

THE FUTURE OF FACIAL SKINCARE: 2020

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



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Report Content



- What's in the report
- Mintel synopsis

IMMEDIATE FUTURE: NEXT TWO YEARS

Have a holistic health & wellness mantra

- Mintel recommends
- Streaming on Netflix
- Bolster holistic wellness with beauty ingestibles
- Ayurveda wellness taps youthful desire for a "total" health solution
- Guide consumers toward emotional balance
 - Graph 1: % of women who are interested in beauty/grooming products that reduce anxiety and stress and help relax, 2019
- Relaxing/de-stressing natural active ingredients rise in popularity
- CBD's mood improvement will remain a draw for younger Westerners
- Tech can prevent skin ageing caused by external stressors
- Blue light protection will become a mainstream anti-ageing facial care claim
 - Graph 2: % of new anti-ageing facial care launches with "blue light" in product description*, by market, 2017-19
- Anti-ageing facial skin products paired with pollution protection in Western markets
 - Graph 3: % of new anti-ageing facial care launches with pollution in product description*, by market, 2016-19
- Anti-ageing pollution protection

Postbiotics advance the probiotic wellness narrative

- Mintel recommends
- Consumers are talking about postbiotics
 - Graph 4: number of mentions of "postbiotics" on Instagram, Twitter and Pinterest, Dec 2018-Nov 2019
- "Probiotics" in beauty have become a leading favorite for US women
 - Graph 5: % of women who are aware of probiotics in beauty products, by age group, July 2019
- Usage of postbiotics rises across beauty
 - Graph 6: % of new BPC launches with postbiotics**, by sub-category, Nov 2015-Oct 2019
- Postbiotics liven up ingredient lists
- Elevate natural skincare with an ecosystem of ingredients
- "Probiotic" skincare resonates with Chinese women
 - Graph 7: % of women who have heard of the facial skincare ingredient and purchased or heard of yet not purchased or are not aware of, May 2019

The Future of Facial Skincare: 2020

- Probiotic/TCM ferments enhance Chinese consumer appeal
- Postbiotics paired with yeast ferments inspire new anti-ageing narratives
 - Graph 8: % of new facial care launches with postbiotics or yeast ferments,* Dec 2017-Nov 2019
- Innovate ferments with different microbes to nourish the skin
- Postbiotic and yeast ferment pairings elevate skin wellness
- Patent watch: probiotic and yeast fermentation compositions in South Korea

Make conservationism an essential part of the mission

- Mintel recommends
- Make sustainability the cornerstone of clean beauty
- Personalized sustainability missions
- Consumers want more action from brands and companies on sustainability
- Leverage bioengineered microbes
 - Graph 9: % of consumers concerned that the ingredients used in natural products (eg palm oil) are not sustainable, July 2019
- Microbe biofactories produce renewable natural ingredients
- Prioritize reducing climate change
- Prioritize reducing climate change
- Add upcycled ingredients to fight climate change
- Upcycling is catching on
- Future upcycling tech
- Become carbon neutral
 - Graph 10: carbon neutral claim, % of new facial care launches, Dec 2016-Nov 2019
- Stand out with carbon negative
- Add more eco-credibility with UEBT certification
- Less is better
- Simplify the skincare routine
- Reduce the water footprint
- Conserve fresh water to build stronger eco-friendly credentials

PLANNING AHEAD: NEXT FIVE YEARS

Take advantage of potential in undersold derma skincare and aesthetics

- Mintel recommends
- Younger generations especially latch on to doctor brands
 - Graph 11: "In the last 12 months I have used doctor-branded facial skincare," 2019
- Expect more youth-friendly derma launches
- Avoid clutter, be clear

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- Consumers have turned to science for the truth
- Address concerns through research and technology
 - Graph 12: "Which of the following skin conditions have you experienced in the last 12 months?," July 2019
- Put personality behind the science
- Growing demand for instant gratification
- Multinationals invest in aesthetic services
- TCM inspires the latest non-invasive procedures
- Aesthetic treatments without aftereffects grow in Asia
- Prolong aesthetic treatment results

Hyper-personalize for diverse types of skin

- Mintel recommends
- Retailers specialize natural, clean beauty for multicultural women
- Natural and clean resonate strongly with US Black women
- US indie natural, clean skincare designed for multicultural skin
- Skincare solutions passed down generations
- US Black women drawn to specific natural hero ingredients
- Stand out with an environmentally progressive narrative
- Get ahead of the demographic shift in the US
- Catch men's interest with genderless products
- Pay attention to the variety of Latin American skin tones
 - Graph 13: % of women interested in purchasing beauty products that provide shades for all skin tones, July 2019
- Pay more attention to the biggest skincare market: China
 - Graph 14: % of women's skin issues that are most frustrating over last six months, May 2019
- Develop more accurate personalized skin tech solutions

FOUR WINNING STRATEGIES FOR THE FUTURE

- Four winning strategies for the future

MARKET OVERVIEW: KEY DATA AND INTERPRETATION

- Top five facial skincare markets, 2020
- Top five facial skincare markets, 2020
- China takes more of the facial care pie year-on-year while others falter
 - Graph 15: % of market total of global retail value sales, 2015-21 (est)
- A.S. Watson Group propels South Korean and Japanese beauty expansion
- China stands apart from the rest of the world
- International companies tap Chinese consumers' prestige mindset

The Future of Facial Skincare: 2020

- APAC takes more share of facial skincare market sales in 2020
- Turkey, Russia and China post double-digit growth over last five years
- Russia's and Turkey's sales forecasts cool, but still post double-digit growth
- Japanese consumers eclipse all others in per capita spend on facial skincare
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- Top five facial skincare markets, 2022
- Top five facial skincare markets, 2022
- Top new global face/neck care claims
- Top five new face/neck care claims: Latin America and North America
 - Graph 16: Latin America
 - Graph 17: North America
- Top five new face/neck care claims: Europe and Asia Pacific
 - Graph 18: Europe
 - Graph 19: Asia Pacific
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