

# 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.



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# 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

## 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**.



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

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# 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...

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- ...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

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- 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

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