

Shelf space is the scarcest thing you own. Every month we name the exact products that have earned it — and the evidence that would take it back.

Keep your proven heroes and **stop buying sunscreen breadth** — three findings could have killed this call, and none did.

Move every incremental August dollar onto the exact mask, lip, PDRN-serum and barrier SKUs that already carry US marketplace proof — at SKU level, never at category level. Three findings could have broken this verdict; the table below shows each one and what we found.

IF THIS WERE TRUE, THE CALL FAILS

WHAT WE OBSERVED

VERDICT

US sunscreen demand is still climbing into August

48,800 → 18,500

Four-year average US search for **korean sunscreen**, June to October — already 38,425 in July and 29,150 in August. Fall-versus-summer sunscreen discussion runs -41% (4.38 → 2.59 title share).

■ DECISIVE ■ SUPPORTIVE

SURVIVES

The fall-facing categories are louder but not selling

100k+ held, three months

BIODANCE's mask never left the top observed sales tier on US e-commerce, May to July. LANEIGE's Lip Glow Balm went 40k → 90k while its observed price rose \$16.24 → \$19.00; medicube's PDRN serum and COSRX's snail essence each went 40k → 100k.

■ DECISIVE

SURVIVES

The “visible results” rotation is only a Korean upstream artifact

18,100 → 60,500

US search for **pdrn**, +234.3% year over year; **medicube** 165,000 → 368,000 (+123.0%). E-commerce Brightening rank movement (+14.7) and Well-aging (+6.0) agree from upstream.

■ DECISIVE ■ SUPPORTIVE

SURVIVES

One finding forced a correction — COSRX's hero rose while its own ingredient lane fell 87% from peak. **Buy the SKU, never the lane.** → p14

Every call in this issue carries its own reversal condition.

Four of five named heroes held or doubled their monthly sales tier into July. Only ARENCIA fell.

These five are the named products US e-commerce actually tracked from May to July. BIODANCE's mask never left the top tier. LANEIGE, medicube and COSRX each moved up a full band. ARENCIA moved down. Four of the month's six decision lanes are set here.

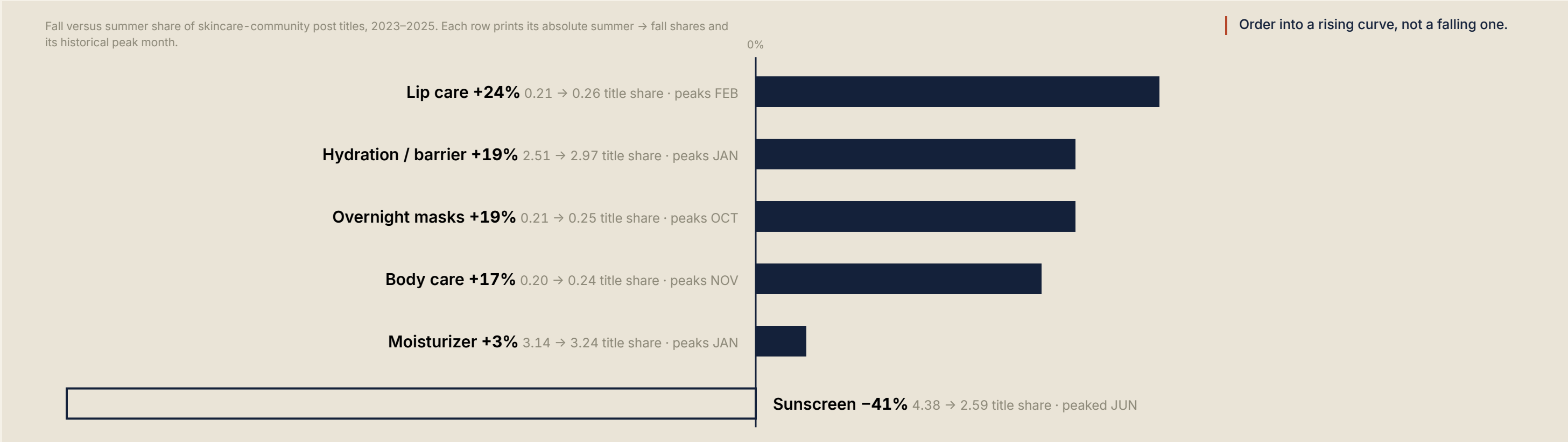


Protect all four risers at their current facing before adding anything new. Reverse any of them the month its sales tier steps down a full step.

DECISIVE — US E-COMMERCE, THREE OBSERVED MONTHS

The five categories rising into fall all peak between October and February. Sunscreen already peaked in June.

Lip care runs 24% higher in fall than summer and peaks in February. Hydration/barrier and overnight masks each run 19% higher, peaking in January and October. Every one of those peaks is in front of an August order. Sunscreen's is behind it.



THE TURN IS ALREADY VISIBLE

Two lanes have already bottomed in the monthly series and turned up in August.



Moisturizer
30.5 in July (year low) → 32.5 in August, per 10k posts



Hydration / barrier
18.0 in July (year low) → 19.8 in August, per 10k posts

SUPPORTIVE

Move incremental depth into lip, overnight mask and barrier facings now. Reverse if the next reading shows fall title share failing to rise above summer in two of these five lanes.

BIODANCE's biggest social media moment is one video by one unverified account — 2.1 million views in 24 hours is a person, not a trend.

The recommendation on the next page does not rest on that video. It rests on a US e-commerce sales tier that held for three months and a search term that grew nine-fold. Social evidence can explain why something is moving. It can never be the reason to order it.

2,100,000

@alydoill · one video · 24 hours · account unverified

96.65% of the social media posts we track come from unverified accounts — verification status alone filters nothing.

View counts above 500,000 are rounded, so precise-looking per-hour rates are approximations.

Community discussion is not US-specific. It is discussion, and it is not US sell-through.

| Standing rule for every page that follows: a single creator, a single video, or a single week is a reason to look, never a reason to buy.

SKIN1004 is the only brand rising on all four signals — and that is still not a purchase order.

S K I N 1 0 0 4

THE LANE

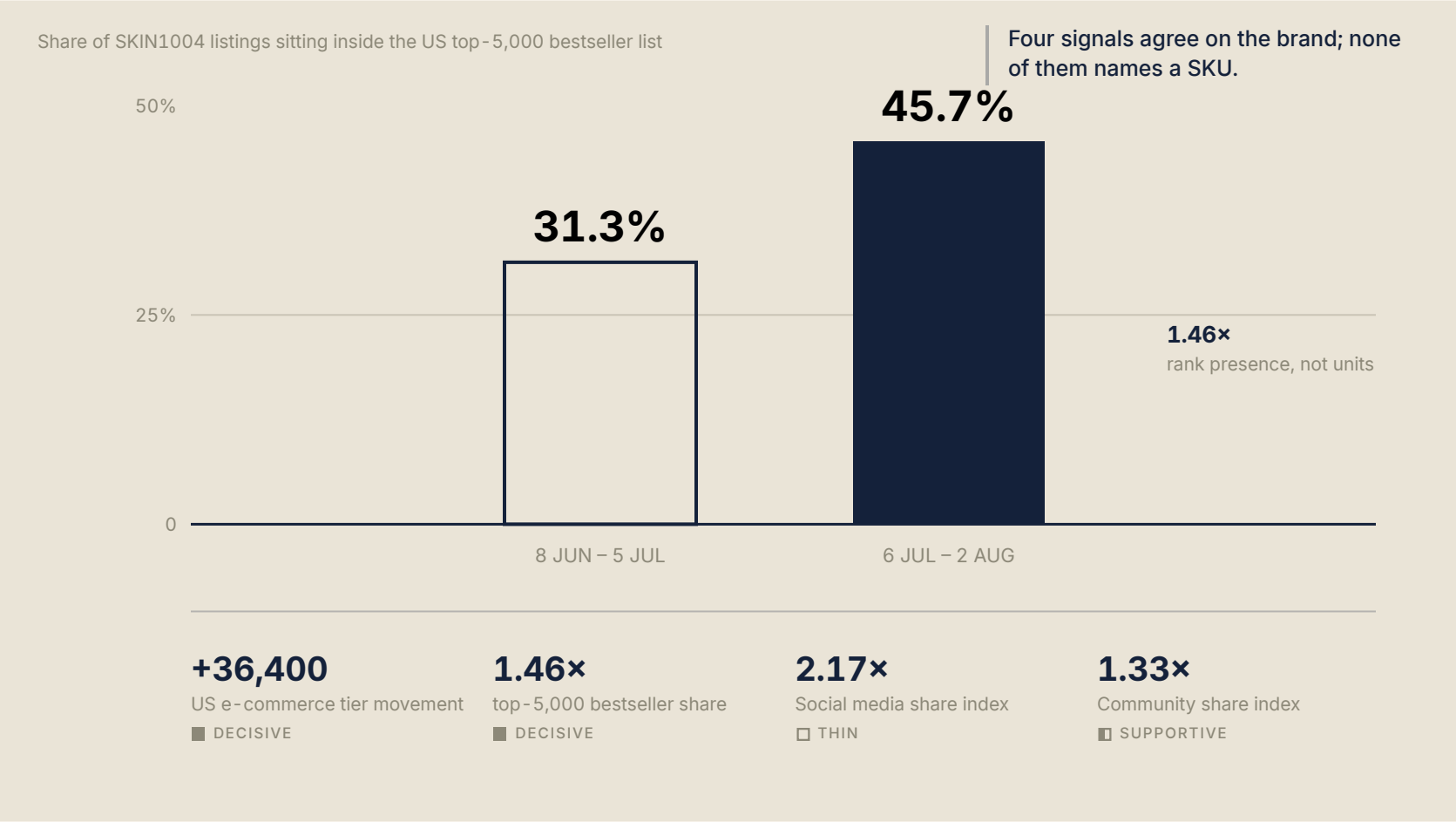
Prioritize & Replenish

No SKIN1004 product shows its own sales-tier persistence this month. Brand strength of this quality earns the brand a lane and the buyer's attention; only product evidence earns inventory depth.

BIODANCE Bio-Collagen Real Deep Mask	p11
medicube Ultra Light PDRN Pink Peptide Serum	p12
LANEIGE Lip Glowy Balm	p13
COSRX Advanced Snail 96 Mucin Power Essence	p14



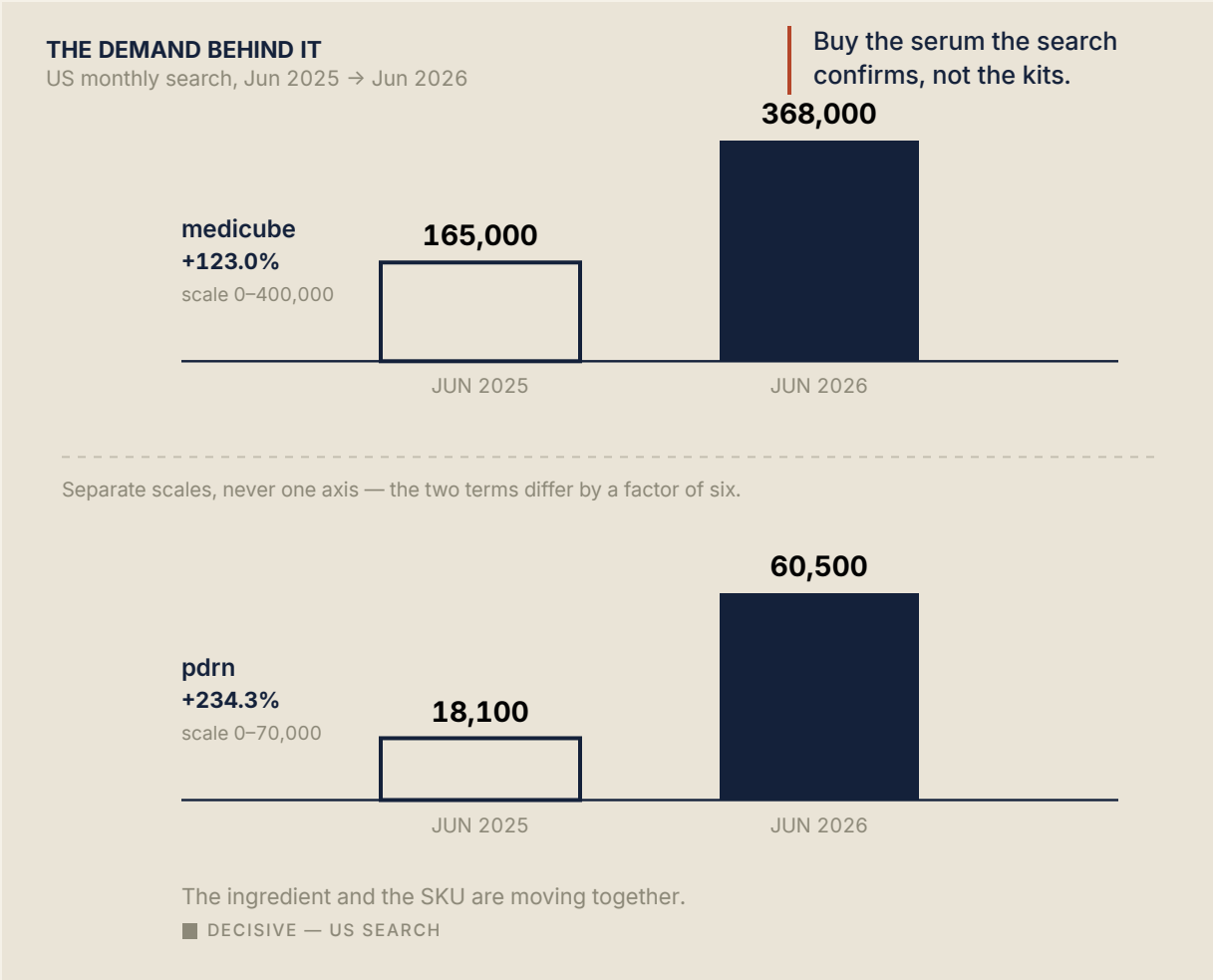
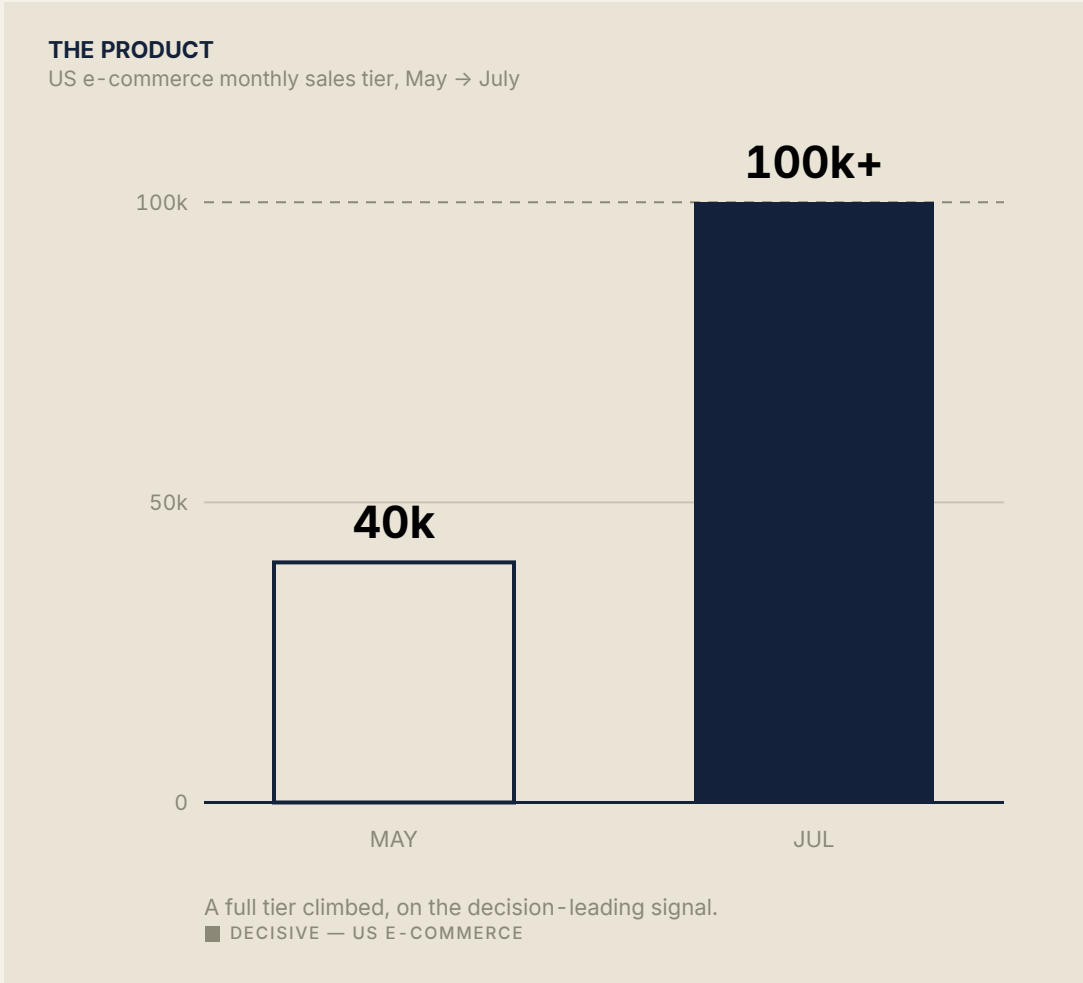
SKIN1004 Madagascar Centella Ampoule, the brand's flagship hero. Shown as brand identification — it is **not** the recommended SKU, because no SKIN1004 product carries product-level evidence this month.



Give SKIN1004 shelf presence, not shelf depth — anchor with the Centella hero and add no sunscreen breadth in August. Upgrade to a SKU-level order only when a named SKIN1004 product shows its own sales-tier persistence on US e-commerce. Downgrade if top-5,000 share falls back toward 31.3%.

medicube's Ultra Light PDRN Pink Peptide Serum went 40k to 100k while US pdrn search tripled to 60,500.

This is the cleanest ingredient-plus-product agreement in the issue. **pdrn** search grew 234.3% to 60,500, **medicube** grew 123.0% to 368,000 — the largest search base that moved — and the named serum climbed a full tier. That agreement authorizes the serum. It does not authorize any PDRN kit.



medicube Ultra Light PDRN Pink Peptide Serum — official product photograph.

CROSS - CHECK

E-commerce brand movement **+43,200**

Social media **1.40×** · Community **1.12×**

■ SUPPORTIVE

Whitespace check: if you carry no PDRN serum, this is the proven one.

PRIORITIZE

The named serum.

Reverse if the serum's sales tier falls back below 100k, or if **pdrn** search stops growing for two consecutive months. The serum's proof does not transfer to any PDRN kit or set — those belong at test size only.

US volume lives at \$10–20 with 3.58 million units — nothing on this shortlist earns a slot above \$30.

US e-commerce volume concentrates at \$10–20 (3.58m units, 1,293 per listing) with \$20–30 next (1.60m, 980). Korea's upstream pool skews higher, at \$35,170 a day in the \$20–30 lane. Different countries, different units, shown separately. The \$30+ lane is real but demands product-level proof, and this month's shortlist does not supply it.

