

NOVEMBER 2026 · YOUR HOLIDAY ORDER

Buy only what still sells the day after Christmas.

Whatever is still on your shelf on December 26 gets marked down or ties up your cash until spring. This issue sorts the holiday order by one question.

THE DAY-AFTER TEST

Before you add a case, ask:
will this still sell on Saturday, December 26?

YES

NO

UNPROVEN

No reading below 10K+ from May to October, with no holiday help.

It is a set, or carries a holiday label. After the 25th it is a markdown.

Its rise is recent, or came only with a big online sale.

YOUR HOLIDAY ORDER, IN FIVE LINES	STILL SELLS DEC 26?
☐ ADD DEPTH	
☐ KEEP STOCKED	
☐ TRY ONE CASE	
☐ CUT BACK	
☐ SKIP	

LAST MONTH, GRADED

28 calls checked: 22 held, 1 reversed, 5 couldn't be read (too few readings before the October sale).

22 held

1 reversed

5 not yet readable

Reversed: → p.17

HOW TO READ THIS ISSUE

100K+

Monthly sales band. US online "bought last month" figure, in steps: 100+, 1K+, 10K+, 100K+. A floor, not a count.

●●● ●●● ●●●

Evidence: strong / medium / thin.

YES

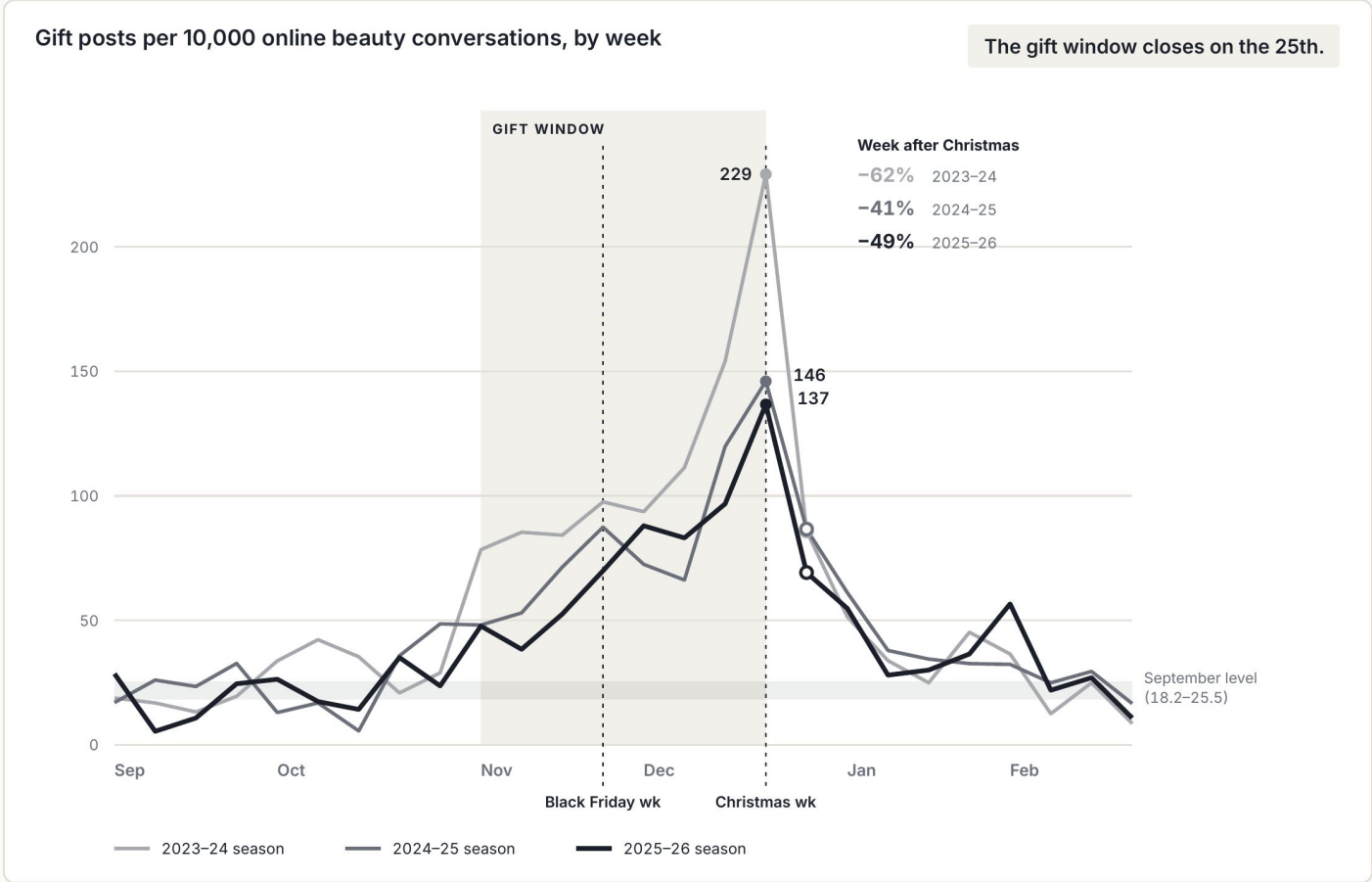
Day-after test on every card and skip row.

WHY DECEMBER 26

●●○ medium

Gift talk peaks in Christmas week, then falls 41–62% the week after.

Three holiday seasons of online beauty conversations, week by week. Gift talk starts climbing in the first week of November and tops out in Christmas week every year. A week later it has lost 41% to 62%. Anything bought for gifting has one window. Skin-care singles don't depend on that window.



STARTS

First week of November: **2.5–3.1×** the September level, in all three seasons.

PEAKS

Christmas week, every season: **229 · 146 · 137** gift posts per 10,000.

FALLS

The week after: **–62% · –41% · –49%**. Back to the September level by mid-February.

SALE TALK IS EARLIER

It peaks in Black Friday week — this year November 27 — falls sharply the week after, and stays at 2–4× its September level until Christmas.

SO ON DECEMBER 26

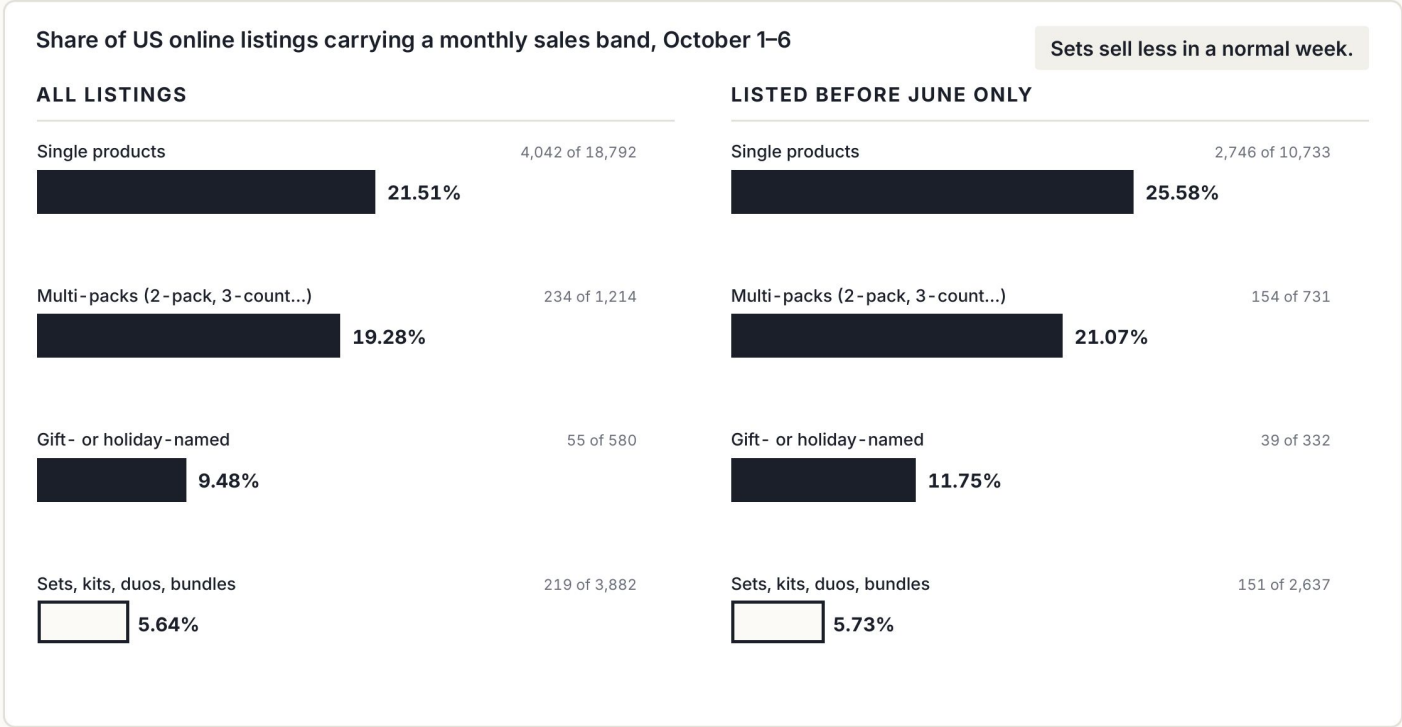
Most gift buyers are gone. The customer who walks in is shopping for their own skin.

SETS AND HOLIDAY PACKS

●●● strong

A set is a gift. On December 26, it's a markdown.

In the first week of October, before any holiday push, only 5.64% of set and kit listings carried a monthly sales band, against 21.51% of single products. It isn't that sets are new: among listings on the shelf since before June, the gap holds, 5.73% against 25.58%.



HOLIDAY-LABELED LISTINGS AREN'T GROWING

0.51%

→

0.52%

Sep 1–6 · 123 listings

Oct 1–6 · 137 listings

Most holiday packs don't say so in the name. Look at what's in the box.

Still sells on Dec 26?

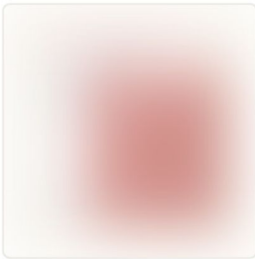
NO

WHAT TO DO

Order holiday sets only to the count you expect to sell by December 24. Put the rest of the budget in singles (pp.4–12).

One exception, honestly. Listings named “kit” improved their best-seller rank more often than average before the sale (40.7% vs 33.8%) and in two quiet September weeks (38.0% vs 35.5%). Listings named “set” did not (28.8%, 29.5%). Kits still carry a sales band far less often than singles; we just can't call them cooling.

ORDER CARDS Singles that held 10K+ or better all summer are the likeliest to still sell on December 26.



ADD DEPTH

●●● strong

US MONTHLY SALES BAND · READINGS

May	Jun	Jul	Aug	Sep	Oct 1-8

US retail price, September

Last month's call

STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

●●○ medium

US MONTHLY SALES BAND · READINGS

May	Jun	Jul	Aug	Sep	Oct 1-8

US retail price

Last month's call

STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS

KEEP STOCKED

10K+ in every reading since May. Keep the facing full through January; none of these needs December depth.

KEEP STOCKED

●●○ medium

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US retail price

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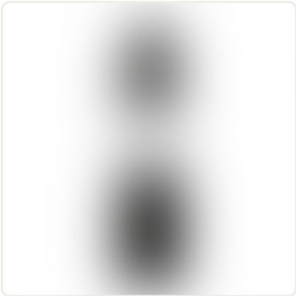
Last month's call

STILL SELLS ON DEC 26?

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WHAT WOULD CHANGE THIS



KEEP STOCKED

●●○ medium

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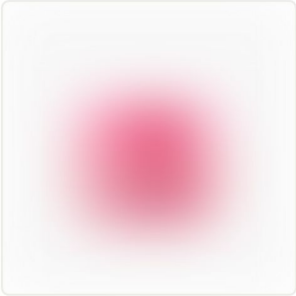
Last month's call

STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

●●○ medium

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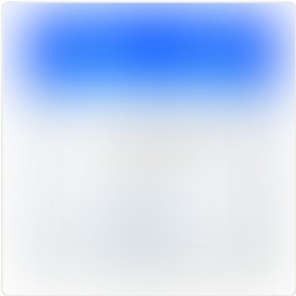
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WHAT WOULD CHANGE THIS



KEEP STOCKED

●●● strong

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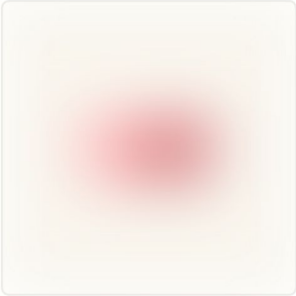
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KEEP STOCKED

●●○ medium

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US retail price

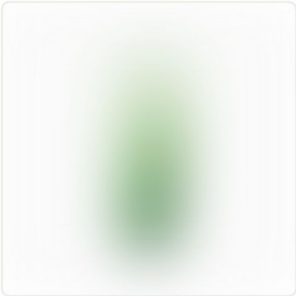
Last month's call

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KEEP STOCKED

●●○ medium

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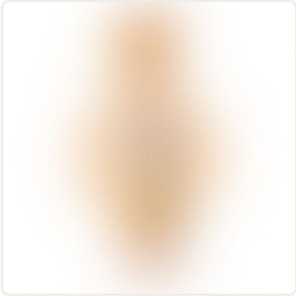
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KEEP STOCKED

●●○ medium

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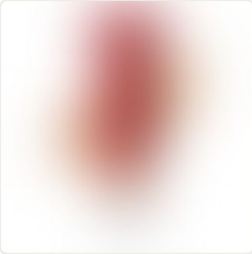
Last month's call

STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



KEEP STOCKED

●●○ medium

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Last month's call

STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS

TRY ONE CASE Rising before the October sale. One case each; November 1-20 decides the reorder.



TRY ONE CASE

●●○ medium

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US retail price

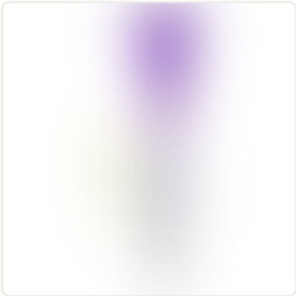
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TRY ONE CASE

●●○ medium

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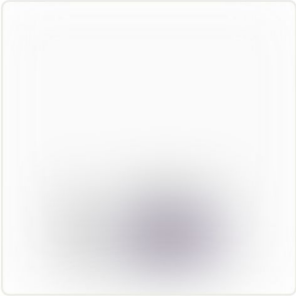
Last month's call

STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



TRY ONE CASE

●○○ thin

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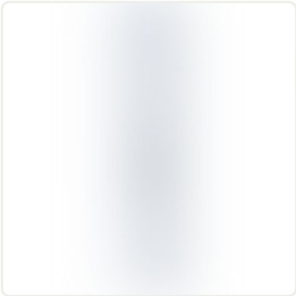
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STILL SELLS ON DEC 26?

WHAT TO DO

Your order _____ units

WHAT WOULD CHANGE THIS



TRY ONE CASE

●●○ medium

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Your order _____ units

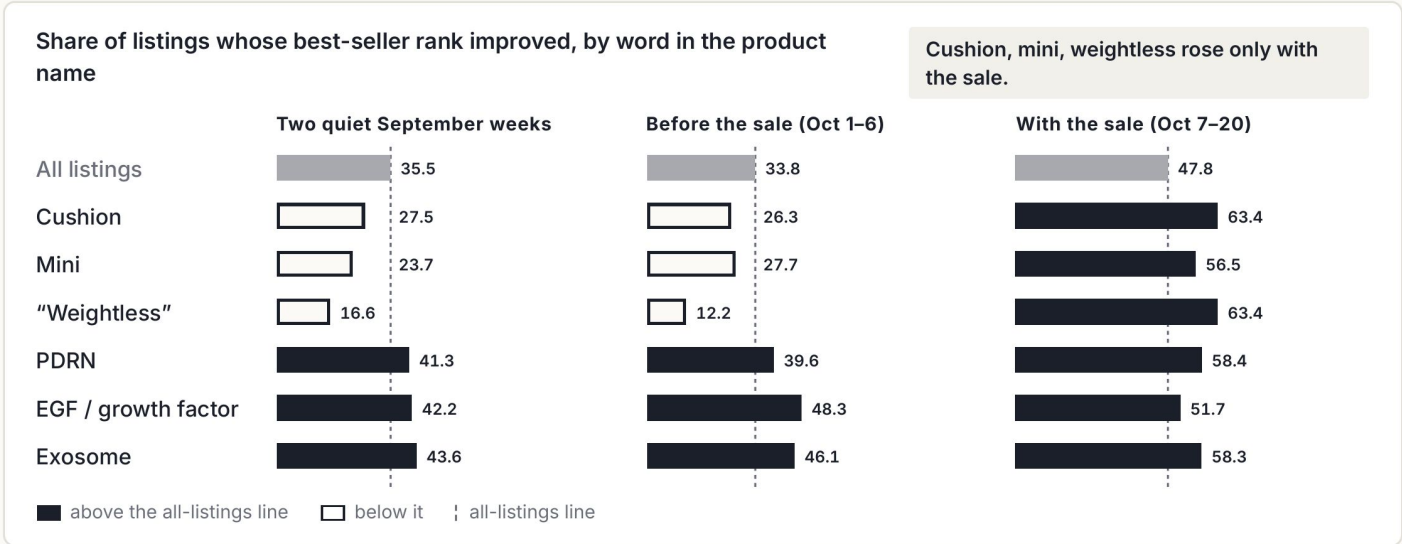
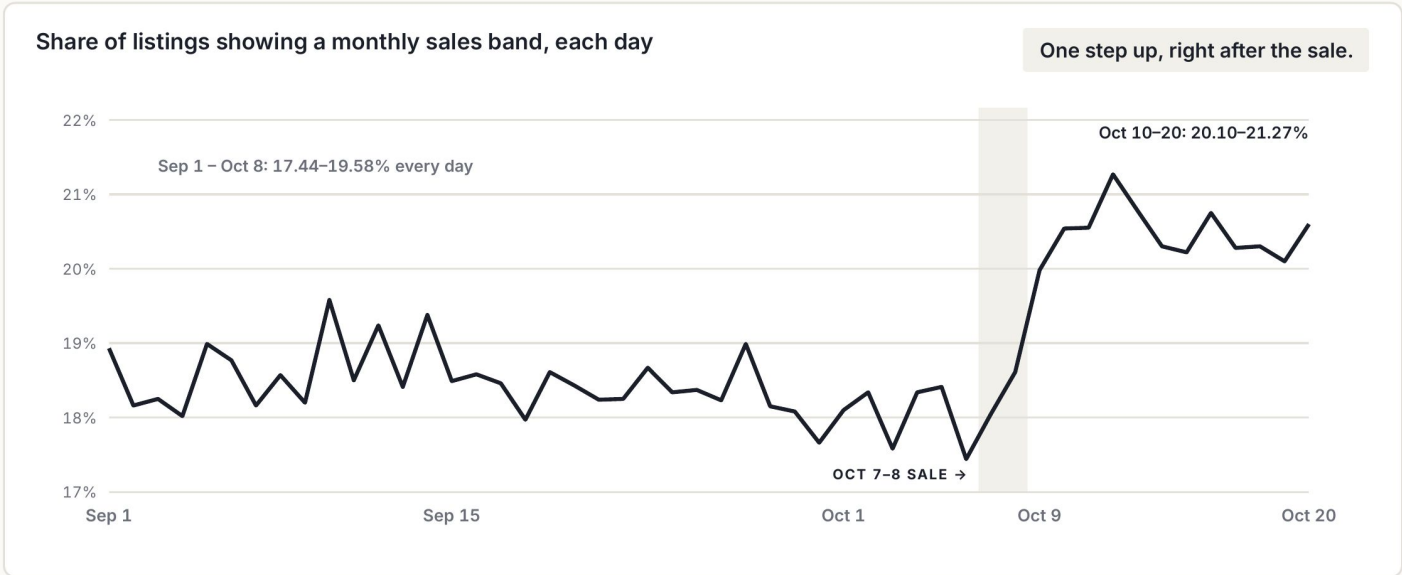
WHAT WOULD CHANGE THIS

READING THE RANKINGS

●●● strong

October’s best-seller list was the sale talking. Expect Black Friday to do it again.

The day after the October 7–8 sale, the share of US online listings showing a monthly sales band stepped up and stayed up. The products that “rose” were mostly sale buys. Expect the same after November 27. Judge your December reorder on November 1–20.



TRY ONE CASE

One case each of the named singles on pp.9–12. The and the carry words that beat the line in quiet weeks and before the sale. Toner pads also held up before the sale, at 1.30× the average rate of carrying a sales band (p.7).

SKIP

Don’t chase cushions, minis or “weightless” on October ranks. Outside the sale they sit below the line. UNPROVEN

CUT BACK AND SKIP

Sellers to thin out, and stock to leave on the truck.

The cut-backs still sell, just below their summer band: keep the facing, cut the depth. The skips are stock not worth adding now — sets fail the day-after test, cushions and minis are unproven, and last month’s falling serum is still falling. Each row names the reading that would bring it back.

WHAT	THE NUMBER	WHY	STILL SELLS DEC 26?	REVISIT WHEN
CUT BACK				
CUT BACK				
CUT BACK				
CUT BACK				
CUT BACK				
SKIP				
SKIP				
SKIP				
SKIP				

"Typical reading" = the middle band of all readings in those months; July is left out because of a mid-summer sale.

ON OUR RADAR

WATCH

Eight climbers we aren't buying yet.

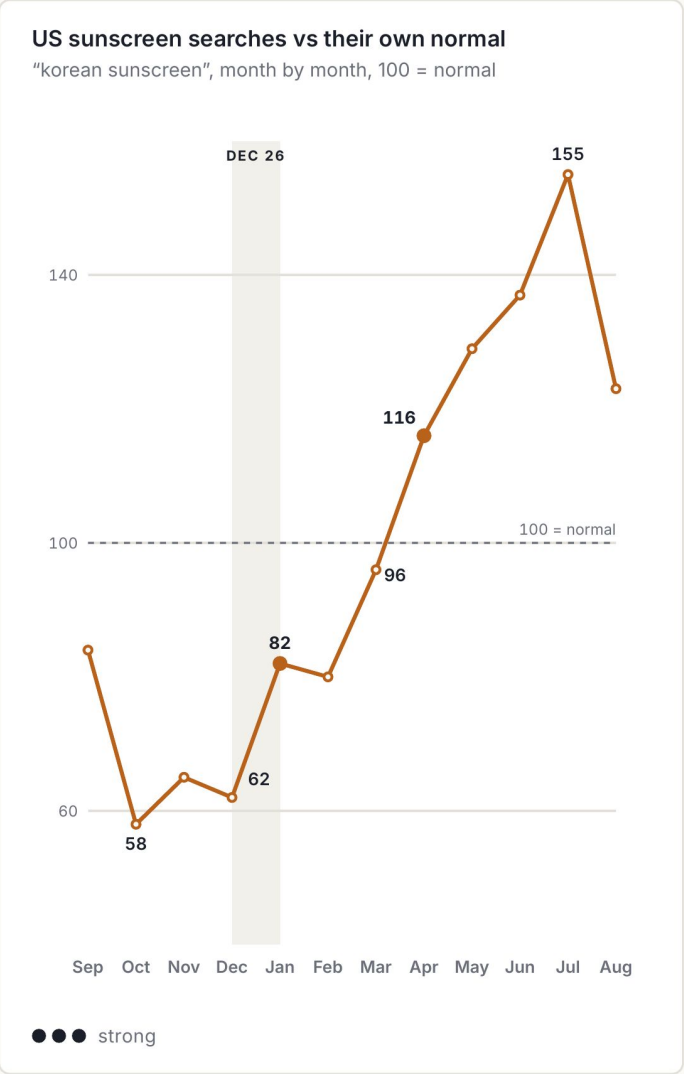
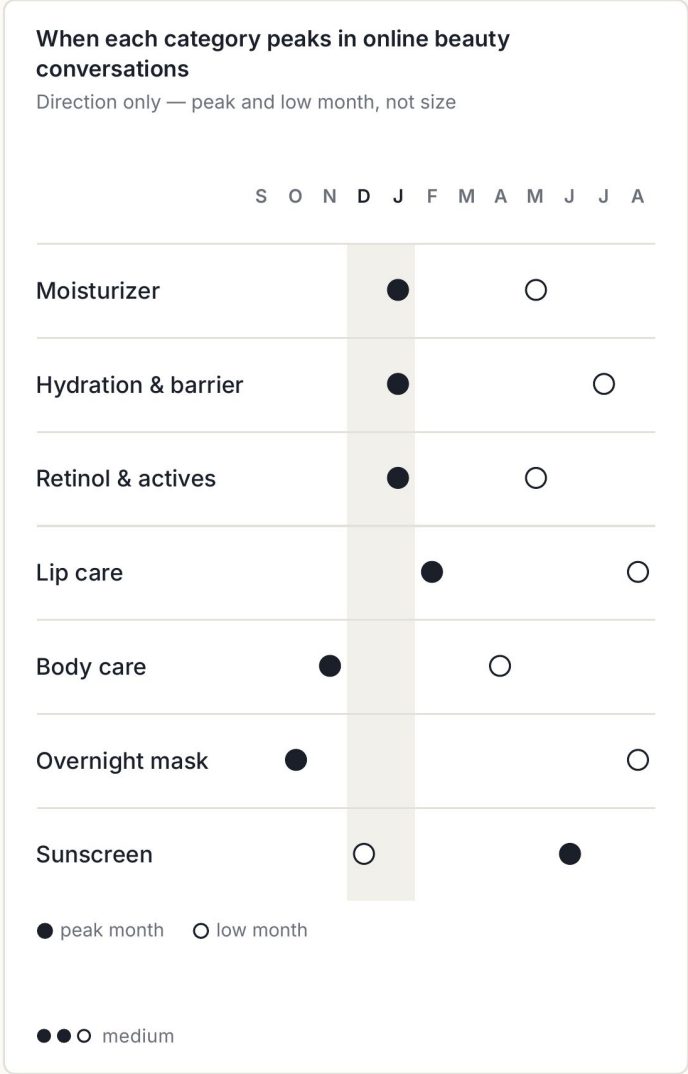
Each is rising, but on too few readings, a low band, or a brand that already has its card. No photos, no order. The last column is the reading that would put it on a card in December.

PRODUCT	WHAT WE SAW	CARD NEXT MONTH IF
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐
Blissoma	Blissoma	☐

THE SHELF AFTER THE 26TH

After the 26th, the talk turns to moisture, barrier and retinol.

In online beauty conversations, moisturizer, barrier and retinol all hit their high point of the year in January. US sunscreen searches bottom out in October–December, start back in January, and pass normal only in April. Plan the space your holiday sets free up.



KEEP STOCKED

Moisturizer, barrier and retinol singles take the space sets leave on Dec 26 — cream (p.4), cream and (p.6). Keep them in stock through January; don't add depth on talk alone.

CUT BACK

Sunscreen: one facing through the holidays. Start rebuilding in March, full depth by April.

LAST MONTH, GRADED


 22 held 1 reversed 5 not yet readable

22 of 28 calls held. One reversed, and five we couldn't read.

Every October call was checked against readings taken October 1–8, before the sale. Readings after the sale are inflated, so they don't count.

REVERSED

Our line was 20K+; two of three pre-sale October readings came in at 10K+. No reorder. After the sale it read 30K+ three times — that is the sale, not a recovery.

NOT YET READABLE

Five calls needed two pre-sale readings, or a middle rank, and got only one: the sale came on October 7, a week into the month. (C1 · C6 · C7 · C16 · S2)

#	OCTOBER CALL	GRADED	WHAT WE READ (OCT 1–8)	THIS ISSUE
☒ C1		NOT YET READABLE	Sales band held (2 of 2 at 100K+); only one pre-sale rank reading (11th).	
☐ C2		HELD	4 of 4 pre-sale readings at 100K+.	
☐ C3		HELD	3 of 3 at 100K+ (line: 50K+).	
☐ C4		HELD	4 of 4 at 70K+ (line: 50K+).	
☐ C5		HELD	80K+ and 90K+ (line: 80K+).	
☐ C6		NOT YET READABLE	One pre-sale reading (40K+); the call needed two.	No card; reread Nov 1–20
☐ C7		NOT YET READABLE	One pre-sale rank reading (67th); the call needed a middle rank.	
☐ C8		HELD	3 of 3 at 30K+.	
☐ C9		HELD	2 of 2 at 10K+.	No card: sunscreen goes to one facing (p.16)
☐ C10		HELD	4 of 4 at 70K+ (line: 40K+).	
☐ C11		HELD	2 of 2 at 70K+ (line: 30K+).	
☐ C12		HELD	30K+ and 40K+ (line: 10K+).	
☐ C13		HELD	2 of 2 at 10K+.	
☐ C14		REVERSED	Line was 20K+; two of three pre-sale readings came in at 10K+.	No reorder
☐ C15		HELD	3 of 3 at 10K+.	Held — keep last month's order; no new card
☐ C16		NOT YET READABLE	One pre-sale reading (20K+); the call needed two.	No card; reread Nov 1–20
☐ C17		HELD	3 of 3 at 20K+ (line: 10K+).	
☐ C18		HELD	2 of 2 at 40K+ (line: 20K+).	Held — keep last month's order; no new card
☐ C19		HELD	10K+, 10K+, 9K+ (line: 4K+).	
☐ S1	PDRN by the word	HELD	No PDRN product held 100K+ in three or more pre-sale readings.	Still skip the word; buy the named singles
☐ S2		NOT YET READABLE	One pre-sale rank reading (114th); the call needed a middle rank.	No card
☐ S3	Holiday depth on a second mask	HELD	No second mask held the top band.	Still skip: mask (p.4) is the only depth
☐ S4	on the current buzz	HELD	Pre-sale total 31,450, below June's 39,800.	No card
☐ S5	Barrier / ceramide as a category	HELD	Barrier 33.3% and ceramide 32.3% vs 34.6% for all listings, before the sale.	Buy named barrier singles, not the word
☐ S6	"Cream is replacing serum"	HELD	Cream 34.4% vs 34.8% for all listings, before the sale.	Still skip
☐ S7		HELD	Typical pre-sale reading 10K+ (line: 70K+).	Still skip
☐ S8		HELD	Typical pre-sale reading 35K (line: 90K+).	Still skip, still falling (p.14)
☐ S9		HELD	2 of 2 at 2K+ (line: 10K+).	Still skip

On our radar: 3 of 7 met their October check, 3 did not, 1 had no reading.

#	RADAR ITEM	CHECK	WHAT WE READ (OCT 1–8)	THIS ISSUE
R1		MET	3 of 3 at 10K+.	
R2		MET	9K+, 10K+, 10K+.	
R3		NOT MET	2K+, 1K+, 1K+ (needed one band at 5K+).	Dropped
R4		MET	9K+ in all 3.	No card: small size only; we don't card minis
R5		NOT MET	1K+ in all 3 (needed above 1K+).	Stays on radar (p.15)
R6		NOT MET	2K+ in all 3 (needed above 2K+).	Dropped
R7		NO READING	No reading before the sale.	Dropped

Our fault, too: some October tests didn't say how many readings, or which way. Every test in this issue now names a direction and the window, Nov 1–20; every product test also names how many readings.