

OCTOBER 2026

Your November–January order

What to add, keep, try, cut and skip — US K-beauty, for store buyers.

THIS MONTH'S ORDER, IN FIVE LINES

TICK AS YOU PLACE IT

☐ ADD DEPTH

☐ KEEP STOCKED

☐ TRY ONE CASE

☐ CUT BACK

☐ SKIP

LAST MONTH, GRADED

18 calls checked: 8 held, 4 reversed, 6 can't be read until December or later.



What we got wrong → p.17

HOW TO READ THE CARDS

100K+

Monthly sales band. 100K+ = shown as "100K+ bought a month" — a floor, not a count.

12 of 12

Readings at that band / readings that month. "Mixed" = more than one band that month.

●●● ●●● ●●●

Evidence: strong / medium / thin.

What would change this. Every card names the reading that would flip our call.

19 products inside, plus 7 on our radar. Each card says what would change our mind.

THE STORY THIS MONTH

This holiday runs on what already sells.

Every holiday you hear the same pitch: chase the new trend, build a winter shelf, stock whatever everyone is talking about. The US numbers tell a quieter story. The holiday is a bump, not a switch. One mask carries December. The loudest trend of the year, PDRN, is not what sells best. And the products that already sell keep selling, even when fewer people search for them. We take these one at a time over the next two pages. Your order comes after, on the cards: short, specific, and each with the reading that would change our mind.

- 1

The season is a bump, not a switch.
p.2
- 2

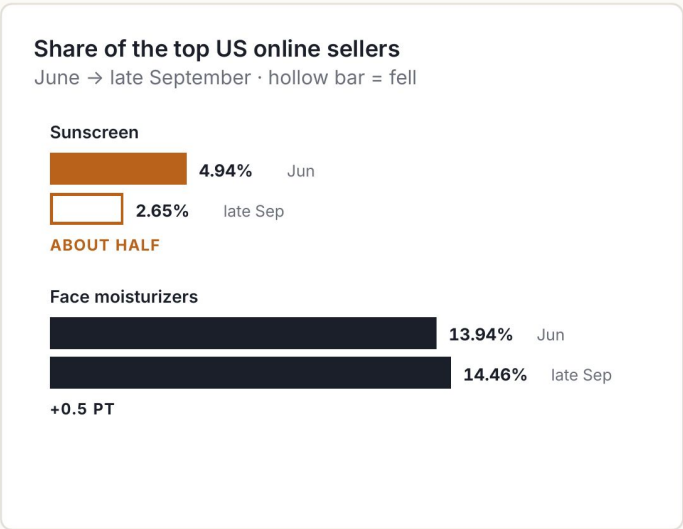
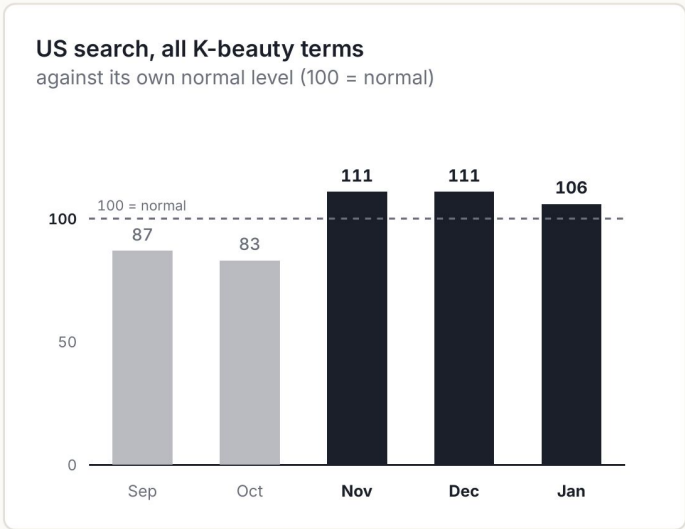
One mask carries December.
p.3
- 3

The loudest trend isn't the best seller.
p.3
- 4

What already sells keeps selling.
p.3

1 The season is a bump, not a switch.

Searching lifts about 11% over normal for the holiday. On the shelf, summer left — sunscreen's share fell to about half — but winter barely arrived: moisturizers gained half a point.



THE STORY THIS MONTH

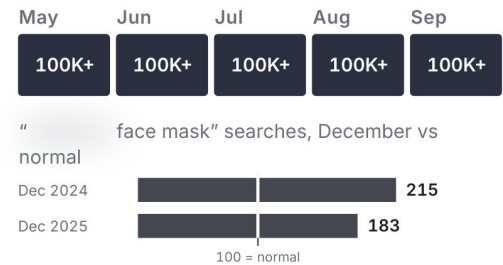
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2 One mask carries December.

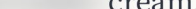
sat in the top US sales band (100K+) in every reading from May to September. US searches for “ face mask” ran 215 and 183 against normal in the two Decembers we can read.

→ CARD P.4

TOP US SALES BAND, MAY-SEPTEMBER



3 The loudest trend isn't the best seller.

Of 322 PDRN-named products in September, none held the top sales band; 12 held a steady middle band. US searches for PDRN sat flat at 49,500–60,500 a month from March to July. The ones with a real record are named products —  cream, inside the top 26 in all six September readings, and a few others on the cards. Buy them by name, not by the word.

→ CARDS P.5, P.7, P.10, P.12 · SKIP LIST P.16

0 of 322

PDRN-named products in the top sales band, September

4 What already sells keeps selling.

was on the US best-seller list in all 12 months last year. snail mucin essence held the 30K+–40K+ band most months this year while US searches for “snail mucin” fell 29.4%.

→ CARDS P.4, P.6

12 of 12

months on the US best-seller list last year —



So the order is short: deepen one mask, keep your proven sellers stocked, try six risers one case each, cut sunscreen depth, and skip the noise. The cards follow.

ADD DEPTH

KEEP STOCKED

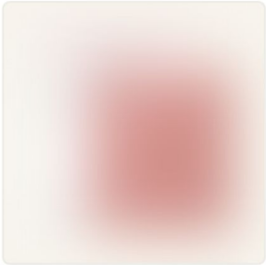
TRY ONE CASE

CUT BACK

SKIP

ADD DEPTH

One product has held the top US sales band every month since May and has a December search peak behind it. Order depth.
RULE Top band (100K+) in every month May–September, plus a December search peak in two years we can read.



ADD DEPTH

US MONTHLY SALES BAND

May

Jun

Jul

Aug

Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS

KEEP STOCKED

Proven sellers: 10K+ every month since May, with no slide. If you carry them, keep them in; if you don't, these are the safest first orders.
RULE Read every month May–September, every reading 10K+ (: one June reading at 8K+), and no step down in September.



KEEP STOCKED

US MONTHLY SALES BAND

May

Jun

Jul

Aug

Sep

US retail price, September

WHAT TO DO

Your order _____ units

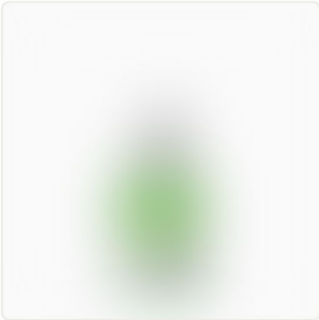
WHAT WOULD CHANGE THIS

ORDER CARDS

■ top band, 100K+

□ lower bands, highest first

4



KEEP STOCKED

US MONTHLY SALES BAND

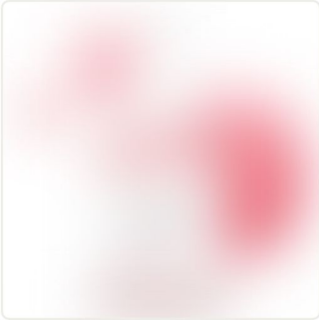
May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

US MONTHLY SALES BAND

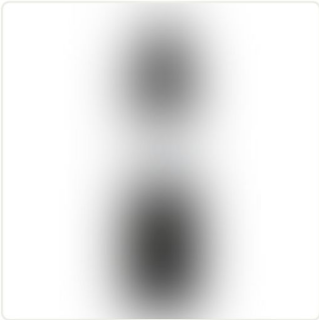
May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

US MONTHLY SALES BAND

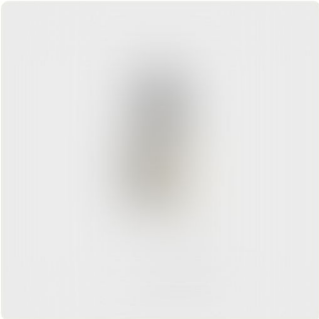
May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

US MONTHLY SALES BAND

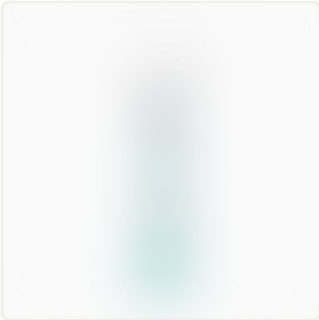
May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

US MONTHLY SALES BAND

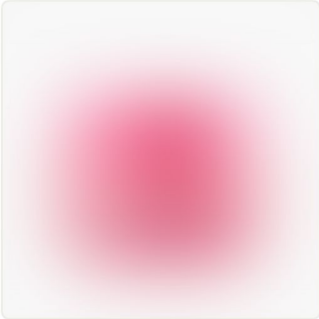
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US retail price, September

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WHAT WOULD CHANGE THIS



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US MONTHLY SALES BAND

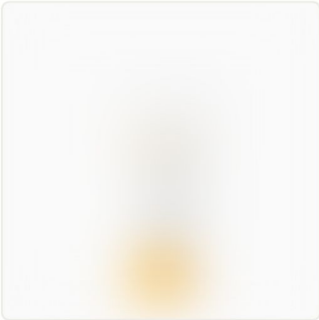
May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



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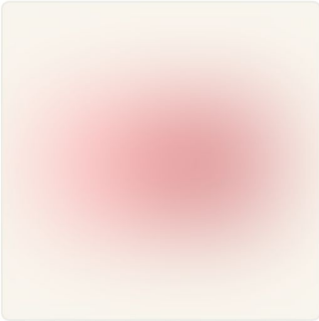
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US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



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US MONTHLY SALES BAND

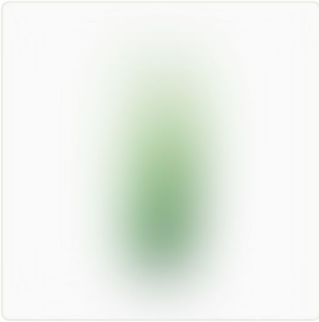
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US retail price, September

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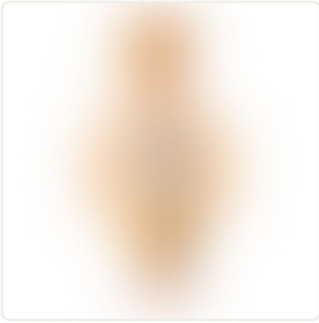
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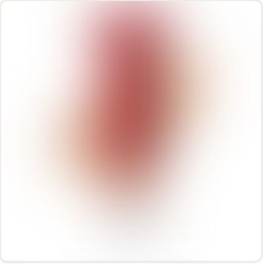
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US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

US MONTHLY SALES BAND

May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS

TRY ONE CASE

Risers: climbing for two months or more, or holding one band all September. One case each; let your own sell-through decide the reorder.

RULE Band rose above its May–July level and either held one band across 5+ September readings or rose two months running.



TRY ONE CASE

US MONTHLY SALES BAND

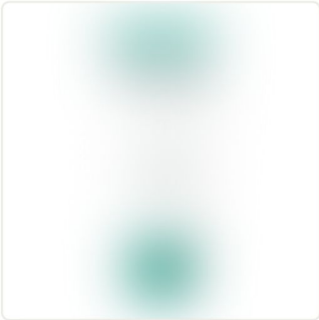
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US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



TRY ONE CASE

US MONTHLY SALES BAND

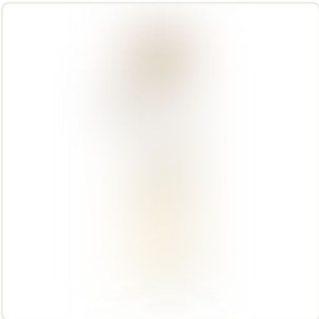
May	Jun	Jul	Aug	Sep

US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



TRY ONE CASE

US MONTHLY SALES BAND

May	Jun	Jul	Aug	Sep

US retail price, September

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US MONTHLY SALES BAND

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US retail price, September

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS

TRY ONE CASE

How to run a one-case test

☐ One case, one facing, at eye level.

☐ Give it four weeks before you judge it.

☐ Reorder only what your own shelf sold — not what the chart says.

☐ Check the card's “what would change this” line when the next issue lands.

YOUR ONE-CASE TESTS	PLACED ON	SOLD AFTER FOUR WEEKS	REORDER?
			☐ yes ☐ no
			☐ yes ☐ no
			☐ yes ☐ no
			☐ yes ☐ no
			☐ yes ☐ no
			☐ yes ☐ no

ON OUR RADAR

WATCH

On our radar

Climbing, but on one month of record or a low band. Not an order — a name to check again next month.

PRODUCT	CATEGORY	SIGNAL SO FAR	WATCH FOR
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30
Bliss	Skincare	2025-09-01 - 2025-09-15	☐ 2025-09-16 - 2025-09-30

SEASON

When your November–January order lands

US search against its own normal level, month by month. 100 = normal. The year starts at September here so your order window sits in one block.



CUT BACK Sunscreen

Sunscreen runs about 30% below normal right when this order lands — keep facings, cut depth, put it back for April. (card, p.8.)

● K-beauty overall

K-beauty overall gets a holiday lift of about 11% over normal — a bump, not a new season.

● Brand spikes

November brand-search spikes land in the sale week; we don't read them as winter demand.

Moisturizer, barrier, lip and body can't be timed from search; on the US shelf they barely moved from June to September.

SKIP LIST

SKIP

Skip this month

What you'll hear about this season that the US numbers don't back yet — and three products that are sliding. Each row names the one reading that would bring it back.

WHAT	WHY — THE NUMBER	REVISIT WHEN
...	...	☐ ...
...	...	☐ ...
...	...	☐ ...
...	...	☐ ...
...	...	☐ ...
...	...	☐ ...

PRODUCTS SLIDING

...	...	☐ ...
...	...	☐ ...
...	...	☐ ...

"Typical reading" = the middle band of all readings in those months.

LAST MONTH, GRADED

We checked all 18 of September's calls

Each call came with a reading that would change it. Here is what those readings said, wrong calls first.



WE WERE WRONG

—

“test small”

We said to stop the test if it ever fell outside the US top 50. It already had: its June middle rank was past 50, then 85th, 110th and 101st in July–September.

WE WERE WRONG

— “brand lane, no order”

We counted it on the US best-seller list once last year. It was there all 12 months — the listing changed its name in December and we missed it. It held 100K+ in every reading in August and September.

OUR TEST WAS TOO LOOSE

cream — “a second soothing cream holds a band two months → widen the lane”

86 soothing or panthenol products passed it, almost all tiny sellers. At level (10K+), still no other soothing cream.

REVERSED

— “brand lane, no order until a named product holds a US position”

cream sat between 13th and 26th in all 6 September readings — its first month inside the top 50 all month.

HELD

mask — prioritize

100K+ in all 9 September readings.

Sunscreen — hold the line

Sunscreen shelf share 2.48% in September, above the 2.40% line.

Sunscreen — no depth now

Search calendar still below normal until April.

Lip — replenish

Lip shelf share 2.02%, below the 3.0% line that would add depth.

cream — test small

10K+ in all 7 September readings.

Snail — replenish only

July searches 0.67× last July.

serum — replenish

80K+–90K+ in September; PDRN searches did not fall.

Reorder continuity

Every brand we named was ordered on our platform in each of the 12 months to August. had no order September 1–28.

CAN'T BE READ YET

— the 9→12 month search ramp

Needs November search data; ours ends in July.

Lip — December depth step

Needs a December US best-seller reading.

December body and gift — don't chase

Needs a December US best-seller reading.

December — season or one year?

Needs a December US best-seller reading.

Barrier and ceramide — don't chase

Needs a winter window; in the autumn window both stayed below average.

Is the long-run bestseller screen worth running?

Needs next year's 12 monthly readings.

What we changed: the monthly conditions on this issue's cards use readings we take every month, not a once-a-year list.