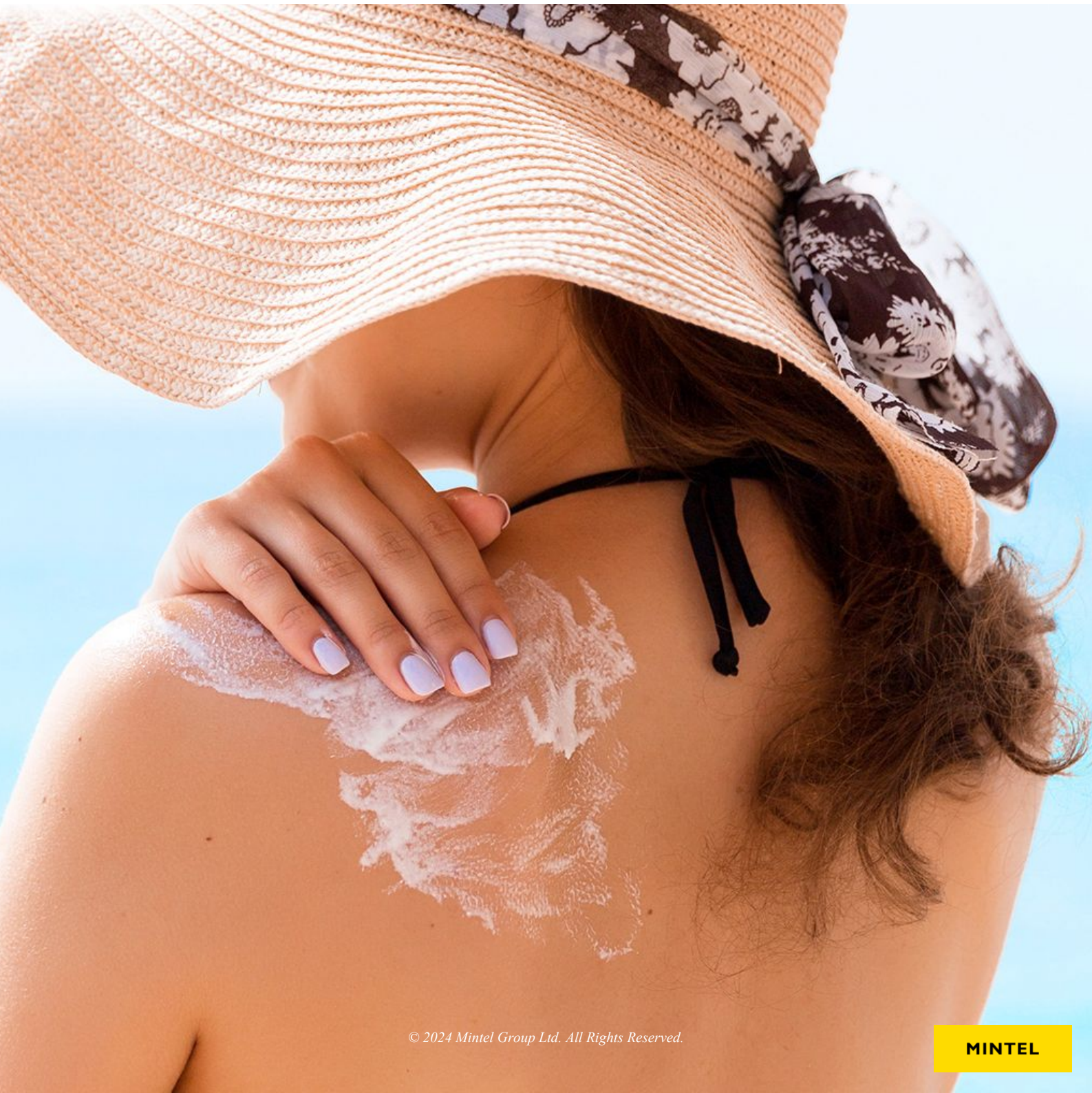


A YEAR OF INNOVATION IN SUNCARE, 2021

Suncare innovations are adding value by blurring with skincare in more exciting ways, expanding protective capabilities and exploring more disruptive eco-concepts.



Rosalia Di Gesu,
Associate Director, Mintel
Beauty & Personal Care



Report Content

- What we have seen
- Our pick of the most innovative launches in this review

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: suncare, 2021

Europe: explore a range of options to help add value to suncare

- Suncare continues to encroach on skincare (and vice versa)
- Sensitive-skin claim shows fast growth
 - Graph 1: suncare launches by select skincare and fortified claims, 2016-17 vs 2020-21
- Lancaster's certified, clean and ocean-friendly range targets sensitive skin
- Brands are bold about their SPF and skincare propositions
- Competition heats up as more skincare brands move into suncare
- Skincare hyaluronic acid, adaptogens and yogurt make more moves in sunscreen
- Self-tan textures blur with skincare
- Self-tan formulas use on-trend and familiar active skincare ingredients
- Protective merits expand and evolve
- Innovations promote superior and multilevel protection
- Tap into on-trend wellness concepts using scent, oils and playful themes

Europe: mitigate any apathy around sustainable claims

- Eco-friendliness is not currently a priority for consumers...
- ...but eco claims continue to be fastest growing
 - Graph 2: suncare launches by fastest-growing claims, 2016-17 vs 2020-21
- Innovations use overt eco-branding/-messaging
- Nivea offers mineral sunscreen options
- Opportunities for more refills
- Spotlight on MEA

ASIA PACIFIC (APAC)

- APAC retail market overview: suncare, 2021

APAC: added value opportunities

- Hybrid skincare/suncare formulas expand and evolve
- More added-value skin-friendly claims are on the rise

A year of innovation in sun care, 2021

- Graph 3: sun care launches by select skincare and fortified claims, 2016-17 vs 2020-21

- Innovations use an array of skin soothing botanicals
- Serum formulas and hydrating and repairing ingredients blur with skincare
- Water and skincare brands collaborate to stress hydration
- Makeup and sportswear brand entrants see growth potential in skin-friendly sun care
- Evolution of protective themes
- More multiprotection formulas emerge
- Use branding/slogans that suggest superior efficacy
- Golf-themed innovations instil trust
- Innovation hints at the antibacterial merits of mastic
- Link scent to mental wellbeing

APAC: promote natural and eco innovations as 'safe'

- Appeal to the increased focus on sustainability and safety
- Dominant botanical claims decline and limited eco-activity
 - Graph 4: sun care launches by select natural and eco claims, 2016-17 vs 2020-21
- The paper bottle trend expands and changes shape
- A variety of natural plant-based ingredients are on offer
- Bondi Sands makes a bold 'clean and conscientious' stance

THE AMERICAS

- Americas retail market overview: sun care, 2021

Americas: add valued innovations and opportunities

- Protective concepts evolve
- Level of sun protection is key for consumers in North and Latin America
- Hero plant-based ingredients appeal to consumer interest in blue light protection benefits
- Niche pollution-protection formulas can expand
- Skincare blurring evolves and reaches new levels
- Consumers in North and Latin America seek skincare benefits from sun care products
- Microbiome skincare concepts expand into sun care
- On-trend skin-friendly ingredients and textures make further moves in sunscreen...
- ...aftersun...
- ...and self-tan
- Skincare/sunscreen blurring expands to include hybrid primers, highlighters and colour correctors
- Link to mental wellbeing trends: distracting pack designs, escapist themes and apt campaigns
- Link to mental wellbeing trends: the relaxing power of scent
- Add value with more disruptive textures: gels, powders and non-greasy lotions stand out

A year of innovation in sun care, 2021

- Take the guesswork out of sunscreen application/re-application

Americas: fastest growth for eco-claims

- There are mixed concerns about the impact of sunscreen on the environment...
- ...but it has the fastest growth for eco-claims
 - Graph 5: sunscreen launches by fastest-growing claims, 2016-21
- More brands are opting for planet-friendly positionings
- Refill opportunities
- New entrants make moves in the mineral sunscreen space
- Mineral formulas champion the powerful benefits of plants

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