

# FACIAL SKINCARE FORMAT AND INGREDIENT TRENDS – UK – 2023

Consumers are engaging with skincare ingredients, but need guidance from brands. Formats can be used to boost efficacy as hero ingredients saturate the market.



Dionne Officer, Research Analyst - BPC Innovation



# Facial Skincare Format And Ingredient Trends - UK - 2023

## This report looks at the following areas:

- The consumer's primary skin concerns and how this correlates with facial skincare usage
- Attitudes towards facial skincare formats and interest in format innovation
- How launch activity compares to consumer interest in select facial skincare ingredients and formats
- How and where brands should communicate ingredient information to consumers
- What brands can do to stand out as products calling out hero ingredients saturate the market



Consumers are engaging with skincare ingredients, but need guidance from brands. Formats can be used to boost efficacy as hero ingredients saturate the market.

## Overview

The cost-of-living crisis continues to squeeze budgets. This will drive savvy shopping behaviours and **encourage more consumers to partake in 'dupe culture'**. This will benefit private label brands if they can **meet the demand for premium ingredients and formats**, while premium brands will have to go further to **demonstrate value**.

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

# Report Content

## EXECUTIVE SUMMARY

### Opportunities for the facial skincare format and ingredient market

- Help consumers navigate ingredients and formats
- Innovate to improve efficacy and stability of ingredients
- Cater for natural demand

### Market dynamics and outlook

- The five year outlook for facial skincare ingredients and formats

### What consumers want and why

- Facial skincare users are receptive to innovation
- Meet the consumer demand for efficacy
- Online and offline media impacts skincare routines
- Sustainability knowledge and behaviours are polarised
- Convenience and familiarity continue to win over consumers

### Innovation and marketing

- Popular active ingredients see growth
  - Graph 1: % of facial skincare launches formulated with select active ingredients, 2018-19 vs 2022-23
- Continued innovation with familiar ingredients
- Men become more engaged in facial skincare
- Novel formats tackle stability issues
- Serum format sees an increase
  - Graph 2: % of facial care\* launches accounted for by serums, 2018-23

## MARKET DYNAMICS

### Macro-economic factors

- The UK has avoided recession, but economic output has stagnated since the cost of living crisis began
  - Graph 3: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
  - Graph 4: CPI inflation rate, 2021-23
- Combat savvy shopping behaviours

### Social, environmental and legal factors

- Create a community through social media...

# Facial Skincare Format and Ingredient Trends – UK – 2023

---

- ...and keep up with fast moving trends
- Natural ingredients remain popular
- Target skin conditions with OTC facial skincare
- Be inspired by eczema-focused innovation
- Drive repertoires through skincare layering trends
- Link facial skincare tools to improved results
  - Graph 5: usage of non-electrical facial tools/accessories, 2022
- Provide more advice to boost skincare device usage
  - Graph 6: usage of electrical facial skincare devices, 2022
- Pay attention to the rise of skincare for melanin-rich skin
- Innovate for an ageing population
- An opportunity for face wipe replacement

## WHAT CONSUMERS WANT AND WHY

### Usage of facial skincare products

- Consumers become more engaged in facial skincare
  - Graph 7: facial skincare usage in the last 12 months, 2021 vs 2023
- Stress the importance of cleansing for dry skin
- Help consumers with oily skin repair their skin barrier
- Heritage brands can drive usage of treatments amongst older consumers
  - Graph 8: facial skincare treatment usage in the last 12 months, by age and gender, 2023
- Tap into growing usage of skincare amongst men

### Skin concerns

- Appeal to the consumer's top skin concerns
- Dryness dominates concerns within facial skincare
  - Graph 9: biggest skin concerns, 2023
- Help consumers with dry skin navigate ingredients
  - Graph 10: experience of dryness, by age and gender, 2023
- Promote the anti-wrinkle benefits of retinol
- Look to emerging ingredients and trends for sensitive skin
- Reach both men and women with genderless acne care
- Pigmentation is more of a concern for ethnic minorities

### Sought after ingredients in facial skincare

- Familiarity continues to boost interest in vitamin C
  - Graph 11: sought after ingredients in facial skincare, 2023
- Extend vitamin C innovation

# Facial Skincare Format and Ingredient Trends – UK – 2023

---

- Reach older consumers with concern-focused products
  - Graph 12: % of consumers who don't typically look for ingredients in the facial skincare products they use, by age, 2023
- Consumer education can create hype around ingredients
- Look to nature for collagen boosting actives
- Target retinol alternatives towards pregnant women
  - Graph 13: % of consumers who look for select ingredients in the facial skincare products they use, by age and gender, 2023
- Tout the skin tolerability of bio-retinols
- Maximise on peptide trends
- Link ceramides to skin health themes to drive interest

## Sources of facial skincare ingredient information

- Consumers use various sources for ingredient information
- Simplify on-pack ingredient information
  - Graph 14: sources of information found most useful when looking for facial skincare ingredient information, 2023
- Seek inspiration from Cocokind's on-pack messaging
- Partner with third parties to verify website information
- Facilitate family/friend conversations with comparison tools
- Make ingredient information more accessible through magazines
- Use social media platforms to educate women aged 55+
- Maximise on TV shows popular amongst men
  - Graph 15: % of consumers who use TV shows for facial skincare ingredient information, by gender, 2023
- Interest in medical advice provides opportunity for doctor partnerships

## Product preferences in facial skincare

- Focus on ingredient naturality and efficacy
- Natural ingredients drive preferences in facial skincare
  - Graph 16: factors that influence facial skincare decisions, 2023
- Cater for natural ingredient demand
- Reach more consumers by highlighting the enhanced penetration of naturals
- Expand target audience by spotlighting multiple ingredient attributes
- Seek inspiration from APAC for deeply penetrating messaging
- Help consumers shop by ingredient concentration
- Use hero actives to tap into minimal ingredient interest
- Tap into social media trends
- Consider marketing techniques to demonstrate traceable ingredients
- Lead with sustainability messaging to combat concerns around lab-engineered ingredients
- Look to AI for patent inspiration

## Attitudes towards facial skincare formats

- A desire for lightweight products poses opportunity
  - Graph 17: perceptions of facial skincare formats, 2023
- Brands tap into desire for lightweight formulations
- Thicker textures can still appeal
- Link format innovation to efficacy
  - Graph 18: interest in alternative facial skincare formats, 2023
- Position vitamins as good for healthy ageing to combat 'skinimalism' trends
- Appeal to early adopters who want new formats
- Position tools as a hygienic way to apply products
- Break down barriers to facial skincare formats
  - Graph 19: barriers to using select facial skincare formats, 2023
- Make single use products reusable
- Combat perceptions that oils will cause breakouts
- Recyclable packaging has become a must-have

## INNOVATION AND MARKETING TRENDS

### Launch activity and innovation

- Consumer interest means vitamin C can grow
  - Graph 20: % of facial skincare launches formulated with select active ingredients, 2018-19 vs 2022-23
- Continued innovation with familiar ingredients
- Brands targeting men call out actives on-pack
- Position actives in a natural light
- Serums see biggest growth in caring textures
  - Graph 21: fastest growing textures and formats in caring facial skincare launches, 2018-19 vs 2022-23
- Bars and powders make headway in cleansing formats
  - Graph 22: fastest growing textures and formats in cleansing facial skincare launches, 2018-19 vs 2022-23
- Enhance active stability with new delivery systems and novel format
- Spotlight formula potency to stand out in an established category
- Waterless formats continue to launch

## APPENDIX

### Report scope and definitions

- Abbreviations and terms
- GNPD data links

## Methodology

- Consumer research methodology
- TURF analysis methodology
- TURF analysis data

### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a UK licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850