

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



The women's facial skincare market has seen sales stall in 2014, with the mass market slipping into decline. Changing consumer behaviours, including switching to discount retailers and online channels, are enabling women to save money on their purchases.

This report looks at the following areas:

- · The future of devices
- · Harnessing the link between nutrition and skin
- Keeping sales in skincare
- Expanding the anti-ageing market

Consumer research for this report investigates how women describe their facial skin, as well as their understanding of skincare ingredients and what they feel has the biggest impact on the appearance of skin

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) <u>943 5250</u>

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Products covered in this report

Executive Summary

RSV slips as sales are cannibalised

Figure 1: Best- and worst-case forecast for UK retail value sales of facial skincare products, 2009-19

Launch trends focus on evolving claims, but more is needed

Figure 2: New product launches in the women's facial skincare market, by launch type, January 2012-March 2015

A third of women have uneven skin tone

Figure 3: How women describe their skin condition, March 2015

Strong interest in 'inside-out' beauty

Figure 4: Most important factors in determining the appearance of skin, March 2015

42% of women have not heard of parabens

Figure 5: Awareness and knowledge of facial skincare ingredients, March 2015

Issues and Insights

The future of devices

The facts

The implications

Harnessing the link between nutrition and skin

The facts

The implications

Keeping sales in skincare

The facts

The implications

Expanding the anti-ageing market

The facts

The implications

The Market - What You Need to Know

RSV slips as sales are cannibalised

Flexi-working presents skincare opportunity

The healthy lifestyle effect

Discount retailers transform the market

Market Size and Forecast

Sales start to slip into decline

Figure 6: UK retail value sales of women's facial skincare products, 2009-19

However growth is expected to return

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 7: Best- and worst-case forecast for UK retail value sales of facial skincare products, 2009-19

Segment Performance

Mass market slips into decline

Figure 8: UK retail value sales of women's facial skincare products, by segment, 2013-14

Moisturisers tumble while lip care triumphs

Figure 9: UK retail value sales of women's mass market facial skincare products, by category, 2013-14

Market Drivers

Ageing population threatens segment sales

Figure 10: Trends in the age structure of the female population, 2009-19

Renewed focus on UV impact on skin

Figure 11: Rates of malignant melanoma diagnoses per 100,000 population, UK, by age at diagnosis, 2009-11

Flexi-working presents skincare opportunity

Figure 12: Employment and unemployment of women, 2009-19

Growing cosmetic surgery market

Figure 13: Experience of cosmetic surgery and interest in future procedures, September 2014

The healthy lifestyle effect

Figure 14: Eat Pretty by Jolene Hart, 2014

Cosmetics and skincare boundaries continue to blur

Channels to Market

Discounters and online retailers change the shape of the market

Figure 15: UK retail value sales of facial skincare products, by outlet type, 2013-14

Prestige sales benefit online and department stores

Key Players - What You Need to Know

Strong heritage and new appeal benefits facial skincare brands

Older women see skincare as a luxury

Serum the new star of advertising

NPD indexing below high of 2012

Paraben- and sulphate-free amongst top growing claims

Natural oils trend lifts botanical/herbal claim

A mixed brand performance in the mass market

Advertising investment reflects on sales performance

Brand Research

Key brand metrics

Figure 16: Key metrics for selected brands, March 2015

Brand map

Figure 17: Attitudes towards and usage of selected brands, March 2015

Brand attitudes: Vichy and Estée Lauder noted for quality

Figure 18: Attitudes, by brand, March 2015



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Vichy struggles to match up to Estée Lauder, despite similar associations

Figure 19: User profile of Vichy, March 2015

Estée Lauder is most likely to be perceived in glamour terms

Figure 20: Brand personality - micro image, March 2015

Estée Lauder is seen as glamorous, but risks being seen as old-fashioned

Figure 21: User profile of Estée Lauder, March 2015

Brand personality: NIVEA's value image promotes accessible associations

Figure 22: Brand personality - Macro image, March 2015

NIVEA has all-round strong brand image

Figure 23: User profile of NIVEA, March 2015

Soap & Glory benefits from youthful, quirky brand associations

Figure 24: User profile of Soap & Glory, March 2015

REN lacks strong awareness and usage but noted for expertise and cutting-edge developments

Figure 25: Demographic breakdown of consumers aware of REN, March 2015

Eau Thermale Avène's product claims influence 16-44s in particular

Figure 26: Demographic breakdown of consumers aware of Eau Thermale Avène, March 2015

Caudalie could leverage an innovative brand image

Figure 27: Demographic breakdown of consumers aware of Caudalie, March 2015

Brand Communication and Promotion

Increased advertising investment in the market

Figure 28: Main monitored advertising spend on women's facial skincare products, by advertiser, 2012-14

Serum the new star of advertising

Figure 29: Main monitored advertising spend on women's facial skincare products, by product type, 2013-14

Shifting focus on medias

Figure 30: Main monitored advertising spend on women's facial skincare products, by media type, 2012-14

Launch Activity and Innovation

NPD indexing below high of 2012

Figure 31: New product launches in the women's facial skincare market, by launch type, January 2012-March 2015

Figure 32: Examples of new women's facial skincare product launches, 2015

Face and neck products dominate launches

Figure 33: Examples of women's facial skincare water product launches, 2014

Figure 34: New product launches in the women's facial skincare market, by sub category, January 2012-March 2015

Paraben- and sulphate-free amongst top growing claims

Figure 35: Examples of paraben-free women's facial skincare launches, 2014

Figure 36: Fastest growing product positioning claims in the women's facial skincare market, 2013-14

Natural oils trend lifts botanical/herbal claim

Figure 37: Examples of women's facial skincare products featuring botanical oils, 2014

Appealing to an ageing population

Figure 38: Examples of women's facial skincare products featuring anti-ageing claims, 2014-15

BUY THIS REPORT NOW VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

FMAII: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

L'Oréal continues to lead NPD

Figure 39: New product development in women's facial skincare, by top five ultimate companies and other, 2014

Figure 40: Product launches from L'Oréal brands, 2014

Market Share

A mixed brand performance in the mass market

Figure 41: Brand shares in UK sales of women's mass market facial skincare, March 2014 - March 2015

Advertising investment reflects on sales performance

Vaseline targets impulse purchases with limited editions

Figure 42: Examples of Vaseline limited edition tins launched in 2014

The Consumer - What You Need to Know

A third of women have uneven skin tone

Wrinkles are the most common skin concern

Facial soaps maintain their resurgence in popularity

Anti-ageing usage remains static

Strong interest in 'inside-out' beauty

Cleansing devices for the older woman

Consumers concerned over stressing skin

Expanding occasions of use

42% of women have not heard of parabens

Anti-ageing ingredient knowledge can be improved

Skin Condition and Concerns

A third of women have uneven skin tone

Figure 43: How women describe their skin condition, March 2015

Wrinkles are the most common skin concern

Figure 44: Skin concerns of women, March 2015

Primer growth increases awareness of pores

Product Usage

Facial soaps maintain their resurgence in popularity

Figure 45: Examples of new women's facial soap products, 2014

Anti-ageing usage remains static

Figure 46: Women's facial skincare product usage, 2013-15

Oils and devices need to increase user base

Product repertoires shrink as women age

Figure 47: Repertoire of women's facial skincare, March 2015

Factors Influencing Appearance of Skin

Strong interest in 'inside-out' beauty

Figure 48: Most important factors in determining the appearance of skin, March 2015

Facial treatments need to highlight importance

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Cleansing devices for the older woman

Skincare Routines

Consumers concerned over stressing skin

Figure 49: Attitudes towards facial skincare products, March 2015

Expanding occasions of use

The routine and brand loyalty

Skincare Ingredients

42% of women have not heard of parabens

Figure 50: Awareness and knowledge of facial skincare ingredients, March 2015

Anti-ageing ingredient knowledge can be improved

Figure 51: Awareness and knowledge of facial skincare ingredients, March 2015

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Abbreviations

Fan chart forecast

Appendix - Key Players

Figure 52: New product launches in the women's facial skincare market, by sub category and launch type, 2014

Figure 53: Top ten product positioning claims in the women's facial skincare market, ranked by 2014, January 2012-March 2015

EMAIL: reports@mintel.cor