

# 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
- Clean beauty: taking an active role
  - Graph 1: clean beauty mentions surge online, 2015 vs 2018
- US specialty, prestige and mass retailers define 'clean' narratives
- Vegan claims amplify natural clean beauty
- Pair naturals with free-from claims in Western markets
  - Graph 2: % face/neck care with natural & free-from ingredient claims, 2015 vs 2018
- EWG green claims will grow across Asia
  - Graph 3: % face/neck care launches with "EWG green"\* claim, Dec 2015–Nov 2018
- Eco-ethical passion joins the clean narrative
- Show a passion for cleaning up the environment
- Take the lead to curb climate change
- Clean brands with a climate change angle
- Cruelty-free will be a clean requirement for Western brands
- Push the cruelty-free claim to China
  - 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
- The glow will continue to gain more influence
  - Graph 5: % face/neck care launches with 'glow' in product name, 2017 vs 2018
- A "healthy glow" is trending in the West
  - 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

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- 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
- Hemp delivers for clean, eco-ethical consumers
  - Graph 7: Facial care launches with hemp seed oil increase in the West, Dec 2015-Nov 2018
- Act now to protect hemp product lines
  - 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
- Matcha offers a powerful wellness package
  - Graph 9: increase of tea with matcha launches, Dec 2014-Nov 2018
- Western markets spotlight matcha skincare
- Avocado: the superfruit poster child for wellness
  - 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

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- Formulate with bakuchiol: "nature's retinol"
- Combining bakuchiol and blue light can boost anti-acne claims

## Focus on prestige beauty for young Chinese

- Mintel recommends
- Chinese consumers are buying local
  - 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
- Say what's inside the bottle
  - 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
- Top 5 facial skincare markets, 2019
- Japan retains top position for per capita spend in 2019
- Ritualistic routines drive skincare purchases
- Russia saw robust increase in facial skincare sales in the last five years
- Turkey on track for strong growth for the next five years
- Russia and Turkey set for strong double digit growth
  - Graph 13: % change retail value sales (2016-17)\*, by segment
- Top five facial care markets in 2021
- Leading new face/neck care claims
- Leading new face/neck care claims

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