

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.

Winter is **not a shelf swap** — except last December, when only nineteen of the fifty carried over from November.

Take the sunscreen step down without cutting the line. Put December depth behind one proven mask and two proven lip SKUs. Place two small tests. Autumn barely moves, so September is not an autumn decision — it is the order that lands on the one month that turns, and six of that month's fifty were K-beauty. One of the two tests is a refusal of ours, reversed.

IF THIS WERE TRUE, THE VERDICT FAILS	WHAT WE SEE	VERDICT
The calendar moves the whole shelf	33 · 39 · 34 into September, October, November — and 19 into December Of the fifty best-selling listings, that many carried straight over. The largest ingredient anchor swings 1.44× best month to worst, and first-half US search is -29%: 323,500 → 229,800. ■ DECISIVE	SURVIVES — EXCEPT DECEMBER
Masks are a winter category	1.41× swing on the mature mask term It sits at 1.135 in August against 1.138 in November, and is -9% year over year: 73,100 → 66,500. One term, and only one, peaks in December — at 1.76× its own trend. Last December's fifty held exactly one sheet mask. ■ DECISIVE	SURVIVES
Barrier and ceramide are rising on the US shelf	36% · 37% against a 38% average Barrier (590 listings) and ceramide (436), across 10,290 compared listings. Only lip balm beat that average, at 43% on 203 listings. ■ DECISIVE	SURVIVES
Nothing a change screen misses is worth buying	10 listings held the US top thirty in every one of last year's twelve readings One is K-beauty and it moved five places all year. Widen to the top fifty across eight readings and a second K-beauty listing survives — on no climb list anywhere in this series. ■ DECISIVE	SURVIVES — THE LEVEL SCREEN FOUND A NAME THE CHANGE SCREEN HID

- One call did not survive — **our own sunscreen call**. We published the number that would cancel it, and August crossed it. → p4
- One refusal did not survive either — also ours. → p23, p29
- December is the exception, and six of its fifty were K-beauty. → p7, p8
- Every call in this issue carries the observation that would cancel it. They are collected on p30.

Eighteen calls for the next eight to twelve weeks — and **two of them are small tests**, not depth.

One product earns depth outright. Two SKUs earn a single reversible test each, and one of those two is a refusal we published last month and are taking back. Four are replenishment, and one of those earns a December depth step. Two lanes are held and two refused. Three items earn a watch line; four brands earn attention and no order at all.

PRIORITIZE	 BIODANCE Bio-Collagen Real Deep Mask Top tier held four months as a single reading, the US top fourteen in all twelve months of last year, and the only K-beauty listing among the ten that held the top thirty every month ■ DECISIVE → p16, p19	
REPLENISH	 LANEIGE Lip Sleeping Mask 33rd on the US bestseller list last December ■ DECISIVE; <i>carried forward — no qualifying reading this month</i> □ THIN → p24  COSRX Advanced Snail 96 Mucin Power Essence <i>carried forward</i>; first-half search −29% ■ DECISIVE and conversation share ×0.83, lower in all six comparable months ■ SUPPORTIVE, against an order in 12 of 12 months — replenish, no expansion → p25	 LANEIGE Lip Glowly Balm 46th last December ■ DECISIVE; reached the 90K tier in July at \$19.00 ■ SUPPORTIVE → p24  medicube Ultra Light PDRN Pink Peptide Serum US search 18,100 → 60,500 in twelve months ■ DECISIVE; readings ran 10K to 100K inside one month □ THIN → p29
TEST SMALL	 PURITO Mighty Bamboo Panthenol Cream 10K tier as a single reading in June, July and August while price rose \$15.50 → \$18.00 ■ DECISIVE → p21	medicube Collagen Overnight Wrapping Peel Off Mask Eight readings from last May to last December, never outside the top fifty, worst month 32nd ■ DECISIVE; listing name unmatched, no photograph, order capped at one □ THIN → p23 medicube — no order Two of its three December listings are single appearances with no persistent tier; the third is now a named test ■ SUPPORTIVE → p8, p23 BEAUTY OF JOSEON — no order An order in 12 of 12 months and the largest line in our book ■ SUPPORTIVE; absent from last year's fifty-deep US readings, which is a limit of that depth □ THIN → p17
HOLD	Sunscreen line Hold facings, add no depth into an October floor of 0.671 and four winter readings with none in the top fifty ■ DECISIVE → p4	Collagen-mask breadth beyond the two named SKUs One sheet mask in last December's fifty, and the surrounding terms are flat to down ☒ CONTRADICTING → p6
WATCH	REJURAN Turnover Ampoule \$52, outside the \$15–20 architecture; four months of readings never settled □ THIN → p29	MEDIHEAL eye patch The observed listing matches no official SKU □ THIN → p29 “quasi mask” A rising search term with no named product attached □ THIN → p30
DO NOT CHASE	Barrier and ceramide as a category 36% and 37% against a 38% average across 10,290 compared listings ☒ CONTRADICTING → p20	December body, hand and gift-set lanes 28% of last December's fifty, and not one listing in them K-beauty ☒ CONTRADICTING → p8

Rising in the US market — check your shelf.

Five lanes with US evidence behind them. Audit your own facings against this list. Each row's cancelling observation is on p30.

A collagen sheet-mask facing

December runs **1.76×** its own trend, and the SKU held the US top fourteen in **all twelve months** of last year

A sunscreen facing kept through winter

calendar floor **0.671** in October; yearly demand **+28.7%**

A soothing / panthenol cream facing

10K tier held three months at a **16%** higher price

A lip-care facing sized for December

8 of the fifty last December, against two or three in most months

A December format for the mask you already carry

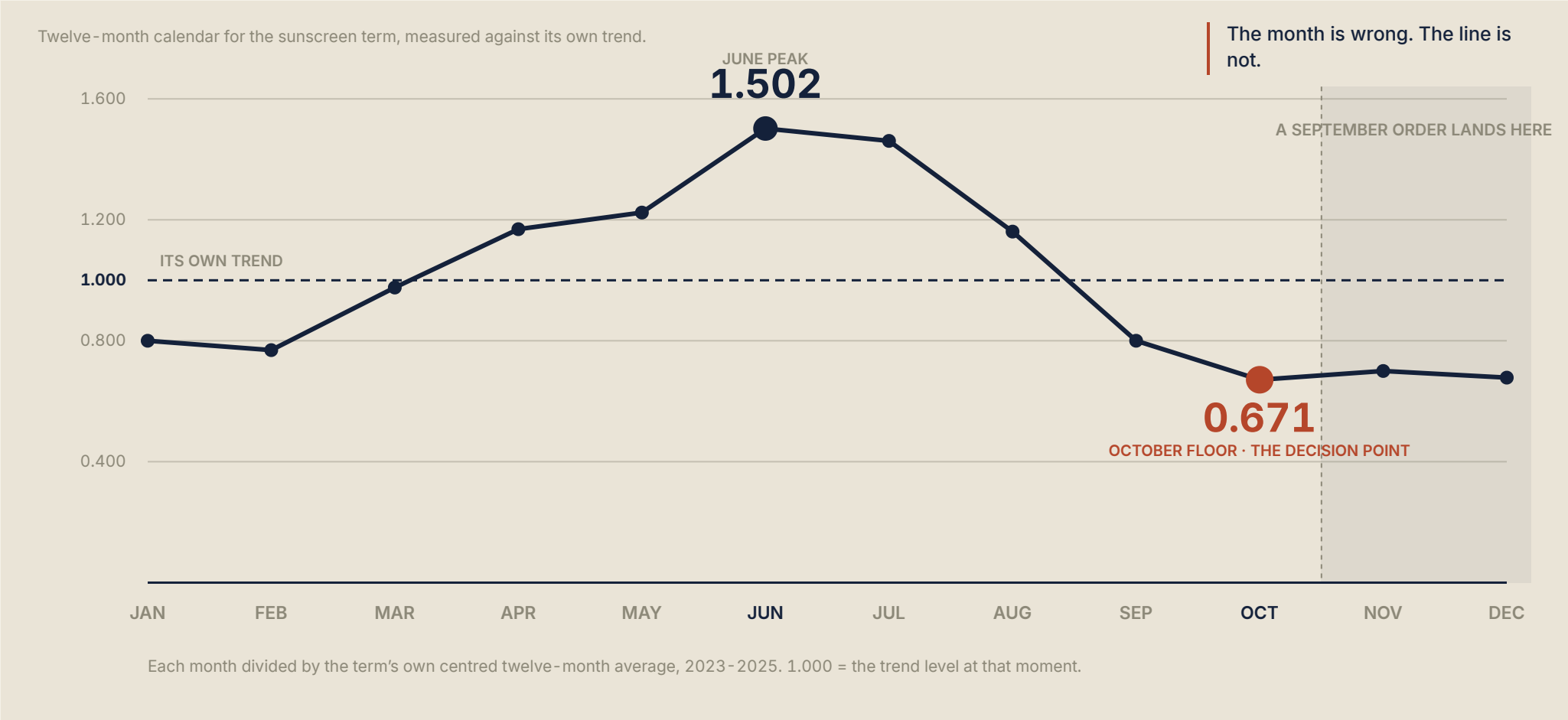
last December the proven mask shipped as a **four-count** gift pack

READING KEY US e-commerce and US search decide every call here. Community, upstream and our own order book can support or contradict a call; they never make one — and what we can supply is never a reason to buy.

Every call assumes supplier confirmation of availability and landed cost — neither is knowable from market data.

Sunscreen’s calendar peak is behind you and its demand is not — hold the line, add nothing now.

Against its own trend, sunscreen runs 1.502 in June and 0.671 in October, a 2.24× swing repeated in all four observed years. That is a timing fact, not a demand fact: first-half US search is up 28.7% to a four-year high. But across the four readings a September order lands on, no sunscreen listing sits inside the US top fifty.



SUNSCREEN LISTINGS IN THE US TOP FIFTY, BY READING

4	1	4	1	0	0	0	0
MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

All four readings, mid-September to mid-December. ■ DECISIVE

The summer readings swing as widely as the drop does — 4 to 1 and back.

A fourth signal agrees from a fourth layer: we placed **1.58×** as many sunscreen orders across the last six months as the six before ■ SUPPORTIVE — order counts, six months against six, and not a demand measure.

41,883 → 36,300 → 46,700

First-half US search, 2024 · 2025 · 2026 — a four-year high, **+28.7%**. ■ DECISIVE

2.10 → 2.29 → 2.40 → 2.67%

US shelf breadth rose in every month this summer. ■ DECISIVE

THE CORRECTION, AND ITS SCOPE

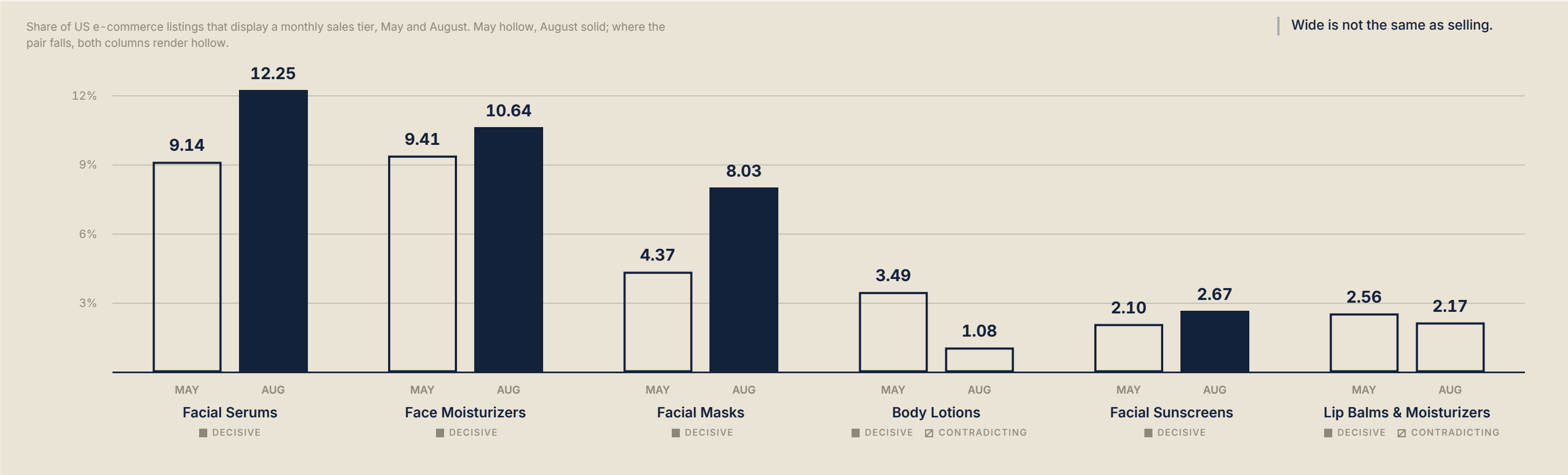
Last month we said do not add sunscreen breadth and published the line that would cancel it — **2.60%**. August reads **2.67%**. That call is withdrawn, for the annual line and not for September depth.

Hold every sunscreen facing you have and add no incremental depth into the October floor. Resume adding depth when the calendar turns up — historically March and April.

Reversal: cut the line only if US shelf breadth falls back below 2.40% for two consecutive months.

Summer share tells you where the shelf is wide, **not what December sells** — body care is the proof.

Six lanes, one measure, four months. Facial masks nearly doubled their share; serums and moisturizers climbed; sunscreen rose in every month. Lip sat still and body care fell by two-thirds. Two of those readings point the opposite way to what the December shelf shows — because breadth of display and top-of-shelf position are not the same measure.



TWO LANES READ THE OTHER WAY

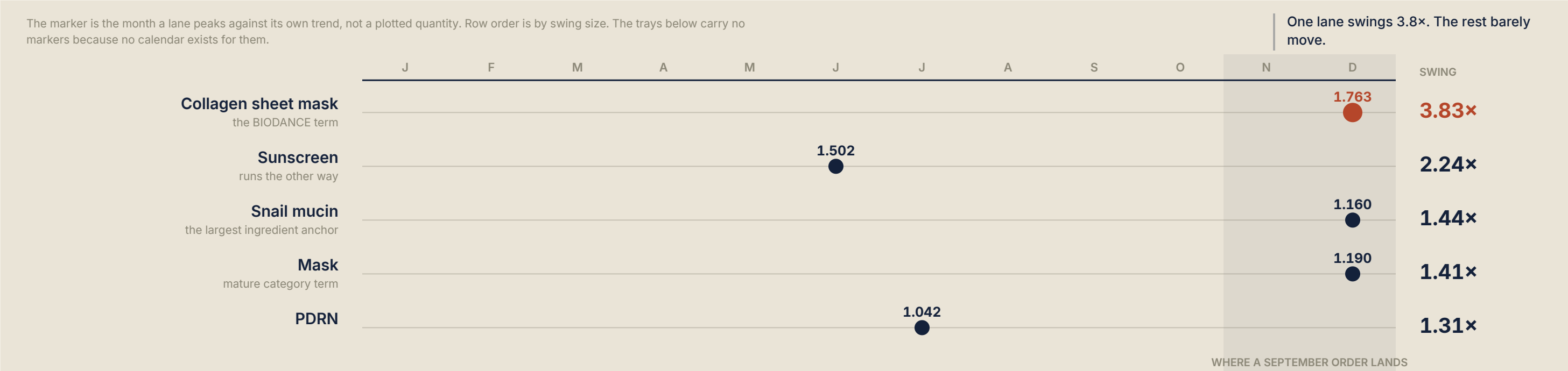
Body care falls here and takes **28%** of last December's fifty ■ DECISIVE. Sunscreen rises here and sits outside the top fifty in **all four** winter readings ■ DECISIVE. Both are true, and neither cancels the other. → p4, p8

Buy this chart’s risers on their own evidence — masks and serums — and never settle a December lane on a summer share.

Reversal: re-read any lane whose summer share and December position point opposite ways, in either direction.

Two lanes have a calendar search can read; the shelf adds one that search never sees.

Placed against its own trend, each lane peaks somewhere. What matters is how far it travels to get there. One mask swings 3.83×. Sunscreen swings 2.24× and runs the other way. The largest ingredient anchor swings 1.44× and is shrinking besides. And three lanes that moved last December do not exist in search at all.



NO READABLE CALENDAR
□ THIN

Two collagen-mask terms carry no marker and no swing. Their shape is set by a 2024 step change — one went 590 → 12,100 → 40,500 in two months. No calendar can separate that from a season.

NO SEARCH CALENDAR AT ALL —
READ ON THE SHELF ONLY
■ DECISIVE

Lip care, hand care and body care. None of the three is a term we can follow in search. On last December's shelf lip care took 8 of the fifty, hand care 3, body care 14 — and only the lip listings include anything K-beauty. → p8

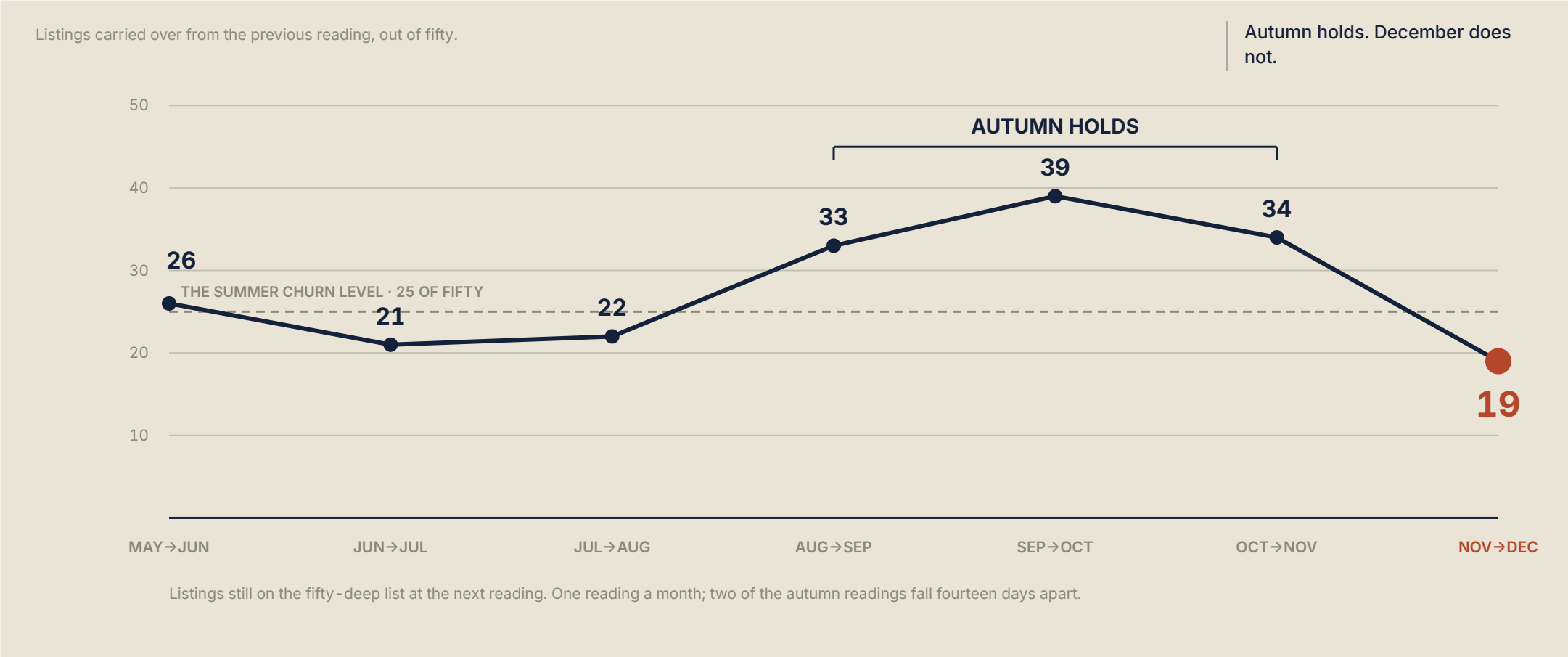
Barrier and moisturizer are decided on shelf evidence — p5 and p20 — not on this calendar.

Time only two lanes on this calendar: step sunscreen down, step the December mask up. Everything in the lower tray is a December decision, not a season.

Reversal: re-open lane timing if a second term posts a December peak above 1.5× its own trend.

September through November the US shelf barely moves — December is where your order lands.

Between one reading and the next, most of the fifty best-selling listings stay put. Through the autumn almost all of them do: thirty-three, then thirty-nine, then thirty-four carried over. Into December, nineteen. Twenty-seven listings appeared last December and in no other month of the year. That is the whole winter shelf change, in one month.



27

of last December's fifty appeared in no other month of the year.

DECISIVE

11

of the fifty carried gift wording in the listing name, against 3 in November.

DECISIVE

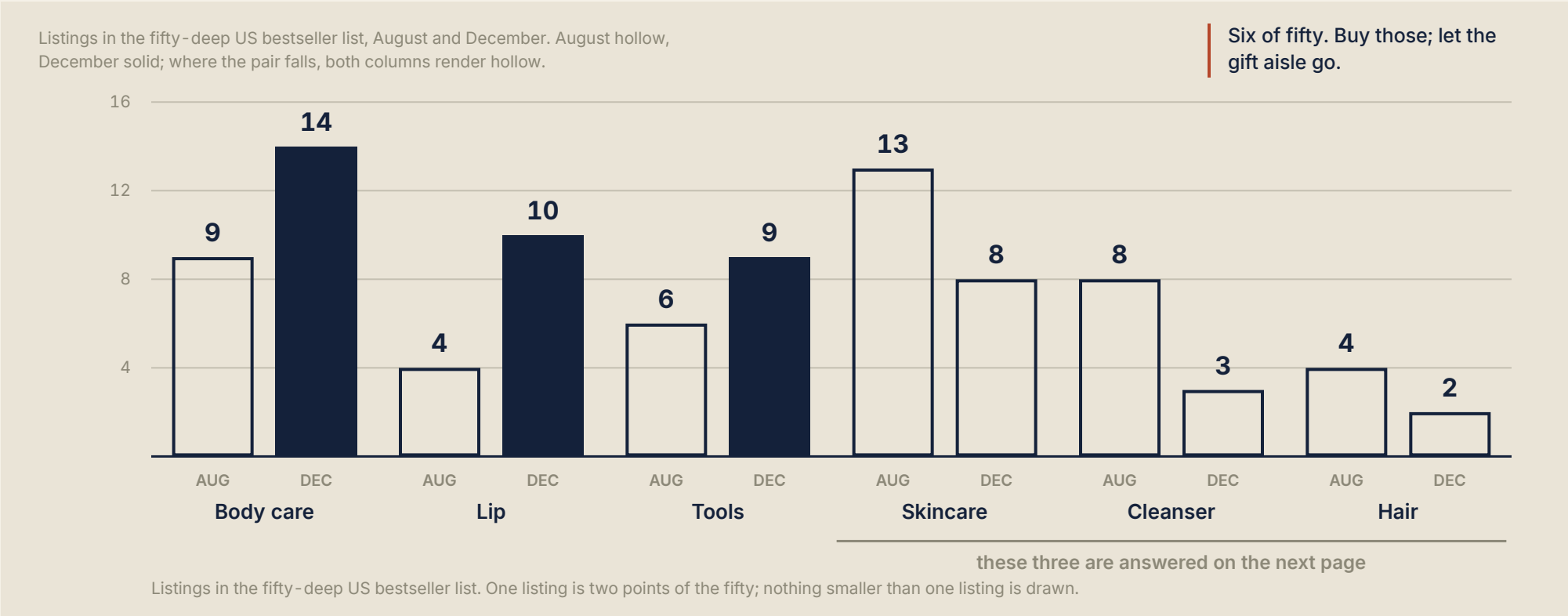
November is the month everything rises in search. It is also the quietest month on this chart. → p10

Do not spend September on an autumn shelf change — there is not one. Spend it on December, and order now for the one month that turns.

Reversal: reconsider if next autumn's readings show carry-over below thirty of fifty.

Almost none of December's shelf is yours — **buy the six positions that are.**

Body care takes twenty-eight per cent of last December's fifty and four of its top ten, and not one of those listings is K-beauty. Lip goes to twenty per cent and two of its ten are. Across the whole December shelf, six listings out of fifty were K-beauty, and three of the six are already on this board.



K-BEAUTY IN LAST DECEMBER'S FIFTY: SIX LISTINGS, THREE BRANDS		
3	collagen sheet mask	→ p19
6	toner pad	
13	jelly cream	
15	overnight wrapping mask	→ p23
33	lip sleeping mask	→ p24
46	lip glowy balm	→ p24
Four sit in the top fifteen; two sit at the tail. None of them is a body, hand or gift listing. ■ DECISIVE		
One of these three brand listings is no longer a December appearance. Read across the whole year it never left the list — p23.		
Counted by brand ownership, not by where a product is made; a manufacturing test would make it seven.		

THE LANE, REFUSED

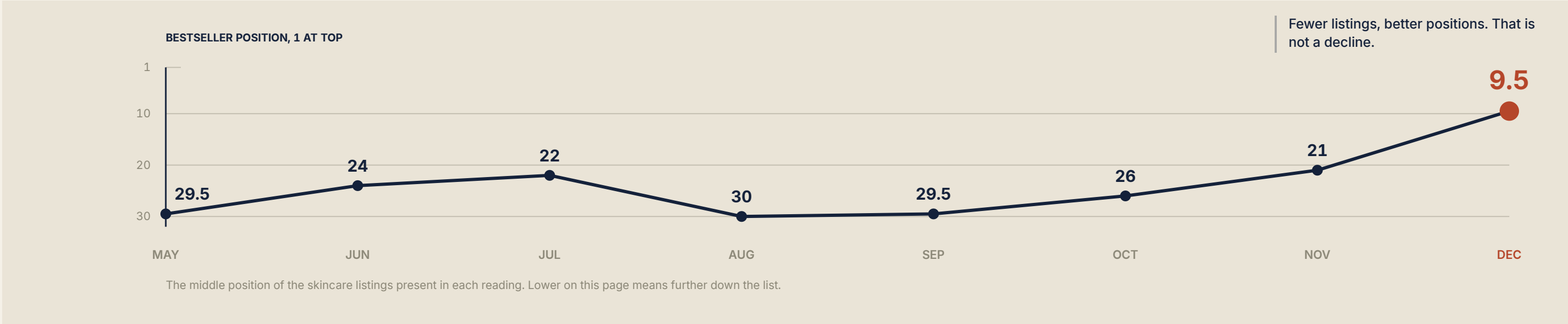
Body care holds **28%** of the December fifty, and **20%** with every gift-worded listing removed. The lane is real and large. It is held by mass gifting and hand-repair brands, and the hand-care listings that entered last December — three, after nine straight months at zero — are the same story.

Put December depth behind the six positions that are yours. Do not build a body, hand or gift-set lane to compete for December — that shelf is already held.

Reversal: reconsider body only when a K-beauty listing appears in the December fifty; one listing would reopen it.

December did not push skincare off the shelf — it pushed your proven skincare to the front.

Skincare's count falls from fourteen listings to eight, and a share chart would call that a collapse. It is not one. December's skincare listings sit higher on the list than in any other month: their middle position is ninth or tenth, against twenty-first to thirtieth all year. December took the tail, not the head.



LAST DECEMBER, AT THE TOP OF THE LIST

2	3	4	5	6	7
body	collagen sheet mask	eye mask	patch	toner pad	body

SKINCARE LISTINGS INSIDE THE TOP TEN

2	3	6	3	3	3	3	4
MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Four of the top six were skincare, and two of those four were K-beauty — the mask on p19 and a toner pad. ■ DECISIVE

The December figure is the second highest of the eight. ■ DECISIVE

Hold every skincare facing through December and give your proven items the front of the shelf. Do not cut skincare depth because the category looks smaller.

Reversal: reverse only if skincare's middle position falls back past twenty while its count keeps shrinking.

Every brand rises in November; the shelf does not move until December — November is a discount week.

Seven of eight brands sit above their own trend in November and three peak there. One of the three builds its business on a sunscreen. And on the shelf, November is the calmest month of the autumn. When everything rises in search while nothing moves on the shelf, the month is telling you when people shop.

1.547

HIGHEST OF THE EIGHT · PEAKS IN NOVEMBER

1.357

SECOND · PEAKS IN NOVEMBER

1.140

A SUNSCREEN-LED BRAND · PEAKS IN NOVEMBER

Three brands, all peaking in November, against their own trend of 1.000.

On the shelf: **34** of the fifty carried straight over into November. Into December, **19**.

Only one of the eight brands peaks in December. We read November as a discount week and nothing else — and no call in this issue rests on it.

Do not translate a November surge into winter demand, in this report or in your own numbers. Judge a November rise only against the same brand’s November last year.

Reversal: reconsider only if a brand’s November lift survives into a January reading.

Only one of these five signals can decide a US order; the other four can only agree or object.

Every number in this report comes from one of five places. They do not have equal standing and pretending otherwise is how a buyer gets talked into a bad order. One of them watches the US market directly. Three watch something adjacent and are useful for arguing. The fifth cannot carry a decision at all, and p15 shows why.

SIGNAL	SETTLES ON ITS OWN	CANNOT SETTLE	CEILING
US marketplace	Which named listings held position and for how long; what US demand does across a season	How much anything sold; how large any lane is	■ DECISIVE
Community discussion	How brands rank against each other inside one month; whether a brand has been present every month	Anything specific to the US; anything from a raw count	▣ SUPPORTIVE
Korean retail	What sits on a Korean shelf now, and what Korean factories are filling next	Anything about a US shelf, in any combination	▣ SUPPORTIVE
Our order book	Whether we have kept ordering a brand, and how often	What will sell. What we do not carry is not what does not sell	▣ SUPPORTIVE
Social media	Which campaigns are running	Brand rank, growth, US demand, season, staying power — all of it	□ THIN

ONE SIGNAL, TWO SHELVES

The same company’s two storefronts rank sunscreen **1st of nine** and **6th of seven** in the same eight weeks — a **3.6×** gap — and of what one of them ranks, **66.4%** has no counterpart on the other. “It is doing well in Korea” does not name a shelf, and neither shelf is in America. ▣ SUPPORTIVE

WHAT THE WEAKEST SIGNAL IS STILL GOOD FOR

In the same conversation where the largest brand’s share more than halved over four years, the share of talk about acne moved from **15.2%** to **14.8%** and has stayed inside a four-point band the whole time. Brands rotate. The problem they are bought for does not. ▣ SUPPORTIVE

Before you act on any number — ours included — ask which of these five rows it came from, and whether that row is allowed to decide it.

Reversal: a ceiling rises only when its signal can be read for the US on its own. None can today.

Two signals only add up when they read the same market, the same layer and the same months.

Three questions decide it. Are they watching the same market? Are they watching the same layer — what people want, what sits on a shelf, what gets ordered? And do their months overlap by at least three? Of the pairs available to us, five pass and four fail, and two of the failures are pairs you will hear used constantly.

PAIR	SAME MARKET	SAME LAYER	MONTHS IN COMMON	VERDICT
US demand × the US shelf, last year	yes	no	12	Use it — as a test of whether demand reached the shelf, not as agreement ■ DECISIVE
The US shelf, last year × our order book	yes	no	12	Use it ■ SUPPORTIVE
Community discussion × our order book	no	no	18	Use it, for direction only — our longest overlap ■ SUPPORTIVE
The US shelf this year × our order book	yes	no	2	Existence only. Never a trend □ THIN
Korean retail × community discussion	no	no	3	“Is what Korea is making being talked about” — nothing beyond that □ THIN
Korean retail × anything, to a US conclusion	no	—	—	Refused
Social media × anything	no	—	—	Refused — no confirming weight, even where it agrees
Community raw counts × the same month last year	—	—	—	Refused — the set is smaller now → p14
This year’s May reading × its June and July readings	—	—	—	Refused — they do not cover the same shelf

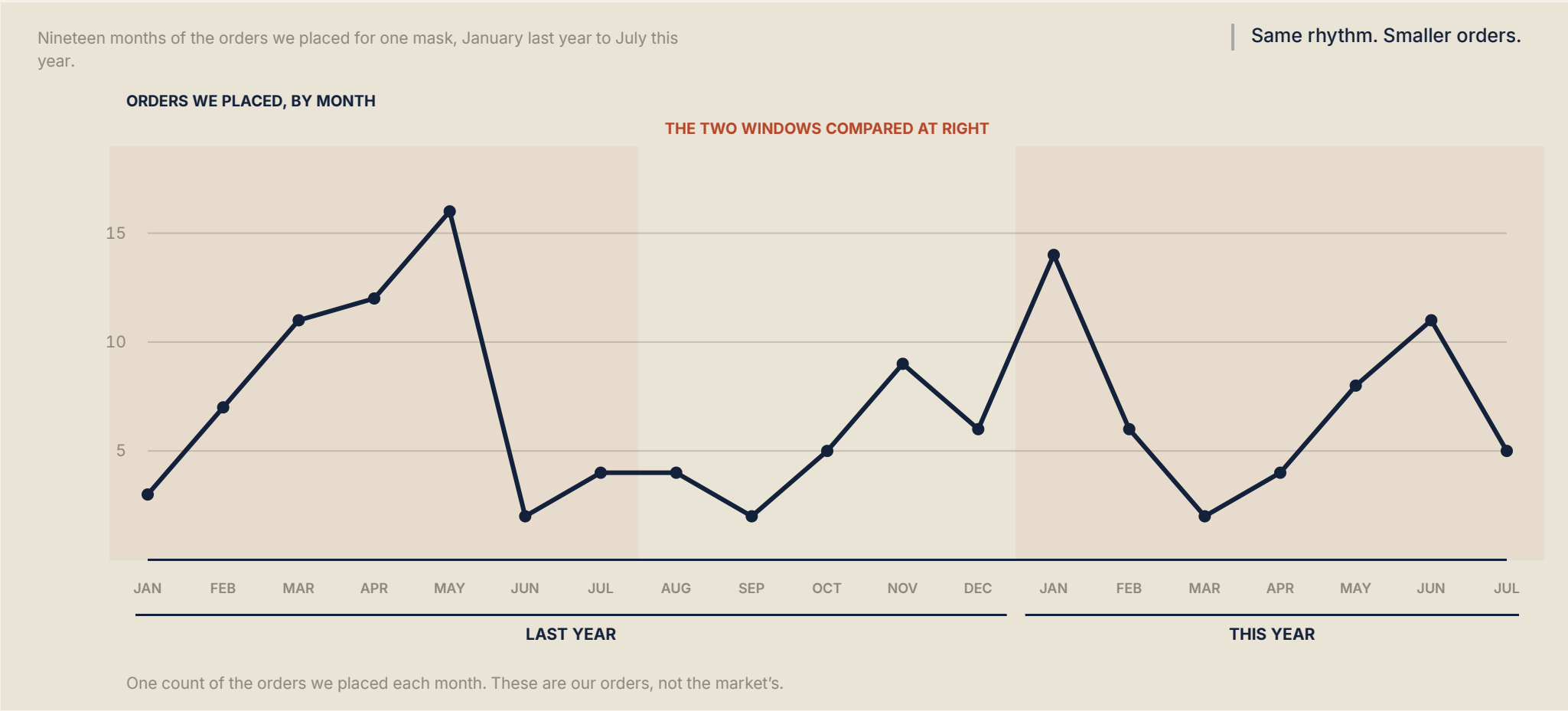
Three signals may be said to point the same way, and twice in this issue they do. Their numbers are never added, averaged or blended — the months behind them do not line up, and the only stretch where three of them overlap is **two months** long.

When anyone tells you sources agree, ask which months they share before you ask what they say. Apply it to this report first.

Reversal: a refused pair becomes usable the moment its two signals share one market and three months.

Read one column of our order book and this mask looks finished; read three and **it is not**.

We placed an order for the mask on p19 in every one of the last twelve months, and across the first seven months of this year we placed within nine per cent of the orders we placed in the same seven last year. The volume behind those orders is a different story, and the value with it. Same rhythm, smaller orders — and none of that is a statement about US demand.



THE SAME SEVEN MONTHS OF BOTH YEARS

×0.91 ×0.41 ×0.39

ORDERS UNITS VALUE

■ SUPPORTIVE

The price we paid per unit sat inside a single band in eighteen of the nineteen months, so the unit figure and the value figure agree without either depending on the other.

WHAT THE SAME BOOK SAYS THE OTHER WAY

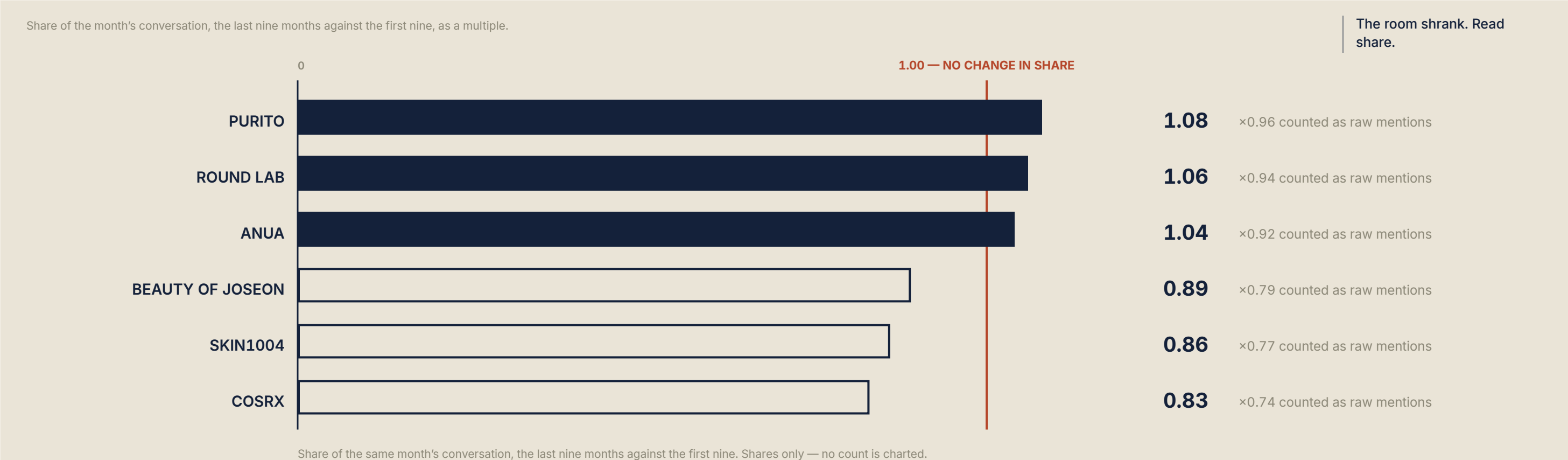
Outside our book nothing about this mask is bending. It held the US top fourteen in every month of last year ■ DECISIVE. Its share of conversation roughly doubled across the same eighteen months ■ SUPPORTIVE. And the most recent reading of this year's US list carries **five** of its listings against **two** in the reading before ■ SUPPORTIVE.

Do not move a US call on our order book. It tells you we can keep supplying this mask, not whether America is still buying it.

Reversal: re-read this the first time the number of months with an order falls below ten in twelve.

Count mentions and every brand you carry is falling; count share and three of six are rising.

The conversation we read is about nine per cent smaller than it was a year ago. A shrinking room pushes every brand’s raw count down at once, whatever that brand is actually doing. Measured as a share of the same month’s conversation, three of these six change direction outright. They are not shrinking. The room is.



A second trap sits under this one. At small sizes a multiple is easy to manufacture — one brand’s sixteen-fold rise this year rests on **seven** mentions, and two more of the year’s largest multiples rest on **five** and **nineteen**. Below thirty mentions in a month, this signal gives direction and nothing else.

Ignore every year-over-year mention count you are shown, ours included. Ask for share of the same month, and for the number underneath it.

Reversal: this rule lifts only when the conversation we read stops shrinking for a full year.

Social tells you which campaigns are running, not which products sell — so we let it decide nothing.

Four faults, and not one of them corrects another. Nearly half the fastest-rising names of the last ninety days are ordinary English words rather than brands. Not one video in the set says what country it came from. The ranking stopped in May. And the view counter only ever goes up, so nothing measured by it can fall.

48%

of the ninety-day risers are not brands — twelve of twenty-five are ordinary words

0

videos out of 786,826 that say which country they came from

May 15

the day the ranking we could read stopped

↑ only

a counter that has no way to go down

WHAT IT IS GENUINELY GOOD FOR

The three most-used new tags of the last thirty days are all sale-event and brand-collaboration tags, and not one organic seasonal or ingredient tag appears in the top twenty. That is the finding. You are looking at where campaign money went, and a great deal of it did not go to America.

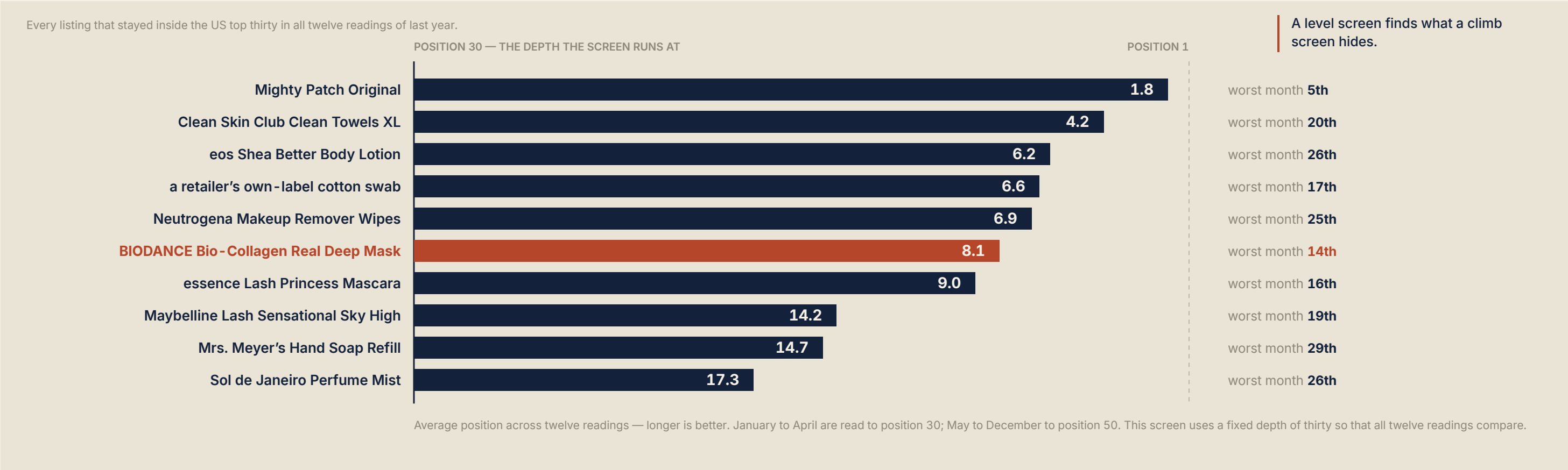
□ THIN

Read a social ranking as a media schedule. Never size an order from one, and never let one break a tie between two signals that can decide.

Reversal: this lifts when a social reading can be separated by country — not before, and not for a bigger sample.

Ten listings held the US top thirty in every month of last year; exactly **one** was **K-beauty**.

We screened last year’s twelve readings for the opposite of a climb — listings that never left. Ten survived all twelve at a fixed depth of thirty. Nine are American mass brands you cannot outbuy. The tenth is the mask this issue already prioritises, and its worst month of the whole year was fourteenth.



THE BIGGEST CLIMBER WAS NOT THE BEST SELLER

Rank last year’s K-beauty by how far it climbed and this mask is nowhere: it moved **five** places across the year, eighth to third. The brand that climbed furthest went twenty-second to sixth — **sixteen** places — and its average position for the year was **11.2** against this mask’s **8.1**. A change screen shows you the second one and hides the first.

Screen your own shelf this way once a quarter — on the worst month, not the best. Anything that never left has earned its facing before any trend has.

Reversal: drop a survivor the first time it is read outside the depth at which it survived.

WIDEN THE NET AND A SECOND ONE SURVIVES

Across the top fifty over the eight readings from last May to last December, fifteen listings never left, and **two** of them are K-beauty. The second is on **p23**, and last month we refused it. ■ DECISIVE

The steadiest brand in conversation and the steadiest line in our order book both earn nothing here.

The screen from the previous page works because it runs on the one signal that can decide a US order. Run it on the other two and it still returns names, and they are strong ones. One has been talked about every month for eighteen months at the least variable share of any brand we read. The other is the largest, most regular line in our own book. Neither is a buying instruction.

ANUA

THE STEADIEST BRAND IN CONVERSATION

18 of 18 months present in the conversation we read

mean share **8.01%**, the **least variable** of the fifty-nine brands read (variation **0.06**)

its whole eighteen-month range is **7.20%** to **8.84%** — it has never once left a 1.64-point band

half-year share multiple **×1.04** — invisible on any growth list, where four risers at **×1.40** to **×1.54** sit above it

and yet its share alone (**8.01%**) is larger than three of those four risers combined (**6.19%**) ■ SUPPORTIVE

CONVERSATION CANNOT DECIDE A US SHELF. NO ORDER.

BEAUTY OF JOSEON

THE STEADIEST LINE IN OUR ORDER BOOK

12 of 12 months with an order, **21.8** orders a month — the largest line in our book

variation **0.30**; half-year order multiple **×1.10**. It is the biggest thing we do and the least eventful ■ SUPPORTIVE

in conversation it is the **largest** brand we read at **10.25%** — and it is bending, **×0.89** ▣ CONTRADICTING

it does not appear in any of last year’s fifty-deep US readings — a limit of how deep those readings go, never a statement about the US market □ THIN

THE SIGNAL THAT DECIDES HAS NOTHING TO SAY. NO ORDER.

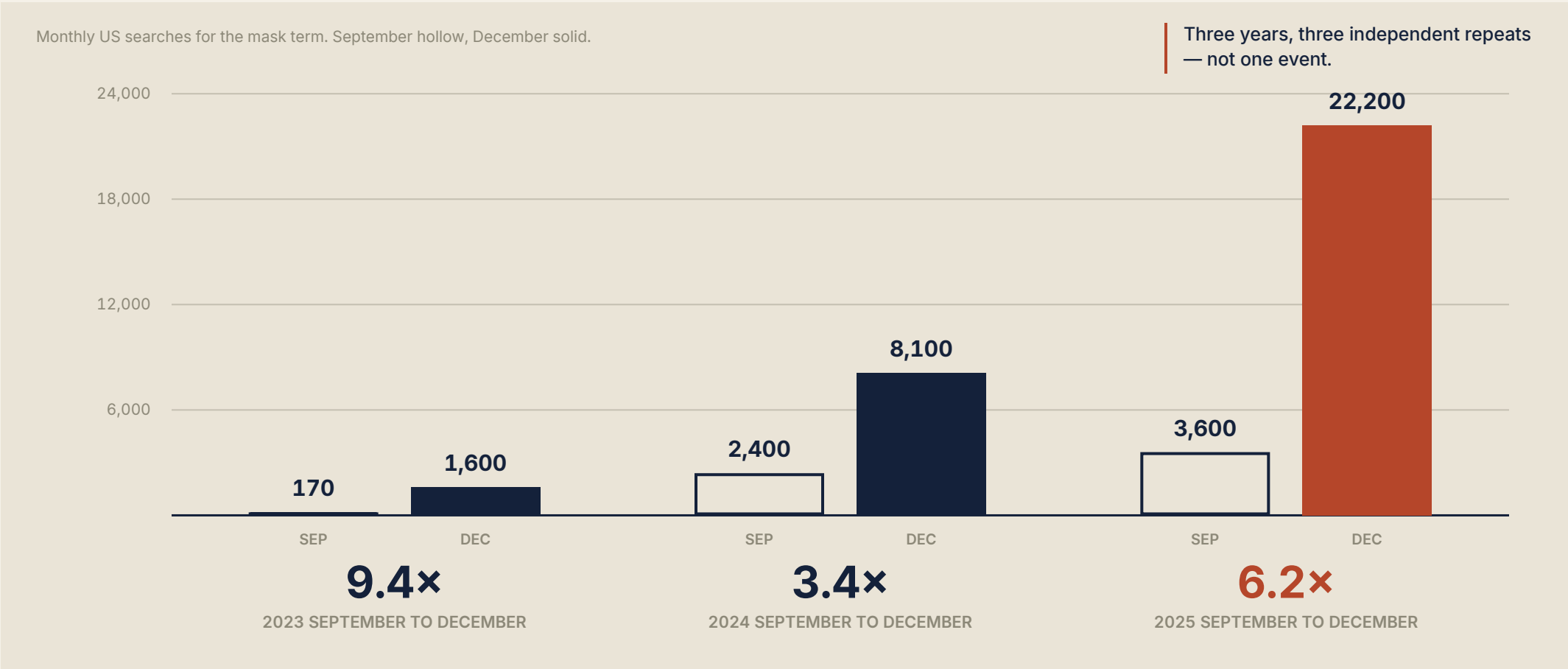
Both are on the board as brand lanes so that next month can promote them, and neither carries a thumbnail. A brand lane is a place to look, not a thing to buy.

Do not buy on steadiness unless the steadiness is on a US shelf. Ask us for either brand’s US position evidence before you order it.

Reversal: either becomes a call the month a named SKU from it holds a US position at a depth we can read.

One mask’s September-to-December ramp has repeated three years running — that is why it gets **your December depth**.

A single strong December proves nothing; a growing term produces one automatically. This one has climbed from September into December in three separate years, on its own, by 9.4×, 3.4× and 6.2×. The pattern is independent of the trend that carries the term, and it is the only mask term in the set that does it.



19,500 → 105,600

First-half search, 2025 to 2026 — a 5.42× year over year.

DECISIVE

1.763 vs 0.460

December against September, each on the term’s own trend — a 3.83× swing, the widest in the set.

DECISIVE

THE COUNTER - EVIDENCE

On the US shelf its best position of last year was **first, in July**. December's third is the year's third-best.

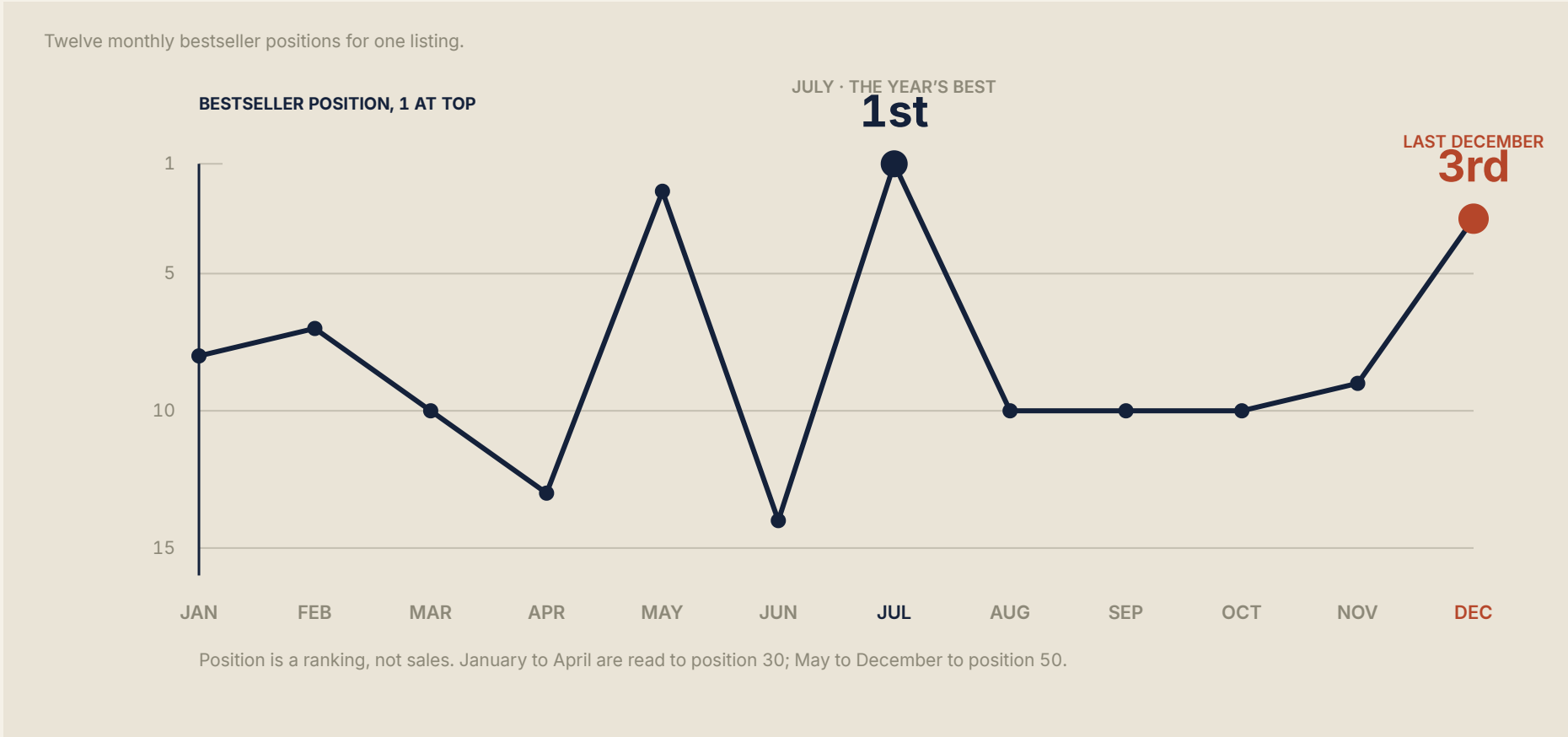
CONTRADICTING

The ramp is real. It is not the year’s high, and this product is not a December product. → p19

Order December depth in September. The lead time is the whole argument: an order placed now lands while the ramp is running, not after it.

Reversal: cancel if the September -to- December ramp fails to appear in the November reading.

This mask held the US top fourteen in all twelve months of last year — **order its December depth now.**



Place depth for the November–December shelf now, at one facing plus backstock. Ask your supplier for the multi-count December format before you size the order.

Reversal: withdraw the moment it is observed at any tier other than the top one across a full month.

Twelve months, twelve readings, never below fourteenth and inside the top ten in nine of them. It is the strongest single-listing record this report has ever observed, and it is not seasonal: December is its third-best month, not its first. You are buying a listing that holds the shelf all year and climbs into the month you are ordering for.

Biodance

BIODANCE Bio-Collagen Real Deep Mask

PRIORITIZE

■ DECISIVE



Top tier in all four monthly readings, one reading each month. ■ DECISIVE

Of the listings present in all three of the same months, **1,071** held the same tier, **42** of those at 10K or above, and **3** held the top tier — this one held four. ■ DECISIVE

\$18.12 · \$18.21 · \$18.53 · \$18.19 ■ DECISIVE

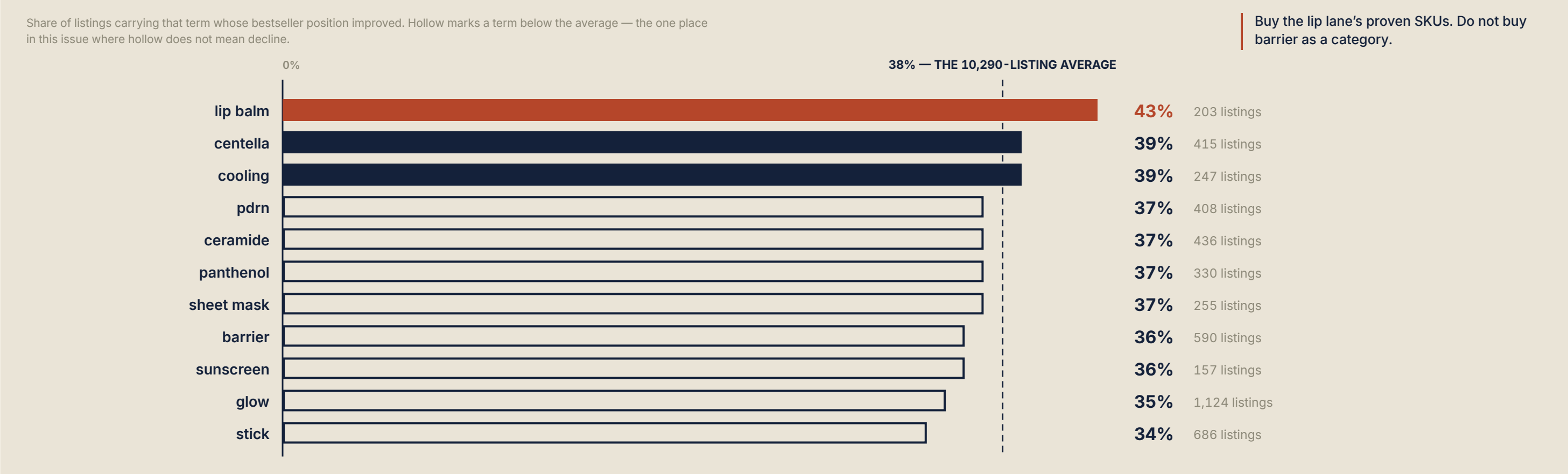
Last December the same product shipped as a **four-count gift pack** — a format fact, not a price fact. □ THIN

And of the ten listings that held the US top thirty in every month of last year, this is the only K-beauty one. ■ DECISIVE → p16

Whitespace check: if you carry no collagen sheet mask, this is where December starts.

Lip balm led every term we can compare this summer — barrier and ceramide both finished below the average.

Across 10,290 listings compared between early May and late August, 38% improved their bestseller position. Lip balm listings improved at 43% — the best result on the chart, in the season that should suit them least. Barrier, ceramide and panthenol all came in at or below the line, and barrier is the largest term of the three.



Barrier is the largest term in this set and one of the weakest results in it — 590 listings, 36%.

Lip balm led this summer and lip care took eight of last December’s fifty. Two different measures, one direction. → p24

Treat barrier and ceramide as a Do Not Chase at category level and buy only named SKUs with their own persistence. Keep lip stocked at current breadth.

Reversal: re-open barrier if both terms finish above the average in a winter-window comparison.

This cream raised its price sixteen percent and kept its tier three months running — **test one order, not a lane.**



Purito

PURITO Mighty Bamboo Panthenol Cream

TEST SMALL

■ DECISIVE

The 10K tier, observed as a single reading in every month of June, July and August — no other value appeared in any of them. That is a durability fact, not a winter fact.

Whitespace check: if you carry no panthenol cream, this is the one that held.

Order one minimum quantity, one facing, no second SKU from the lane. The evidence here is durability, so the test is whether it sells at your price.

Reversal: end the test the first full month in which the tier is no longer a single reading.

The page before says barrier and ceramide did not work as a category. This is the SKU that did. Across June, July and August it showed the 10K tier and nothing else — not one other reading in any of them — while its price went from \$15.50 to \$18.00. That is durability, not winter.



Reviews accumulated 3,310 → 3,586 → 3,779 across the same months — a soft signal, shown only because it moves with a tier that is not. □ THIN

Three named products, three prices between \$15.50 and \$19.00 — **hold that band** and make anything above \$30 prove itself.

The \$15–20 band holds 1,770 of the 5,937 US listings that display a monthly sales tier, and the strength inside it is real: 453 of them sit at 1K or above and 116 at 10K or above. Every product this issue names sits in that band. The one it refuses sits at \$52.

BIODANCE Bio-Collagen Real Deep Mask

\$18.12 → \$18.53

top tier throughout ■ DECISIVE

\$15–20 holds 29.8% of tiered listings and both proven survivors.

PURITO Mighty Bamboo Panthenol Cream

\$15.50 → \$18.00

tier unchanged ■ DECISIVE

LANEIGE Lip Glow Balm

\$19.00

at its July high ■ SUPPORTIVE

REJURAN Turnover Ampoule

□ THIN

\$52

outside the band; this is why it stays a watch line

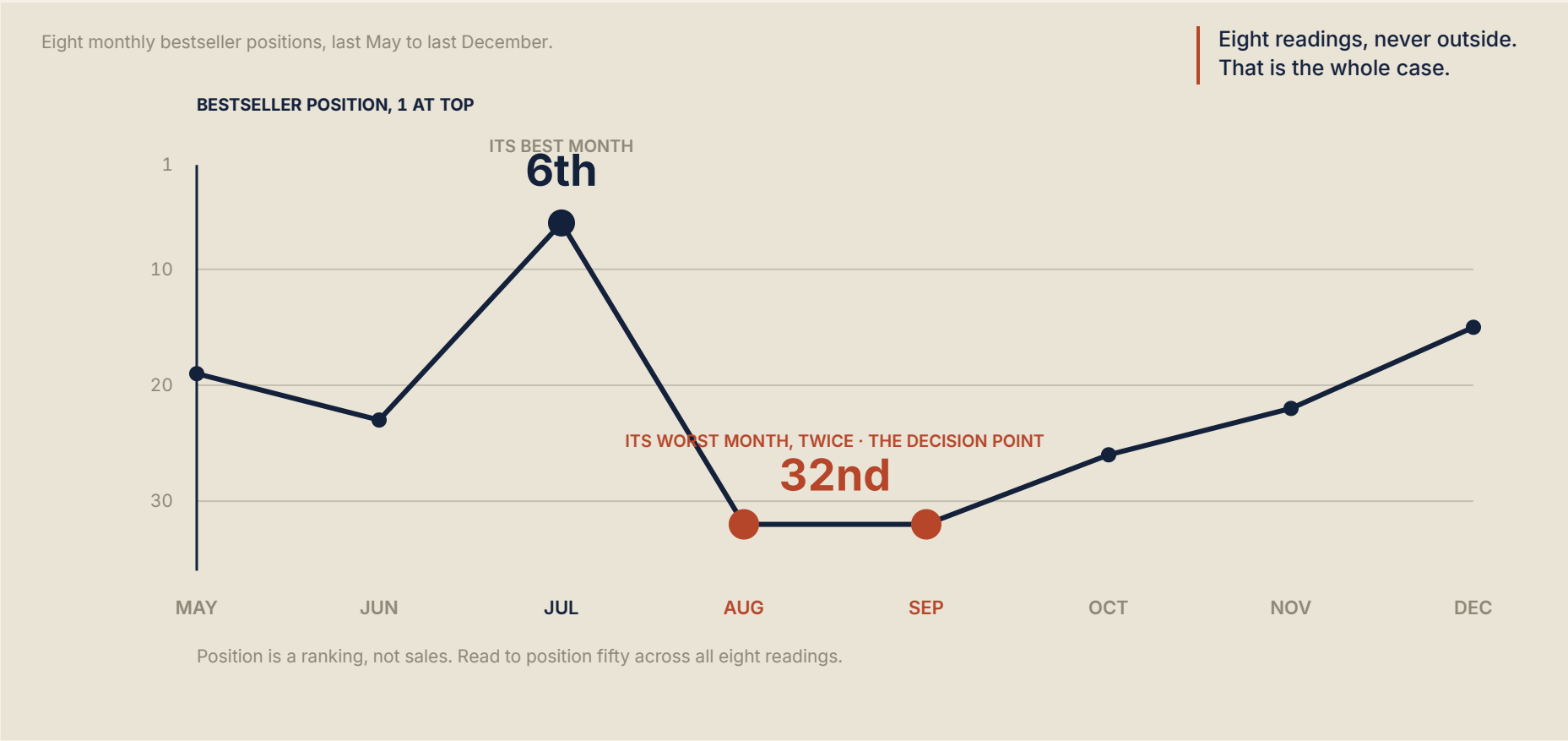
Thirty-one listings raised price by 10% or more and held or improved their tier — a price rise is not, by itself, a reason to drop a SKU.

Hold the \$15–20 architecture for this cycle. Above \$30, require product-level persistence before ordering, not brand reputation and not a launch.

Reversal: open the \$30+ lane if a named SKU there holds one tier across two full months.

This mask never left the US top fifty across eight straight readings — order one small test, not a lane.

Last month we published this listing as brand presence and refused it, because we saw it once, in December, and called that an appearance. Reading the same year at a wider depth shows it in every one of the eight readings from last May to last December — worst month thirty-second, average twenty-second. That is persistence. The refusal was ours and it was wrong.



MEDICUBE

Collagen Overnight Wrapping Peel Off Mask

TEST SMALL

eight readings, eight appearances, worst month **32nd**, average **21.9** ■ DECISIVE

15th in last December's fifty — one of six K-beauty listings in it ■ DECISIVE

no tier reading has ever settled on it. The condition we published last month is still unmet, and it is not what changed our mind □ THIN

the observed listing name has not been matched to the brand's own catalogue, so no photograph appears here and the order is capped at one □ THIN

Order one minimum quantity, one facing, no second SKU from the lane. Have your supplier confirm the exact SKU behind the listing name before the order goes in.

Reversal: end the test if it is read outside the top fifty in any single month, or if the identity check fails.

Lip demand is not expanding, but **December earns a depth step** on the two SKUs you already carry.

Lip runs three or four of the fifty most months and ten in December, and all of that increase is care, not colour. Lip balm also led the summer shelf test at 43%. But two of those ten December listings are K-beauty, and they are the two below — an argument about two SKUs, not a lane.



LANEIGE Lip Sleeping Mask

REPLENISH

33rd on the US bestseller list last December. ■ DECISIVE

Readings inside a single month ranged 2K to 60K. □ THIN

Carried forward — no qualifying reading this month.



LANEIGE Lip Glow Balm

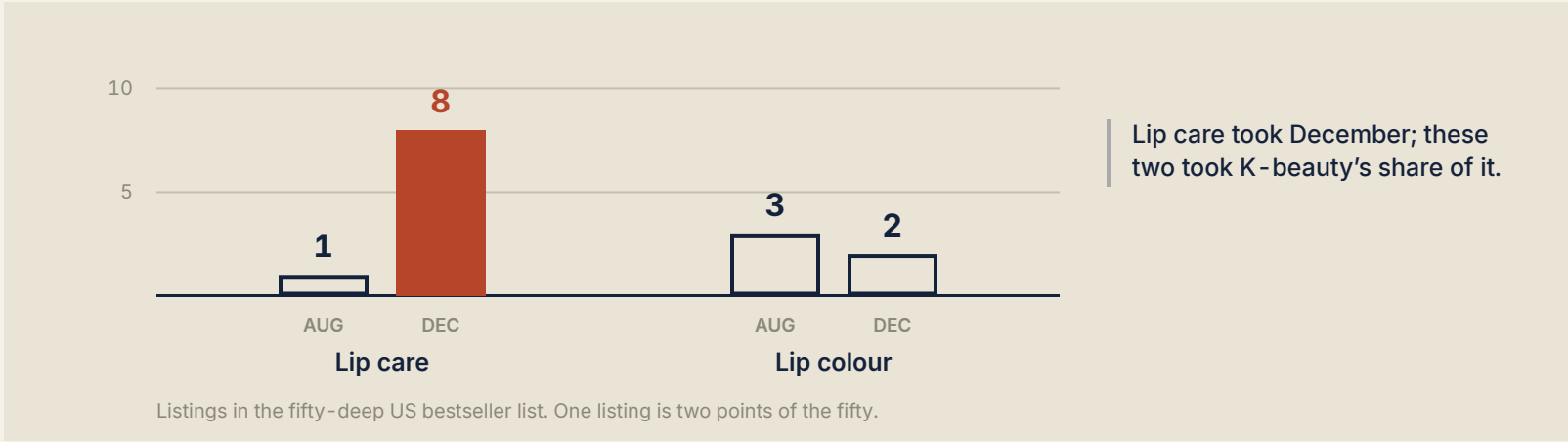
REPLENISH

46th last December. ■ DECISIVE

Reached 90K in July at \$19.00. ■ SUPPORTIVE

Readings inside a single month ranged 1K to 40K. □ THIN

A position is a ranking, not sales.



DISCOVERY HAS GONE QUIET — THE SHELF HAS NOT

Mentions fell from **2.60 to 1.32 per 1,000** conversations ■ SUPPORTIVE and the brand no longer surfaces in conversation titles □ THIN. On the shelf, both SKUs sat in last December's fifty.

Buy the two SKUs; do not buy the brand story.

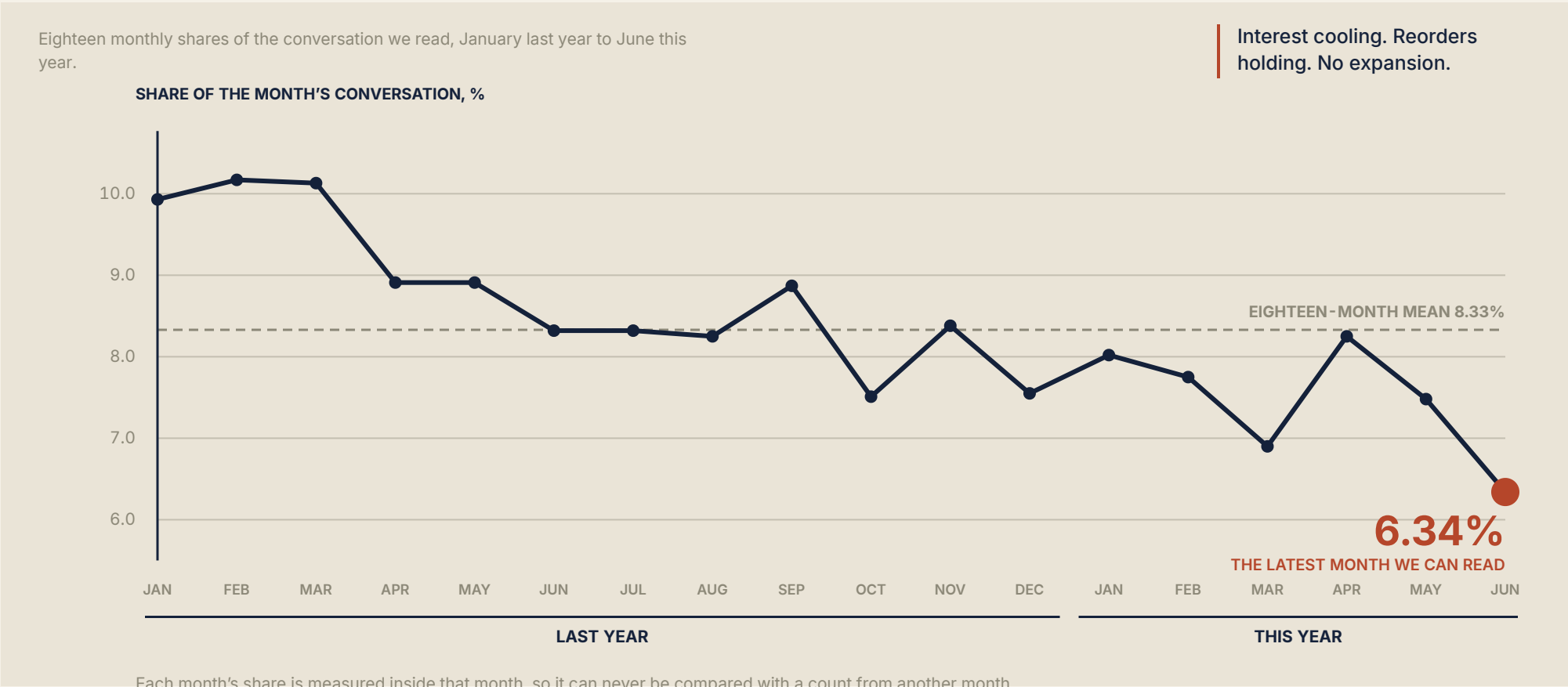
Eight of the ten December lip listings were not K-beauty. The lane is proven; our share of it is these two positions.

Replenish both SKUs and add one December depth step on the sleeping mask. Add no third lip SKU, and treat the July highs as ceilings when you size it.

Reversal: drop the December step if lip care falls below five of the fifty next December; expand the lane only above 3.0% of tiered listings.

The essence you replenish is cooling in conversation and steady in our reorders — **replenish, do not expand.**

Its share of conversation has fallen against the same month a year earlier in every one of the six months we can compare, without a single exception, and its half-year share is down to 0.83 of what it was. Across the same stretch we ordered it in every month, and more often than the year before. Two layers, opposite directions, one instruction.



Against the same month a year earlier, **six comparisons out of six** are lower. There is no exception to find. ■ SUPPORTIVE

In our own book: an order in **12 of 12** months, and **×1.21** as many orders across the first seven months of this year as the same seven last year ■ SUPPORTIVE. **That is why this is a Replenish and not a Reduce** — the thing that would justify cutting is not happening.

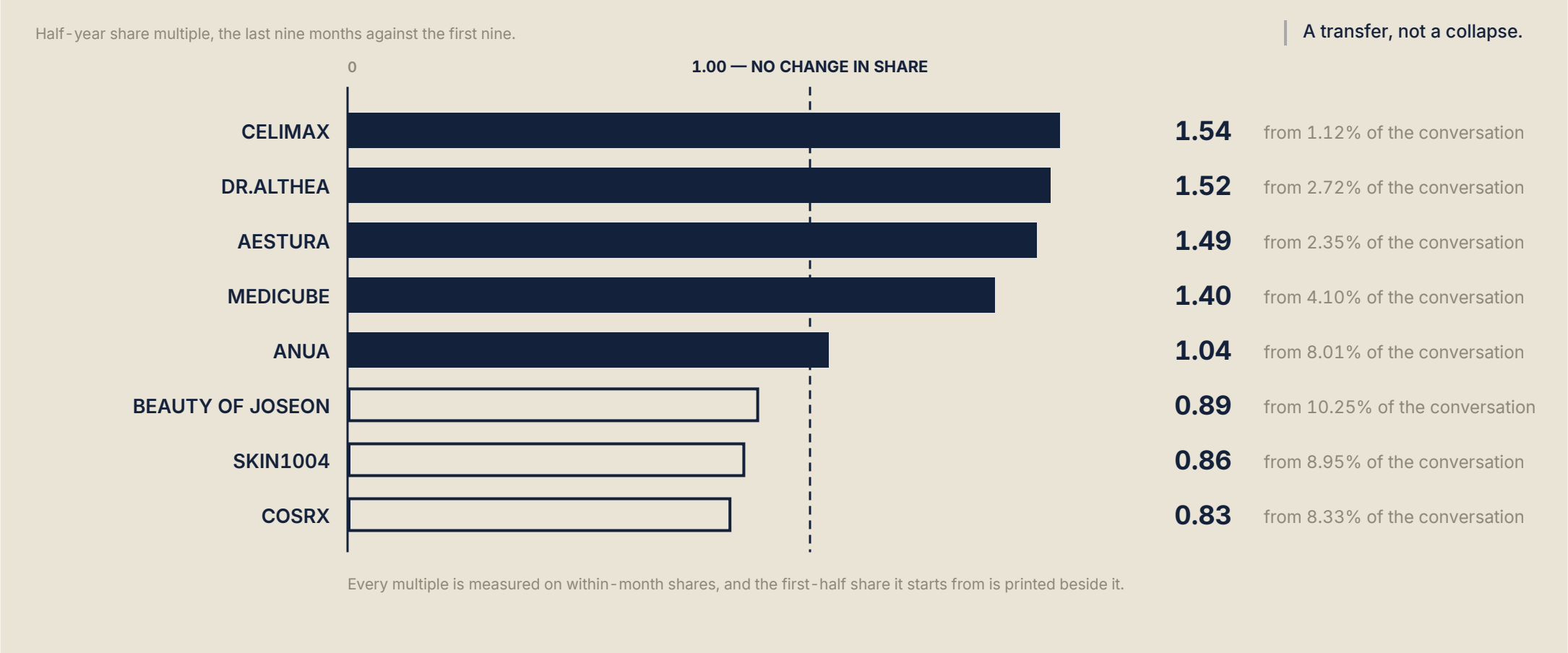
US demand said it first and said it hardest: first-half search **−29%** ■ DECISIVE. Last month's condition for expanding this lane was never met.

Keep the facing you have. Add no second SKU from this brand and no incremental depth on this one.

Reversal: reduce only when the reorder rhythm thins — fewer than ten of twelve months carrying an order.

Four brands are taking conversation from the three biggest — and not one of them earns an order yet.

Share is a fixed pie, so this is a transfer and not a collapse. The three largest K-beauty names in the conversation we read are all down, between 0.83 and 0.89 of their first-half share. Four smaller names are all up, between 1.40 and 1.54. One large brand holds. None of the four risers has a US position we can read, so none of them is a buy.



READ THE TWO COLUMNS TOGETHER

The four risers move furthest and start smallest. The one large brand that holds — at **1.04** — has a share to itself larger than three of the four risers combined. Growth ranks them one way; size ranks them the other. → p17

FOUR MORE ARE BENDING WHILE STAYING LARGE

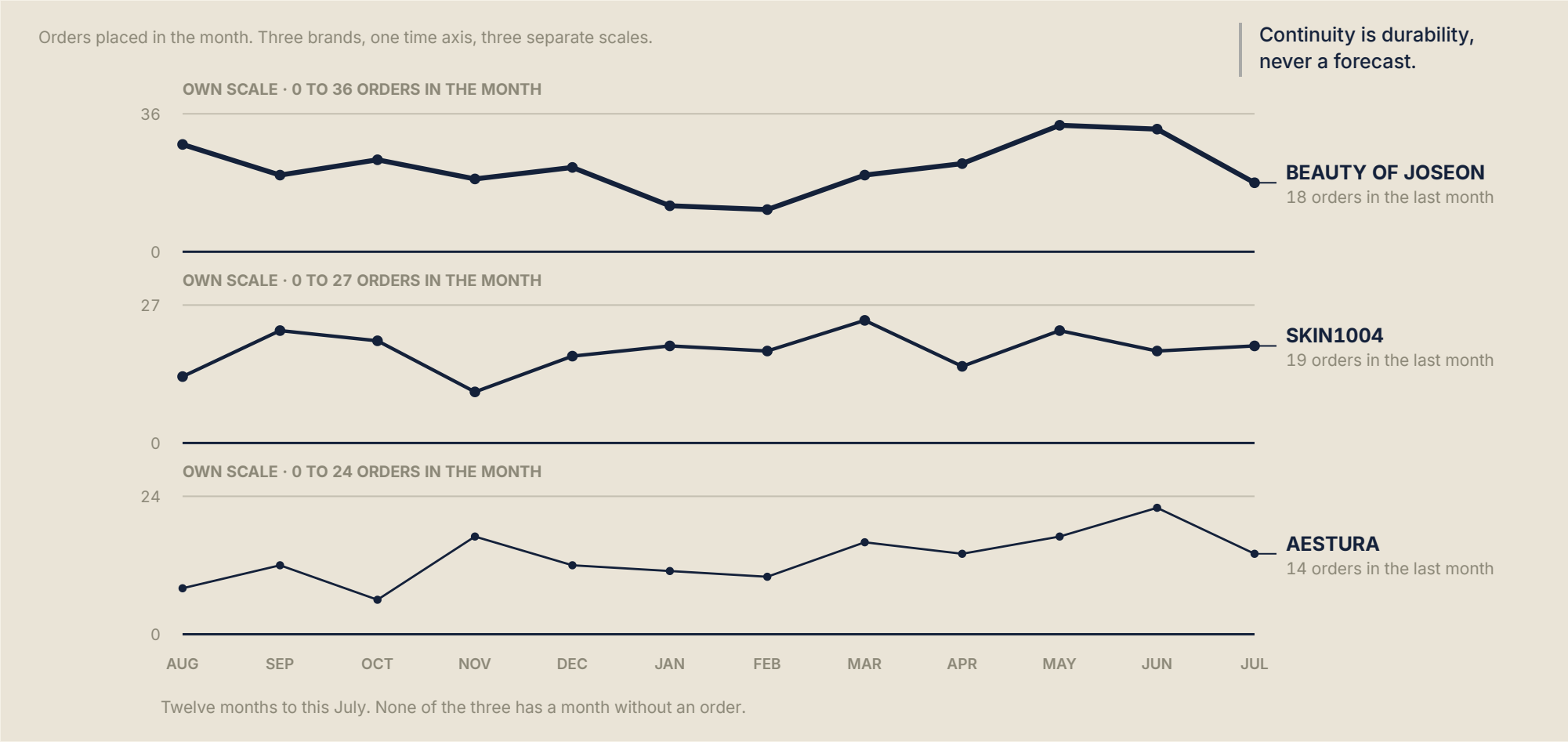
Four brands sit above 0.8% of the conversation and are down between **×0.72** and **×0.79** across the same halves. In every case the bend is in the one signal that cannot decide a US shelf, and in every case the second signal either disagrees or is flat. **A bend in a signal that cannot decide is not a bend.** We are naming them and doing nothing. □ THIN

Expect to be asked about the four risers. Answer that none of them has a US shelf record yet, and change nothing on your own shelf because of this page.

Reversal: any riser becomes a call the month a named SKU from it holds a US position at a readable depth.

Our order book can tell you whether a brand keeps moving — it cannot tell you how many days apart.

Twenty-three brands have carried an order in every one of the last twelve months, and a hundred and sixty of the hundred and seventy-eight we work with carried at least one. That is continuity, and continuity is a durability signal. It says a brand keeps going. It never says a brand is about to start.



ALL TWELVE CARRIED AN ORDER IN 12 OF 12 MONTHS		
BRAND	ORDERS / MONTH	VARIATION
BEAUTY OF JOSEON	21.8	0.30
ILLIYOON	18.3	0.35
SKIN1004	18.1	0.21
DR.ALTHEA	15.6	0.24
AESTURA	13.2	0.32
CELIMAX	11.2	0.37
COSRX	9.5	0.44
LANEIGE	6.5	0.29
NUMBUZIN	6.0	0.48
PURITO	5.2	0.44
DR.G	4.8	0.48
ISNTREE	4.7	0.47

■ SUPPORTIVE

Use continuity to decide what not to drop. Never use it to decide what to add — our book is slowest of all on the brands that are newest.

Reversal: a continuity row lapses the first month a brand carries no order at all.

WHAT THIS CANNOT ANSWER

How often a brand is reordered, in days or weeks. Our book is kept by month, so every brand in it would return the same answer and that answer would mean nothing. We do not publish it.

Thirty-two of the thirty-six brands on the US list are already in our order book — that is supply, not demand.

We can now say what we carry, so here it is, together with the reason it proves nothing. The two most recent readings of this year’s US list carry thirty-six brands between them. We placed an order for thirty-two of them in the last twelve months. The list is already narrowed to K-beauty and our book is several times larger than it, so the overlap is arithmetic.

36

brands across the two most recent readings of the US list

32

we placed an order for in the last twelve months

4

we did not

BASK & LATHER — an American hair brand

FULLY

Medix 5.5 — an American skincare brand

Peach Slices — American-owned

Three of the four are not K-beauty at all and the fourth is American-owned. Set them aside and the cover is complete — which still tells you nothing about what will sell.

FOUR REASONS THIS IS NOT AN ADVANTAGE

the list we measured against is already narrowed to K-beauty, and our book runs to **160** brands

this is cover at brand level, not at product level — carrying the brand is not carrying the listing that sells

we are structurally late to anything new: a brand reaches the US list **before** it reaches our book

a brand missing from our book is a brand we have not brought in, never a brand America is not buying

THE ONE AXIS NOTHING ELSE HAS

Every signal in this report reads a cut-off list — the top thirty, fifty or hundred. Our book saw **73** different brands ordered in a single month this July. Nothing this report leaves unnamed has been ruled out.

■ SUPPORTIVE

Ask us for anything in this report by name. What we can supply never makes a decision — it only decides whether a decision you already made can be executed.

Reversal: this page carries no call to reverse. Its four limits are what would falsify any claim built on it.

Twelve conditions graded: one call withdrawn, one promoted, two unresolved — and two refusals of ours corrected.

Every call in the last issue was published with the observation that would cancel it. Here is what each one did. One call is withdrawn because our own cancelling number was crossed. One promotion is rescinded on re-checking. Two questions stay open, and two refusals of ours come off.

LAST MONTH’S CALL	THE CONDITION WE SET	WHAT HAPPENED	VERDICT
BIODANCE mask — prioritize depth	Leaves the top tier, or search falls two months running	Top tier in every month, one reading each; search 18,100 → 27,100 into June; and the US top fourteen in all twelve months of last year	HOLDS — STRENGTHENED
medicube PDRN serum — prioritize	Tier below the top, or search flat two months running	Search rose to 60,500 , a 3.3× year over year; tier readings ran 10K to 100K inside one month	SEARCH HOLDS · TIER NOT GRADEABLE
LANEIGE Lip Glowly Balm — replenish	Tier below 90K while price is at or above \$19.00	Reached 90K at \$19.00 in July, the opposite of the condition; and 46th on the US list last December	HOLDS
COSRX snail essence — replenish only	Search rises year over year two months running before any expansion	First-half search −29% ; the condition was never met	HOLDS — NO EXPANSION
SKIN1004 — brand lane, no order	A named SKU holds a tier	No single-SKU persistence	HOLDS — NO PROMOTION
Sunscreen — do not add breadth	Sunscreen holding above 2.60% of tiered listings cancels this call	August reads 2.67%, the fourth straight monthly rise. And it appears in none of the four readings from mid-September to mid-December	WITHDRAWN — SCOPED → P4
ARENCIA — reduce pacing	Two consecutive rises restore it	The called SKU did not rise. A different SKU in the brand is moving, and has not cleared checking	HOLDS — BRAND QUESTION OPEN
REJURAN — watch	A US tier appears, or US search rises	Last month recorded no August reading. There is one, and it is lower. A lower reading is not gradeable, so the promotion recorded last month is rescinded	WATCH — PROMOTION RESCINDED
PURITO — watch	Community interest leaves parity	One SKU showed the 10K tier as a single reading in June, July and August while price rose 16%	PROMOTED → TEST SMALL, P21
MEDIHEAL eye patch — watch	The listing matches an official SKU	Checked against the brand’s own catalogue on 24 August. No official SKU carries the observed name. No photograph is used anywhere in this issue	UNRESOLVED — IDENTITY
Three small tests	End if a cycle passes without sell-through	The kit test survived its threshold; a duplicate listing under a near-identical name appeared alongside it	SURVIVES — IDENTITY FLAG
“quasi mask” — open question	A named product attaches to the term	Still no named product	UNRESOLVED

AND TWO CORRECTIONS OF OURS

The reason, not the call. Every seasonal call this report has published rested on US search. This issue is the first to read a full year of US bestseller positions. It confirms both calls search made. It also shows we refused body care for the wrong reason: the December body shelf is large, and it is held by companies you do not compete with. The refusal stands; the reason is corrected on p8.

The refusal itself. Last month we refused a mask because we saw it once, in December, and called that brand presence. Reading the same year at a wider depth shows the same listing in every one of the eight readings from last May to last December, worst month thirty-second. **The condition we published — that it hold a tier for a full month — is still unmet, and it is not what changed our mind. A different reading did.** The refusal comes off. → p23

Carry every HOLDS row forward unchanged and act on the four that moved: sunscreen returns to the shelf plan with a scope, the panthenol cream and the wrapping mask each get one test order, and December depth goes to the mask and the two lip SKUs.

Reversal: any HOLDS row reverts the month its own condition is met — the conditions are unchanged.

Eighteen observations would change these calls — and four cannot be checked until next December or later.

Each line below is a number, not a feeling, and each is stated on the same basis used throughout this issue so next month compares like with like. Four of them cannot resolve inside a month. If those four fail, the December story and the screen that found this issue’s second test are both finished, not deferred.

THE CALL	WHAT WOULD CHANGE IT	THE NUMBER
BIODANCE mask — prioritize	Observed at any tier other than the top one across a full month	any single lower reading
BIODANCE mask — prioritize	The September-to-December ramp fails to appear, after three years of appearing	November reading
Sunscreen — hold the line	US shelf breadth falls back for two consecutive months	below 2.40% (August: 2.67%)
Sunscreen — no depth now	The calendar turns up, historically March and April	above 1.000 against trend
Lip — replenish	The lip lane clears its share threshold and expansion becomes arguable	above 3.0% (August: 2.17%)
Lip — December depth step	Lip care does not repeat its December step	fewer than 5 of fifty · next December
December body and gift lanes — do not chase	Any K-beauty listing appears in the December body shelf	one listing · next December
medicube toner pad and jelly cream — brand lane, no order	Either holds a tier across a full month, or either is read in more than one month	a single-reading month
PURITO cream — test small	The tier is no longer a single reading across a full month	any second reading
PURITO cream — test small	A second soothing or panthenol SKU holds a tier two months running	promotes the lane
Snail — replenish only	First-half search turns positive year over year twice running	above 1.00× (now 0.71×)
medicube PDRN serum — replenish	It shows one tier across a full month, or search falls twice running	a single-reading month
Barrier and ceramide — do not chase	Both finish above the average improvement rate in a winter-window comparison	above 38% (now 36% and 37%)
Is December a season, or one year we saw?	The same three lanes repeat, or they do not	hands, lip care, body · next December
medicube wrapping mask — test small	It is read outside the top fifty in any single month, or the listing name fails to match the brand’s own catalogue	one reading, or one failed match
ANUA and BEAUTY OF JOSEON — brand lane, no order	A named SKU from either holds a US position at a depth we read	one named listing
Reorder continuity — a durability signal, never a buying one	A named brand’s months-with-an-order falls below ten of twelve	below 10 of 12
Is the level screen worth running?	Next year’s twelve readings return a survivor set of a different size, or none at all	10 survivors · next year

Two watch items resolve only on identity or attachment — the unmatched eye-patch listing when it matches an official SKU, and the unattached search term when a named product carries it. A third, row 15, resolves on identity too, and until it does the order stays at one.

Photograph this page and check it against next month’s issue. If row 14 fails next December the December story is disproved, and if row 18 fails next year the screen that found row 15 goes with it — and the issue that reads them will say so first.