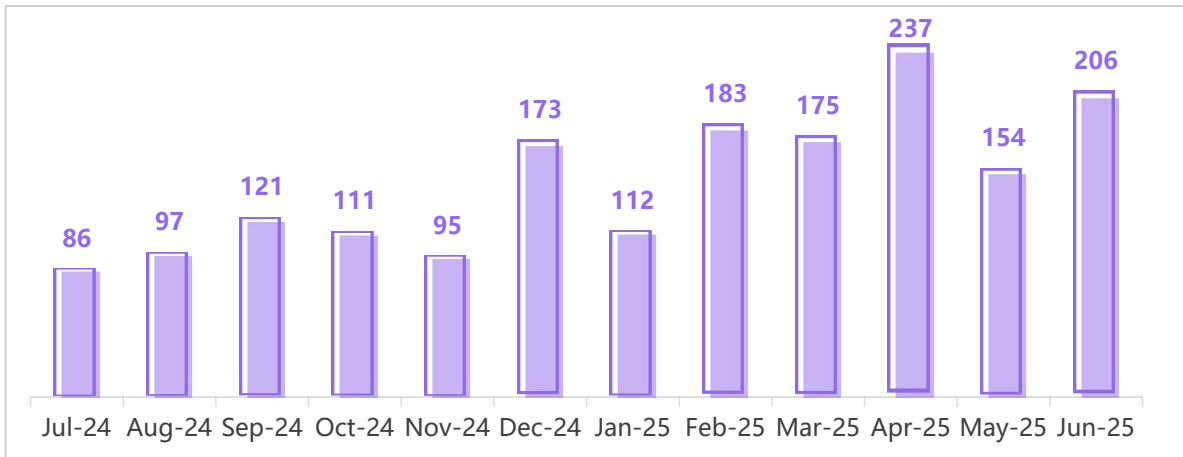
Monthly Performance of Top 10 Categories: TH Market (Past 12 Months)



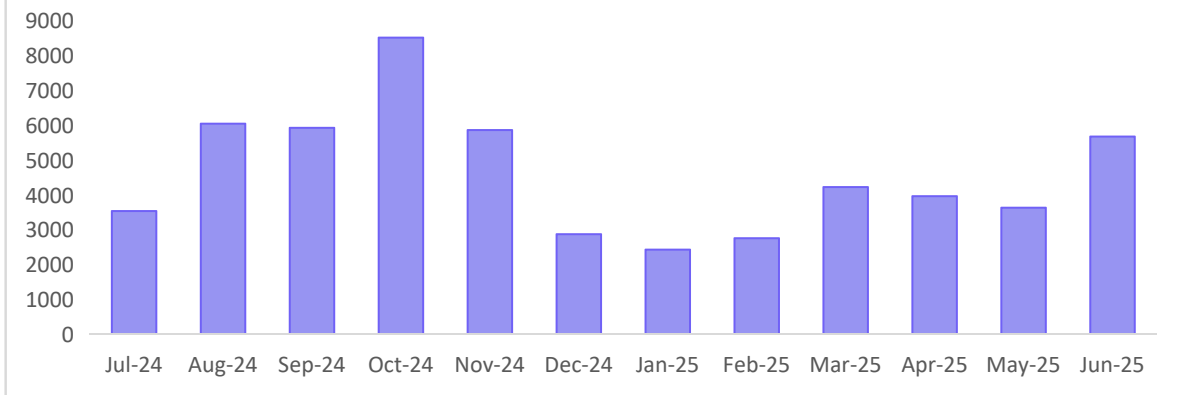
TH Market-Beauty&Personal Care Marketing Strategy

Beauty & Personal Care GMV Tops \$200M Video Leads&Influencer Growth Steady

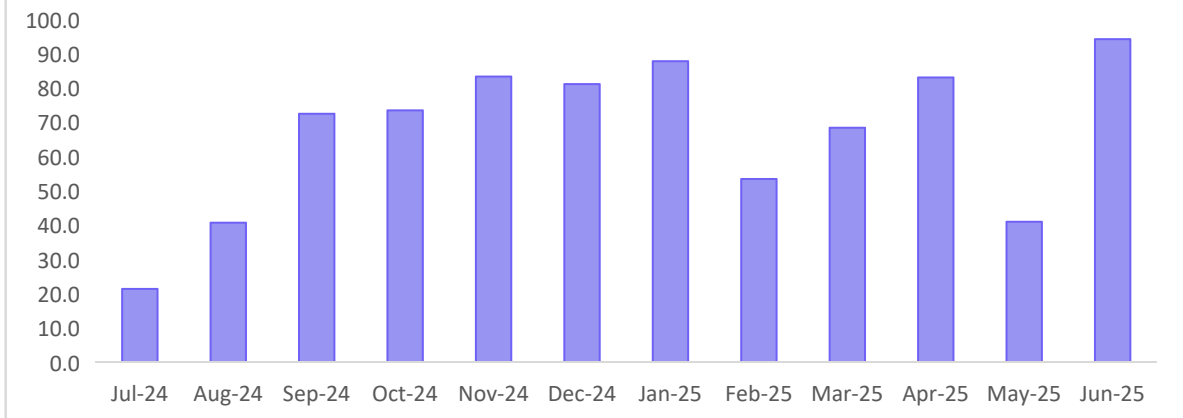
Beauty&Personal Care GMV TH Market (Past 12 Months | in Millions)



YoY Influencer Marketing Growth: TH Beauty & Personal Care Category



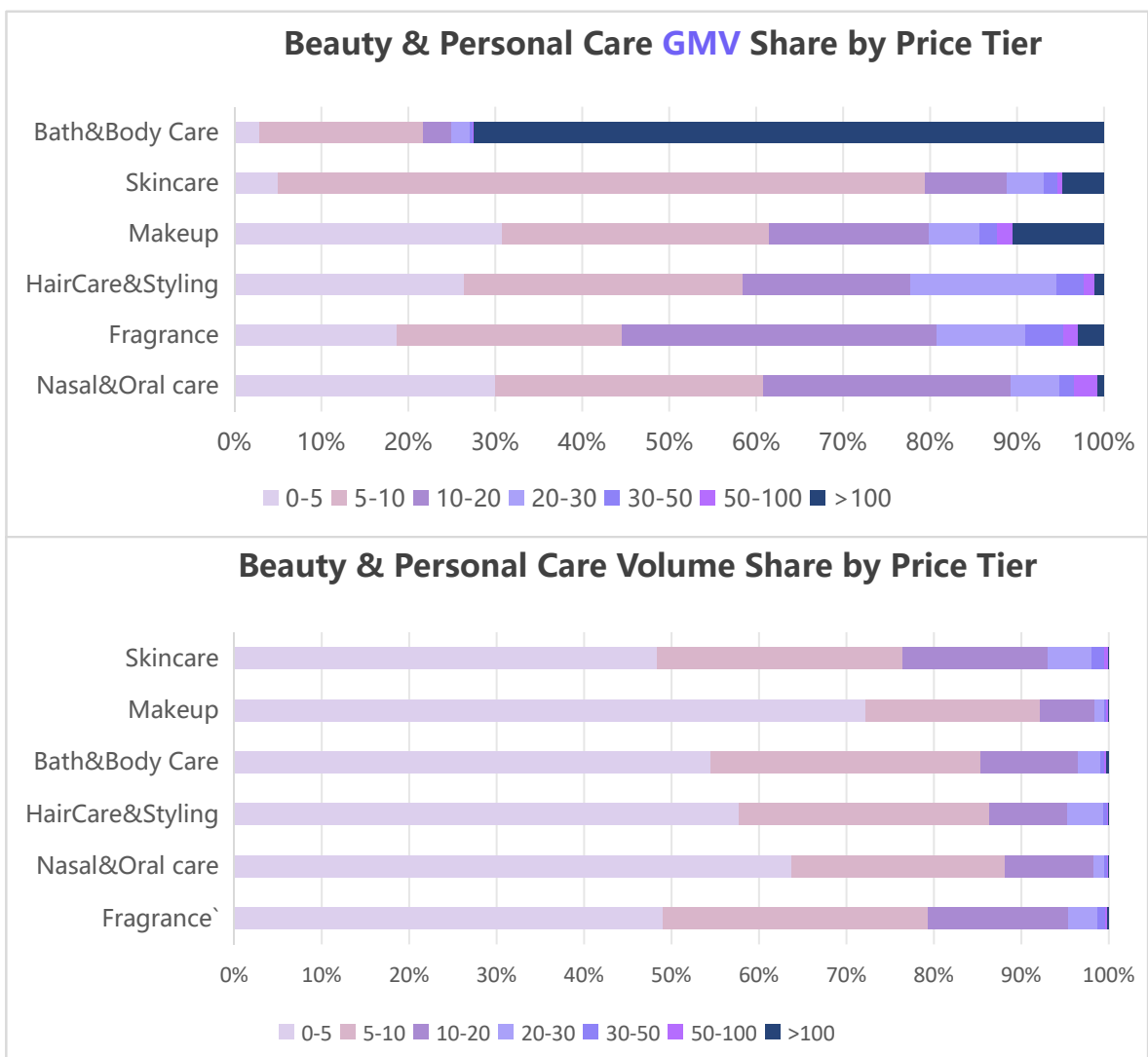
YoY Video Marketing Growth: TH Beauty & Personal Care Category



TH Market-Beauty&Personal Care

Sub-categories:GMV Contribution Led by \$10 Tier; Transaction Volume Concentrated Under \$5

- ◆ in Thailand's beauty & personal care market, GMV is highly concentrated: bath & body care, skincare, and cosmetics collectively contributed over \$3.8 billion, accounting for 93% of the Top 10 categories. Price is dominated by the under \$10 segment across most sub-categories, with skincare reaching nearly 80%. However, bath & body care captures 70% of the >\$100 premium tier, representing a potential niche for new entrants.
- ◆ In terms of volume, skincare, cosmetics, and bath & body care reached 120 million units sold. The \$0–5 range is most popular, with over 90% of cosmetics sales under \$10, highlighting a clear budget-friendly trend.



TH Market-Beauty&Personal Care

Thailand Beauty SMBs Oligopoly Structure \$150K Entry& \$10-30 Price Focus

Clear Oligopoly Among Top 10 SMBs

- Tier structure is clear: Tier 1 (No.1-2) stores achieve \$110-120M sales, over 50 times that of No.3, showing strong moat effect and stable leadership;
- Stores ranked 4th-10th range from \$150K-\$500K, with narrow gaps allowing potential overtaking.

Pronounced Differentiation in Product and Pricing Strategies

- Sales volume correlates closely with GMV, peaking at over 1.6M units;
- Product strategies are differentiated, mostly expanding SKU breadth;
- 60% of Top 10 stores' average price is concentrated at \$10-30, with some exceeding \$250.

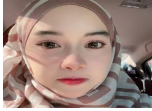
Past 12-Month Sales & ASP for Top 10 Beauty&Personal care Sellers

Shop	GMV (\$)	Sales Volume(K)	Product Quantity	Price (\$)	Peak Sales Timing
บริษัท สกิน	1100-1200M	207	7	12.33	Mar-2025
Surefreshskinofficial	1100-1200M	134	80	25.24	Feb-2025
Twhite shop	1900-2000k	260	50	13.35	Dec-20205
Spoi your skkn	1500-1600k	13	5	17.61	Mar-2025
เจ้า ข อง แบ ร น ด์ ค า ร ิ ส ก ิ น 2	400-500K	28	8	7.04	Apr-2025
เจ๊ ก ั น ย ์ ด อ น เ ม ี อ ง	300-400K	8	77	5.20	Mar-2025
ร ั ว น แ ก ้ว ส ิ น ค ั ว ท ุ ก ต ั ว ข อ ง แ ท ้	200-300K	7	73	111.94	Sep-2024
WINDSCENTOFFICIAL	150-200K	180	139	259.58	Mar-2025
Simplus Official Store	150-200K	1286	694	43.35	Sep-2024
drpongshop	150-200K	1639	322	15.97	Jun-2024

TH Market-Beauty&Personal Care

Brand-Owned Store Tops Sales Rankings

Leveraging Brand Momentum and Hero Products



TOP1: บริษัท ท ค า ริ ส กิ น

บริษัท ท ค า ริ ส กิ น is a Thai functional skincare brand focused on acne treatment and post-acne repair. It is known for localized R&D (adapted to humid climate and local skin types), high cost-effectiveness, and strong social media marketing. The store primarily sells beauty, personal care, and body care products, with 6 in-stock items priced from \$3.06 to \$33.09, averaging \$12.33.

Sales Performance

Sales channels



Creator	Followers	Likes	Product Category	Sales	GMV	Related Videos	Related Lives
karimabeenaaa	333.8K	12.6M	Beauty & Personal Care	115.8K	\$184.59M	Video 482	Live 4
mimiegamu48	22.2K	231.0K	Beauty & Personal Care	4.2K	\$30.03M	Video 125	Live 0
jaja_kk	126.4K	1.7M	Beauty & Personal Care	2.1K	\$29.73M	Video 0	Live 5
yfarmareview	4.3K	20.4K	Luggage & Bags	1.3K	\$19.54M	Video 2	Live 1
plaikanokrot	3.1K	12.8K	Beauty & Personal Care	800	\$17.83M	Video 0	Live 0

Per Echotik's channel forecasts, 68% of store sales come from brand-driven direct channels (website/storefront), while 32% derive from influencer marketing, primarily mid-tier influencers in niche categories who drive high conversions via engaged followers. Notably, @karimabeenaaa (320K followers) alone reached \$180M GMV through frequent livestreams and videos.

Top 3 Selling Products



Cariskin
Price:\$5.04
Sales:449.5K
Influencers: 3.1K



Ginseng Kari Cream
Price:\$5.81
Sales:5.1K
Influencers: 38



TomatoToner soap
Price:\$12.37
Sales:1.8K
Influencers: 34

TH Market-Beauty&Personal Care

August 2025 Top 5 Beauty & Personal Care Basic Skincare & Body Care Dominate Sales



Vitamin Cream

Shop:YerpallThailand
 Price:\$32.06
 Sales:97.6K
 GMV: \$3.06M
 Influencers:1.4K
 Videos:5.1K



Marine Mask

Shop:Layleena
 Price:\$21.02
 Sales:1.3K
 GMV: \$2.79M
 Influencers:7
 Videos:14



Body Soap

Shop:THIPSทีพีเอส
 Price:\$18.23
 Sales:596.7K
 GMV: \$1.83M
 Influencers:5.4
 Videos:2.2K



GLACE DAILY TONER PADS

Shop:LA GLACE
 Price:\$24.12
 Sales:74.7K
 GMV: \$1.45M
 Influencers:532
 Videos:1.0K

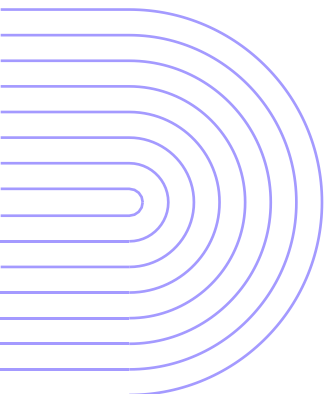


Strawberry Serum

Shop:YerpallThailand
 Price:\$45.14
 Sales:365.8K
 GMV: \$1.21M
 Influencers:557
 Videos:2.0K

ID market

Annual Performance and Trend Analysis: Beauty & Personal Care Category



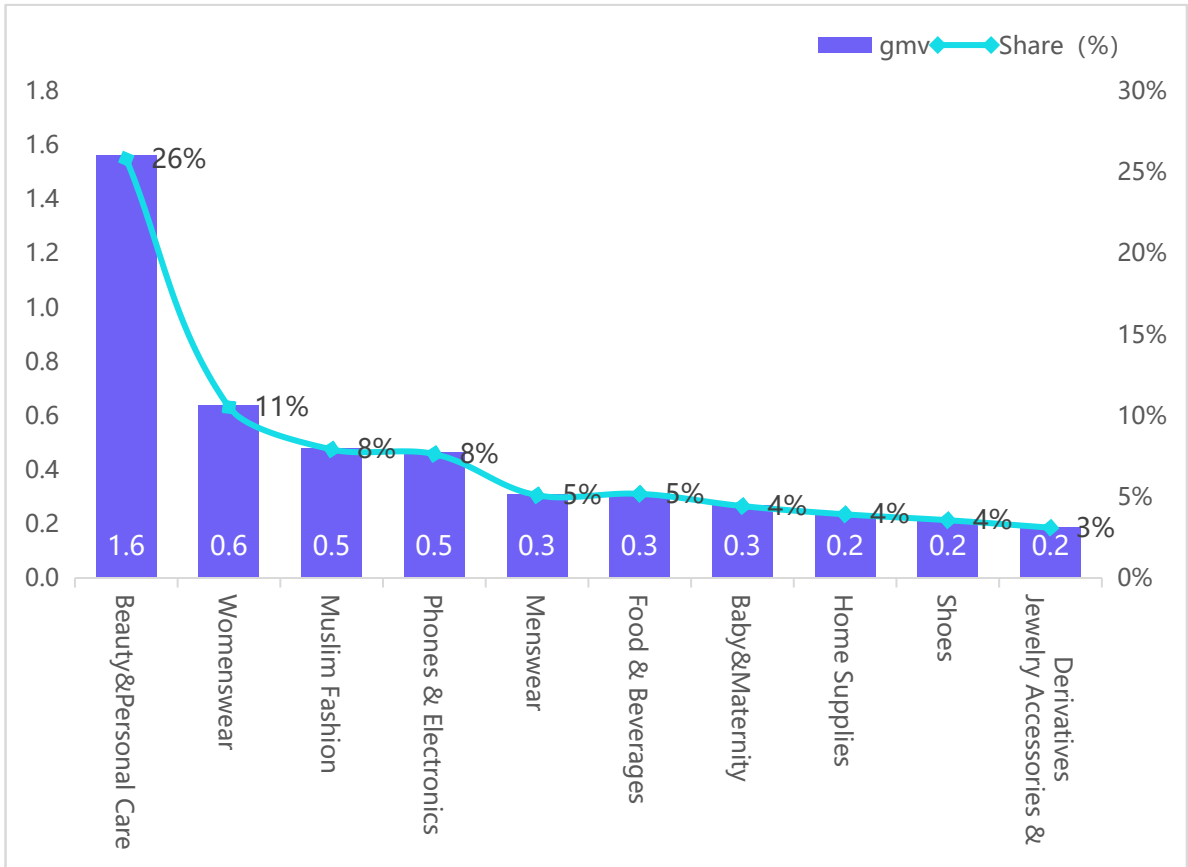
3

CHAPTER THREE

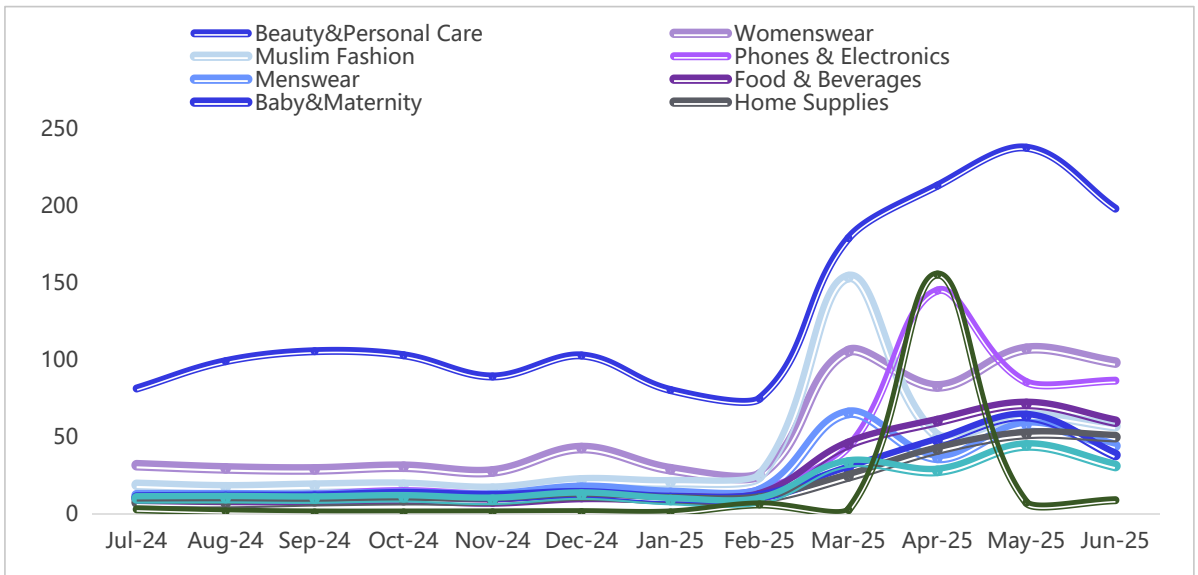
ID Market-Top 10 Categories Performance

High Top 10 Concentration with Beauty & Personal Care Leading the Pack

Top 10 GMV in ID Market Past 12 Months (in Billions)



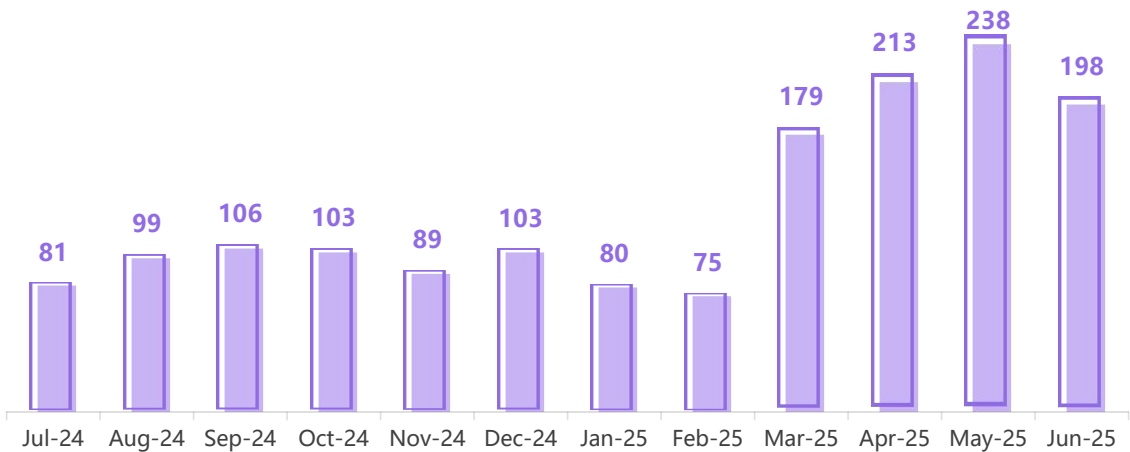
Monthly Performance of Top 10 Categories: ID Market (Past 12 Months)



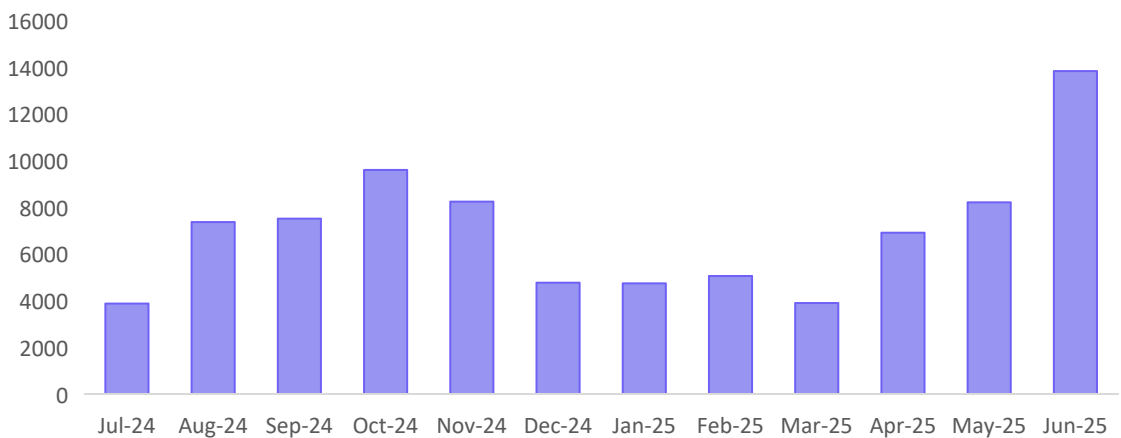
ID Market-Beauty&Personal Care Marketing Strategy

GMV Nears \$240M Amid Seasonal Swings, Fueled by Volatile Influencer & Video Channels

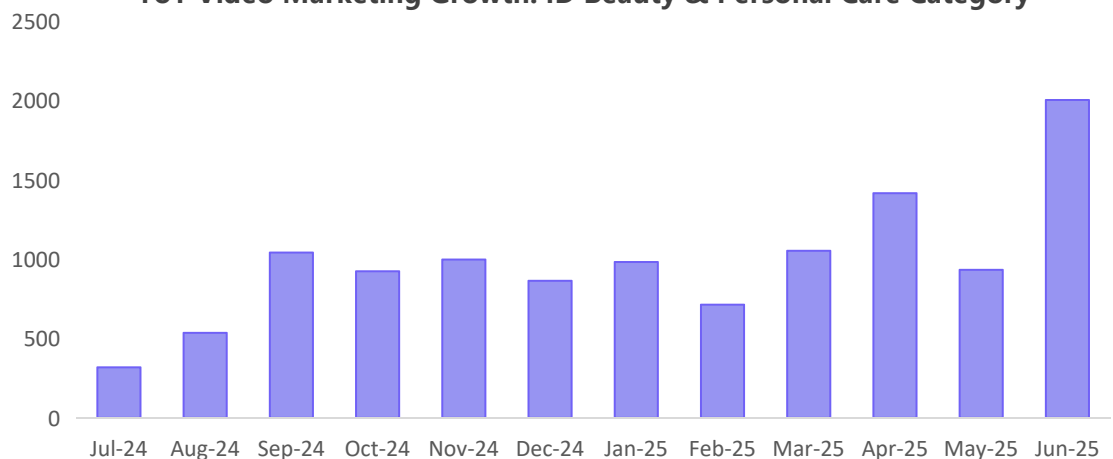
Beauty&Personal Care GMV ID Market (Past 12 Months | in Millions)



YoY Influencer Marketing Growth: ID Beauty & Personal Care Category



YoY Video Marketing Growth: ID Beauty & Personal Care Category

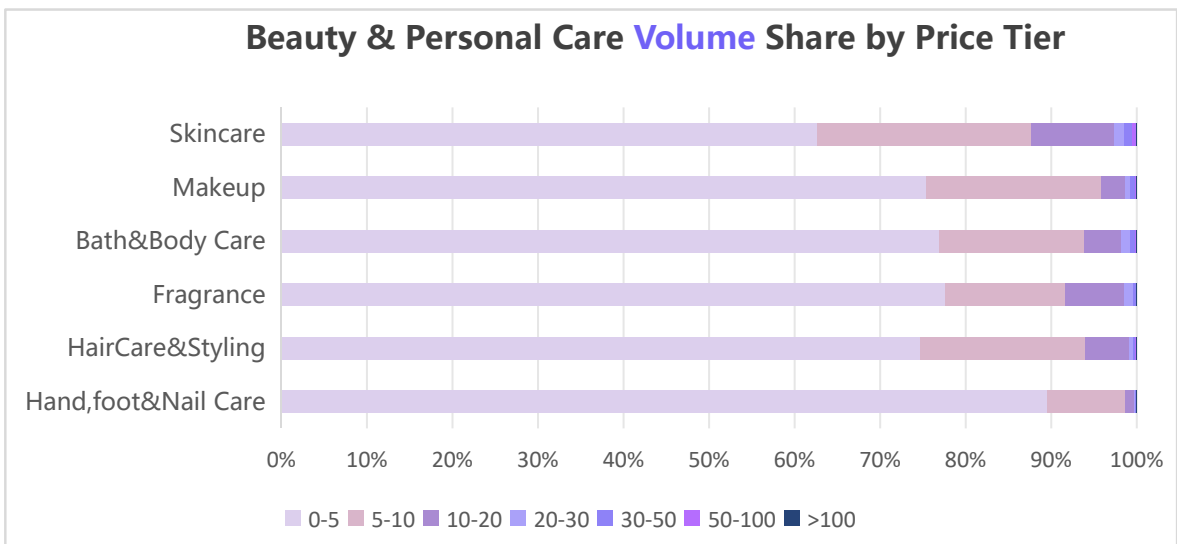
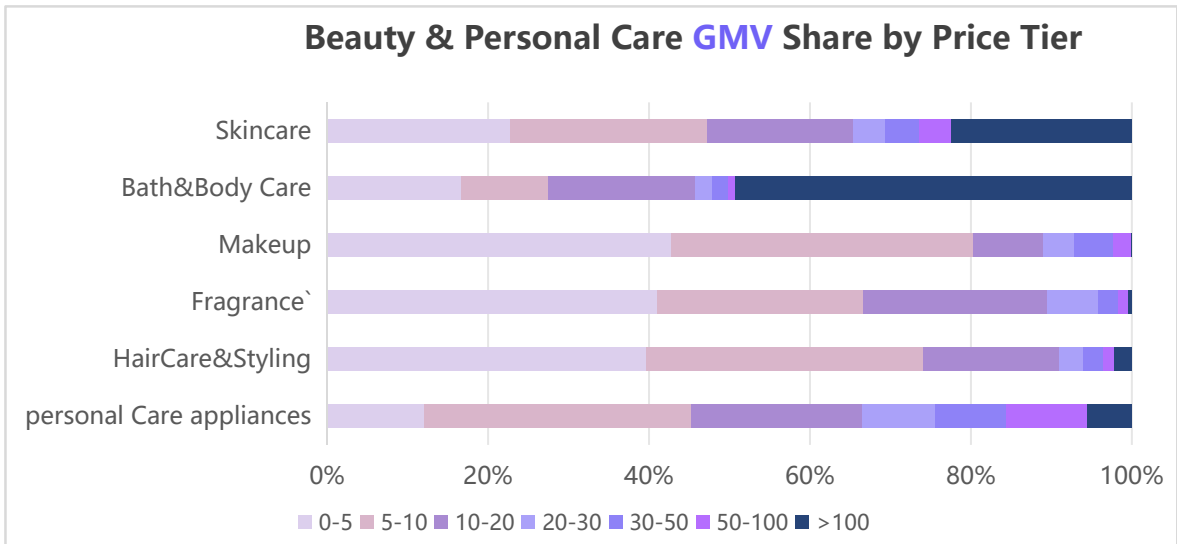


ID Market-Beauty&Personal Care

GMV Concentrated in \$0-10 Tier

Transaction Volume Focused Under \$5

- ◆ In ID's market, the top 3 categories—skincare, bath & body care, and cosmetics—collectively generated nearly \$1.4 billion, accounting for 83% of the Top 10 GMV. Price concentration remains high, led by low-price segments. However, basic bath & body care products in the >\$50 range contribute nearly 50% of GMV, representing a premium segment in a generally low-price market worthy of focus.
- ◆ In volume terms, skincare, cosmetics, and bath & body care reached approximately 200 million units sold. The \$0–5 range dominated the top categories, with hand, foot, and nail care exceeding 90% in low-price contribution, confirming budget-driven volume as the market norm.



ID Market-Beauty&Personal Care

Stable Top 10 Structure with \$150K Threshold; Price Differentiation in \$20-50 Range

Top 10 SMBs Form Oligopoly

- The tier structure is clear with solid leadership. The top store achieves \$5-6 million in sales, ten times that of the second, demonstrating a strong lead and a solid moat.
- Stores ranked 2nd to 10th have sales between \$150,000 and \$600,000, with minor gaps indicating high potential for ranking shifts.

Wide Price Gaps & Broad Assortment Strategy

- Sales volume is proportional to GMV, peaking at nearly 10 million units.
- 90% of Top 10 stores employ a broad assortment strategy with over 100 products.
- Price points vary significantly, mainly concentrated in the \$20-50 range, while high-price stores achieve nearly \$150.

Past 12-Month Sales & ASP for Top 10 Beauty&Personal care Sellers

Shop	GMV (\$)	Sales Volume(K)	Product Quantity	Price (\$)	Peak Sales Timing
MAYDOOZAOFFICIAL.ID	5000-6000K	78	61	33.30	Mar-2025
glad2glow.indo	500-600K	9376	461	142.20	Mar-2025
skintific.indonesia	400-500K	4081	584	20.33	Dec-2024
Daviena Skincare Official	200-300K	1059	292	82.42	Jun-2024
Bella Shofie Dabe	200-300K	943	585	84.39	Sep-2024
npureofficial	200-300K	1877	267	30.85	Apr-2024
SSSKIN ID	150-200K	741	269	32.77	Aug-2024
wardahbeautyid	150-200K	5147	769	9.56	Apr-2024
Maybelline Indonesia	150-200K	1733	216	15.77	May-2025
SKIN1004	150-200K	1685	330	35.55	Mar-2025

ID Market-Beauty&Personal Care Shop

Brand-Owned Store Tops Rankings via Hero Products and Rapid Trend Response



TOP1: MAYDOOZAOFFICIAL.ID

MAYDOOZAOFFICIAL.ID is a trendy and affordable color cosmetics brand targeting Indonesian Gen Z and young millennials, empowering self-expression through makeup with its lively, bold, and confident identity. Its product line focuses on face color cosmetics, emphasizing fast-updating color products like lip items and blushes, with 61 SKUs at an average price of \$11.25.

Sales Performance

Sales channels



Creator	Followers	Likes	Product Category	Sales	GMV	Related Videos	Related Lives
mayacado_	285.0K	8.3M	Beauty & Personal Care	277	\$9.67M	Video 9	Live 0
maydoza_official.id	37.1K	62.9K	Beauty & Personal Care	1.2K	\$6.73M	Video 86	Live 1
adekkechill_	10.0K	212.2K	Beauty & Personal Care	1.0K	\$2.05M	Video 22	Live 0
kentangrebus_970	7.1K	1.1M	Beauty & Personal Care	73	\$1.72M	Video 3	Live 0

The brand follows a typical DTC model driven by influencer content creating viral hits. Sales are primarily through highly interactive, easy-to-follow video content (e.g., makeup tutorials) driving traffic to its official website or storefronts. According to Echotik, 99% of its GMV comes from direct channels, with minimal contribution from influencer reselling.

Top 3 Selling Products



BodySerum
 Prices\$27.5
 Sales:12.4K
 Influencer: 80



SerumBooster
 Prices\$17.74
 Sales:9.8K
 Influencer: 60



Scrub + Red Serum
 Prices\$5.83
 Sales:9.8K
 Influencer: 1

ID Market-Beauty&Personal Care

August 2025 Top 5 Beauty & Personal Care Core Care & Cosmetics Dominate Sales



Herbal Gel - Comfortable

Shop:Kreain Nature
Official.id
Prices: \$9.32
Sales:6.1K
GMV: \$1.01M
Influencers:177
Videos: 563



NPURE Cotton

Shop:npureofficial
Prices: \$60.66
Sales:290.0K
GMV: \$882.55K
Influencers:0
Videos: 0



Matte Lipstick

Shop:Maybelline
Indonesia
Prices: \$5.82
Sales:2.4M
GMV: \$777.12K
Influencers:1.7K
Videos: 7.3K



Brightens Lips

Shop:Hanasu
Prices: \$4.60
Sales:21.7K
GMV: \$771.74K
Influencers:1.6K
Videos: 5.5K



Yogurt Peel Off Mask

Shop:FAV Beauty
Prices: \$6.54
Sales:360.8K
GMV: \$739.97K
Influencers:1.1K
Videos: 3.5K



MY Market

**Annual Performance and Trend Analysis:
Beauty & Personal Care Category**

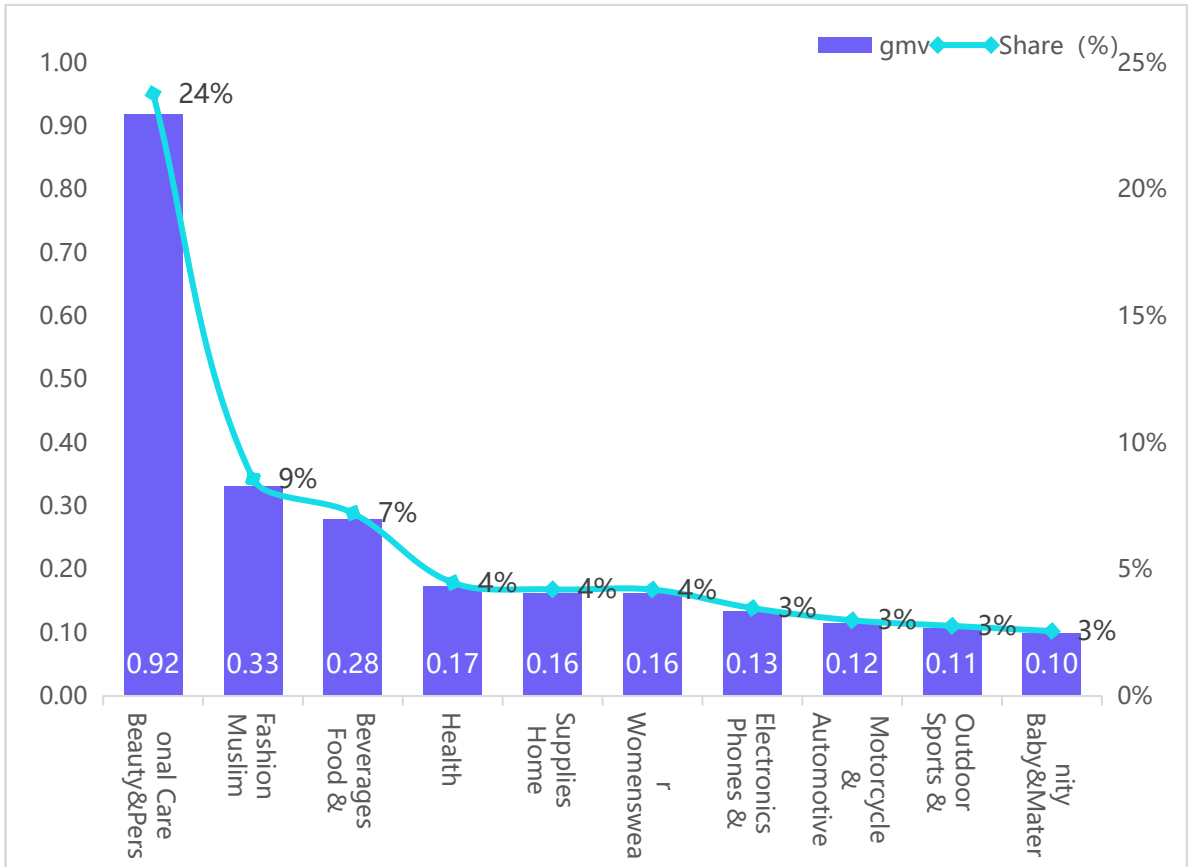


CHAPTER FOUR

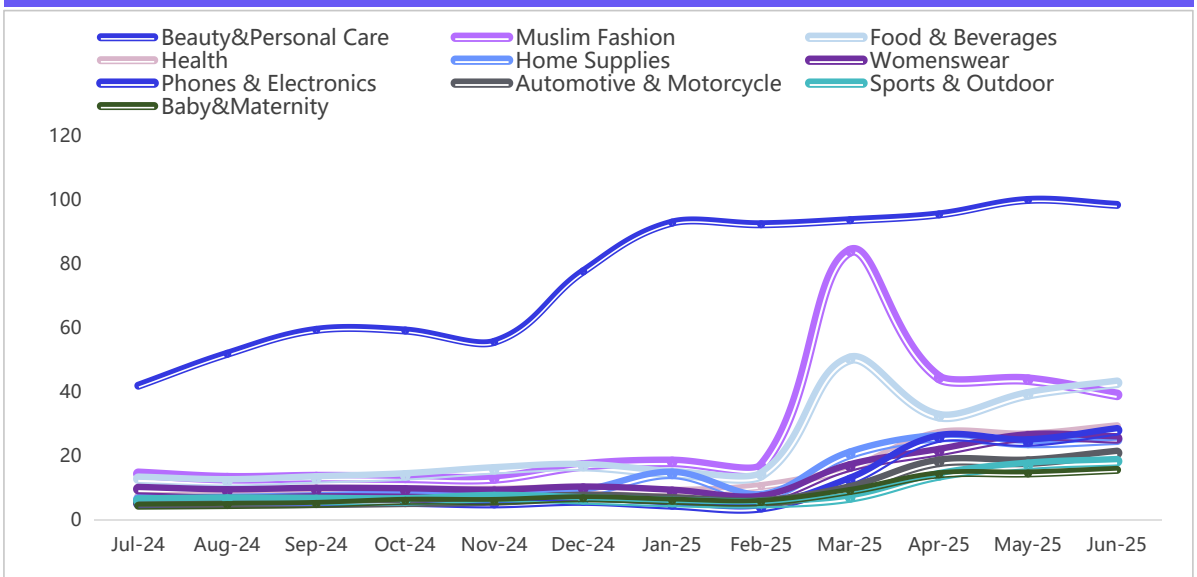
MY Market-Top 10 Categories Performance

High Top 10 Category Concentration with Beauty & Personal Care Showing Dominant Lead

Top 10 GMV in MY Market Past 12 Months (in Billions)



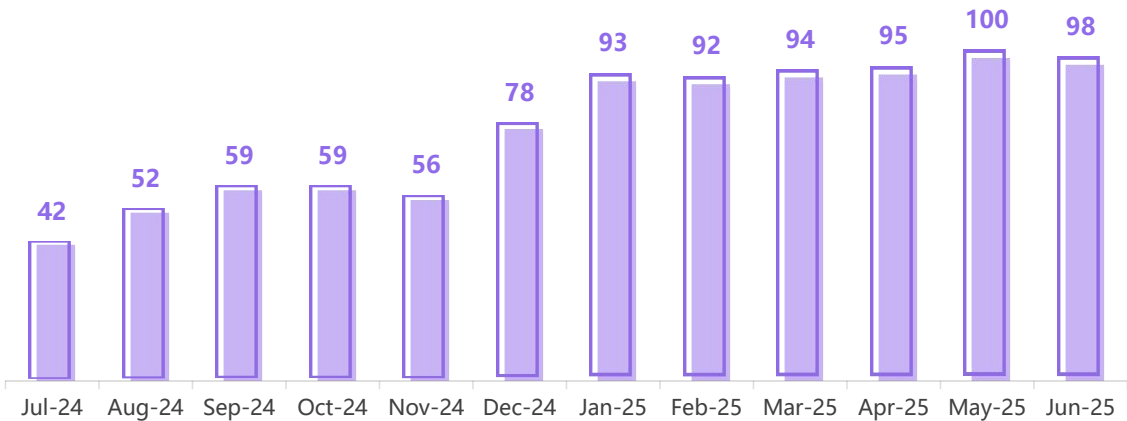
Monthly Performance of Top 10 Categories: MY Market (Past 12 Months) In millions



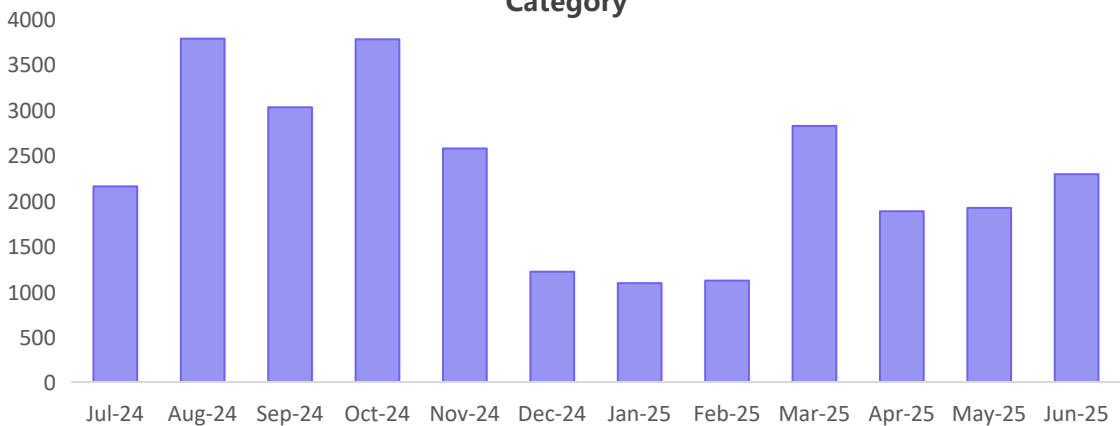
MY Market-Beauty&Personal Care Marketing Strategy

Core Categories \$100M Monthly GMV Peak with Intensifying Video-Driven Growth

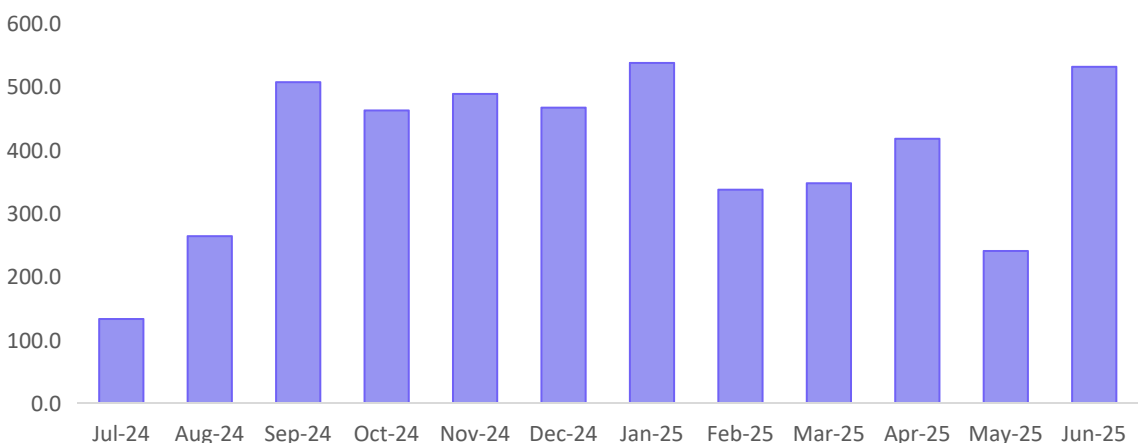
Beauty&Personal Care GMV MY Market (Past 12 Months | in Millions)



YoY Influencer Marketing Growth: MY Beauty & Personal Care Category



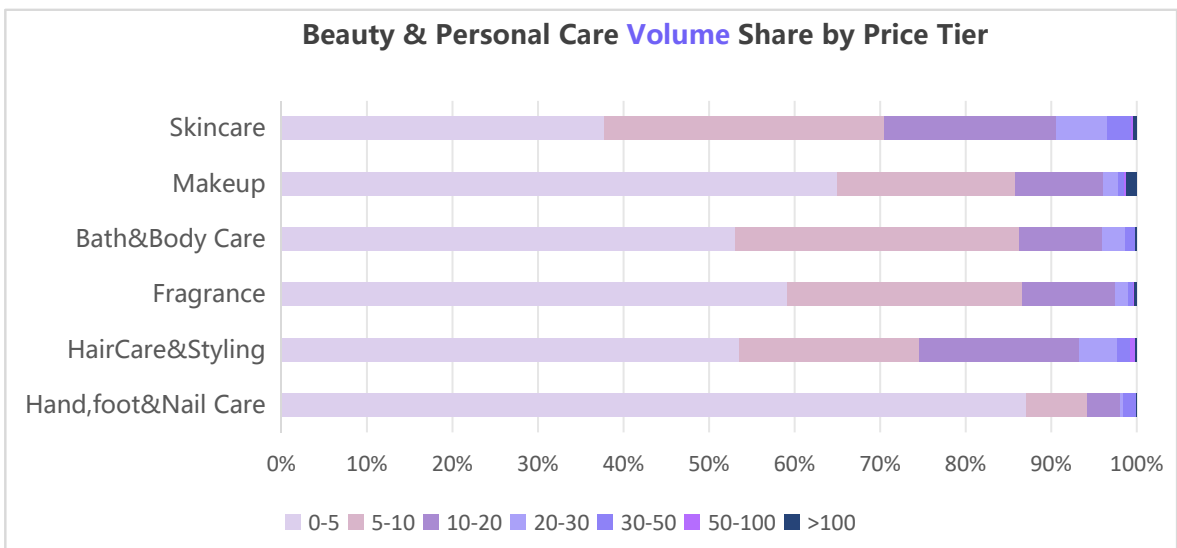
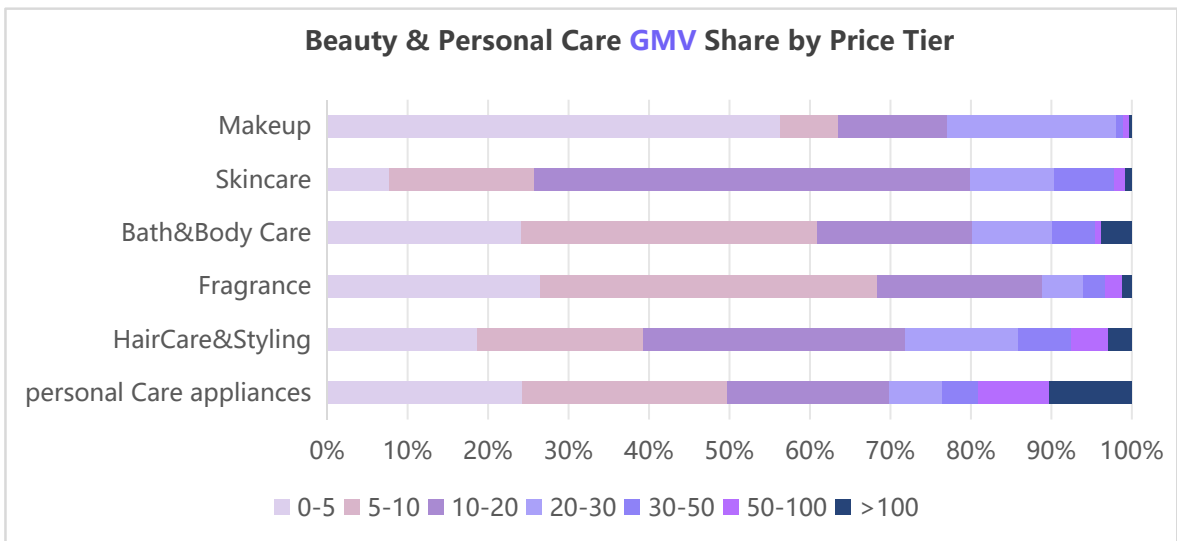
YoY Video Marketing Growth: MY Beauty & Personal Care Category



MY Market-Beauty&Personal Care

Sub-categories Balanced GMV & Volume Concentration in \$0-10 Tier

- ◆ In Malaysia's beauty & personal care market, the top 3 categories—cosmetics, skincare, and bath & body care—account for 73% of the Top 10 GMV. Price distribution is more balanced compared to other sites, with budget segments contained around 50%. Skincare contributes nearly 60% of GMV in the \$10–20 range, while beauty devices exceed 10% in the >\$100 tier, indicating a viable premium segment.
- ◆ For volume, skincare, cosmetics, and bath & body care sold over 60 million units, representing 65% of total. Products priced at \$0–5 were most popular, with hand, foot, and nail care exceeding 90%, underscoring the dominance of budget consumption.



MY Market-Beauty&Personal Care

Oligopoly with Entry Barrier \$8M Top 10 Threshold and Clear Low-Price Edge(Under \$30)

Top 10 SMBs Show Clear Oligopoly

- Store tier structure shows clear monopolistic advantage: the top store achieved \$300 million in sales, over three times that of the second, reflecting a large Malaysian beauty & personal care market with strong concentration;
- Stores ranked 6th to 10th all report sales below \$20 million, with narrow gaps suggesting potential future ranking shifts

Concentrated Pricing & Focused Product Strategies

- In terms of sales volume: Top 10 stores record high volumes, peaking at over 2 million units;
- In terms of product count: Top 10 stores deploy both focused and broad assortment strategies, with half holding under 100 SKUs;
- In terms of average price: Top 10 stores show minimal price variation, with over 80% concentrated below \$30.

Past 12-Month Sales & ASP for Top 10 Beauty&Personal care Sellers

Shop	GMV (\$)	Sales Volume(K)	Product Quantity	Price (\$)	Peak Sales Timing
FAYCY BEAUTY MALAYSIA	0.29-0.3B	153	81	123.24	Mar-2025
DJTWISTER	79-80M	186	7	3.59	Mar-2025
Dnars Skincare Hq	41-42M	127	49	14.27	Jan-2025
SkintificMalaysia-SKT	25-26M	1751	360	23.91	Mar-2025
MAZAVILLE	20-21M	2180	24	9.61	Mar-2025
Cosfume HQ	16-17M	117	123	26.65	Jan-2025
Glad2GlowMalaysia	16-17M	1979	188	18.41	Jan-2025
GMEELAN.Malaysia	12-13M	910	208	13.72	Sep-2024
KYLIA HQ	8-9M	24	29	48.80	Mar-2025
BORONG MURAH KOSMETIK NAZ	8-9M	18	363	8.01	May-2025

MY Market-Beauty&Personal Care

Local Fashion Beauty Brand Tops Sales Rankings with Affordable Hero Products

FAYCY

TOP1: FAYCY BEAUTY MALAYSIA

Faycy Beauty is a budget-friendly gentle cosmetics brand targeting Malaysian Gen Z and young women, focusing on face color cosmetics and rapidly updated skincare. The store carries approximately 51 products priced between \$1.40-\$23.78, averaging \$406.99, and relies on affordable best-sellers to drive sales.

Sales Performance

Sales channels



Creator	Followers	Likes	Product Category	Sales	GMV	Related Videos	Related Lives
faycybeautyhq	423.2K	1.3M	Beauty & Personal Care	26.7K	RM881.16K	Video 212	Live 0
ellyemirza2	740.0K	28.2M	Beauty & Personal Care	2.5K	RM138.57K	Video 1	Live 0
ainsyaa0	5.1K	36.9K	Beauty & Personal Care	1.8K	RM105.44K	Video 18	Live 0
ain_soleh	144.6K	2.4M	Beauty & Personal Care	1.8K	RM81.72K	Video 25	Live 0
nurismanizan	51.3K	2.2M	Beauty & Personal Care	1.6K	RM72.04K	Video 28	Live 3

Faycy Beauty collaborates primarily with local micro-mid-tier influencers and KOCs, using tutorials, reviews, and ingredient education videos to drive traffic to its official website or storefront. According to Echotik, 99% of GMV comes from direct channels, with minimal contribution from influencer reselling.

Top 3 Selling Products



MEDIUM LIGHTY
Price: \$2.36
Sales: 41.1K
Influencer: 17



setting spray
Price: \$3.77
Sales: 31.6K
Influencer: 2



BODY MIST
Price: \$4.26
Sales: 28.6K
Influencer: 81

MY Market-Beauty&Personal Care

August 2025 Top 5 Beauty & Personal Care Core Makeup Products Dominate Sales



setting spray

Shop: FAYCY BEAUTY
MALAYSIA
Price: \$2.3
Sales: 310.3K
GMV: \$3.25M
Influencers: 7
Videos: 6



GLOWING & ANTI CRACK

Shop: FAYCY BEAUTY
MALAYSIA
Price: \$2.11
Sales: 161.2K
GMV: \$903.24K
Influencers: 1
Videos: 1



Hair Growth

Shop: Dr.Lan beauty -
MY
Price: \$481.99
Sales: 1.8K
GMV: \$607.99K
Influencers: 56
Videos: 86



SUNSCREEN

Shop: Rozyana
Roslan
Price: \$7.10
Sales: 9.8K
GMV: \$599.21K
Influencers: 119
Videos: 202



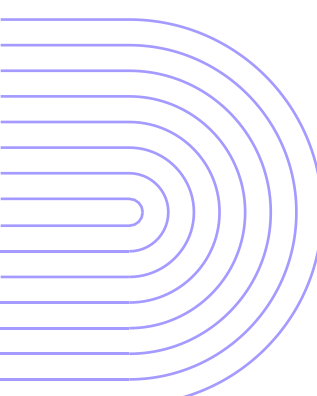
COSFUME KOMBO

Shop: MAZAVILLE
Price: \$1.18
Sales: 796.6K
GMV: \$508.23K
Influencers: 489
Videos: 1.1K



VN Market

Annual Performance and Trend Analysis: Beauty & Personal Care Category



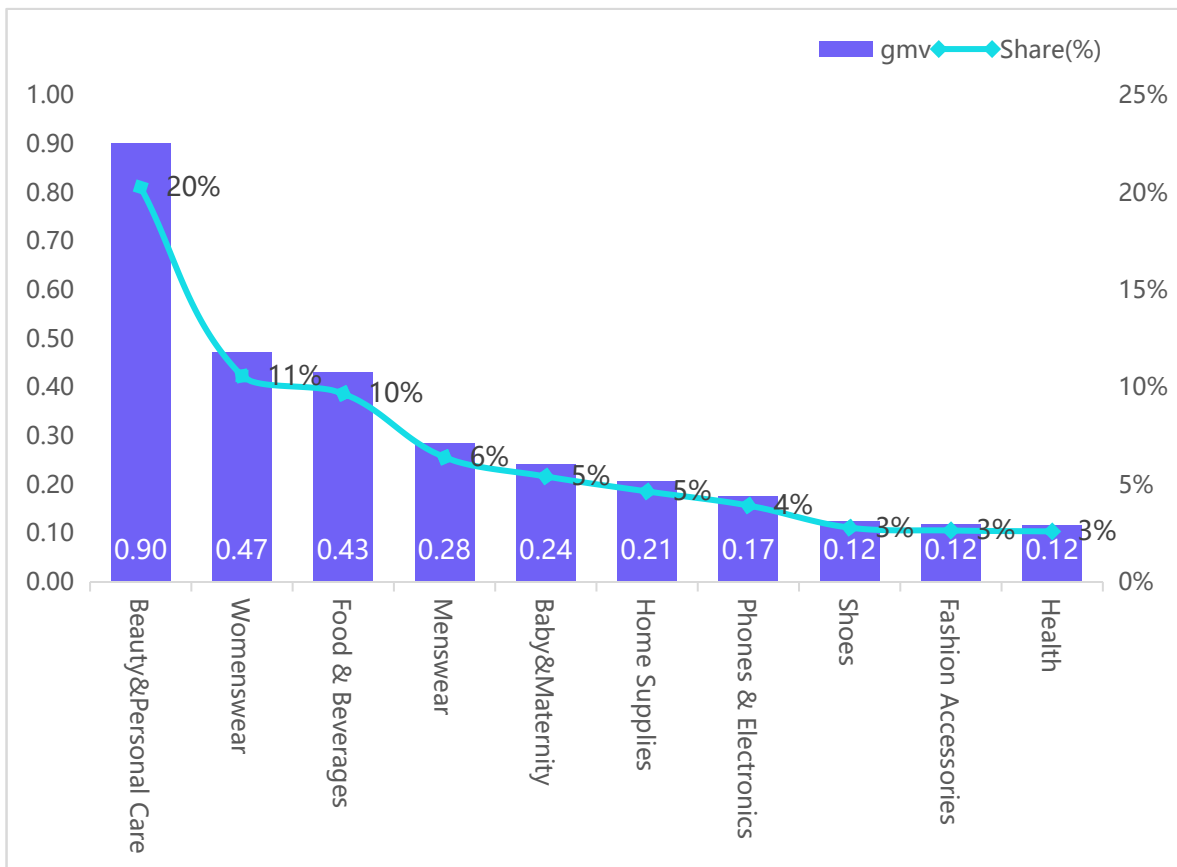
5

CHAPTER FIVE

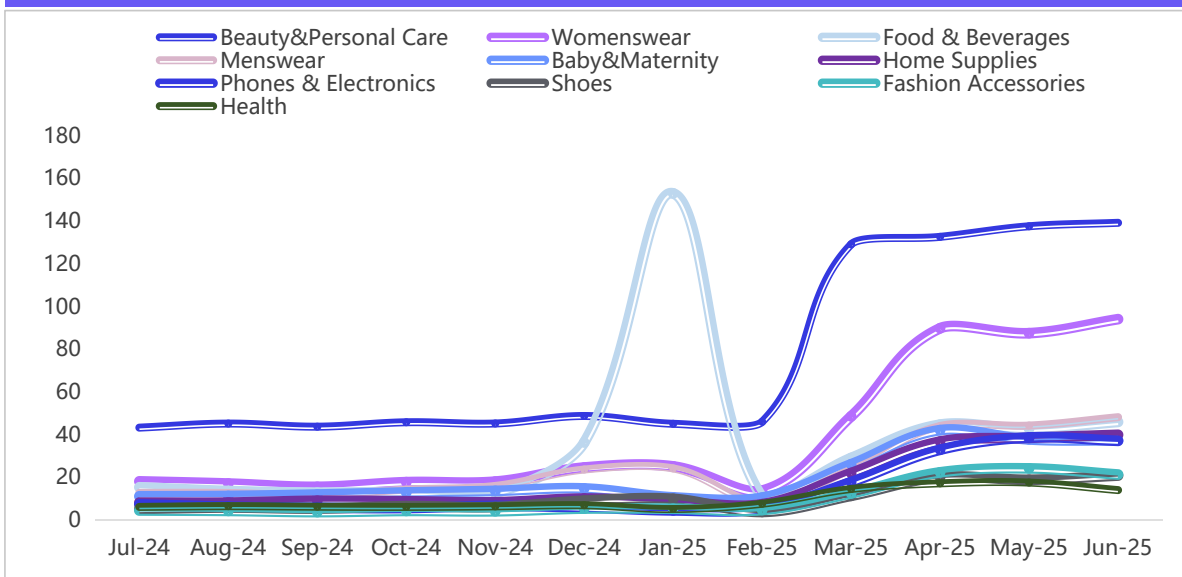
VN Market-Top 10 Categories Performance

Beauty Leads Market (30% Share) with Seasonal Swings, Food & Beverage Shows Clear Peaks

Top 10 GMV in VN Market Past 12 Months (in Billions)



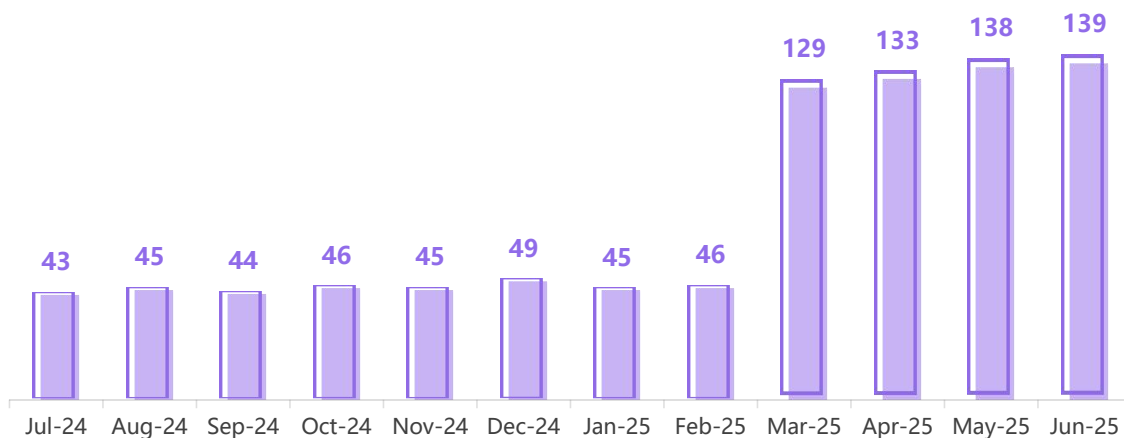
Monthly Performance of Top 10 Categories:VN Market (Past 12 Months) In millions



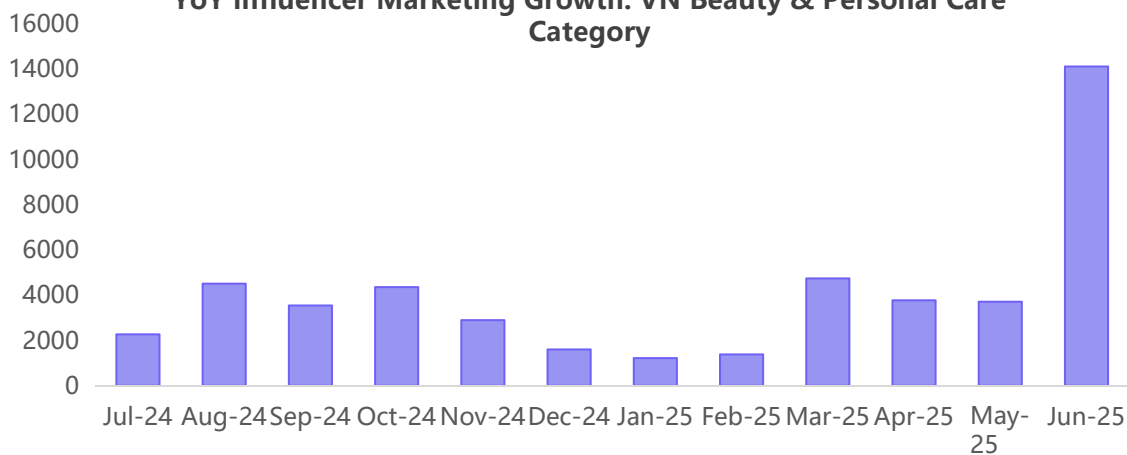
VN Market-Beauty&Personal Care Marketing Strategy

GMV Surges Nearing \$140M Peak; Steady Video Growth & Accelerating Influencer Marketing

Beauty&Personal Care GMV VN Market (Past 12 Months | in Millions)



YoY Influencer Marketing Growth: VN Beauty & Personal Care Category



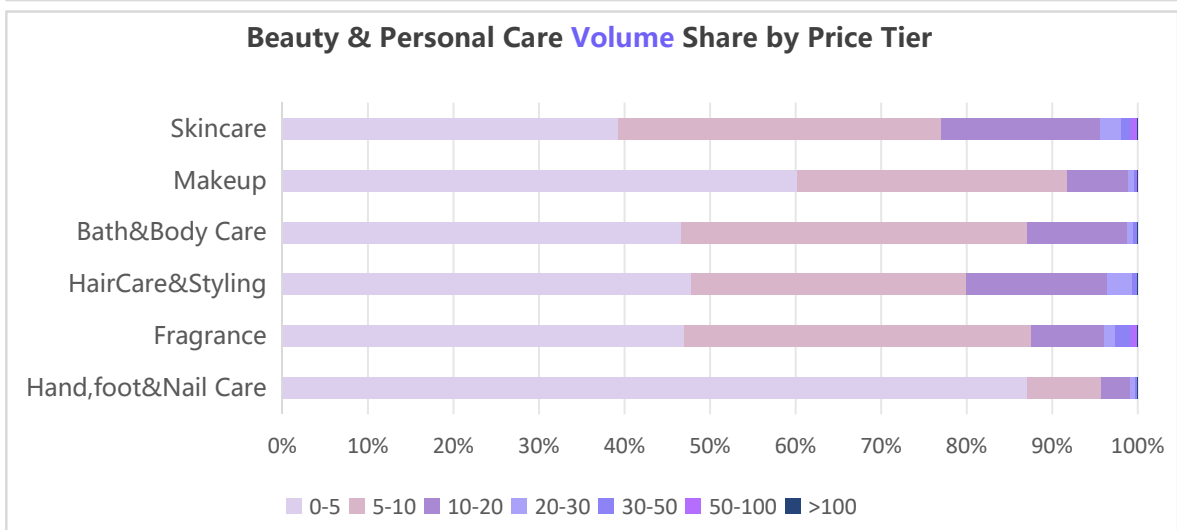
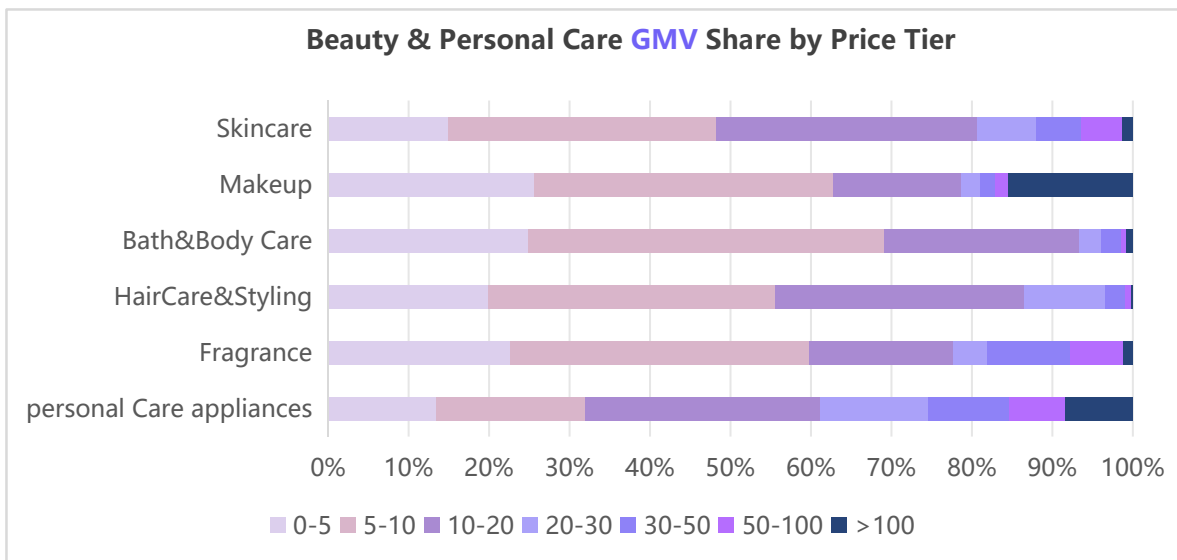
YoY Video Marketing Growth: VN Beauty & Personal Care Category



VN Market-Beauty&Personal Care

Sub-categoriesGMV Concentrated in \$0-10 Tier, Volume Focused Under \$5

- ◆ In VN's market, the top 3 categories—skincare, Makeup collectively contributed over \$60,000, accounting for 68% of the Top 10 GMV. The Top 3 show high concentration yet relatively low price concentration, with budget segments still dominating. Bath & body care exceeds 60% GMV share in the \$0–10 range, while cosmetics sees nearly 20% in the >\$100 tier, indicating potential in premium segments.
- ◆ In volume terms, skincare, cosmetics, and bath & body care reached approximately 130 million units sold. The \$0–10 range dominated the top categories, with hand and foot care exceeding 90% in budget products share, confirming low-price dominance.



VN Market-Beauty&Personal Care

SMBs Show Clear Tier Structure with \$5M Top 10 Threshold; Price Concentration at \$10-20 Range

Top 10 SMBs Show Clear Tier Structure

- The tier structure is clear and stable: the top store achieves \$25-26 million in sales, with stores ranked 2nd-3rd at \$12-15 million, and the top 3 threshold exceeding \$10 million, indicating short-term stability in leadership;
- Stores ranked 4th to 10th report sales between \$5-9 million, with narrow gaps suggesting potential ranking shifts.

High Price Concentration & Broad Assortment Strategy

- In terms of product count: All Top 10 stores adopt a broad assortment strategy, each carrying over 100 SKUs;
- In terms of price: Top 10 stores show minimal price variation, with over 70% concentrated in the \$10-20 range;
- Recent sales peaks indicate their product selections align with market demand, warranting intensified marketing efforts.

Past 12-Month Sales & ASP for Top 10 Beauty&Personal care Sellers

Shop	GMV (\$)	Sales Volume(K)	Product Quantity	Price (\$)	Peak Sales Timing
COLORKEY Việt Nam	25-26M	3811	300	13.10	Sep-2024
HASAKI BEAUTY	14-15M	2230	2062	12.36	May-2025
eHerb Viet Nam	12M-13M	2886	398	5.84	May-2025
The Cafuné	9-10M	1233	179	11.10	Aug-2024
Carslan.VN	8-9M	810	175	12.43	Oct-2024
L'oreal Paris Việt Nam	7-8M	788	508	18.38	May-2025
Thế Giới Skinfood Store	6-7M	1065	2597	17.62	Apr-2024
Body Miss Việt Nam	6-7M	1300	113	6.98	Jun-2024
Cocoon Vietnam	6-7M	777	598	13.36	May-2025
GMEELAN Beauty Store	5-6M	775	185	9.07	Sep-2024

VN Market-Beauty&Personal Care

August 2025 Top 5 Beauty & Personal Care Diverse Product Range with Cosmetics



Sensitive Cleansing Water

Shop: Garnier Vietnam
Price: \$57.18
Sales: 77.1K
GMV: \$1.40M
Influencers: 0
Videos: 0



Cleansing Water

Shop: Garnier Vietnam
Price: \$57.18
Sales: 27.6K
GMV: \$965.98K
Influencers: 0
Videos: 0



Women's Perfume

Shop: Bella Raute
VNPrice: \$228.74
Sales: 3.8K
GMV: \$711.48K
Influencers: 0
Videos: 0



cooling tool

Shop: VTT Personal
Care Shop
Price: \$37.48
Sales: 63.4K
GMV: \$595.45K
Influencers: 648
Videos: 2.0K



camicosmetic Body

Shop: Cami.cosmetic
Price: \$5.30
Sales: 446.4K
GMV: \$594.01K
Influencers: 328
Videos: 1.7K



PH Market

**Annual Performance and Trend
Analysis: Beauty & Personal Care
Category**



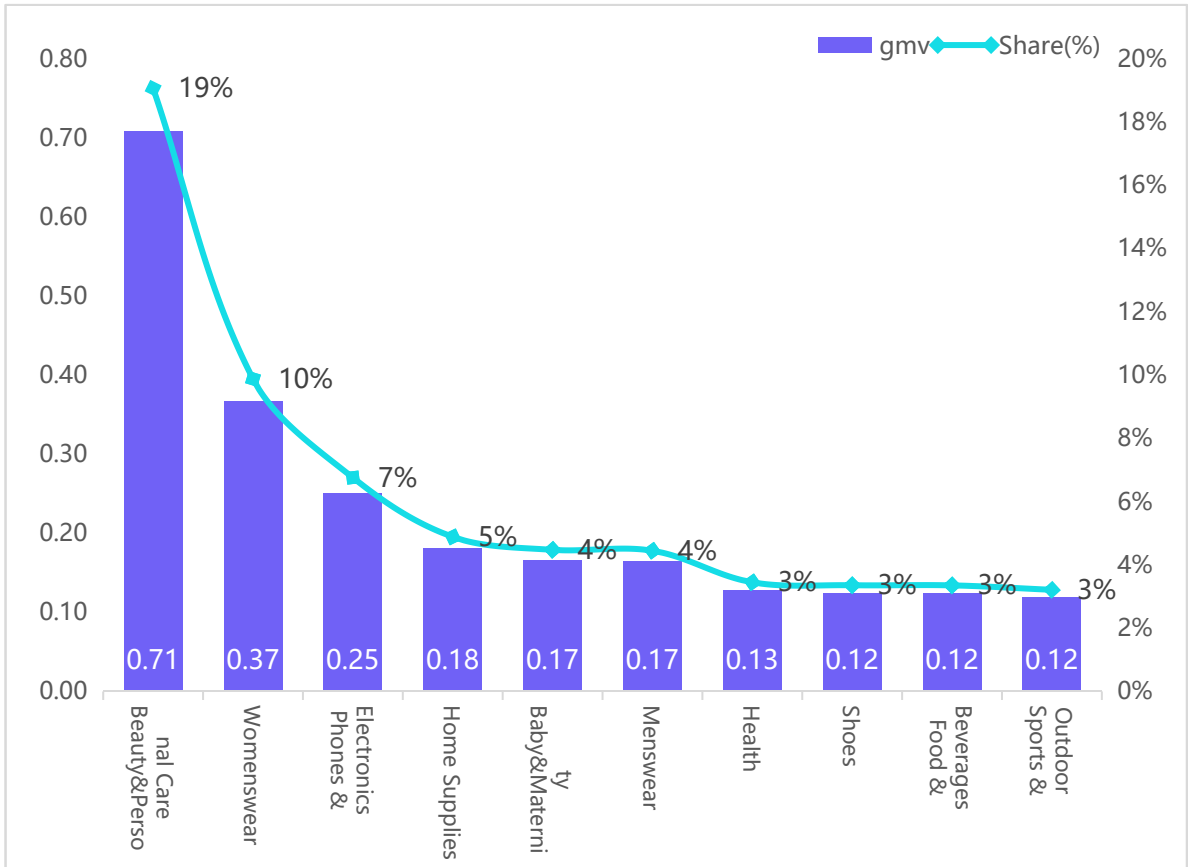
CHAPTER SIX



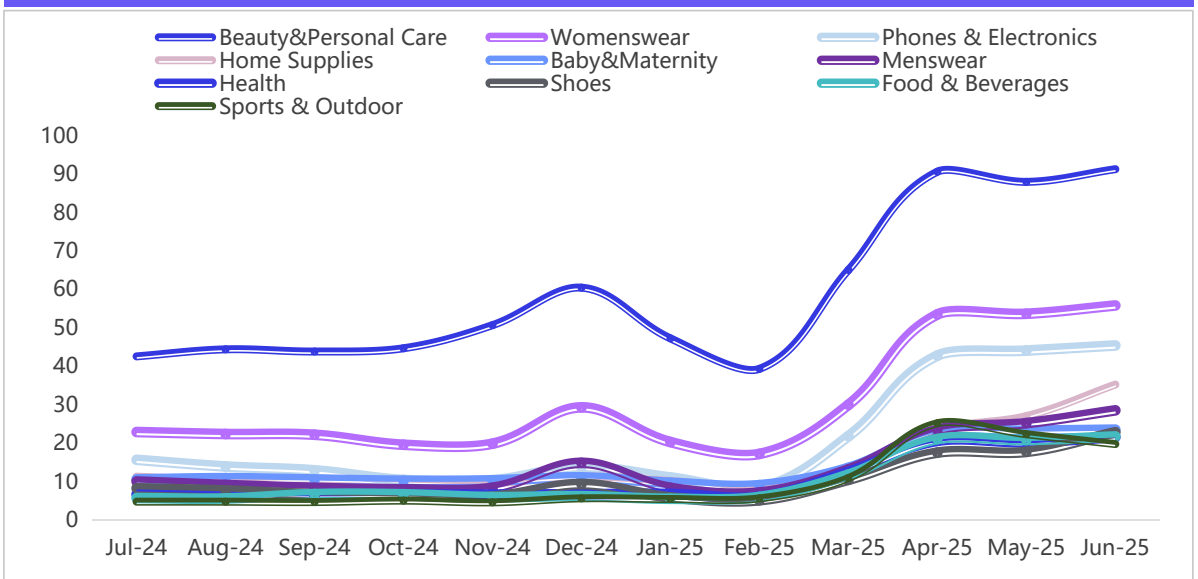
PH Market-Top 10 Categories Performance

Steady GMV Growth with Aligned Top 10 Trends; Beauty & Personal Care Leads at 30% Share

Top 10 GMV in PH Market Past 12 Months (in Billions)



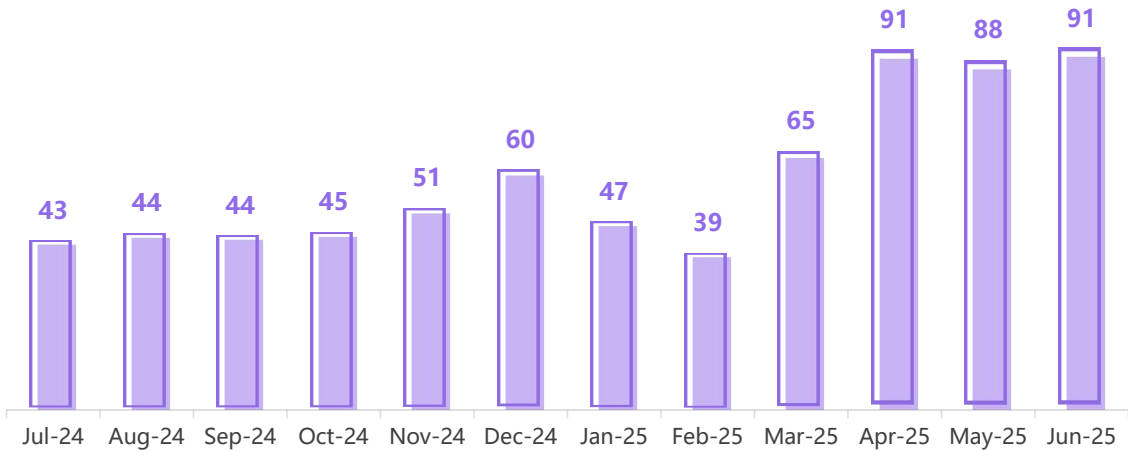
Monthly Performance of Top 10 Categories:PH Market (Past 12 Months) in millions



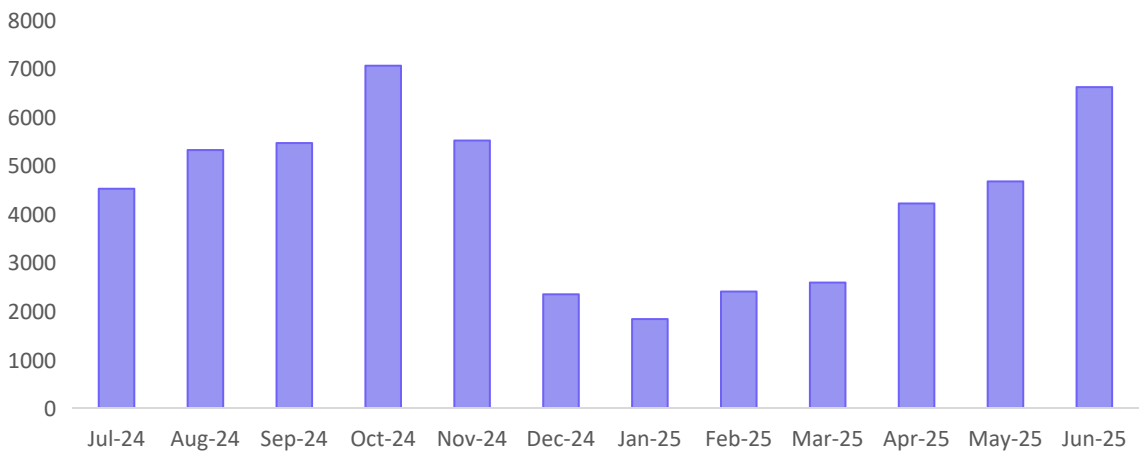
PH Market-Beauty&Personal Care Marketing Strategy

Volatile GMV Peaks Over \$90M, Driven by Video Growth & Fluctuating Influencer

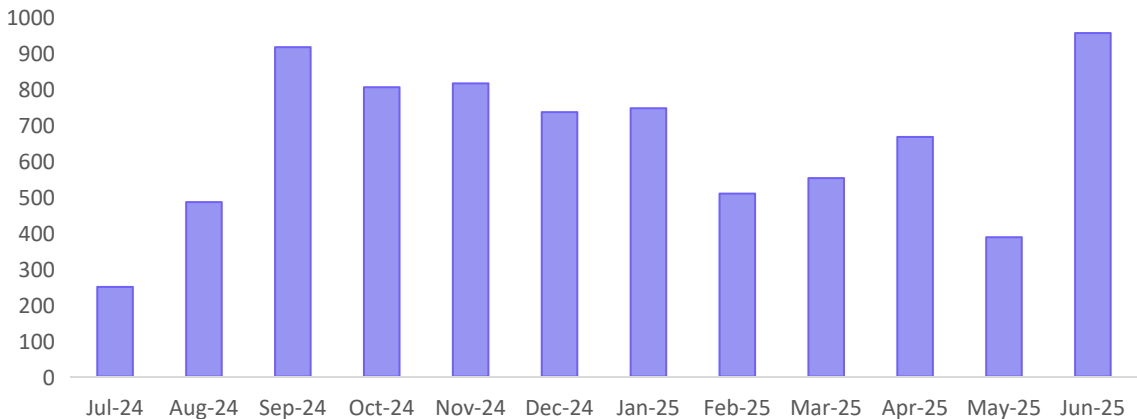
Beauty&Personal Care GMV PH Market (Past 12 Months | in Millions)



YoY Influencer Marketing Growth: PH Beauty & Personal Care Category



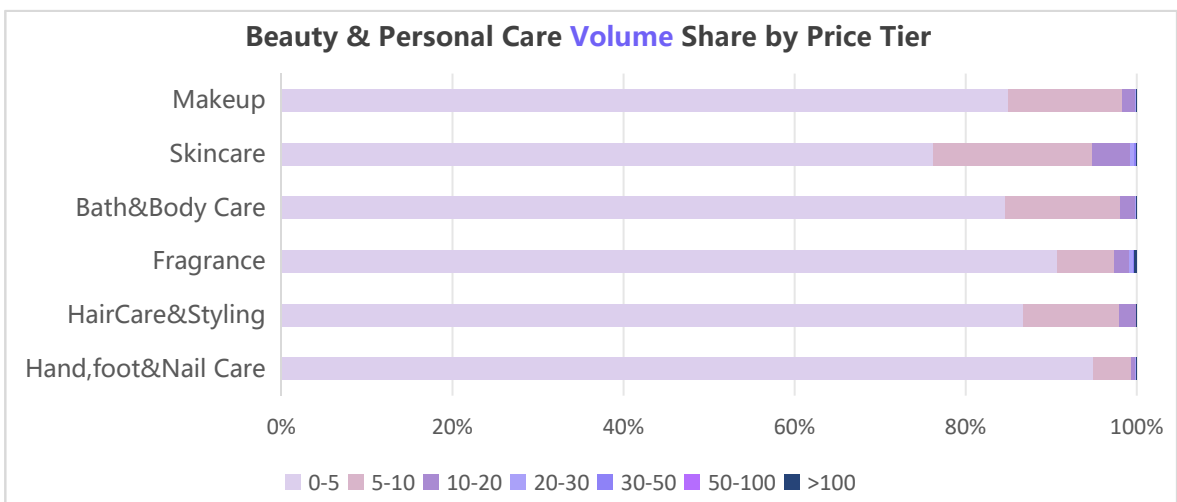
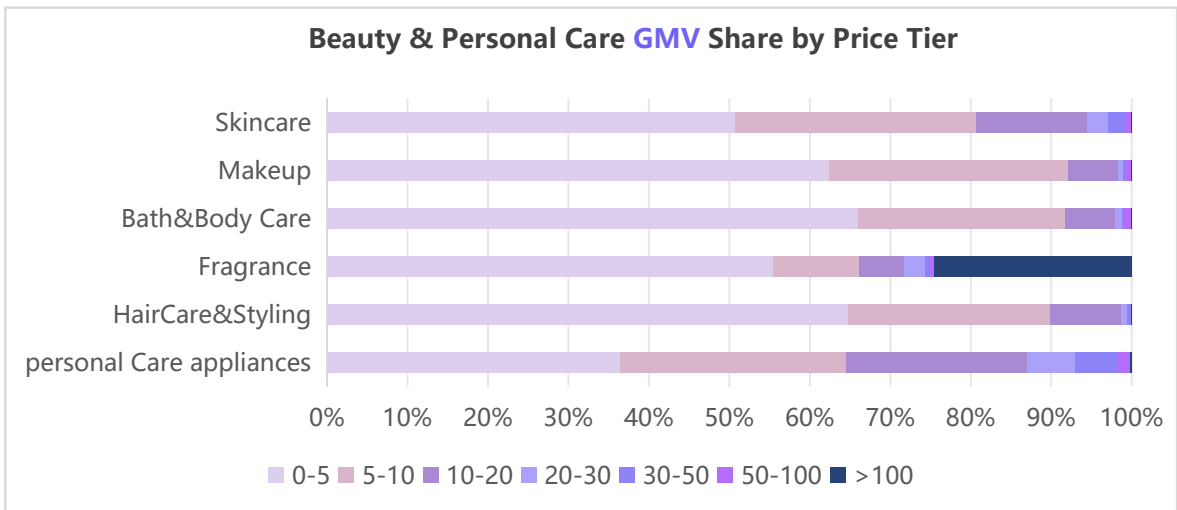
YoY Video Marketing Growth: PH Beauty & Personal Care Category



PH Market-Beauty&Personal Care

Sub-category GMV & Volume Concentration, Both Dominated by \$0-5 Tier

- ◆ In the Ph' beauty & personal care market, the top 3 categories—skincare, Makeup and bath & body care—collectively generated over \$400 million, accounting for 68% of the Top 10 GMV with high concentration. Price analysis reveals clear budget dominance, as all sub-categories exceed 60% GMV share in the \$0–10 range, with cosmetics and body care surpassing 90%. Notably, fragrance achieves nearly 30% share in the >\$100 tier.
- ◆ For sales volume, skincare,makeup, and bath & body care reached approximately 120 million units, representing 65% of total volume. The \$0–5 range dominated the top categories, each exceeding 90% share, highlighting the prevalence of budget consumption.



PHMarket-Beauty&Personal Care

Top 10 SMBs Solid Oligopoly with \$6M+ Threshold; Low-Price Dominance in \$5-10 Range

Top 10 SMBs Show Clear Monopoly Effect

- The tier structure is clear with a solid leading effect: the top store achieved \$17–18 million in sales, more than double that of the second, demonstrating clear leadership and short-term stability;
- Stores ranked 3rd to 10th report sales between \$6–8 million, with narrow gaps suggesting potential for ranking shifts and overtaking.

Price Concentration & Wide Assortment Strategy

- In terms of sales volume: Top 10 stores maintain high sales, peaking at nearly 3 million units;
- In terms of product count: 80% of Top 10 stores adopt a broad assortment strategy (SKUs > 100), while the leader excels through a hero-product approach;
- In terms of average price: Top 10 stores are led by low-price offerings, with over 70% concentrated in the \$5–10 range.

Past 12-Month Sales & ASP for Top 10 Beauty&Personal care Sellers

Shop	GMV (\$)	Sales Volume(K)	Product Quantity	Price (\$)	Peak Sales Timing
Jejuglutaice	17-18M	18	6	17.50	Nov-2024
Prestige Exclusive Shop	7-8M	66	169	6.87	Dec-2024
Sugar Dolls PH	7-8M	1628	138	5.49	May-2025
O.TWO.O Beauty-PH	7-8M	2855	467	6.29	Jul-2025
Dermorepubliq	7-8M	2178	91	10.87	May-2025
SKIN1004 PH	7-8M	2145	166	20.28	Nov-2024
FOCALLURE.PH	7-8M	712	286	5.09	May-2025
Sophiaandkalel	6-7M	2427	557	6.25	May-2025
GMEELAN	6-7M	2159	151	7.80	Jun-2024
Scoban PH	6-7M	1088	412	7.61	Apr-2024

PH Market-Beauty&Personal Care

August 2025 Top 5 Beauty & Personal Care Skincare Products Dominate Sales



Serum

Shop: Dermorepubliq
Price: \$3.27
Sales: 1.7M
GMV: \$889.50K
Influencers: 2.4K
Videos: 7.1K



Facial Oil

Shop: shopwithbonita
Price: \$3.91
Sales: 1.0M
GMV: \$867.94K
Influencers: 1.4K
Videos: 3.8K



Sunscreen

Shop: A&J Beauty and Wellness Shop
Price: \$4.25
Sales: 13.5K
GMV: \$529.74K
Influencers: 1.3K
Videos: 2.9K



Glow Cream

Shop: The Originote.PH
Price: \$4.673
Sales: 7.1K
GMV: \$412.09K
Influencers: 443
Videos: 820



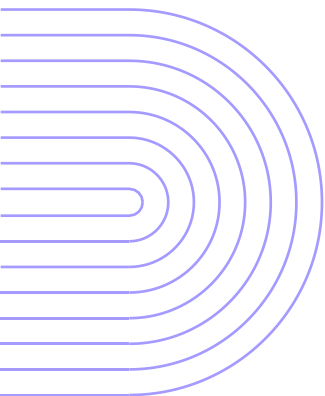
2-in-1 Serum

Shop: Dermorepubliq
Price: \$8.78
Sales: 22.8K
GMV: \$46.28K
Influencers: 570
Videos: 2.0K

SG market



Annual Performance and Trend Analysis: Beauty & Personal Care Category

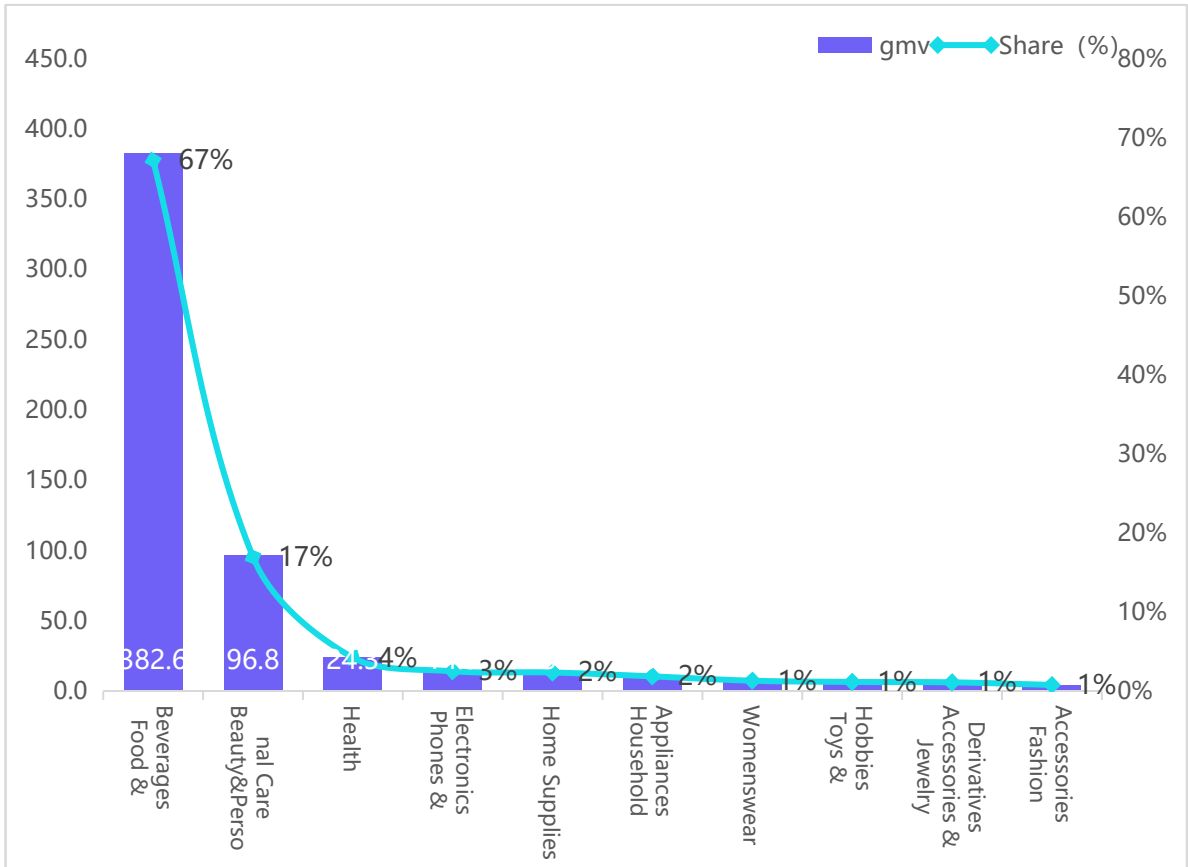


CHAPTER SEVEN

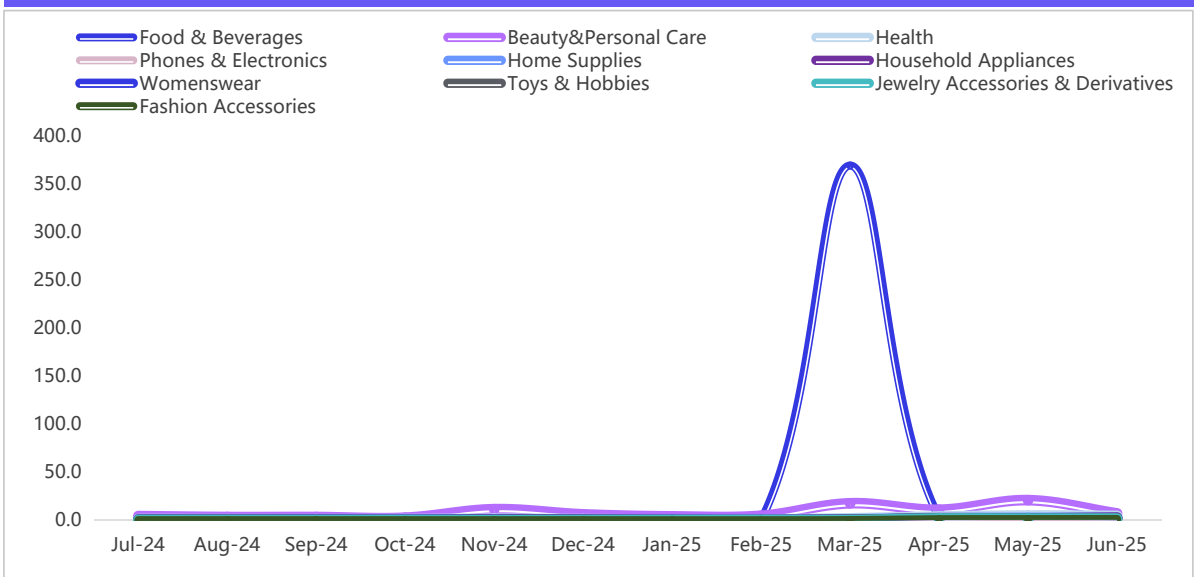
SG Market-Top 10 Categories Performance

High GMV Concentration with F&B Leading, Beauty & Personal Care Ranks #2 at 17% Share

Top 10 GMV in SG Market Past 12 Months (in Millions)



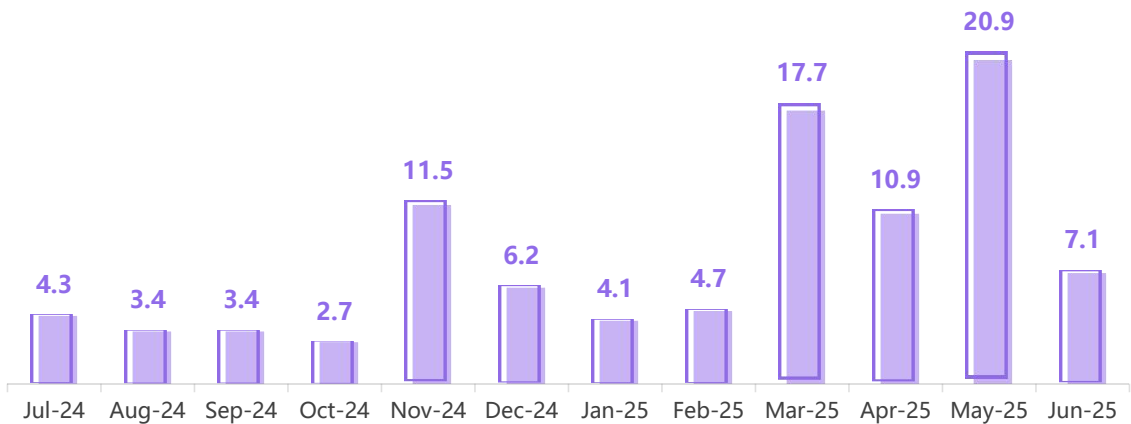
Monthly Performance of Top 10 Categories: SG Market (Past 12 Months) in millions



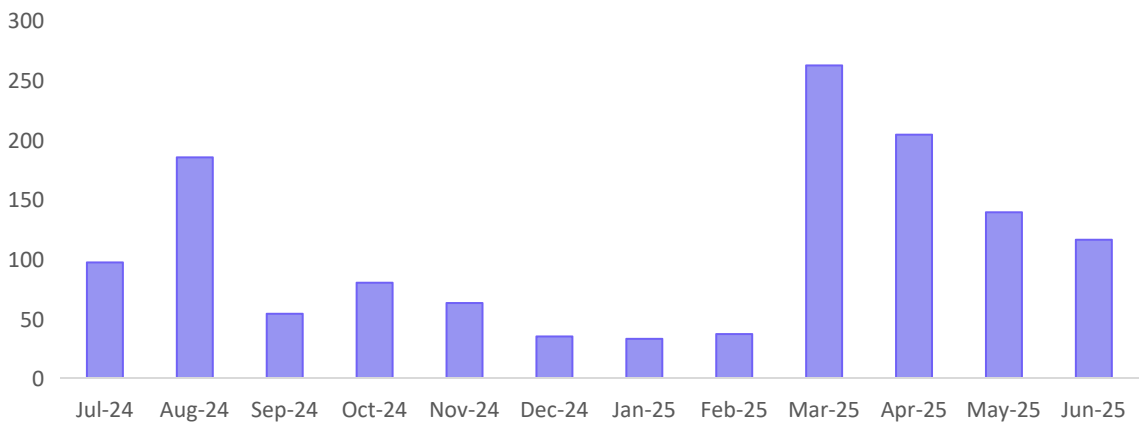
SG Market-Beauty&Personal Care Marketing Strategy

GMV Peaks Over \$20M; Steady Shopping Video Growth Amid Slow Influencer Expansion

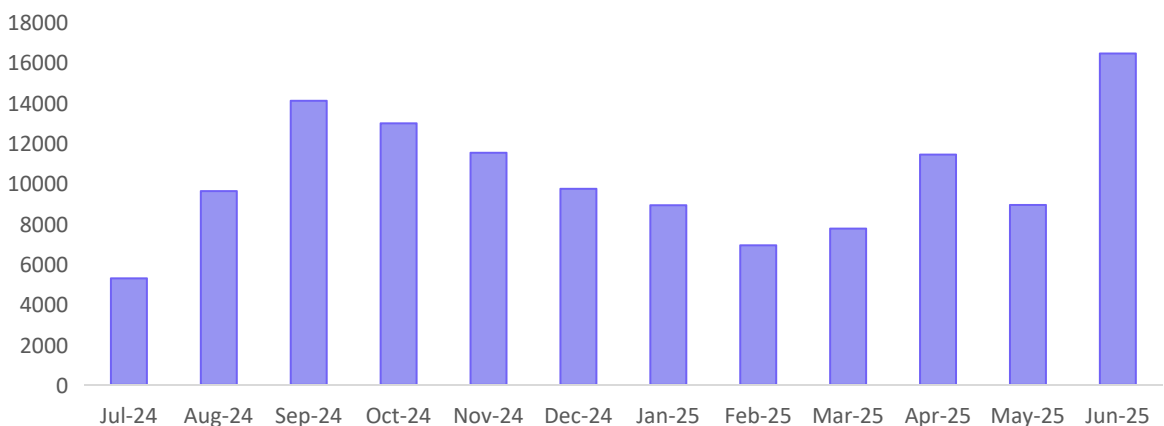
Beauty&Personal Care GMV SG Market (Past 12 Months | in Millions)



YoY Influencer Marketing Growth: SG Beauty & Personal Care Category



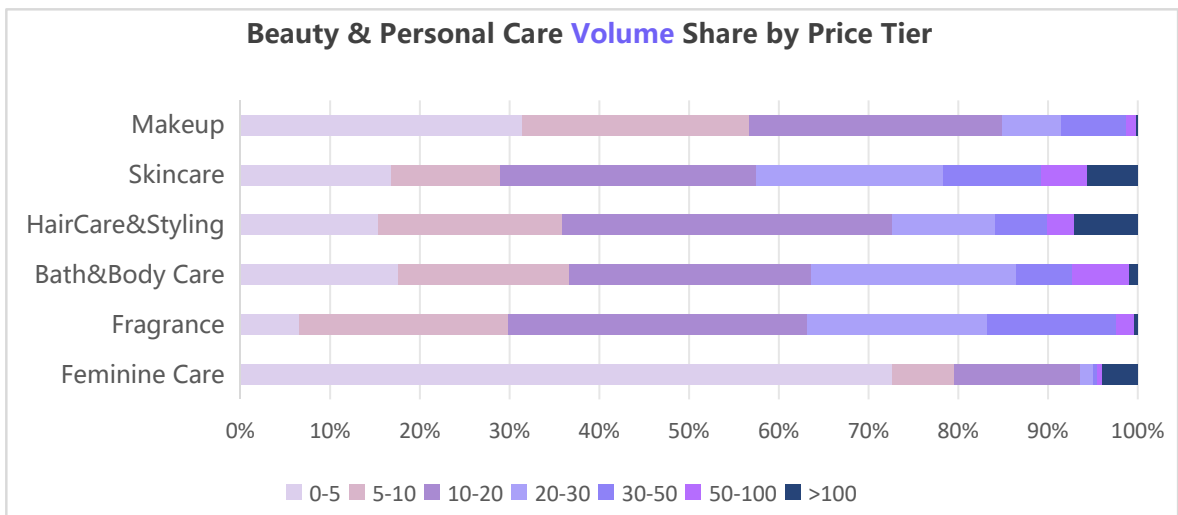
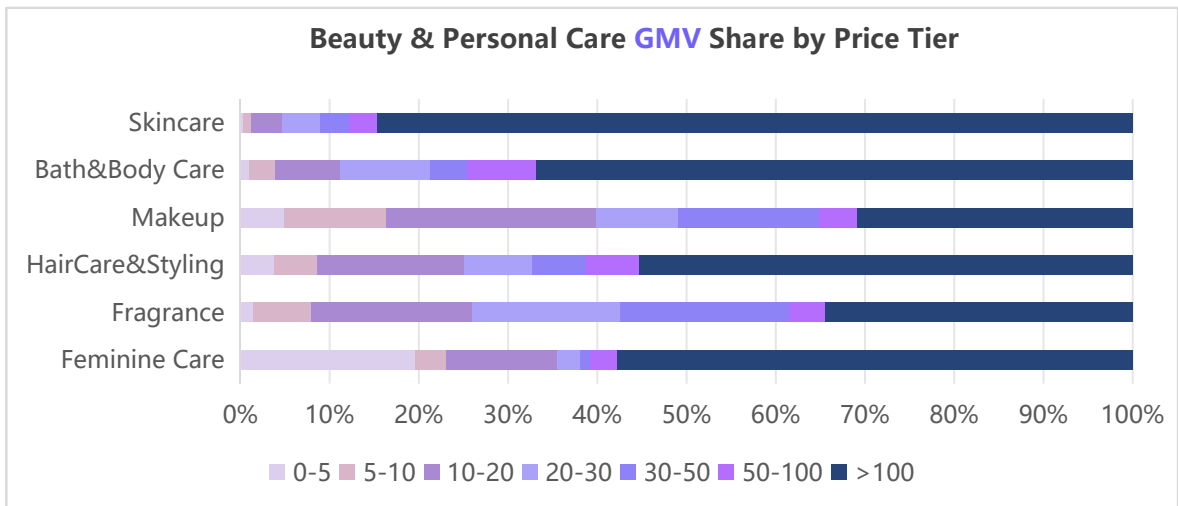
YoY Video Marketing Growth: SG Beauty & Personal Care Category



SG Market-Beauty&Personal Care

Sub-categories GMV Concentrated in >\$100 Tier; Sales Volume Balanced Under \$20

- ◆ In SG'S market, the top 3 categories—skincare, bath & body care, and Makeup contributed approximately \$70 million, accounting for 80% of the Top 10 GMV, representing the highest category concentration among Southeast Asian sites. As a developed market, Singapore shows significant premium segment contribution, with 40–80% of beauty care GMV in the >\$100 tier, highlighting a quality-driven market, particularly in skincare where over 80% of GMV comes from products above \$100.
- ◆ In volume terms, Makeup, skincare, and hair care & styling exceeded 1 million units sold, representing about 60% of total volume, with balanced demand across categories. In feminine intimate care, products under \$10 accounted for nearly 80% of sales, demonstrating the success of budget strategies.



SG Market-Beauty&Personal Care Shop

Top 10 SMBs Forming Tier with \$500K Threshold Premium Pricing Focus Above \$60

Top 10 SMBs Show Emerging Tier Structure

- The tier structure is initially forming: the top store achieved approximately \$4 million in sales, leading the second by about \$1 million, yet the overall scale remains relatively small, suggesting potential market changes;
- Stores ranked 5th to 10th report sales between \$500,000 and \$1 million, with narrow gaps indicating a high likelihood of ranking shifts.

Price Differentiation & Focused Assortment Strategy

- In terms of sales volume: Top 10 stores maintain strong unit sales, peaking at over 50,000 units;
- In terms of product count: Top 10 stores primarily adopt a focused strategy, with 70% carrying fewer than 100 SKUs;
- In terms of average price: Top 10 stores show significant price variation, with over 50% concentrated below \$60, while the highest average price exceeds \$200.

Past 12-Month Sales & ASP for Top 10 Beauty&Personal care Sellers

Shop	GMV (\$)	Sales Volume(K)	Product Quantity	Price (\$)	Peak Sales Timing
Medicube Singapore	3000-4000K	64	124	84.83	Sep-2024
Dixmondsg	2000-3000k	15	24	88.96	Jan-2025
IEM SG	1000-2000K	7	74	259.72	Nov-2024
Skintific.sg	1000-2000K	11	144	23.64	Apr-2025
FOXYAFFAIRSSG	500-1000K	5	93	118.22	Dec-2024
Dr.ville Shop	500-1000K	42	85	19.27	May-2025
HERBMICAL SG	500-1000K	31	10	22.85	Sep-2024
JOMO SG Shop	500-1000K	57	548	25.08	Apr-2025
Abduct Cosmetics	500-1000K	23	45	36.29	Mar-2025
EMPIRE HOME SG	500-1000K	3	27	65.95	Dec-2024

SG Market-Beauty&Personal Care

August 2025 Top 5 Beauty & Personal Care Hair Care Products Dominate the List



Anti-Hair loss Hair Care

Shop: Dixmondsg
Price: \$187.07
Sales: 15.9K
GMV: \$101.87K
Influencers: 5
Videos: 16



6-IN-1 High-tech Device

Shop: Medicube Singapore
Price: \$301.77
Sales: 7.8K
GMV: \$57.37K
Influencers: 24
Videos: 35



Anti-Hair Loss

Shop: Dr.ville Shop
Price: \$25.13
Sales: 14.4K
GMV: \$81.30K
Influencers: 39
Videos: 69



perfect hair on-the-go

Shop: Stryv
Price: \$69.31
Sales: 3.5K
GMV: \$72.46K
Influencers: 6
Videos: 6



Anti-Hair Loss Serum

Shop: Dixmondsg
Price: \$537.15
Sales: 3.5K
GMV: \$70.19K
Influencers: 0
Videos: 0