

# THE FUTURE OF FACIAL SKINCARE: 2019

Global annual review: what's now and what's next for the facial skincare market.



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# Report Content

- What's in this report
- Mintel's synopsis

## IMMEDIATE FUTURE: NEXT 2 YEARS

### Go from clean beauty to cleaning up the planet

- Mintel recommends
- Future success in clean beauty requires eco-ethical leadership for long term
- From clean beauty to cleaning up the planet
  - Graph 1: clean beauty mentions surge online, 2015 vs 2018
- Vegan claims amplify natural clean beauty
  - Graph 2: % face/neck care with natural & free-from ingredient claims, 2015 vs 2018
  - Graph 3: % face/neck care launches with "EWG green" claim, Dec 2015-Nov 2018
- Eco-ethical passion joins the clean narrative
- Clean brands with a climate change angle
- Cruelty-free will be a clean requirement for Western brands
  - Graph 4: % animal-ethical claim in new face/neck care product launches\*, 2018
- Pair natural, clean skincare with customization

### Maximize the K-Beauty glow

- Mintel recommends
  - Graph 5: % face/neck care launches with 'glow' in product name, 2017 vs 2018
  - Graph 6: use of 'healthy glow' when describing product in facial care launches, 2017 vs 2018
- Glow redefines healthy skin
- Natural, water and honey glows
- Mass brands push a dewy glow
- The new powders offer alternative glows
- Cushions that deliver the glow
- Mix quirky ingredients and tech into the glow
- Partner natural clean beauty with the glow
- Natural clean skincare that taps into the glow

### Formulate with ingredient heroes

- Mintel recommends
  - Graph 7: Facial care launches with hemp seed oil increase in the West, Dec 2015-Nov 2018

# The Future of Facial Skincare: 2019

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- Graph 8: % active patents granted that relate to cannabinoids\*, 2014-2019 (Jan 31)
- Be transparent about hemp CBD
- Focus on the health and wellness benefits of hemp
  - Graph 9: increase of tea with matcha launches, Dec 2014-Nov 2018
- Western markets spotlight matcha skincare
  - Graph 10: Avocado fruit extract jumps in usage in facial skincare, 2017 vs 2018
- Avocado branches out across natural beauty
- Calamansi: a new, natural-sourced vitamin C
- A new home for calamansi in South Korean skincare
- Promote multi-functional niacinamide for better skin
- Niacinamide can attract younger, prestige-minded Asian consumers

## PLANNING AHEAD: NEXT 5 YEARS

### Team "tweakments" with skincare

- Mintel recommends
- Tweakments are the new facelifts
- Micro-botox will appeal to young Millennials
- Professional affiliation proves credibility
- FaceGym changed the facelift landscape forever
- Radiofrequency and laser offer alternatives for needle phobics
- Microdermabrasion gets an upgrade
- Create post-nanoblading skin solutions
- Supercharge skincare with on-the-go LED devices
- "Bottle the forest" to boost skin immunity
- Formulate with bakuchiol: "nature's retinol"

### Focus on prestige beauty for young Chinese

- Mintel recommends
  - Graph 11: women's usage of skincare brands over last 6 months, April 2017
- Make Yunnan the Jeju Island of China
- Jade rollers: a natural C-Beauty skincare option
- Young Chinese ramp up skincare spending
- Mainstream brands cultivate new experiences for the young
  - Graph 12: female consumers not always clear on what certain skincare ingredients do, 2018
- Give ingredients the limelight
- Ingredient-centric Chinese indie brands
- Engage young Chinese with niche and novel formats

- Chinese brands showcase ampoules

### THE BOARDROOM CHECKLIST

- The boardroom checklist

### MARKET OVERVIEW: KEY DATA AND INTERPRETATION

- Markets to watch: China is full of opportunities
- APAC accounts for two thirds of facial skincare sales in 2019
- Top 5 facial skincare markets, 2019
- Japan retains top position for per capita spend in 2019
- Russia saw robust increase in facial skincare sales in the last five years
- Turkey on track for strong growth for the next five years
  - Graph 13: % change retail value sales (2016-17)\*, by segment
- Top five facial care markets in 2021
- Leading new face/neck care claims

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