

SUNCARE & SKIN PROTECTION – US – 2024



Consumer engagement with the category beyond functional need expands usage occasions and resonant claims.



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Suncare & Skin Protection - US - 2024

This report looks at the following areas:

- Market trends within the US suncare and skin protection market
- Key challenges and opportunities for suncare and skin protection stakeholders
- Consumer engagement with suncare and skin protection products
- Attitudes and behaviors toward suncare and skin protection
- Consumer shopping channels and resources for suncare and skin protection



Consumer engagement with the category beyond functional need expands usage occasions and resonant claims.

Overview

As a whole, consumers are using more sun care and skin protection, their demand bolstered by not only post-pandemic activity, but also improved features such as skincare ingredients and comfortable textures that make application more motivating. A heightened attention toward skin health has naturally translated to skin protection from sun exposure and beyond: the traction of other environmental protections such as pollution and blue light suggests that this overall category sees continued opportunity in giving consumers' agency over their health and appearance.

Sun care is skin care. As certain segments, such as tanning, must realign to evolving needs, and other segments face a near future of crowding claims. To remain competitive, stakeholders must continue to reinforce feel-good distinctions, without sacrificing fundamental efficacy.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- You saw it here first...
- Competitive strategies & opportunities

THE MARKET

Market context

- Market context

Market drivers

- Vacations and heat fuel demand
 - Graph 1: select appealing luxury destinations, by highest appeal, 2022
- Environmental interests stagnate, hindered by confusion around ingredients and recalls
- The great debate: mineral vs chemical
- Foreign sunscreens opens doors for greater enthusiasm and fluency

Market size and forecast

- Total retail sales and forecast of market, at current prices, 2018-28
- Total retail sales and forecast of market, at current prices, 2018-28
- Total retail sales and forecast of market, at current prices, 2018-28
- Total retail sales and forecast of market, at inflation-adjusted prices, 2018-28

Market share/brand share

- Sales of suncare and skin protection, by leading companies and brands
- Leading brands tap into skincare, texture, and mineral sunscreen trends
- Small brand growth indicates a crowding category

COMPETITIVE STRATEGIES AND OPPORTUNITIES

- Quiet luxury: transform skin protection into status items in beauty routines...

- Make it easier on consumers to commit to good protection habits
- Facilitate re-application experiences to boost sun protection
- Sensitized skin becomes a driving force in preference

CONSUMER INSIGHTS

Consumer fast facts

Sunscreen and skin protection usage

- Overall usage remains roughly stable
 - Graph 2: net usage of suncare and skin protection products, 2022 vs 2023
- Sun-protection-fortified BPC drives year-round use
 - Graph 3: sunscreen and skin protection usage frequency, 2023
- Call out protection from environmental aggressors as a growing, recognizable claim
- Connect skin protection to rising interest in bodycare
- Bring men up to daily SPF application
 - Graph 4: daily use of select sun protection products, men vs women, 2023

Changes to skin protection routines

- Increased interest and engagement, driven by younger audiences
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 - Graph 5: frequency of application compared to last year, 2023
- Better options in formats and ingredients help drive higher use
 - Graph 6: reasons for applying skin protection more often compared to a year ago, 2023
- Age-related protection motivates Millennials & beyond
 - Graph 7: consumers motivated by signs of aging, by generation, 2023
- Age-defense spotlight: pavisé
- Lagging engagement among older consumers may run deeper than education
 - Graph 8: reasons for applying skin protection the same as or less than last year, 2023

Benefits sought in sunscreen

- Amid new benefits, sun protection is still bottom-line
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 - Graph 9: purchase drivers, ranked, 2023
- Sensation and beauty become non-negotiable for younger users
 - Graph 10: top purchase drivers among Gen Z vs all consumers, any rank, 2023
- Ingredient callouts create distinction for premium buyers
 - Graph 11: select purchase drivers, by mass or premium shopping, 2023
- Ingredient forecast: tocopherol for antioxidant protection

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- Ingredient forecast: zinc oxide and anti-irritants for sensitive skin
- Ingredient forecast: microbiome-driven protection

Attitudes and behaviors towards sunscreen

- Premiumize through skincare ingredients and benefits
- As with skincare, natural claims are desirable
- Traditional sunscreen maintains its edge in trust and recognition
 - Graph 12: trust in traditional sunscreen over new personal care with SPF, by generation, 2023
- Provide clarity on the difference between mineral and chemical
- The promises of mineral resonate with consumers of color, but might not deliver on all fronts
 - Graph 13: select sunscreen attitudes, by race, 2023
- Formula forecast: hybrid could deliver the best of both worlds

Tanning routines

- Self-tanning remains small but mighty
 - Graph 14: usage of self-tanning products, 2023 vs 2024
- Consider tapping into quiet luxury, with focus on skin health
 - Graph 15: use of any self-tanning products, by race, 2023
- Compatibility with prevalent benefits and routines can draw skin-health-conscious consumers
- Get ahead of greater ingredient scrutiny

Shopping for suncare

- Professional approval drives distinction in a competitive environment
- Specialty shopping points toward a solid prestige and indie market
 - Graph 16: purchase channels for suncare products, by type of suncare, 2023
- Tap into social to promote trial in a trending category
 - Graph 17: select trial and interest attitudes toward new suncare, by age, 2023
- Opportunity: link sharable, visual education to sunscreen education

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart
- Bases: use of select suncare products

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