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2024 BEAUTY REPORT

# The Second Wave of K-Beauty

THE COMPLETE PRIMER FOR K-BEAUTY IN RETAIL



# Table of Contents

	<b>FOREWORD</b>	03
1	<b>THE K-BEAUTY BOOM</b>	04
2	<b>K-CULTURE UNLEASHED</b>	07
3	<b>INSIDE THE K-BEAUTY MACHINE</b>	11
4	<b>HOW K-BEAUTY OPERATES IN THE U.S.</b>	26
5	<b>THE SECOND WAVE OF K-BEAUTY</b>	30
6	<b>GROWTH DRIVERS OF THE SECOND WAVE</b>	33
7	<b>THE SPATE ANALYSIS ON K-BEAUTY</b>	37
8	<b>THE CLEARFORME ANALYSIS ON K-BEAUTY</b>	43
9	<b>UNDERSTANDING THE U.S. CONSUMER FOR K-BEAUTY</b>	46
10	<b>K-BEAUTY'S RETAIL REVOLUTION: WHERE IT SHINES</b>	52



# Table of Contents (detailed)

## **FOREWORD: DON'T CALL IT A COMEBACK**

### **1 THE K-BEAUTY BOOM: A MARKET ON THE MOVE**

### **2 K-CULTURE UNLEASHED: THE GLOBAL WAVE OF KOREAN INFLUENCE**

- 2.1 K-Food Frenzy: A Culinary Craze
- 2.2 K-Movies: Cinema Without Borders
- 2.3 K-Pop: The Soundtrack of a Global Movement
- 2.4 K-Dramas: Streaming Sensations Captivating the World

### **3 INSIDE THE K-BEAUTY MACHINE: HOW THE INDUSTRY OPERATES**

- 3.1 Why There Are So Many K-Beauty Brands
- 3.2 Why K-Beauty is Trusted for Safety
- 3.3 Why K-Beauty Doesn't Break the Bank
- 3.4 How K-Beauty Brands Can Stand Out
- 3.5 Olive Young: Its Role and Influence

### **4 HOW K-BEAUTY OPERATES IN THE U.S.**

- 4.1 Anatomy of a Successful K-Beauty Brand
- 4.2 Types of K-Beauty Brand Personalities

### **5 THE SECOND WAVE OF K-BEAUTY**

- 5.1 Expanding Horizons: From Skincare to Color, Body, Hair & Fragrance

### **6 GROWTH DRIVERS OF THE SECOND WAVE**

- 6.1 E-Commerce Kings: K-Beauty's Success on Amazon
- 6.2 The Power of Influence: K-Beauty's TikTok Takeover

## **7 THE SPATE ANALYSIS ON K-BEAUTY**

- 7.1 Top K-Beauty Brands on TikTok
- 7.2 TikTok and K-Beauty Related Tags
- 7.3 K-Beauty Tags by Major Retailers
- 7.4 K-Beauty Search Terms in the U.S. Market
- 7.5 Notable Differences in Beauty Search Terms: U.S. vs. Korea

## **8 THE CLEARFORME ANALYSIS ON K-BEAUTY**

- 8.1 K-Beauty Products Formulation: Clean, Safe, and Skin-Friendly
- 8.2 Trending K-Beauty Ingredients: Anti-Aging, Acne Solutions, and Sensitive Skin Care

## **9 UNDERSTANDING THE U.S. CONSUMER FOR K-BEAUTY**

- 9.1 Top K-Beauty Brands on TikTok
- 9.2 TikTok and K-Beauty Related Tags
- 9.3 K-Beauty Tags by Major Retailers
- 9.4 K-Beauty Search Terms in the U.S. Market

## **10 K-BEAUTY'S RETAIL REVOLUTION: WHERE IT SHINES**

- 10.1 Where are K-Beauty Beauty Consumers Shopping?
- 10.2 Where Do K-Beauty Consumers Discover New Products?
- 10.3 Ulta: Mainstream Meets Innovation
- 10.4 Costco: A Surprising Home for K-Beauty
- 10.5 Notable Differences in Beauty Search Terms: U.S. vs. Korea





**SARAH CHUNG PARK**

FOUNDER AND CEO  
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## Foreword: Don't Call It a Comeback

### **Korean Beauty never truly disappeared after its first wave of popularity in the 2010s**

Since the first K-Beauty product (BB cream) hit American shelves in 2011, consumers quickly fell in love with the quality, efficacy, and affordability of Korean skincare products. Iconic items from this initial wave, such as pimple patches, sheet masks, and essences, didn't just make a splash—they became staples in skincare routines worldwide. These products transcended trends, solidifying their place in the beauty market as essentials, rather than fleeting novelties.

In its early days, K-Beauty was often treated as a curiosity by beauty editors who were enamored with its unique, sometimes offbeat ingredients and methods. It was this novelty that made K-Beauty a frequent headline grabber, with editors eager to introduce their audiences to the latest bizarre but effective products from South Korea.

However, beneath the novelty, U.S. and European brands began to leverage advanced Korean formulations and innovative technologies into their own products, recognizing the effectiveness and innovation that K-Beauty brought to the table. This cross-pollination not only validated the impact of K-Beauty but also elevated global standards in skincare, pushing Western brands to innovate and incorporate Korean-inspired elements into their own lines.

We are now in the second wave of K-Beauty. It is defined by its speed, savvy, and significant cultural impact. This time, K-Beauty isn't just a trend—it's part of a larger cultural phenomenon that includes the global rise of K-Pop, K-Drama, and K-Food. Together, these cultural exports from South Korea are not only dominating their respective fields but are also creating a powerful collective influence. K-Beauty is riding this wave with confidence, leveraging its cultural power to cement its place in the global beauty industry.



# 1 The K-Beauty Boom:

**A Market on the Move**







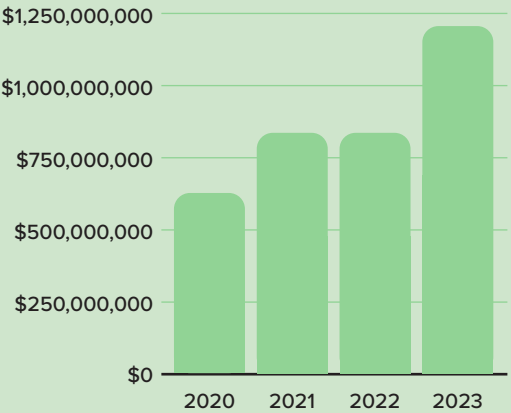
# Korea surpassed France as the top exporter of beauty to the U.S. in 2024.

In the first four months of 2024, South Korea ranked first in the U.S. imported cosmetics market share, with exports of \$477.1 million, accounting for 20.1% of the market share. France, historically the global cosmetics leader, ranked second with exports of \$459.43 million, accounting for 19.3% of the market share. Canada followed closely behind, exporting \$327.23 million worth of cosmetics to the United States, according to the United States International Trade Commission (USITC).

**K-Beauty exports to the U.S. have doubled from \$622.3 million in 2020 to \$1.2 billion in 2023.**

In the U.S., K-Beauty is especially popular among millennials and Gen Z consumers, who are drawn to its focus on natural ingredients, multi-step skincare routines, and social media-driven marketing.

**K-BEAUTY EXPORTS TO THE U.S.**







Korean skincare has captivated consumers with its focus on cutting-edge ingredients and a layered, multi-step philosophy that emphasizes the “care” in skincare. Its influence continues to surge, driving millions of views on TikTok and billions of dollars at retail.

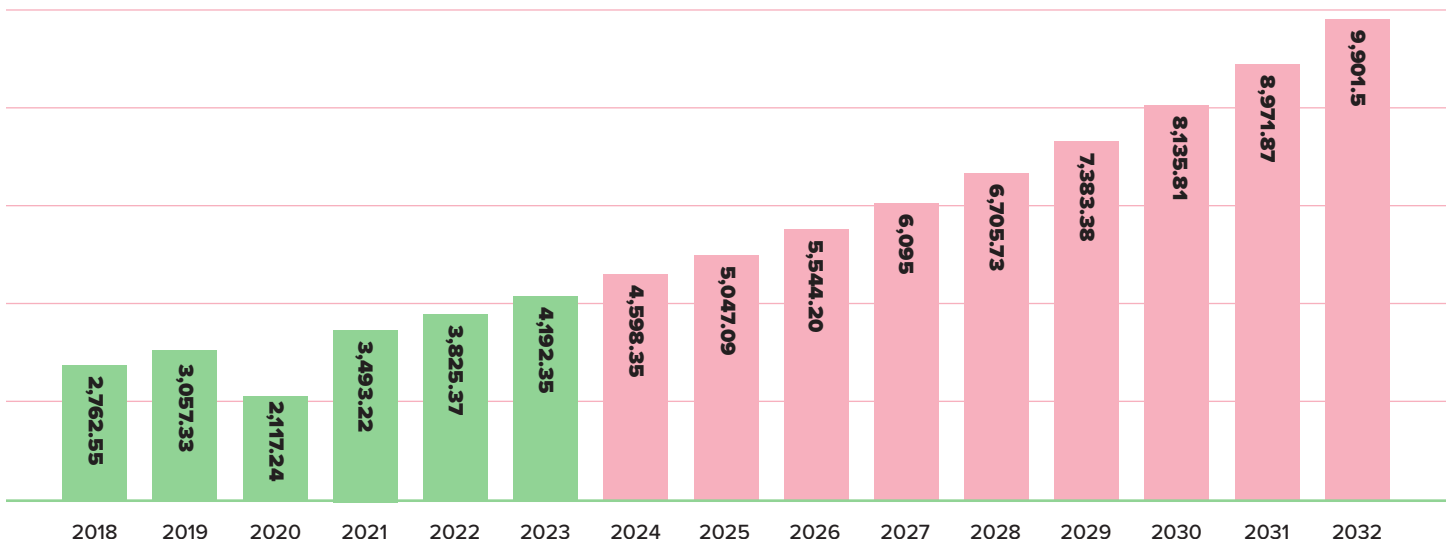
Today, with skincare still booming, K-beauty continues to expand, with exciting new launches in makeup, fragrance, body and hair care.

The global K-Beauty products market was valued at approximately \$91.99 billion in 2022, with a projected compound annual growth rate (CAGR) of 9.3% from 2023 to 2030. In North America, K-Beauty product revenue reached around \$3.8 billion in 2022 and is expected to grow significantly, with forecasts predicting it will surpass \$9.9 billion by 2032, following a consistent upward trend.

**Demand for Korean skincare products is rapidly growing among consumers, thanks to a rise in awareness and popularity.**

#### REVENUE OF THE K-BEAUTY PRODUCTS MARKET IN NORTH AMERICA FROM 2018 TO 2022, WITH FORECAST TO 2032

(IN MILLION U.S. DOLLARS)





# 2 K-Culture Unleashed:

The Global Wave of Korean Influence







The Korean Wave, known as “Hallyu,” refers to the growing global influence of South Korea’s cultural economy, which includes everything from entertainment and music to food and beauty. This cultural phenomenon has expanded significantly in recent years,

**with global spending on Korean cultural products expected to nearly double to over \$143 billion by 2030.**

Recognizing its impact, the term “Hallyu” was officially added to the Oxford English Dictionary in 2021, cementing its status as a major driver of cultural and economic trends worldwide.

## Key Market Figures:

### ★ K-FOOD

Expected to grow from \$9.5 billion in 2020 to \$15.2 billion by 2027.

### ★ K-DRAMA

Projected to grow at a CAGR of 9.5% from 2023 to 2028, driven by hits like Squid Game.

### ★ K-MOVIES

Valued at \$2.9 billion in 2022, projected to reach \$4.5 billion by 2030.

### ★ K-POP

Global market valued at \$10.1 billion in 2022, with K-Pop events projected to grow from \$8.1 billion in 2021 to \$20 billion by 2031.



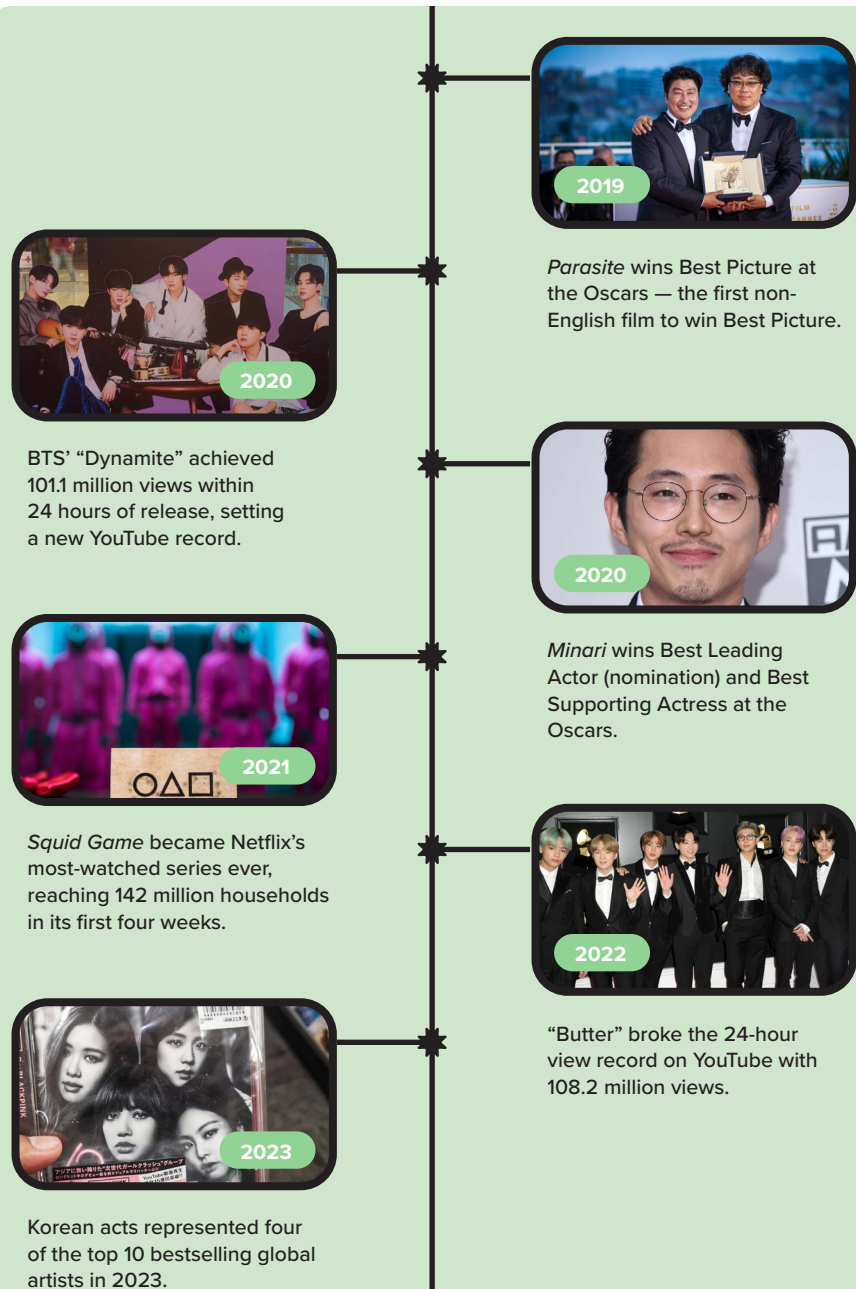


## K-Food Frenzy: A Culinary Craze

K-Food has seen rapid growth globally, driven by its bold flavors and emphasis on health-conscious ingredients. The global K-Food market, valued at \$9.5 billion in 2020, is projected to reach \$15.2 billion by 2027, with a compound annual growth rate (CAGR) of 6.6%. Korean staples such as kimchi, bibimbap, and Korean barbecue have become widely popular in countries like the U.S., where the Korean frozen food market saw a 31% increase in 2022. Leading brands like Bibigo and Nongshim have expanded their distribution across American grocery stores, while Korean restaurants, both traditional and fusion, continue to grow in major cities.

## K-Movies: Cinema Without Borders

Korean cinema has also gained significant recognition on the global stage. The 2020 success of *Parasite*, which became the first non-English-language film to win the Academy Award for Best Picture, marked a turning point for K-Movies. *Parasite* grossed over \$53 million in the U.S. alone, contributing to the growth of the global K-Movie market, which was valued at \$2.9 billion in 2022 and is expected to reach \$4.5 billion by 2030, with a CAGR of 5.1%. Streaming platforms like Netflix and Amazon Prime have played a pivotal role in increasing the visibility of K-Movies.







## K-Pop: The Soundtrack of a Global Movement

K-Pop has become the most globally recognized aspect of the Korean Wave, with artists like BTS, BLACKPINK, and TWICE achieving worldwide success. The global K-Pop market was valued at \$10.1 billion in 2022, with projections of continued growth as K-Pop dominates streaming platforms and social media. By 2024, K-Pop has amassed a global fanbase of over 150 million, with the U.S. emerging as the second-largest K-Pop market after Japan. K-Pop album exports reached \$233 million in 2022, up 5.6% from the previous year, further highlighting the genre's rapid growth.

## K-Dramas: Streaming Sensations Captivating the World

K-Dramas have captivated international audiences through engaging storytelling and high-quality production. In 2021, K-Dramas contributed significantly to South Korea's \$10.7 billion media export revenue. Shows like *Crash Landing on You* and *Squid Game* became global hits, with *Squid Game* amassing 1.65 billion viewing hours in its first 28 days on Netflix. The global K-Drama market is expected to grow by 9.5% annually from 2023 to 2028, as international streaming platforms like Netflix continue to bring K-Dramas to new audiences.





# 3 Inside the K-Beauty Machine:

**How the Industry Operates**





# Defining K-Beauty

K-Beauty’s success is powered by an innovative and efficient industry structure that makes it easier to launch brands, keep prices affordable, and ensure safety. K-Beauty refers to beauty products that originate from South Korea, a term primarily associated with skincare but increasingly expanding into other beauty categories as well.

This report will explore the Korean-Born & Raised brands, delving into the market conditions that gave rise to these brands, analyzing their global strategies, and examining the domestic factors driving their growth.



## THE 3 MAIN CATEGORIES OF K-BEAUTY BRANDS AND PRODUCTS

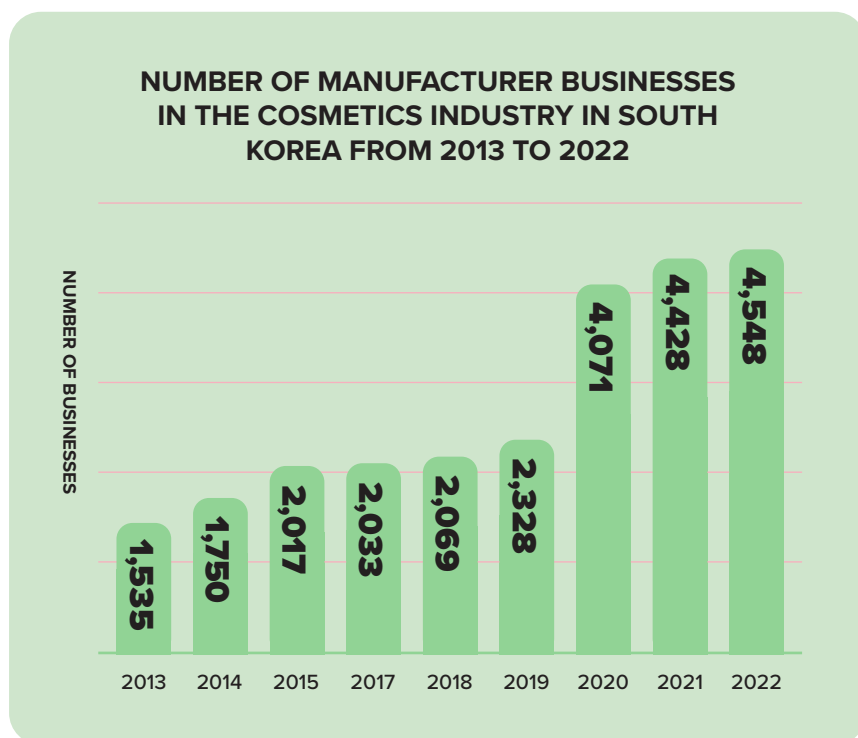
BORN & RAISED	MADE & INSPIRED	SOURCED & INFLUENCED
Brands that are fully rooted in Korea, being incorporated and headquartered there, with their products primarily targeting the Korean market.	Brands that produce most of their products in Korea but are incorporated and headquartered in the U.S. or other countries. While their primary market isn’t Korea, they may still identify as K-Beauty or be recognized as such within the industry.	Brands that source some of their products from Korea but are incorporated and headquartered outside of Korea, targeting a non-Korean audience. Neither the brands nor the industry typically classify them as K-Beauty.
COSRX Amorepacific Dr. Jart Beauty of Joseon Mixsoon	Peach & Lily Glow Recipe Then I Met You Erborian Hero Cosmetics	La Mer Haus Labs Rare Beauty Estee Lauder Tarte Cosmetics Olaplex





## Why There Are So Many K-Beauty Brands

The South Korean beauty industry has experienced a massive explosion in the number of brands over the past two decades. This surge can be attributed to several factors, including the presence of Original Design Manufacturers (ODMs), strong government support for the cosmetics industry, a culture of beauty innovation, and a global demand for Korean beauty products. As of 2022, South Korea had nearly 33,000 companies active in the cosmetics industry, including 28,015 responsible sellers and 4,548 cosmetics manufacturers. The number of manufacturers has been increasing steadily, and jumped to over 4,000 in 2020.





# Why There Are So Many K-Beauty Brands

## 1. The Role of ODMs: Fueling Brand Proliferation

One of the key reasons behind the proliferation of K-Beauty brands is the availability of ODMs (Original Design Manufacturers). South Korea has developed a sophisticated network of ODMs, such as Cosmax, Kolmar Korea, and Cosmecca Korea, which handle product development, formulation, and manufacturing for beauty brands. This infrastructure allows even small or startup companies to create a full line of beauty products without having to invest in expensive R&D or production facilities.

ODMs offer end-to-end services, providing formulas, packaging, regulatory support, and quality control. This accessibility reduces barriers to entry, making it easier for entrepreneurs and companies to launch new beauty brands. As a result, South Korea has seen a rapid increase in beauty brands, both large and small, that can easily bring products to market without owning their own manufacturing operations.



### BENEFITS OF ODM

#### NO NEED FOR EXTENSIVE KNOWLEDGE

By rebranding a pre-existing product from the manufacturer, sellers can bypass the need for in-depth product development or conceptualization. This approach is ideal for those looking to launch a product quickly without the need for extensive research or specialized expertise.

#### SIGNIFICANTLY REDUCED LEAD TIME

Creating a unique product from scratch involves a lengthy R&D process that can take several months, encompassing everything from formulation to packaging design. With an ODM product, this process is already completed, allowing for quicker ordering and faster delivery compared to OEM products.

#### LOWER MINIMUM ORDER QUANTITY (MOQ)

Developing a custom OEM product typically requires a substantial order quantity, which can range from 500 to 3,000 units depending on the product. In contrast, ODM products are often available in stock, enabling much smaller order quantities and faster delivery, sometimes within just a few days.

### DRAWBACKS OF ODM

#### LACK OF COMPETITIVE ADVANTAGE

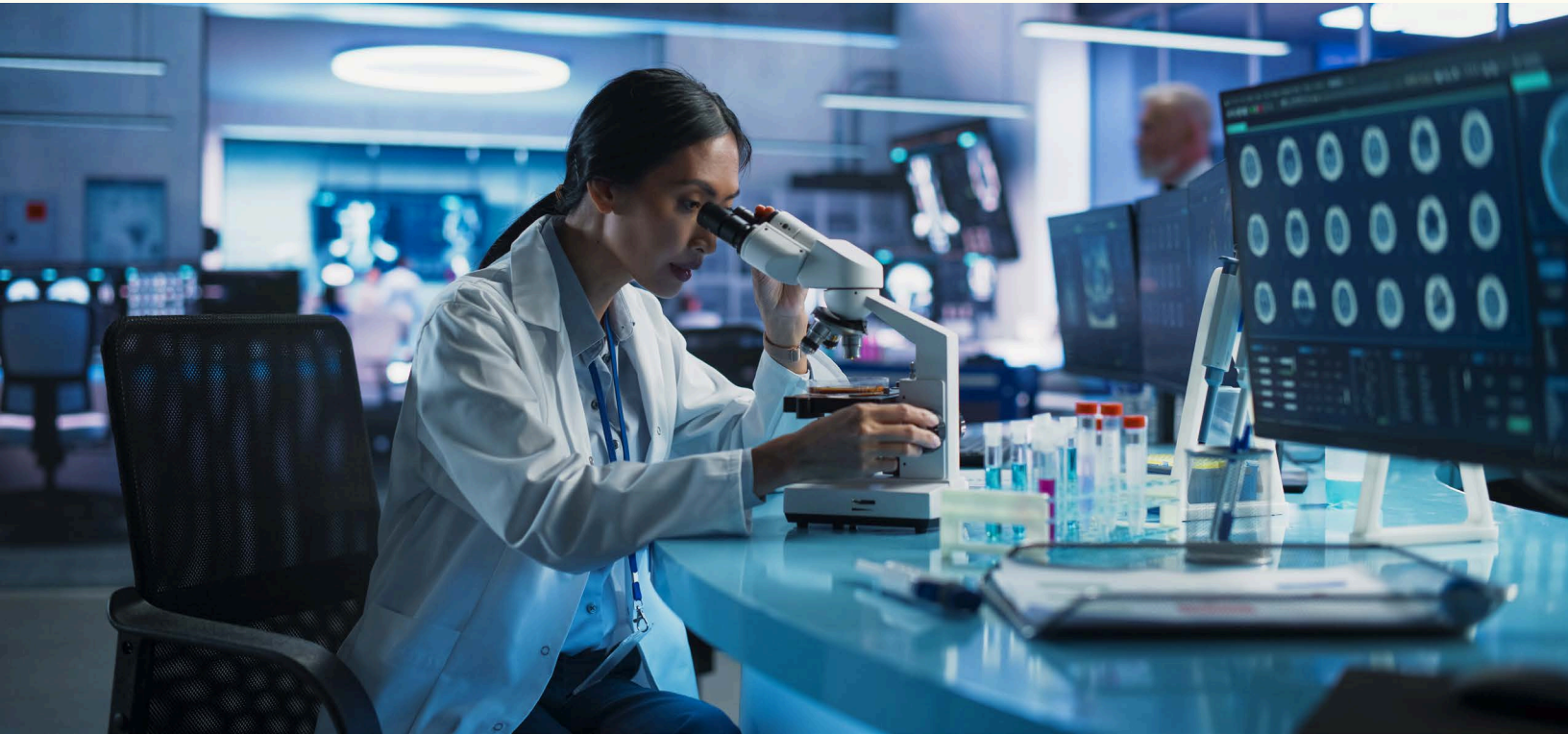
Since ODM products are pre-made, they are not innovations unique to the brand.

#### LIMITED PACKAGING AND DESIGN OPTIONS

Unlike OEM products, where buyers can choose from a wide range of packaging options, ODM products typically offer limited choices based on the manufacturer's inventory.



# Why There Are So Many K-Beauty Brands



## 2. Culture of Innovation and Fast Product Development

K-Beauty is globally recognized for its rapid innovation cycles, with trends like sheet masks, cushion foundations, and multi-step skincare routines originating in South Korea. Korean consumers are known for being highly demanding and eager to try the latest products, which encourages brands to innovate continuously. This culture of innovation leads to a dynamic market where brands are constantly launching new products and lines to stay ahead of trends.

The fast-paced product development cycle is another reason for the large number of brands. South Korean beauty companies can take a product from concept to market in a fraction of the time compared to traditional beauty brands in other countries. This speed encourages the creation of niche brands targeting specific consumer needs or trends, which further diversifies the market.

**This culture of innovation leads to a dynamic market where brands are constantly launching new products and lines to stay ahead of trends.**



# Why There Are So Many K-Beauty Brands

## 3. Government Support and Strategic Focus on Exports

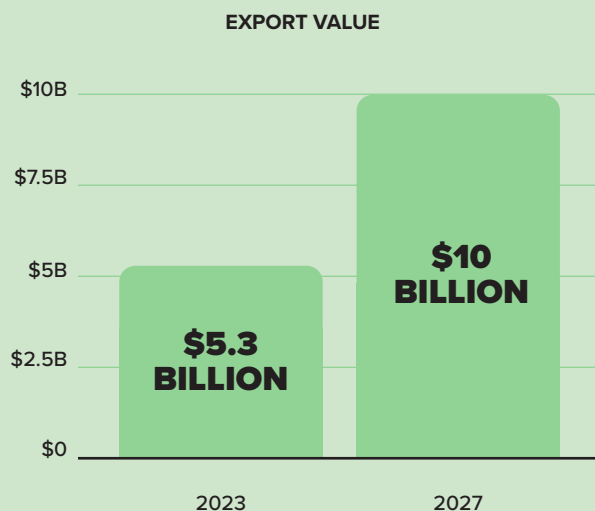
The South Korean government has played a significant role in supporting the growth of the cosmetics industry, recognizing it as a key export sector. In July 2024, the government announced a plan to double small to medium K-Beauty exports from \$5.3 billion in 2023 to \$10 billion by 2027, while increasing the number of exporting brands from 8,360 to 10,000 in the same period.

The South Korean government has a number of programs designed to promote beauty exports and has helped brands expand globally. The government provides financial and logistical support to help beauty companies enter new markets, participate in international trade shows, and comply with global regulatory standards.

In 2022, South Korea's cosmetics exports were valued at over \$7.65 billion, with key markets in the U.S., China, and Southeast Asia. As K-Beauty brands successfully expand internationally, more entrepreneurs are motivated to launch their own brands, knowing they have government-backed resources to scale globally.



### INCREASING EXPORTS FOR SMALL AND MEDIUM K-BEAUTY BRANDS





# Why K-Beauty is Trusted for Safety

Korean cosmetics are considered extremely safe due to several key factors:

## 1. STRICT MANUFACTURING STANDARDS

Leading manufacturers like Cosmax and Kolmar implement stringent quality control and testing protocols, ensuring that their products meet high safety and efficacy standards.

## 2. ADVANCED TECHNOLOGY AND INNOVATION

The Korean beauty industry is known for its innovation, using the latest advancements in cosmetic science and technology to develop safe formulations that are effective and gentle on the skin.

## 3. REGULATORY OVERSIGHT

South Korea has rigorous regulations governing the cosmetics industry, with strict guidelines for product safety, ingredient testing, and manufacturing processes.

## 4. CONSUMER AWARENESS

Korean consumers are highly educated about ingredient safety, and popular domestic apps like Hwahae allow them to analyze the safety of cosmetic ingredients, driving companies to prioritize non-toxic, hypoallergenic formulations.

## 5. INGREDIENT TRANSPARENCY

Korean brands often emphasize natural, clean, and minimal ingredients, with a focus on avoiding harmful chemicals. This transparency in ingredient lists helps consumers make informed decisions.

## 6. INTERNATIONAL SAFETY COMPARISONS

Studies, such as those conducted by the EWG, have shown that Korean cosmetics tend to have better safety ratings compared to products in other markets, including the U.S., further reinforcing their reputation for safety.



### HWAHAE

Mobile App for Checking the Safety of Ingredients in Cosmetic Products

**Founded:** 2013

**Active Users:** 805,118

**Products:** 200,000+

**Reach:** 80% of women in their 20s and 30s

By 2023, K-beauty products showed improvement, achieving an average safety score of 2.9, a half-point better than in 2018. This rating also outperformed the average safety score of 3.6 for skincare products sold in the U.S. Overall, K-beauty products maintain an average safety rating of 3, compared to 4 for other skincare products in the U.S. SOURCE: EWG Database

The EWG (Environmental Working Group) scale is a safety rating system that evaluates the potential hazards of cosmetic ingredients based on available scientific research. It assigns scores ranging from 1 to 10, where lower numbers indicate a lower risk of harmful effects and higher numbers signify greater concern for health impacts. A score of 1-2 is considered low hazard, 3-6 represents moderate hazard, and 7-10 indicates high hazard.





## Why K-Beauty Doesn't Break the Bank

K-Beauty's affordability is driven by multiple factors, one of the most significant being the low cost of launching a brand in South Korea. With the support of ODMs, Korean entrepreneurs can easily develop, manufacture, and scale beauty products without significant upfront investments. This streamlined production process lowers costs, allowing brands to offer high-quality products at competitive prices. Additionally, Olive Young, the leading offline beauty retail channel in South Korea, plays a crucial role in maintaining affordability. With over 1,338 stores as of 2023, Olive Young offers a wide range of beauty products at prices typically ranging from \$15 to \$35. This

positions most K-Beauty brands within the entry-level prestige category, offering premium quality at accessible prices.

Korean consumers are generally price-conscious when it comes to beauty products. Despite their strong commitment to skincare and beauty routines, Korean consumers prioritize value for money, often seeking affordable, high-quality products that deliver effective results. This price sensitivity has driven the popularity of K-Beauty brands that offer innovative, premium products at accessible price points.

**Korean entrepreneurs can easily develop, manufacture, and scale beauty products without significant upfront investments.**





## How K-Beauty Brands Can Stand Out

In a market in which launching a brand is quick, easy, and affordable, Korean brands can stand out by focusing on unique elements that differentiate them from the competition. One key strategy is controlling the supply chain, which allows brands to ensure the highest quality of ingredients and maintain consistency across their products. Additionally, developing proprietary ingredients gives brands a unique selling point that competitors can't easily replicate. These exclusive ingredients, combined with proprietary extraction methods, enable brands to create products with enhanced efficacy and innovative formulations, further distinguishing them in a crowded marketplace. By leveraging these strategies, Korean brands can build strong identities and maintain a competitive edge.

### PROPRIETARY INGREDIENTS

Brands cultivate their own unique ingredients for exclusive formulations.

- Ensures product differentiation and quality control
- Promotes transparency and traceability, appealing to consumers seeking authenticity

### PROPRIETARY EXTRACTION METHODS

Development of exclusive extraction or fermentation processes enhances product efficacy.

- Helps preserve the potency of active ingredients for superior skincare benefits
- Protects intellectual property, making the brand's products difficult to replicate

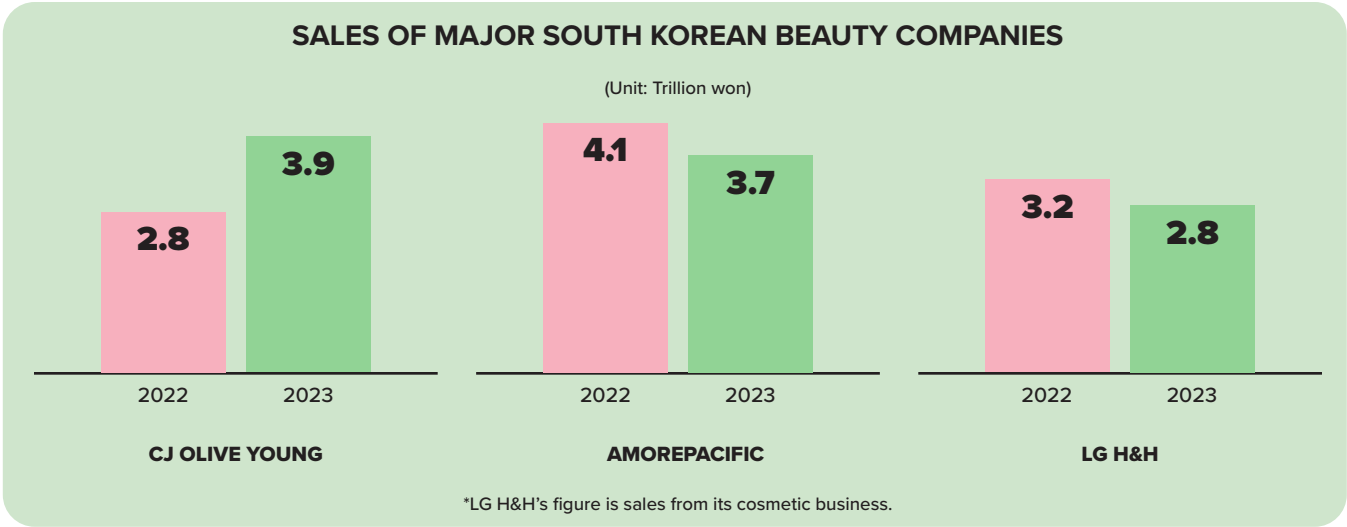


# Olive Young—Its Role and Influence

Olive Young has played a pivotal role in shaping and amplifying the global success of K-Beauty. As South Korea’s largest health and beauty retailer, Olive Young has served as the primary platform for both established and emerging K-Beauty brands. In 2023, Olive Young surpassed AmorePacific as the largest beauty company in Korea. It is the primary offline channel for beauty and represents 35% of total beauty spending in Korea.



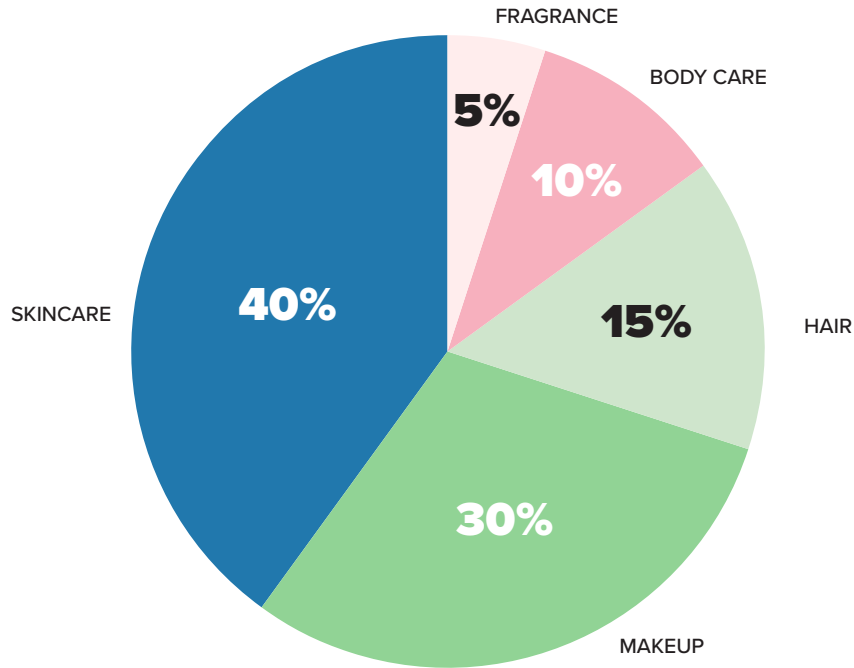
FOUNDED	1999
NUMBER OF STORES	1,338
HEADQUARTERS	Seoul, Korea
2023 SALES	\$2.9B
OWNED BRANDS	Bioheal BOH, WakeMake, Colorgram, and BringGreen



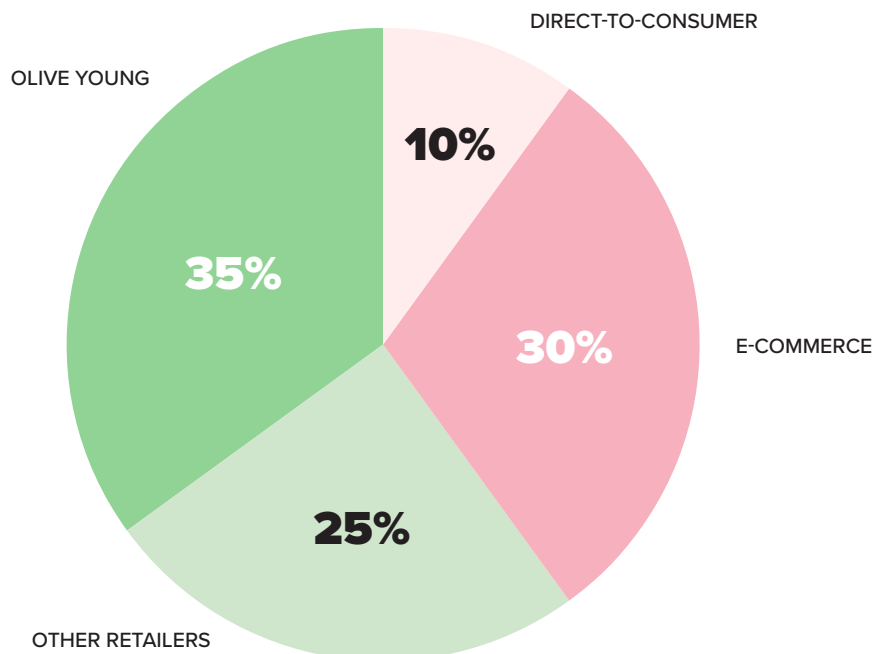


# Olive Young—Its Role and Influence

OLIVE YOUNG: BREAKDOWN OF PRODUCT CATEGORIES BY SALES



OLIVE YOUNG: SHARE OF KOREAN BEAUTY SPENDING



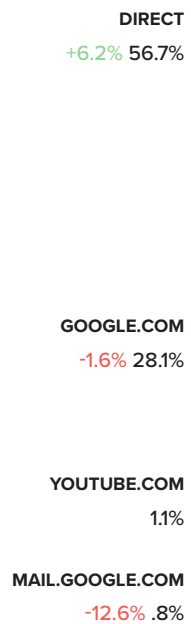


# Olive Young—Its Role and Influence

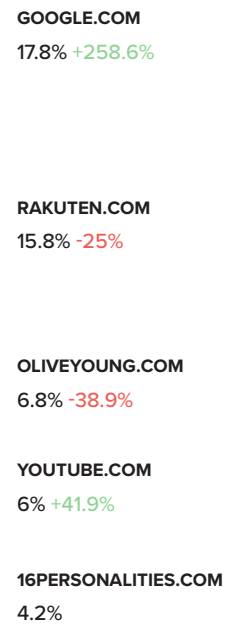
Olive Young is the 12th most visited site in the U.S. for beauty. 56.7% of the traffic is direct, which indicates a high brand awareness for the site.

Most traffic (56.7%) to Olive Young Global is direct, which shows the consumer awareness for the Olive Young site. The second traffic source is Google with 28.1%.

## TOP SOURCES

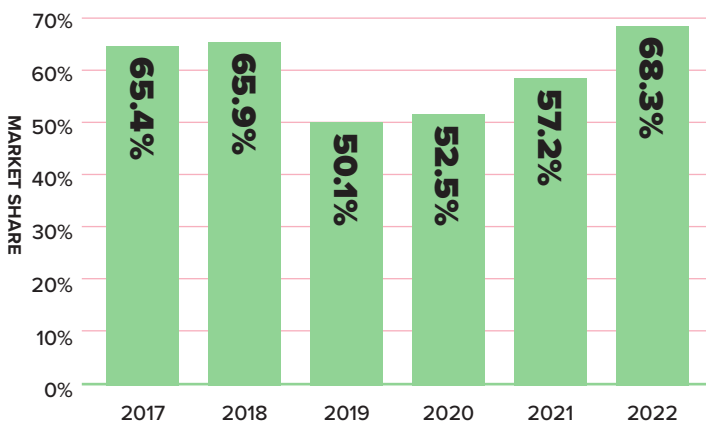


## TOP DESTINATIONS



The majority (65.6%) the Olive Young Global traffic is from the U.S. Most (59.6%) are visiting from mobile devices. Australia is a distant second with 7.6% of the traffic.

## MARKET SHARE OF OLIVE YOUNG IN THE HEALTH AND BEAUTY MARKET BASED ON THE NUMBER OF STORES IN SOUTH KOREA FROM 2017 TO 2022



## WHERE PEOPLE ARE

COUNTRY	%	ALL DEVICES	DESKTOP	MOBILE
United States	65.6%	2.2M	40.38%	59.6%
Australia	7.6%	254.7M	47.5%	52.5%
South Korea	3.6%	123.7K	54.1%	45.8%
United Kingdom	2.6%	89.8K	72.4%	27.6%
Canada	2.6%	87.78K	76.3%	23.7%

# Olive Young—Its Role and Influence

## Top 25 Products Olive Young Global

\*These are the Top 50 Products across all product categories for Week of September 4, 2024

RANKING	BRAND	PRODUCT NAME	CATEGORY
1	ROUND LAB	Birch Juice Moisturizing Sunscreen	Sun Care
2	numbuzin	No.5+ Vitamin Concentrated Serum	Skincare
3	Manyo Factory	Pure Cleansing Oil	Skincare
4	UNOVE	Deep Damage Treatment EX	Hair
5	VT	Reedle Shot 100 Essence	Skincare
6	Torriden	Dive-In Serum	Skincare
7	SKIN1004	Madagascar Centella Hyalu-Cica Water-Fit Sun Serum	Sun Care
8	SKINFOOD	Carrot Carotene Calming Water Pad	Masks
9	MEDIHEAL	Madecassoside Blemish Pad	Masks
10	HERA	Black Cushion Foundation	Makeup
11	BIODANCE	Bio Collagen Real Deep Mask Sheet	Masks
12	Beauty of Joseon	Relief Sun: Rice + Probiotics (SPF50+ PA++++)	Sun Care
13	Anua	Heartleaf Pore Control Cleansing Oil	Skincare
14	BIODANCE	Bio Collagen Real Deep Mask Sheet	Masks
15	ilso	Super Melting Sebum Softener	Skincare
16	SKIN1004	Madagascar Centella Ampoule	Skincare
17	Dr.G	Red Blemish Clear Soothing Cream	Skincare
18	fwee	Lip Cheek Blurry Pudding Pot	Makeup
19	MEDIHEAL	Collagen Ampoule Pad	Masks
20	JUNGSÆMMOOL	Essential Skin Nuder Cushion	Makeup
21	d'Alba	White Truffle First Spray Serum	Skincare
22	Torriden	Dive-In Low Molecule Hyaluronic Acid Mask Sheet	Masks
23	FOODOLOGY	Coleology Cutting Jelly 30 Sticks	Supplements
24	HERA	Sensual Nude Gloss	Makeup
25	BANILA CO	Covericious Ultimate White Cushion	Makeup



# Olive Young—Its Role and Influence

## Top 25 Products Olive Young Korea

\*These are the Top 50 Products across all product categories for Week of September 4, 2024

RANKING	BRAND	PRODUCT NAME	CATEGORY
1	Manyo Factory	Pure Cleansing Oil	Skincare
2	Mediheal	Madecassoside Trace Pad Disney Pixar	Masks
3	Tuke	New Classic Velvet Lip Tint	Makeup
4	Mediheal	Essential Mask Pack	Masks
5	Wellage	Real Hyaluronic Blue 100 Ampoule	Skincare
6	Hera	Black Cushion Foundation	Makeup
7	Aestura	Atobarrier 365 Cream	Skincare
8	Torriden	Dive-in Low Molecular Hyaluronic Acid Serum	Skincare
9	The Delight Project	Project Bagel Chips	Food
10	Banila Co	Ultimate White Cushion	Makeup
11	Round Lab	Pine Calming Cica Ampoule	Skincare
12	Mediheal	Essential Mask Pack	Masks
13	Anove	Large Capacity Deep Damage Treatment EX	Hair
14	Sweep	Super Melting Sebum Softener	Skincare
15	Too Cool for School	Protage Pencil Sharpener	Makeup
16	Goodall	Green Tangerine Vita C Spot Care Serum 50ml	Skincare
17	Ponzu	Clear Spa Lip &iRemover	Skincare
18	Bioderma	Sensibio H2O 500ml Cleansing Water	Skincare
19	Round Lab	Birch Moisture Sun Cream	Sun Care
20	Number Inn	Toner Pad Refill	Masks
21	Manyo Factory	Witch Factory Pure & Deep Cleansing Foam	Skincare
22	Peripera	Ink Mood Glow Tint	Makeup
23	Oprah Cosmetics	Mini Highlighter	Makeup
24	Tooq	Waterproof Slim Eyeliner	Makeup
25	Espoir	Bigelow Volume Cushion	Makeup

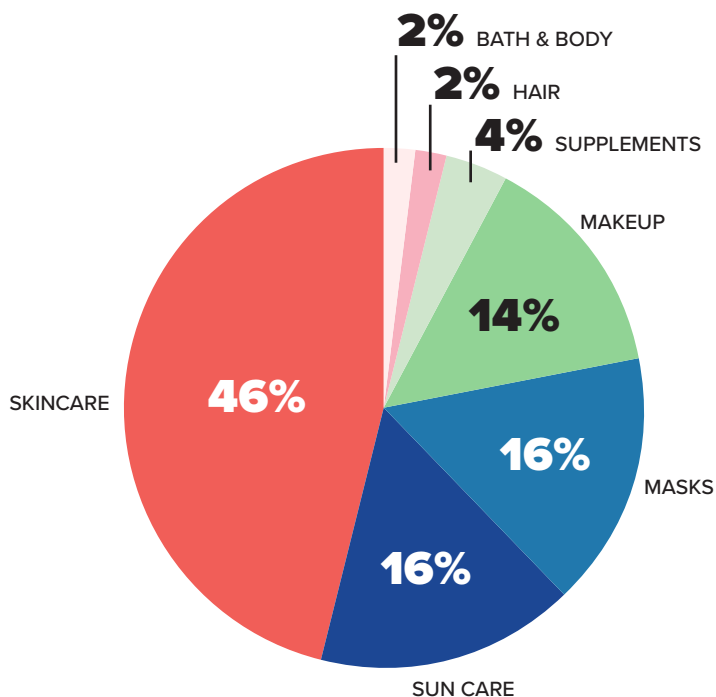
# Olive Young—Its Role and Influence



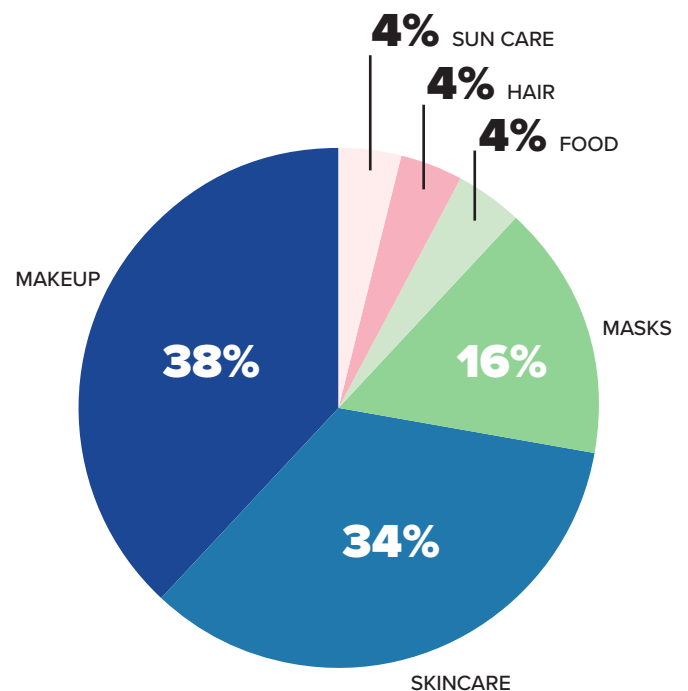
## Category Differences between Korean vs Global Site

The category distribution on Olive Young's Korean and global sites reveals distinct market priorities. The global site emphasizes skincare with 23 instances, followed by significant attention to sun care, due to the high demand for Korean sun products which are limited in U.S. retailers due to FDA regulations. In contrast, the Korea site prioritizes color with 19 instances, partially due to limited shade range of Korean foundations and less awareness of Korean color products in the U.S.

OLIVE YOUNG GLOBAL SITE TOP 50



OLIVE YOUNG KOREA SITE TOP 50





# 4 How K-Beauty Brands Operate in the U.S. Market





K-Beauty brands utilize a variety of business models to establish their presence in the U.S. market. Each model comes with its own set of benefits and challenges, depending on the level of control the brand wants to maintain and the resources they are willing to invest.

U.S. retailers have faced significant challenges in working with K-Beauty brands, often due to misunderstandings about who they are partnering with and how these partnerships function. One of the primary issues has been the inconsistent supply chains, with many retailers struggling to secure a steady flow of products. This problem is exacerbated by unauthorized and channel distributors who frequently approach retailers in hopes of securing partnerships, but without proper authorization or long-term commitment to the brand’s success. These distributors, focused on short-term gains, are often reluctant to invest in marketing efforts because while it may improve their sales, it typically benefits the brand across all channels. As a result, retailers are left with minimal support in promoting the products, which limits their ability to build brand awareness and drive sales growth. This lack of cohesive strategy and investment from K-Beauty distributors has made it difficult for U.S. retailers and the brands themselves to fully capitalize on the demand for K-Beauty products.



K-BEAUTY IN U.S. OPERATIONAL MODELS		
STRUCTURE	DESCRIPTION	NOTES
Corporate Subsidiaries	U.S. operations are a direct subsidiary of the Korean parent company.	This is rare, typically used by conglomerates like AmorePacific or LG. It involves complex administration due to separate P&L and product purchases from the parent company.
Joint Ventures	A U.S. entity and the Korean headquarters form a joint corporate structure.	Popular during the first wave of K-Beauty but less common today.
Exclusive Distributor	A U.S. entity holds exclusive distribution rights for a K-Beauty brand.	Also rare, with the distributor often acting as the brand’s U.S. office, focusing solely on one brand.
Channel Distributor	A U.S. entity has exclusive rights for specific channels or retailers.	Common, offering U.S. distributors protection while allowing flexibility without being tied to Korean sales targets.
Unauthorized Distributors	An entity distributes products without the brand’s authorization.	These are typically grey market goods purchased for other countries.
Counterfeit Product Distributors	An entity distributes counterfeit products in the U.S.	A growing issue as K-Beauty gains traction on platforms like Amazon and TikTok.



# Anatomy of a Successful K-Beauty Brand

Launching and sustaining a successful K-Beauty brand in the U.S. market requires a multifaceted approach. From a strong management team with market insight to continuous product innovation, a brand's success hinges on its ability to adapt, engage, and deliver value to consumers. Below are the key factors that drive the success of K-Beauty brands in the U.S.



## 1. MANAGEMENT TEAM: UNDERSTANDING OF THE U.S. MARKET

The management team's understanding of the U.S. market is critical to the success of a K-Beauty brand. Unlike the Korean market, U.S. consumers have different beauty preferences, cultural expectations, and purchasing behaviors. A strong management team needs to be familiar with these nuances to effectively navigate the competitive landscape. This includes understanding local trends, consumer habits, and the regulatory environment.

## 2. PRODUCT INNOVATION: UNIQUENESS IS KEY

Product innovation is essential for success. K-Beauty brands must offer unique, high-quality products that differentiate them from others. Whether through advanced formulations or new product formats, innovation drives consumer interest and sets the brand apart in a crowded market.

## 3. PRODUCT PIPELINE: BALANCE OF BASE ASSORTMENT AND NEW RELEASES

A successful K-Beauty brand must have a solid product pipeline, with a well-rounded base assortment of core products that establish the brand's identity. These core products, such as cleansers, toners, and moisturizers, create the foundation for the brand. However, it's also critical to continuously introduce new products to upsell to existing customers and attract new ones. Regular product launches, whether through seasonal items or limited-edition offerings, can keep the brand fresh in consumers' minds and ensure sustained interest. This combination of a reliable base assortment and innovative new products ensures that the brand maintains both relevance and excitement in a competitive market.

## 4. UNDERSTANDING THEIR CONSUMER: KNOW YOUR AUDIENCE

Successful K-Beauty brands in the U.S. know exactly who their customers are—whether they are skincare enthusiasts, Gen Z trendsetters, or millennial professionals. This knowledge allows brands to tailor their messaging, product offerings, and marketing strategies to fit seamlessly into the consumer's life. Knowing how the brand fits into the daily routines and lifestyles of their audience is critical for building loyalty.

## 5. OWNING THEIR COMMUNITY: ENGAGING WITH INFLUENCERS AND CONSUMERS

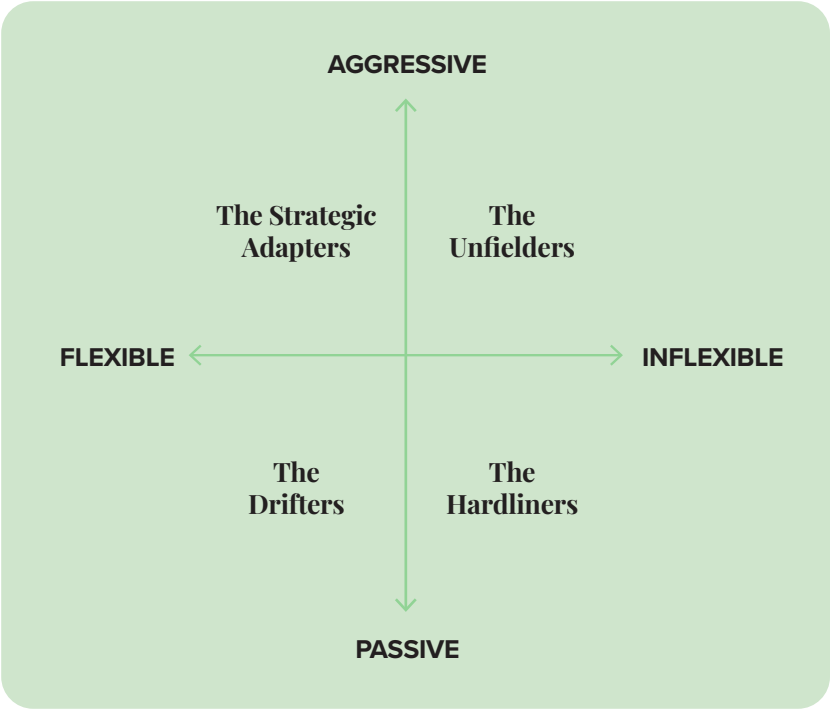
Successful K-Beauty brands own their community by actively engaging with influencers and consumers to foster loyalty and trust. In the U.S., social media platforms like Instagram, YouTube, and TikTok play a massive role in beauty trends. By collaborating with influencers and directly interacting with their audience, brands can gain valuable feedback and build a loyal following. Influencers help drive awareness and serve as authentic voices who can validate the brand's effectiveness. Engaging with customers on social media, responding to feedback, and creating a sense of community around the brand are essential strategies for long-term success.

## 6. SALES STRATEGY: BALANCING GLOBAL OPERATIONS

Managing the brand's operations between Korea and the U.S. is another important factor for success. The brand must carefully balance its Korea business with the needs of the U.S. market and other international markets. By strategically leveraging its presence in Korea and using that as a springboard, the brand can funnel resources into growing its U.S. operations. However, this requires the brand to adapt its sales strategies based on regional demands. A strong global sales strategy ensures that the U.S. business is not only supported by the home market but also able to evolve independently to cater to American consumers.

# Anatomy of a Successful K-Beauty Brand

K-Beauty’s success in the U.S. market is not only about product quality or innovation but also about how adaptable and aggressive a brand is in its approach to entering and scaling in a highly competitive landscape. The level of flexibility and aggressiveness a K-Beauty brand brings to its U.S. operations plays a crucial role in determining its success or failure. Brands can typically be categorized into four groups based on these traits: **The Drifters**, **The Strategic Adapters**, **The Unyielders**, and **The Hardliners**. Each category reveals valuable lessons about how flexibility and aggressiveness shape a brand’s ability to thrive in a new market.



TYPES OF K-BEAUTY BRAND PERSONALITIES		
NAME	DESCRIPTION	NOTES
The Drifters	Flexible/Passive	These brands have a hard time succeeding as their distribution and product pricing will likely be a mess and there will be no clear vision to drive the brand forward. They’re too open to creating products to adapt to any retailer and lack a clear point of view.
The Strategic Adapters	Aggressive/Flexible	These brands will be laser focused on succeeding in the long-term and will adapt to the market to succeed.
The Unyielders	Inflexible /Passive	These brands don’t want to change their branding or products to suit the U.S. market at all and they will allow distributors to represent their products as is but won’t invest in marketing.
The Hardliners	Aggressive/Inflexible	These brands have very high standards for what they will accept and usually will demand unreasonable terms and will generally not succeed in the U.S.



# 5 The Second Wave of K-Beauty







The first wave of K-Beauty introduced Korean beauty products to the global market with quirky, kitschy packaging and novelty items, often seen as fun and playful but lacking in long-term consumer engagement and sometimes at the expense of scientific credibility. At this time, there was also low awareness of Korean culture, making it difficult for K-Beauty brands to resonate with a broad audience. Products often didn't have a proper market fit in Western markets, and without strong marketing channels, these brands struggled to reach and educate consumers effectively. The first wave was characterized by curiosity, but it failed to build lasting consumer loyalty or widespread recognition.

In contrast, the second wave of K-Beauty is successfully capitalizing on the growing global popularity of K-Culture, where Korean music, food, and entertainment have become “cool” and mainstream. K-Beauty is now recognized for its innovation, use of natural ingredients, and sleek, modern packaging that appeals to sophisticated consumers. With the rise of social media and online commerce, K-Beauty has become a leading force on platforms like TikTok, Instagram, and YouTube, driving trends and connecting with younger audiences. It has gained a massive following, particularly with Gen Z and Hispanic consumers, who are drawn to the authenticity, affordability, and effectiveness of K-Beauty products. This wave is defined by its cultural relevance, innovation, and strong digital presence.

**The second wave of K-Beauty is successfully capitalizing on the growing global popularity of K-Culture**

FIRST WAVE	SECOND WAVE
	
<p>K-Beauty known for kitschy, gimmicky items</p> <p>Low awareness of Korean culture</p> <p>Lacked consumer market fit</p> <p>Lack of marketing channels to reach consumers</p>	<p>K-Culture has become cool</p> <p>K-Beauty is known for innovation, natural ingredients and cool packaging</p> <p>K-Beauty is a leading driver in social channels and online commerce</p> <p>K-Beauty has a huge following with Gen Z and Hispanic consumers</p>

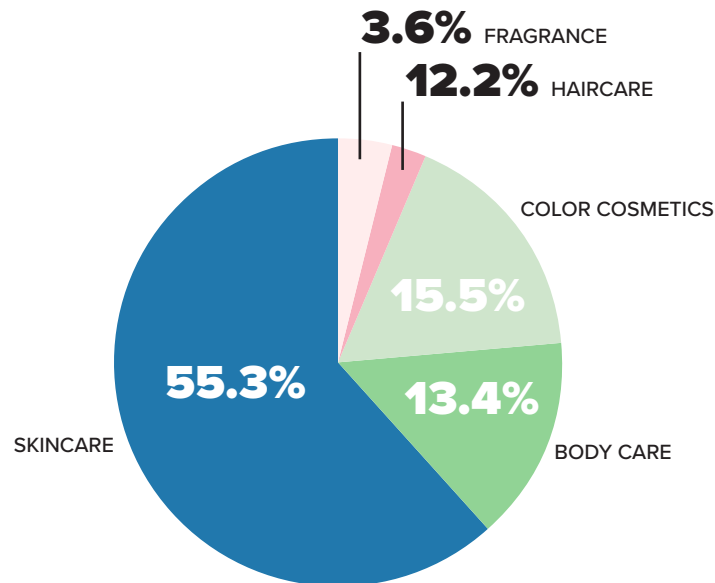


# Expanding Horizons: From Skincare to Color, Body, Hair & Fragrance

While skincare remains the heart of K-Beauty’s success, it is making significant inroads into haircare, color cosmetics, body care, and fragrance. This expansion is supported by both consumer demand and the sector’s reputation for natural ingredients, high efficacy, and affordability. Each of these emerging categories shows promising growth, signaling that K-Beauty is evolving into a comprehensive beauty solution.

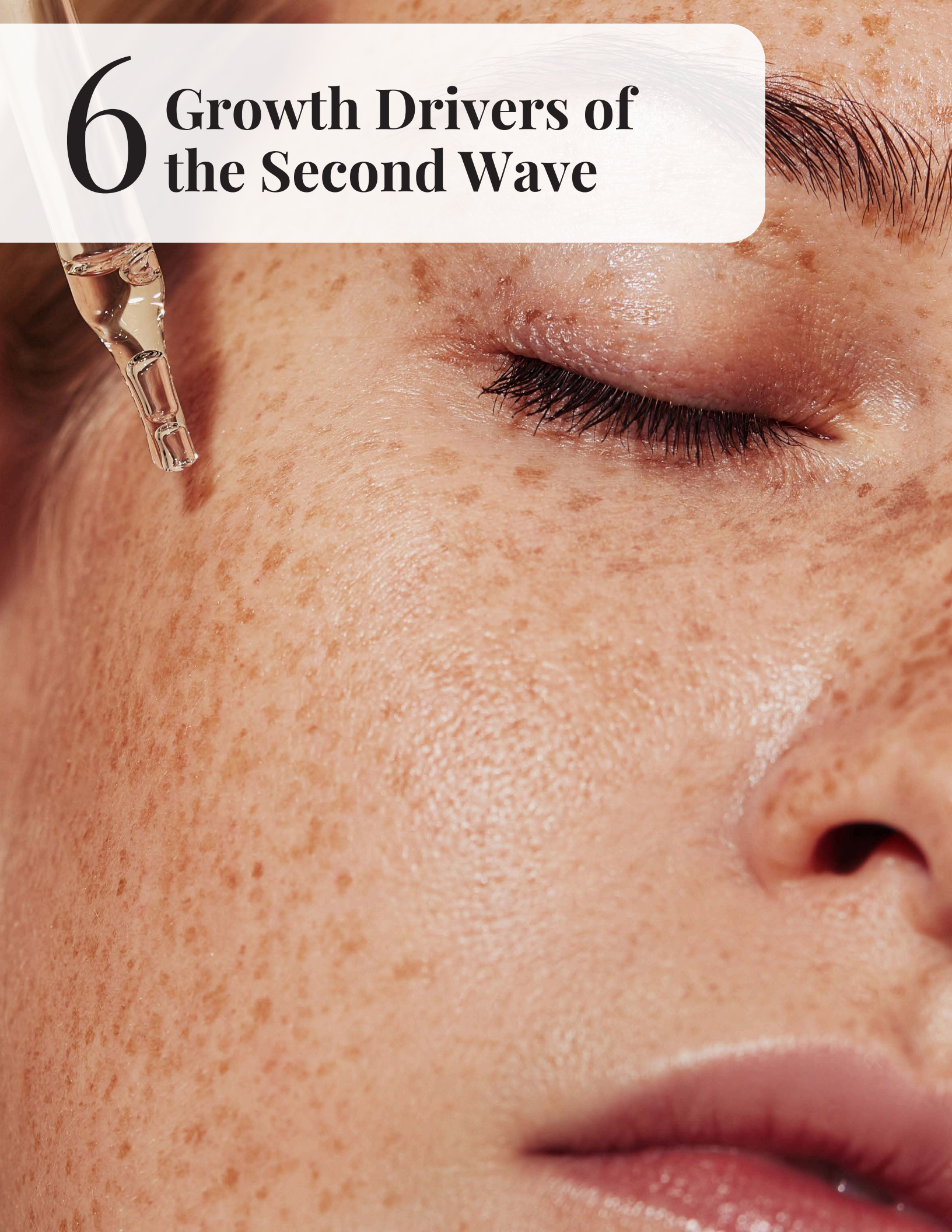
K-Beauty exports cover a wide range of product categories beyond its traditional stronghold in skincare. Here are the key export categories of K-Beauty:

K-BEAUTY EXPORTS TO THE U.S.





# 6 Growth Drivers of the Second Wave







**In 2023, K-Beauty revenue on Amazon.com jumped 78% year over year.**

## **E-Commerce Kings: K-Beauty's Success on Amazon**

In 2023, K-Beauty revenue on Amazon.com jumped 78% year over year. In the first five months of 2024, sales are estimated to more than double from the same period last year. And during the spring big sale period in March, sales of K-beauty products increased by more than 200% YoY.

The number of Korean cosmetics sellers earning more than \$100,000 per year has also more than doubled from 2022, underscoring their strong growth streak in terms of quantity and quality, according to Amazon.

In response to the growing global demand, Amazon launched an initiative called “Project K-Beauty Go Big” in June 2024 seeking to simplify the process for Korean beauty brands to sell and market their products internationally via Amazon. Kolmar announced at the same time that it has joined forces with Amazon to support the successful global market entry of K-beauty brands.

# E-Commerce Kings: K-Beauty's Success on Amazon

## 12% OF TOP 50 SKINCARE PRODUCTS ARE K-BEAUTY

- #3 BIODANCE Bio-Collagen Real Deep Mask
- #7 COSRX Snail Mucin 96% Power Repairing Essence
- #25 Medicube Zero Pore Pads 2.0
- #36 Anua Pore Deep Cleansing Foam
- #42 COSRX Snail Mucin 92% Repair Cream
- #47 Sungboon Editor: Deep Collagen Overnight Mask

## 32% OF TOP 50 TONERS ARE K-BEAUTY BRANDS

- #2 Medicube Zero Pore Pads 2.0
- #3 Anua Heartleaf 77 Soothing Toner
- #4 TIRTIR Milk Skin Rice Toner
- #7 MEDIHEAL Madecassoside Cotton Facial Pads
- #13 I'm from Rice Toner
- #14 SOME BY MI AHA BHA PHA 30 Days Miracle Toner
- #16 COSRX 6X Peptide Collagen Booster Toner Serum
- #24 ANUA Heartleaf 77 Toner Pad
- #26 ANUA Rice 70 Glow Milky Toner,
- #27 Beauty of Joseon Glow Replenishing Rice Facial Sebum Toner
- #28 numbuzin No.5+ Niacinamide Concentrated Toner Pad
- #30 COSRX AHA/BHA Treatment Toner
- #31 (Only Refill) Mediheal Madecassoside Blemish Pad
- #44 COSRX Niacinamide 2% + BHA 4% Blackhead Exfoliant Toner
- #45 LANEIGE Cream Skin Refillable Toner & Moisturizer
- #49 The Face Shop Rice Ceramide Moisturizing Toner

## 16% OF TOP MASKS ARE K-BEAUTY

- #1 BIODANCE Bio-Collagen Real Deep Mask
- #28 Medicube PDRN Collagen JellyGel Mask
- #29 SKIN1004 Zombie Pack 1 Box
- #31 OOTD Hydrating Smoothing Sheet Mask Gift Set for Skincare
- #35 Innisfree Super Volcanic Pore Clay Mask
- #38 Beauty of Joseon Red Bean Pore Refreshing Mask Mud Cream Hydrating Wash Off Pack
- #39 VT Cosmetics Daily Soothing Mask 30ea
- #47 SKIN1004 Madagascar Centella Poremizing Quick Clay Stick Mask

## 26% OF TOP 50 SERUMS ARE K-BEAUTY

- #1 COSRX snail mucin 96% Power Repairing Essence
- #5 Anua 10% Niacinamide 4% Tranexamic Acid Serum
- #17 Medicube Zero Exosome Shot 7,500 PPM Spicule Facial Serum
- #20 SKIN1004 Madagascar Centella Asiatica Ampoule Facial Serum
- #22 COSRX Niacinamide 15% Face serum
- #27 Beauty of Joseon Glow Serum Propolis and Niacinamide
- #30 AXIS-Y Dark Spot Correcting Glow Serum
- #32 COSRX 6X Peptide Collagen Booster Toner Serum
- #33 VT COSMETICS CICA Needle Shot 100 Essence
- #36 Beauty of Joseon Glow Deep Serum Rice 40 GOODAL Green Tangerine Vitamin C serum
- #41 mixsoon Bean essence
- #48 COSRX Pure Vitamin C 23% Serum with Vitamin E & Hyaluronic Acid





## CASE STUDY

### Beauty of Joseon

A TikTok influencer from the U.S., boasting 910,000 followers, shares reviews of lesser-known Korean cosmetics, prompting followers to eagerly purchase the highlighted products. Through word of mouth, the product achieves the top sales rank on the largest U.S. e-commerce platform, Amazon. The company's revenue, which was a mere \$83,000 in 2020, is estimated to have surpassed \$153 million last year.

# The Power of Influence: K-Beauty's TikTok Takeover

TikTok (with 170 million users in the U.S.) has been a major driver of K-Beauty's second wave of growth. Searches on the platform for "Korean skin care" are up 180% year-over-year, and K-beauty brand Biodance joined the Top 25, reported by BeautyMatter. Searches with the hashtag #kbeautymakeup were up 85% year-over-year on TikTok. It's driving significant sales through TikTok and also on other platforms. In fact, social media is the top driver of awareness and traffic for K-beauty brands on Amazon, cites Market Defense to BeautyMatter.

According to Spate, six out of the top 10 skin care brands by quarter-over-quarter TikTok views growth are K-beauty brands.

The growing popularity of TikTok K-Beauty search terms highlights the increasing role of e-commerce in driving K-Beauty sales and visibility. Consumers are using social media platforms to discover and purchase K-Beauty products, with TikTok acting as a key discovery platform for new trends.

As a result, K-Beauty's social shareability has allowed lesser-known Korean beauty brands to become increasingly popular in the U.S. market. Their substantial growth in exports can be attributed to positive word-of-mouth on social media platforms, where they are praised for offering high-quality products at affordable prices. Exports to the U.S. from small to medium K-Beauty brands increased 79.1% to \$266.3M in Q3 2023.

# 7 The Spate Analysis on K-Beauty





Landing worked with trend forecasting agency Spate to conduct an analysis of the top K-Beauty brands and products on TikTok and Google search. Here’s what we found.

## TikTok and K-Beauty Related Tags

TikTok plays a vital role in reflecting and shaping beauty trends, particularly among diverse demographic groups. While it’s clear that K-Beauty is already resonating with Millennials and Gen Z, the following hashtags shed light on how various age groups and ethnicities engage with skincare content, which can be leveraged to shape K-Beauty marketing strategies. Here’s a deeper analysis of the potential K-Beauty connection with these hashtags:

### TOP DEMO HASHTAGS VIEWED ALONGSIDE K-BEAUTY CONTENT/HASHTAGS ON TIKTOK

#momsover30

36.4M total views  
221.8K avg weekly views

#over40skincare

2.2M total views  
167.5K avg weekly views

#momsoftiktok

38.5M total views  
152.2K avg weekly views

#over50skincare

1.1M total views  
143.4K avg weekly views

#over40

4.4M total views  
98.1K avg weekly views

#blackgirlskincare

7.3M total views  
91.1K avg weekly views

#over50

3.6M total views  
81.4K avg weekly views

#latina

4.1M total views  
4.2K avg weekly views

#teenskincare

2.6M total views  
2.7K avg weekly views

### TikTok views for #KBeauty 4.4 Billion views

TOP K-BEAUTY BRANDS ON TIKTOK		
RANKING	BRAND	TOP VIEWS
1	Anua	197M
2	Numbuzin	189M
3	Beauty of Joseon	132M
4	Laneige	129M
5	SKIN1004	123M
6	COSRX	113M
7	Medicube	107M
8	Rom&nd	98M
9	Roundlab	88M
10	TIRTIR	74M
11	Peripera	70M
12	Some By Mi	62M
13	Mixsoon	57M
14	Mediheal	56M
15	Goodal	29M
16	Torriden	28M
17	Etude House	28M
18	Innisfree	26M
19	Tonymoly	24M
20	Isntree	21M

## 1. KEY INSIGHTS FOR AGE GROUPS

- **Strong engagement with skincare in older age groups:** Skincare for women over 30, 40, and 50 is a highly engaged category. K-Beauty brands, traditionally known for focusing on younger consumers, can tap into these markets by developing products and content that address the unique skincare needs of these age groups (e.g., anti-aging, hydration, skin elasticity).

- **Opportunity for anti-aging and skincare innovation:** With the weekly engagement numbers for these hashtags showing robust activity, K-Beauty could position its advanced ingredients and skincare technologies—such as snail mucin, ginseng, and fermented products—as solutions for these age demographics. Highlighting K-Beauty’s focus on natural, yet highly effective ingredients can appeal to the 30+ age group who are looking for gentle yet results-driven products.

- **Targeted TikTok campaigns:** K-Beauty can leverage TikTok influencers within the 30+, 40+, and 50+ demographics to promote routines and products tailored to older skin. Incorporating these popular hashtags into campaigns will allow K-Beauty brands to reach engaged users already discussing these topics.

## K-Beauty Tags by Major Retailers

By grouping the hashtags related to major retailers like Sephora, Amazon, Ulta, Costco, Olive Young, and YesStyle, we gain insights into their relative presence and engagement within the K-Beauty social media ecosystem.

## 2. KEY INSIGHTS FOR NICHE MARKETS

- **Inclusivity in skincare:** K-Beauty has often been criticized for its lack of shade diversity and focus on certain skin types. However, with hashtags like #blackgirlskincare showing strong engagement, there’s a clear demand for content addressing skincare for darker skin tones. K-Beauty brands can develop content highlighting the effectiveness of their products on melanin-rich skin, ensuring inclusivity.

- **Products catering to diverse skin needs:** Many K-Beauty products are formulated for sensitive skin, which may appeal to women of color, especially if marketed effectively. Ingredients like Centella Asiatica (Cica) and rice water, which are popular in K-Beauty, can be promoted for their soothing and brightening properties to target the needs of melanin-rich skin.

- **Campaigns with diverse influencers:** Partnering with Black and Latina skincare influencers on TikTok to create tutorials or testimonials using K-Beauty products can help to build trust and visibility within these communities. These influencers can highlight how K-Beauty products meet their specific skincare concerns such as hyperpigmentation, dryness, or sensitivity. Hashtags into campaigns will allow K-Beauty brands to reach engaged users already discussing these topics.

### TOP K-BEAUTY CO-VIEWED TERMS ON TIKTOK

TERM	TOTAL VIEWS
#sephora	175M
#amazonfinds	166M
#oliveyoung	105M
#thefaceshop	46M
#sephorahaul	38M
#yesstyleinfluencers	30M
#amazon	24M
#amazonmusthaves	20M
#oliveyoungkorea	17M
#ultabeauty	15M
#amazonbeauty	15M
#costco	14M



## Here is a breakdown of the performance based on total views:

### 1. AMAZON'S GROWING PRESENCE: SURPASSING SEPHORA WITH 224M K-BEAUTY VIEWS

Amazon emerges as a major hub for K-Beauty, outperforming even Sephora in total hashtag views, with a combined 224.4M views. Hashtags like #amazonfinds (166M views) are especially impactful, driven by consumers actively discovering and sharing K-Beauty products found on Amazon. These results reflect Amazon's broad accessibility and growing importance in the K-Beauty market, catering to consumers who prefer online convenience.

### 2. SEPHORA'S INFLUENCE: LEADING K-BEAUTY ENGAGEMENT WITH 175M VIEWS

Sephora continues to lead in terms of visibility and consumer engagement with K-Beauty-related content. The primary hashtag, #sephora, leads with 175M total views, showing that Sephora's role as a premier beauty retailer significantly drives K-Beauty discovery and sales. The hashtag #sephorahaul adds an additional 37.7M views, reflecting the popularity of haul content, where influencers and consumers showcase their Sephora purchases, reinforcing the retailer's influence on K-Beauty shopping behavior.

### 3. OLIVE YOUNG'S GLOBAL EXPANSION: 121M VIEWS HIGHLIGHT INTERNATIONAL APPEAL

Olive Young, a leading K-Beauty retailer in Korea, shows substantial international visibility with 121.4M combined views. The primary hashtag, #oliveyoung, drives the bulk of this with 104.6M total views, signaling strong interest in Olive Young's offerings among global consumers.

### 4. YESSTYLE'S NICHE APPROACH: INFLUENCER-DRIVEN CONTENT REACHES 30M VIEWS

YesStyle, an online platform focused on Asian beauty and fashion, generates a respectable 29.9M total views, largely through influencer-driven content (#yesstyleinfluencers). While it has a smaller reach compared to Amazon and Sephora, YesStyle's niche positioning and strong influencer partnerships give it a unique advantage.

## K-Beauty Search Terms in the U.S. Market

Google search data for K-Beauty products in the U.S. highlights key trends and a wide range of categories.

TERM	VOLUME
Korean Sunscreen	35.8K
Kojic Acid Soap	32.5K
Sheet Mask	78.3K
Cushion Foundation	20.7K
Skin Barrier	35.8K
Enzyme Mask	11.1K
Tinted Sunscreen	50.7K
Snail Cream	10.7K
Korean Glass Skin	29.9K
Scalp Massage	40.6K
Toner Pads	7.1K
Rice Face Mask	7.9K
Snail Serum	5.3K

# Analyzing the Most Searched K-Beauty Terms:

## 1. SUNSCREEN AND SKIN PROTECTION

- Korean Sunscreen (35.8K searches) and Tinted Sunscreen (50.7K searches):

Sunscreen is a core element of K-Beauty routines, known for lightweight, high-quality formulas that combine sun protection with skincare benefits. The significant search volume for both Korean and tinted sunscreens indicates that U.S. consumers are seeking advanced formulations that not only protect against UV rays but also provide cosmetic coverage. Tinted sunscreens, which act as a light-coverage foundation, are particularly popular for those looking for multi-functional products.

## 2. SKINCARE ESSENTIALS AND TREATMENTS

- Sheet Mask (78.3K searches):

Sheet masks remain one of the most iconic K-Beauty products. The high search volume demonstrates the continued popularity of sheet masks as part of regular skincare routines, driven by their convenience and efficacy.

- Kojic Acid Soap (32.5K searches):

Kojic acid, a well-known ingredient for brightening and reducing hyperpigmentation, is attracting attention in the U.S. market. The search data indicates that American consumers are increasingly turning to K-Beauty for solutions for uneven skin tone, a common skincare concern.

- Snail Cream (10.7K searches) and Snail Serum (5.3K searches):

Snail mucin, known for its hydrating and regenerative properties, has been a staple in K-Beauty for years. Although these searches are lower compared to other categories, they show a consistent interest in this unique ingredient, particularly among skincare enthusiasts focused on anti-aging and skin repair.

## 3. SKIN HEALTH AND REPAIR

- Skin Barrier (35.8K searches):

The focus on skin barrier health shows that consumers are seeking solutions to protect against environmental damage and harsh treatments, and ones that support long-term skin health, which aligns with K-Beauty's holistic approach.

- Korean Glass Skin (29.9K searches):

The glass skin trend, characterized by a dewy, luminous complexion, remains a key driver of interest in K-Beauty.

## 4. SPECIALIZED TREATMENTS AND MASKS

- Enzyme Mask (11.1K searches) and Rice Face Mask (7.9K searches):

These niche masks highlight consumer interest in natural ingredients and targeted treatments. Enzyme masks are sought after for their gentle exfoliating properties, while rice masks are prized for their brightening and nourishing effects. The lower search volumes suggest that these are more specialized products, appealing to a smaller but dedicated group of skincare aficionados.

## 5. EMERGING BEAUTY CATEGORIES

- Scalp Massage (40.6K searches):

Scalp care is gaining momentum, reflecting an increasing interest in holistic beauty routines that go beyond facial skincare. The search for scalp massage products indicates that U.S. consumers are looking for ways to improve hair health and circulation, influenced by K-Beauty's comprehensive approach to wellness.

- Cushion Foundation (20.7K searches):

Cushion foundations, a K-Beauty innovation, offer a convenient, lightweight alternative to traditional foundations, blending makeup with skincare benefits. The search volume shows that this product format continues to resonate with U.S. consumers, especially those who value convenience and dewy, natural-looking coverage.



## Notable Differences in Beauty Search Terms: U.S. vs. Korea

The differences between beauty-related search terms in the U.S. and Korea reflect contrasting priorities, cultural preferences, and approaches to beauty routines with zero overlap in top searches.

TERM	VOLUME
Modeling Mask	133.9K
Hush Cut	123.6K
Ultherapy	95K
Lip Fillers	85.6K
Mesobotox	76.9K
Thermage	70.4K
Laser Treatment	64.6K
Cleansing Balm	48.5K
Laser Facial	64.6K
Cleansing Milk	45.2K
Mineral Sunscreen	44.6K
Jelly Perm	40.4K
Potenza	38.3K
Hime Haircut	32K

*\* Korean Search Terms*

## Here are the key differences:

### U.S. SEARCHES:

- The top K-Beauty searches in the U.S. highlight interest in everyday skincare products like Sheet Masks (78.3K), Korean Sunscreen (35.8K), Tinted Sunscreen (50.7K), and Skin Barrier (35.8K). These searches show that U.S. consumers prioritize sun protection, hydration, and skin health, with a focus on practical, daily-use products.
- There is also an emphasis on Snail Cream (10.7K) and Snail Serum (5.3K), reflecting a consistent interest in anti-aging and regenerative skincare solutions.

### KOREAN SEARCHES:

- Korean consumers, on the other hand, are more focused on advanced cosmetic procedures and high-tech beauty treatments, as shown by searches for Ultherapy (95.0K), Lip Fillers (85.6K), Mesobotox (76.9K), and Thermage (70.4K). These treatments reflect a desire for long-term, noticeable improvements in skin tightness, contouring, and anti-aging, with a preference for non-invasive procedures.
- Terms like Modeling Mask (133.9K) and Laser Treatment (64.6K) show that Korean consumers are exploring more clinical skincare options, moving beyond basic routines.

### Acne Is a Major Traffic Driver

Search terms related to acne are major drivers of traffic, reflecting a widespread concern with acne management and prevention. K-Beauty's reputation for offering gentle, effective solutions for acne-prone skin explains the high engagement with these terms. With over 501.2M total views for #KBeautyAcne, consumers are clearly seeking targeted skincare tips and products to address this common skin issue. The term #AcneProneSkin shows that consumers are looking for tailored advice for sensitive skin types, further solidifying K-Beauty's image as a go-to for resolving skin concerns gently.

### Collagen and Anti-Aging Products Gain Traction

Collagen is a key ingredient in anti-aging, and these terms show considerable interest in K-Beauty's offerings in this category. Consumers are turning to collagen masks and other products to improve skin elasticity and reduce signs of aging, as seen in the 99.8M total views for #CollagenMask. The overall interest in collagen-based products indicates a significant demand for anti-aging solutions in the K-Beauty space.



# 8 The ClearForMe Analysis on K-Beauty





ClearForMe, an Ingredient Intelligence company that analyzes products with relevant attributes like skin concerns, benefits, and lifestyle compatibility, assessed Landing’s K-Beauty brands and found the following insights. ClearForMe is an ClearForMe analyzed Landing’s K-Beauty brands and found the following.

An Analysis of Landing’s  
Partner K-Beauty Brands

- COSRX
- Hanskin
- Dear Klairs
- ISNTree
- Mixsoon
- Some By MI
- Pyunkang Yul
- Numbuzin

The analysis of Landing’s K-beauty partners highlights a strong commitment to clean and skin-friendly formulations. A significant portion of the products analyzed are formulated with consumer preferences in mind, such as being vegan (81%), free of drying alcohols (95%), and aluminum-free (96%). The data also emphasizes that these products cater to individuals with sensitivities, with 91% fragrance-free, 91% gluten-free, and 75% made without known allergens. Additionally, nearly all products avoid potentially harmful ingredients, being 100% paraben-free, 99.9% phthalate-free, and 99.9% talc-free. The analysis further reveals that 97% are mineral oil-free, and a majority are formulated without palm oil (96%), silicones (77%), and sulfates (98%).

In terms of benefits, the analysis showcases the skin-friendly nature of K-beauty products, particularly for dry skin (83%) and sensitive skin (72%), with 68% known to boost hydration. This data supports the notion that K-beauty products are well-suited for those seeking effective hydration and moisture retention. Additionally, 57% of the products are good for combination skin, demonstrating versatility across skin types. This commitment to avoiding harmful ingredients and catering to diverse skin needs further cements K-beauty’s appeal as a leader in clean, safe, and effective skincare.



FORMULATION ATTRIBUTES		
FREE OF/MADE WITHOUT		GOOD FOR
● 81% of products are likely to be vegan		● 83% are great for dry skin
● 95% are made without drying alcohols		● 57% are good for combination skin
● 96% are free of aluminum-derived ingredients		● 68% are known to boost hydration
● 91% are fragrance-free		● 72% are good for sensitive skin
● 91% are gluten-free		
● 75% are made without known allergens		
● 97% are free of mineral oils		
● 66% are made without known comedogenics		
● 96% are made without palm oil		
● 100% are paraben-free		
● 99.9% are phthalate-free		
● 77% are made without silicones		
● 98% are made without sulfates		
● 99.9% are talc-free		

## Key Insights

### 1. ANTI-AGING IS A PRIMARY CONCERN

Many of the most-searched ingredients, such as snail mucin, collagen, hyaluronic acid, and retinol, are known for their anti-aging benefits. This reflects a strong demand for products that target wrinkles, fine lines, and sagging skin.

### 2. ACNE SOLUTIONS ARE HIGHLY SOUGHT AFTER

Ingredients like tea tree, retinol, and snail mucin emphasize acne treatment, especially for combination and oily skin types, indicating that many K-beauty consumers are focused on acne management.

### 3. GENTLE SKINCARE FOR SENSITIVE SKIN

Ingredients like vitamin C, rice water, Centella Asiatica, and niacinamide, which are gentle and non-irritating, suggest that a significant portion of the consumer base is looking for products that cater to sensitive or redness-prone skin.

### 4. MULTIFUNCTIONALITY IS KEY

Ingredients like niacinamide and retinol address a variety of concerns, such as dark spots, acne, wrinkles, and skin texture, reflecting the desire for multifunctional skincare solutions.

### 5. GROWING INTEREST IN SKIN BRIGHTENING

Ingredients like tranexamic acid, glutathione, and vitamin C show that brightening and evening skin tone are major trends, especially in markets where hyperpigmentation is a common concern.

This analysis highlights the current focus areas in K-beauty, reflecting a balance between anti-aging, acne control, and gentle care for sensitive skin, catering to diverse skincare needs.



ClearForMe also analyzed Spate data showing the top ingredients associated with K-Beauty.

INGREDIENT	TOTAL VIEWS	GOOD FOR
Snail Mucin	140.8M	Acne, Fine Lines, Wrinkles
Vitamin C	66.1M	Sensitive Skin
Collagen	59.0M	Fine Lines, Wrinkles, Sagging
Niacinamide	51.4M	Brightening, Combination Skin, Dark Spots, Dry Skin, Fine Lines, Wrinkles, Redness
Ricewater	43.3M	Sensitive Skin
Centella Asiatica	42.4M	Normal Skin, Redness
Houttuynia Cordata	32.3M	Fine lines, Wrinkles
Hyaluronic Acid	30.5M	Fine lines, Wrinkles
Retinol	30.3M	Acne, Dark Circles, Dark Spots, Pore, Fine lines, Wrinkles
Glutathione	21.2M	Fine Lines, Wrinkles, Sagging
Teatree	17.0M	Acne, Combination Skin, Oily Skin
Tranexamic Acid	16.2M	Redness, Dark Spots
Panthenol	6.3M	Dry Skin, Redness, Puffiness



# 9 Understanding the U.S. Consumer for K-Beauty





# Who's Buying K-Beauty?

## MILLENNIALS AND GEN Z LEAD THE WAY

K-Beauty is most popular among younger consumers, with Gen Z leading in spending:

- Gen Z (16-24) accounts for 33% of K-Beauty buyers and spends \$5 more per year on K-Beauty than the average consumer.
- Millennials (25-40) make up 43% of the market, focused on anti-aging and preventative skincare.
- Gen X (40-55), while representing 15% of the market, is seeing the fastest dollar growth, signaling increasing interest in K-Beauty products.

Source: Mintel Global Beauty Trends Report 2023; Statista, Beauty & Personal Care Report 2023

K-Beauty buyers spend \$270 more per year on beauty and personal care products compared to the average shopper, reflecting their dedication to skincare.

## WOMEN DOMINATE, BUT MEN ARE JOINING IN

While women remain the core demographic, men are increasingly entering the K-Beauty scene:

- 72% of K-Beauty consumers are women, but 28% are men, representing a growing male skincare segment in North America.

Source: Statista, Beauty & Personal Care Report 2023







# The “Mom-portunity” in K-Beauty

Moms are emerging as key drivers of K-Beauty’s success in North America, influencing not only their beauty routines but also those of their children. The rise of K-Beauty in family households presents a significant opportunity for brands targeting busy moms seeking effective skincare solutions for themselves and their families.

*Source: NIQ Omnishopper Panel 2023; TikTok Analytics*

K-Beauty has grown +81.5% in households with kids aged 6-12, as moms look for high-quality, accessible skincare products that fit into their daily routines.

In households with teenagers (aged 13-17), K-Beauty adoption is up +66.1%, as moms pass on skincare habits to their teens, while teenagers themselves are drawn to K-Beauty’s trendy appeal.

This trend is further amplified by the social media presence of moms engaging with beauty and skincare content:

#momsover30 has garnered 36.4M total views and 221.8K average weekly views on TikTok, showcasing the active involvement of moms in beauty trends.

#momsoftiktok boasts 38.5M total views and 152.2K weekly views, reflecting the strong influence of mothers in the beauty space.



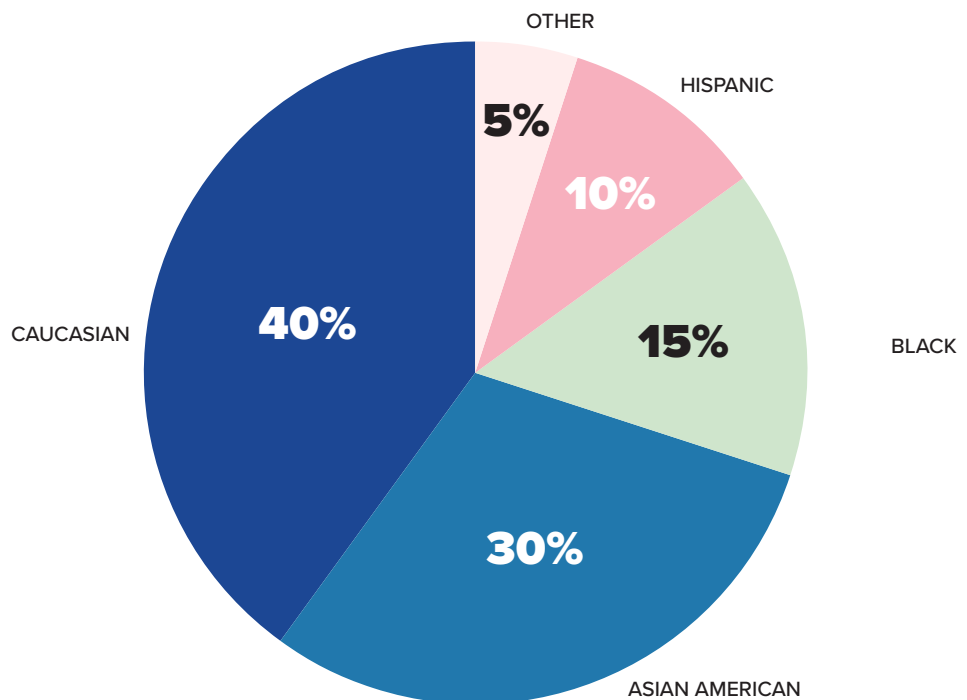
**ETHNIC DIVERSITY:  
HISPANIC SHOPPERS  
LEAD PENETRATION  
GROWTH**

K-Beauty appeals to a diverse audience in North America: Penetration growth is the highest among Hispanic shoppers, indicating that this demographic is quickly adopting K-Beauty products.

40% of consumers are Caucasian, 30% are Asian-American, and 15% are Black, showcasing the broad appeal of K-Beauty's inclusive product lines.

*Source: Euromonitor, Beauty and Personal Care in North America 2022*

**K-BEAUTY CONSUMERS BY ETHNICITY**





# What are K-Beauty Consumers Buying?

Skincare products dominate K-Beauty purchases:

- 54% of consumers prioritize skincare, including cleansers, serums, and moisturizers.
- 30% of buyers seek specialty products such as sheet masks and pimple patches, iconic to K-Beauty.
- 16% focus on cosmetics, especially BB creams and cushion foundations.

Source: Kline & Company, Skincare Market Analysis 2022



## Characteristics of K-Beauty Consumers

### A. BRAND LOYALTY VS. EXPERIMENTATION

K-Beauty buyers in North America are both brand loyal and open to experimentation:

- 42% of consumers are loyal to specific brands like Laneige, Innisfree, and COSRX.
- 58% enjoy trying new products, drawn by K-Beauty's frequent product launches and innovative formulations.

Source: McKinsey, Beauty Consumer Insights 2022

### B. THE APPEAL OF MULTI-STEP ROUTINES

North American consumers are embracing the multi-step routines that define K-Beauty:

- 35% follow a 7-10 step regimen, using toners, essences, serums, and more to achieve glowing skin.
- 47% opt for a simplified 3-5 step routine, prioritizing key products while cutting down on time.

Source: Mintel, Beauty & Skincare Routines Report 2023

### C. SUSTAINABILITY AND NATURAL INGREDIENTS

Consumers are increasingly concerned about sustainability and the use of natural ingredients:

- 65% of K-Beauty buyers in North America prefer products with eco-friendly packaging.
- 58% seek out products made with natural ingredients like Centella Asiatica and green tea, which are common in K-Beauty formulations.

Source: GlobalData, Clean Beauty and Sustainability Report 2023



# Why They Buy: Key Motivations Behind K-Beauty Purchases

## A. INNOVATION AND UNIQUE INGREDIENTS

70% of North American K-Beauty consumers are attracted to the unique formulations, such as snail mucin and ginseng extract, which are often missing in Western beauty products.

Source: Statista, K-Beauty Market Trends 2022

## B. AFFORDABLE LUXURY

60% of consumers appreciate that K-Beauty offers high-quality products at lower prices compared to luxury Western brands, allowing more buyers to access effective skincare solutions.

Source: Kline & Company, Global Skincare Report 2022

## C. PACKAGING THAT POPS

48% of consumers are drawn to K-Beauty for its visually appealing packaging, with designs that stand out on store shelves and in online carts.

Source: Euromonitor, Beauty Trends 2022



# 10 K-Beauty's Retail Revolution: Where It Shines





# Where are K-Beauty Beauty Consumers Shopping?

## 1. ONLINE SHOPPING DOMINATES THE MARKET

The majority of K-Beauty consumers in North America prefer shopping online for their skincare and beauty needs. E-commerce offers a wide selection of K-Beauty products that are sometimes not available in physical stores, making it a popular choice for shoppers looking for both convenience and variety.

**68% of K-Beauty purchases are made online.**

- Popular online retailers include YesStyle, Soko Glam, and Amazon, which provide curated selections of K-Beauty products, as well as comprehensive descriptions and user reviews, which appeal to consumers.

Online shopping also enables customers to take advantage of promotions, and it's easier for them to discover new products through digital advertising and influencer marketing.

Source: GlobalData, E-commerce Beauty Insights 2023

## 2. PHYSICAL STORES STILL PLAY A KEY ROLE

Despite the strong preference for online shopping, physical stores still hold significant importance for K-Beauty shoppers in North America. Retailers like Sephora, Ulta, and Target are expanding their K-Beauty sections to meet growing demand, making these stores a critical touchpoint for beauty enthusiasts who prefer to see and test products in person before purchasing.

**32% of K-Beauty purchases happen in physical stores.**

- Sephora and Ulta, in particular, have been instrumental in introducing K-Beauty brands to the U.S. market, dedicating shelf space to popular brands like Laneige, Innisfree, and COSRX.

Many shoppers enjoy the tactile experience of in-store shopping, allowing them to engage with the products, test them, and receive personalized advice from beauty consultants.

Source: GlobalData, E-commerce Beauty Insights 2023





## Where Do K-Beauty Consumers Discover New Products?

Social media has a significant impact on K-Beauty consumer behavior:

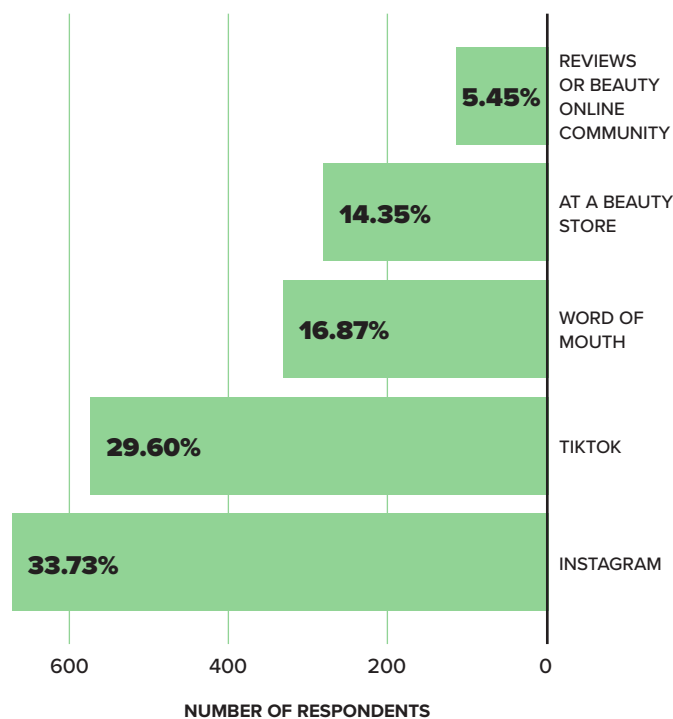
73% of consumers discover new products through platforms like Instagram, TikTok, and YouTube.

62% of purchases are influenced by beauty influencers, making digital marketing and social media campaigns crucial for brand success.

According to a Landing International survey of 1,900 consumers, potential K-Beauty consumers discover products primarily on Instagram and TikTok.

Not surprisingly, TikTok was the preferred discovery method for the under 18 and 18-24 age group, while Instagram was the most popular for ages 25 and above.

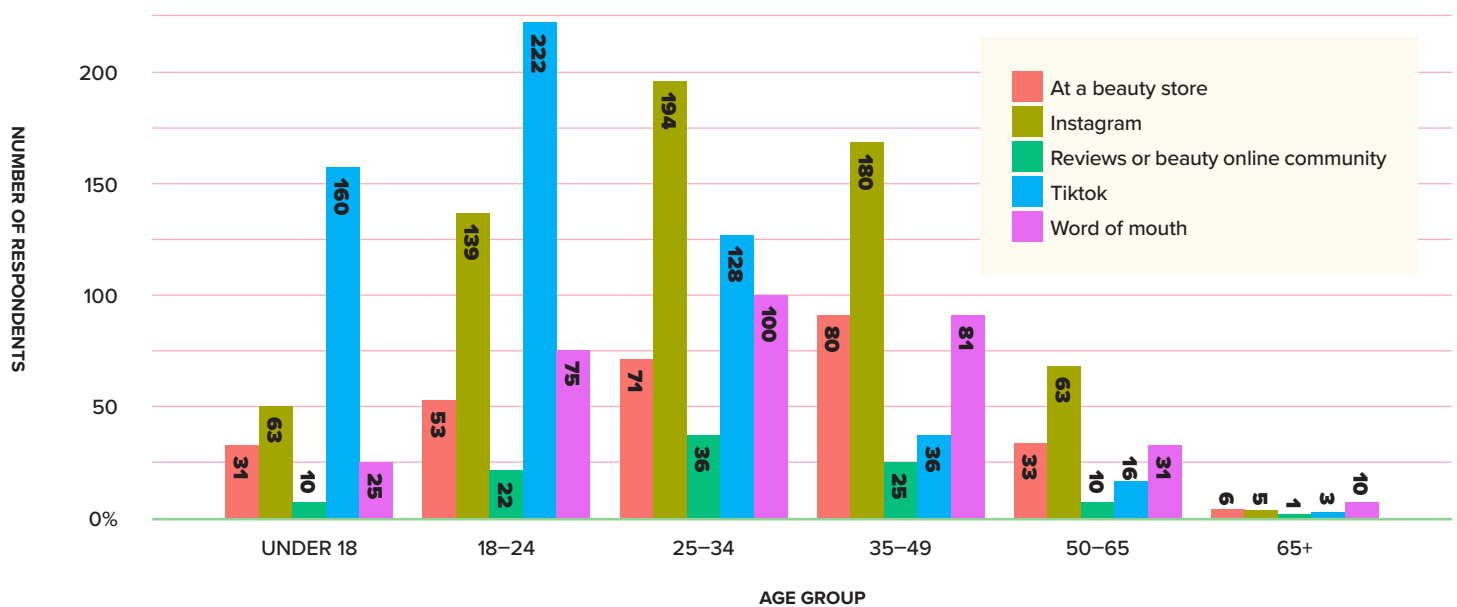
### HOW RESPONDENTS DISCOVER NEW BEAUTY PRODUCTS



Source: Landing International Inc.



## HOW DO YOU USUALLY DISCOVER NEW BEAUTY PRODUCTS?



Source: Landing International Inc.



# Ulta: Mainstream Meets Innovation

Ulta Beauty, one of the largest beauty retailers in the U.S., has become a go-to destination for beauty enthusiasts seeking a wide range of products, from skincare to makeup. In response to the growing demand for K-Beauty, Ulta has expanded its offerings to include a variety of K-Beauty brands, renowned for their cutting-edge formulas and holistic approach to skincare.

Here are the current K-Beauty brands sold at Ulta:

## BORN AND RAISED K-BEAUTY BRANDS

PRESTIGE BRANDS	BRAND	DESCRIPTION
	belif	Known for its herbal-based skincare, belif combines modern technology with traditional apothecary methods, focusing on hydration and natural ingredients.
	COSRX	A minimalist brand that targets specific skin issues with potent, no-frills formulations, especially for acne-prone and sensitive skin.
	Hanskin	Specializes in multi-step skincare and glowing complexions, offering products that prioritize hydration and radiance.
MASS BRANDS	Klairs	A cruelty-free and eco-friendly brand, Klairs focuses on gentle skincare products that cater to sensitive skin and use clean, effective ingredients.
	BRAND	DESCRIPTION
	Banila Co	Best known for its Clean It Zero Cleansing Balm, Banila Co provides affordable, effective cleansing solutions with a focus on makeup removal.
	Factory	Offers natural and fermented ingredient-based products, known for gentle yet effective formulations aimed at improving skin health.
	MEDIHEAL	Famous for its sheet masks, MEDIHEAL delivers affordable, quick-fix treatments that target a variety of skin concerns.
	SKIN1004	A brand focused on soothing and calming the skin, often using natural ingredients like Centella Asiatica to reduce irritation.
	Skinfood	One of the original K-Beauty brands, Skinfood integrates food-based ingredients into its skincare products, emphasizing nourishment and exfoliation.
	The Crème Shop	Combines fun, playful packaging with effective skincare products, offering a wide range of affordable options.
	TONYMOLY	Known for its quirky packaging and diverse product range, TONYMOLY combines innovation with affordability, making K-Beauty accessible to a broader audience.

## KOREAN-MADE AND INSPIRED BRANDS

BRAND	DESCRIPTION
Peach & Lily	A pioneer in K-Beauty, Peach & Lily offers high-quality, clean, and innovative skincare products. Known for its focus on hydration and sensitive skin, the brand emphasizes gentle yet effective formulations.
Peach Slices	A sister brand to Peach & Lily, Peach Slices provides playful, affordable skincare options. Its product line is simple and easy to use, ideal for those new to skincare or looking for quick results.
I Dew Care	A fun, vibrant skincare brand with colorful packaging and a youthful energy. I Dew Care blends skincare benefits with a sense of playfulness.
Hero Cosmetics	Known for its Mighty Patch acne solutions, Hero Cosmetics takes a targeted approach to skincare. The brand blends Korean skincare innovation with a focus on problem-solving.
Dear Cloud	A minimalist brand that focuses on natural, gentle formulations, Dear Cloud appeals to consumers looking for clean, straightforward skincare.
Oh K!	Known for its quirky, fun packaging and affordable sheet masks, Oh K! is a playful entry into K-Beauty with a focus on self-care.
Good Light	A gender-inclusive brand focusing on barrier protection and clean beauty. Good Light combines K-Beauty principles with modern skincare to appeal to a diverse audience.
Erborian	A blend of Korean and French skincare expertise, Erborian delivers high-performance, hybrid products that combine skincare with makeup benefits.

# Sephora: High-End Beauty with a Korean Twist

Sephora, a global beauty retail giant, is known for curating a diverse selection of top-tier beauty brands and products. As the K-Beauty phenomenon continues to gain traction, Sephora has embraced this trend by introducing a wide array of Korean skincare and cosmetic brands. K-Beauty’s focus on innovative ingredients, gentle formulations, and multi-step skincare routines fits seamlessly with Sephora’s commitment to offering cutting-edge beauty solutions.

Here are the current K-Beauty brands sold at Sephora:

## BORN AND RAISED K-BEAUTY BRANDS

BRAND	NOTE
belif	A brand that blends traditional herbal ingredients with modern skincare science, belif is known for its focus on hydration and simple, effective formulations.
Dr. Jart+	This brand is renowned for its science-driven approach to skincare, often incorporating dermatological expertise into its formulations. It offers targeted solutions for various skin concerns.
innisfree	A nature-inspired brand that sources ingredients from Korea’s Jeju Island, innisfree focuses on eco-friendly practices and harnesses the power of natural ingredients for its formulations.
Sulwhasoo	Sulwhasoo merges traditional Korean herbal medicine with advanced skincare science, emphasizing luxury and the holistic healing power of its ingredients.
Laneige	Known for its innovative water-based technology, Laneige is dedicated to creating hydrating and moisture-locking products that target various skin hydration concerns.

## KOREAN-MADE AND INSPIRED BRANDS

BRAND	NOTE
Glow Recipe	Glow Recipe offers vibrant, fruit-powered skincare products designed to deliver radiant, glowing skin with clean and innovative formulations.
Then I Met You	Then I Met You focuses on rich, nourishing skincare products inspired by the Korean concept of “jeong,” emphasizing deep, meaningful connections with skincare.



# Costco: A Surprising Home for K-Beauty

Costco, a global leader in wholesale retail, is known for offering high-quality products at competitive prices, attracting a diverse and loyal customer base. In recent years, Costco has embraced the booming K-Beauty trend, introducing Korean skincare and cosmetics products to its shelves. K-Beauty, famous for its innovative ingredients and multi-step skincare routines, aligns well with Costco's mission to provide premium products at value-driven prices.

Here are the current K-Beauty brands sold at Costco:

BRAND	CATEGORY	PRODUCT
Abib	Suncare	Abib Airy Sunstick Smoothing Bar 50 SPF 0.81 oz, 2-pack
AROMATICA	Haircare	AROMATICA Rosemary Root Enhancer, 6.76 fl oz, 2-pack
	Haircare	AROMATICA Rosemary Shampoo + Rosemary Conditioner Set, 16.9 fl oz
Beauty of Joseon	Skincare	Beauty of Joseon Glow Serum Propolis + Niacinamide, 3.38 fl oz
BIOHEAL BOH	Skincare	BIOHEAL BOH Probioderm Tightening Collagen Serum 1.01 fl oz, 2 pack
	Skincare	BIOHEAL BOH Probioderm Lifting Cream Special Set
	Skincare	BIOHEAL BOH Vitamin Toning All Melting Cleansing Balm, 3.21 fl oz, 2-pack
BRING GREEN	Skincare	BRINGGREEN Carrot Vita Toner Pad, 60 Pads, 2-pack
	Skincare	BRINGGREEN Artemisia Cera Calming Moisture Repair Cream, 2.53 fl oz, 2-pack
BRMUD	Personal Care	BRMUD Scrub Daily Body Wash, 33.8 fl.oz
d'Alba	Skincare	d'Alba Piedmont White Truffle Double Serum & Cream, 2.46 oz
Dear Dahlia	Makeup	Dear Dahlia Paradise Dream Velvet Lip Mousse 0.21 fl oz, 2-pack
Hince	Makeup	Hince Mood Enhancer Lip Glow Lip Balm, 0.19 oz, 2-pack
	Makeup	Hince True Dimension Glow Cheek Duo 0.31 oz, Mellow & Blush On
	Makeup	Hince Brow Pencil & Brow Shaper
It's SKIN	Skincare	It's SKIN Prestige Creme 2x Ginseng D'Escargot Creme, 2.0 oz
Kahi	Skincare	Kahi Seoul Wrinkle Bounce Multi Balm 0.32 oz, 2-pack
LAKA	Makeup	LAKA Jelling Nude Gloss, 0.16 oz, 2-pack

(continued)

BRAND	CATEGORY	PRODUCTS
Mary&May	Skincare	Mary&May Niacinamide+Chaenomeles Sinensis Serum 1.01 fl oz, 2-pack
	Skincare	Mary&May Vegan Rose Hyaluronic Hydra Wash off Mask 4.4 oz, 2-pack
	Skincare	Mary&May Niacinamide Vitamin C Brightening Mask 13.5 oz, 2-pack
	Skincare	Mary & May Vegan Blackberry Complex Cream Essence, 4.73 fl oz, 2-pack
MEDIHEAL	Skincare	MEDIHEAL Madecassoside Blemish Pad Set
mixsoon	Skincare	mixsoon Bean Trio Special Skin Care Set
Nature Republic	Skincare	Nature Republic Ginseng Gold Silk Watery Cream, 2.11 fl oz
	Haircare	Nature Republic Argan Essential Deep Care Shampoo, 33.8 fl oz
	Haircare	Nature Republic Black Bean Anti-Hair Loss Shampoo, 33.8 fl oz
NEOGEN	Suncare	NEOGEN DERMALOGY Day-light Protection Airy Sunscreen SPF 50, 1.69 fl oz, 2-pack
	Makeup	NEOGEN DERMALOGY Extra Slim Metal Maxicara Black and 1 Refill, 0.2 oz
ONOMA	Skincare	ONOMA Lights Blossom Essence, 1.18 fl oz
Rated Green	Haircare	Rated Green Detangling Perfume Hair Mist, 2.7 fl oz, 2-pack
Round Lab	Skincare	Round Lab 1025 Dokdo Toner, 16.9 fl oz
shaishaishai	Skincare	shaishaishai Banana Conceal Eye Cream, 0.53 oz, 2-pack
Thank You Farmer	Suncare	Thank You Farmer Sun Project Skin Relief Sun Cream SPF 50+ 1.75 fl oz, 2-pack
	Suncare	Thank You Farmer Sun Project Water Sun Cream SPF 50+ 1.75 fl oz, 2-pack
TIRTIR	Skincare	TIRTIR Milk Skin Toner, 5.07 fl oz, 2-pack
	Skincare	TIRTIR Collagen Core Glow Mask, 2.7 fl oz, 2-pack
Torriden	Skincare	Torriden DIVE-IN Low-Molecular Hyaluronic Acid Serum, 2-pack
	Skincare	Torriden Dive In Soothing Cream 3.38 fl oz 2-pack





## About Landing International

Landing International is beauty's global growth partner. Since 2012, we have been the leading K-Beauty category builder in the U.S. and beyond. With our deep retail relationships, we launch global beauty brands into new markets through storytelling, sales, and services. Our mission is to support brands every step of the way, creating spaces where beauty is accessible to everyone. By combining our industry expertise with a passion for innovation, we help brands navigate new markets successfully and sustainably.

## How Landing International Can Help

At Landing International, we specialize in launching global beauty brands into new markets and supporting their growth every step of the way. Our deep retail relationships and expertise in storytelling, sales, and services enable us to overcome the challenges of market entry and expansion. We create spaces where beauty is accessible to everyone by:

- **Connecting Brands with Retailers:**

Leveraging our extensive network to introduce your brand to the right retail partners.

- **Strategic Storytelling:** Crafting compelling marketing narratives online and IRL that resonate with local audiences and enhance brand visibility.

- **Sales Support:** Providing proprietary technology to streamline operation and sales.

For more information: [info@landingintl.com](mailto:info@landingintl.com)





## Sarah Chung Park

Dubbed “K-Beauty’s Godmother” Sarah Chung Park is the founder and CEO of Landing International. A beauty industry veteran since 2003 who has worked with over 300 brands and retailers.

Sarah has helped brands such as AmorePacific and COSRX in their U.S. launch and business. She was a critical figure in the first wave of K-Beauty working with retailers like Ulta, Target, Urban Outfitters and JCPenney to bring K-Beauty to their shelves.

She was named one of Inc. Magazine’s Top 100 Female Founders of 2021 and Ernst & Young Entrepreneur of the Year Finalist in 2023 and Winning Women of 2024.



A close-up photograph of a woman's face, focusing on her nose and lips. She is wearing a vibrant red lipstick. The image is overlaid with several semi-transparent purple geometric shapes, including triangles and polygons, which create a modern, abstract aesthetic. The background is a solid purple color.

## About SPATE

Spate is an AI-powered market research platform that uncovers the next big consumer trends by analyzing over 20 billion search signals and 60 million beauty-related TikTok videos globally. The Spate dashboard provides actionable insights to help brands refine their marketing strategies, craft social media content, and plan research and development. With Spate, brands can differentiate between fleeting and lasting trends, measure competition, and understand consumer needs for better positioning and messaging.

## About ClearForMe

ClearForMe partners with 400+ beauty retailers and brands, including industry leaders such as Amazon, Ulta Beauty, and Credo, to deliver enhanced product recommendations and personalization through our sophisticated Ingredient Intelligence.

ClearForMe's proprietary ingredient intelligence delivers automated product attribution analysis for their entire beauty catalog across all concerns, benefits, and lifestyle attributes (CF, vegan, etc). This enables e-commerce and merchandising teams to gain real-time visibility as soon as a product is onboarded and across all search tags and inputs customers care most about.

ClearForMe enables teams to efficiently apply relevant tags to SKUs, streamlining workflows, addressing data integrity challenges, and significantly reducing the manual effort typically required for data collection and integration into product information management (PIM) systems. Most importantly, it equips retailers to present trusted, personalized product recommendations to consumers, increasing revenue and reducing bounce rates. Further details are available at [clearforme.com/sales-intelligence](https://clearforme.com/sales-intelligence).

