

Skincare Ingredient and Format Trends - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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



US adults are looking for easy-to-use, functional formats when shopping for skincare products, explaining the popularity of wipes and sheet masks. Brands may also consider a focus on natural ingredients, with charcoal, micellar water, and aloe appealing to consumers. Further success can be achieved by incorporating trends from the Asian skincare market, with unique ingredients beginning to emerge in US product launches.

This report looks at the following areas:

- Adults allocate most spend toward facial skincare
- Adults consider impacts of environment and product usage on the appearance of their skin
- Skincare usage higher among younger women

Within the skincare category, the highest spend is allocated to facial skincare, comprising 63% of 2014 category sales. Higher spend on facial skincare is due to wider availability of premium priced options, as well as the regimented approach of facial skincare routines, requiring the purchase of multiple products.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+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

Skincare Ingredient and Format Trends - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Definition

Executive Summary

The issues

Adults allocate most spend toward facial skincare

Figure 1: Share of sales in skincare market, by segment, 2014 (est.)

Adults consider impacts of environment and product usage on the appearance of their skin

Figure 2: Factors impacting appearance of skin, any ranking (net*), October 2015

Skincare usage higher among younger women

Figure 3: Use of skincare products, by gender, age, and race, October 2015

The opportunities

Simple, functional packaging appeals to consumers

Figure 4: Interest in skincare packaging features, October 2015

Incorporating Asian trends into products can help brands to stand out

Focus on natural ingredients

Figure 5: Correspondence analysis of natural ingredient benefits, October 2015

What it means

The Market – What You Need to Know

Most spend allocated toward facial skincare, especially anti-aging

Natural approaches impact market, adults reluctant to try new products

Population of females, Black and Hispanic adults to boost skincare market

Market Breakdown

Adults allocate most spend toward facial skincare

Figure 6: Share of sales in skincare market, by segment, 2014 (est.)

Market Perspective

Adults increasingly stress importance of looking young

Figure 7: Attitudes toward skincare and appearance – Any agree (net^), April 2010 -June 2015

Figure 8: Attitudes toward skincare and appearance – Any agree (net^), by gender and race/Hispanic origin, April 2014-June 2015

Asian skincare trends influence US market

Beauty from within trend extends from vitamins to beverages

In their words

Skincare users reluctant to try new products

In their words

Natural ingredients appealing amid concerns over ingredient safety

In their words

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Skincare Ingredient and Format Trends - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Market Factors

Growth in female population a positive indicator for skincare market

Figure 9: Female population by age, 2010-20

Population growth among multicultural adults could improve skincare sales

Figure 10: US Population by race and Hispanic origin, 2010-20

Aging population may slow market growth

Figure 11: US Population by age, 2010-20

Stabilizing incomes may encourage increased spend on skincare

Figure 12: Median household income, in inflation-adjusted dollars, 2004-14

Spend impacted by race and Hispanic origin

Figure 13: Mean skincare expenditures, by gender and race/Hispanic origin, April 2014-June 2015

Key Initiatives – What You Need to Know

Natural ingredients, easy-to-use formats appeal to consumers

Technology, Asian skincare present opportunities for products to stand out

What's In?

Natural ingredients like charcoal, aloe popular in product launches

Water-based products, mist sprays offer ease-of-use, hydrating benefits

Easy-to-use formats like sheet masks, dual chamber products simplify routines

What's Next?

Environmental claims evolve from the brand level to the product level

Asian influence becomes increasingly mainstream, inspires new ingredients

Technology enhances the retailing landscape

Products also benefit from the incorporation of technology

The Consumer – What You Need to Know

A variety of factors impact skin's appearance

Skincare use is higher among younger women, use of wipes increasing

Consumers research products, consider recommendations

Wipes seen as convenient, opportunities to position as easy-to-use or gentle

Consumers look for functional features in skincare packaging

Packaging innovations appeal to younger consumers

Aloe stands out as a multi-purpose ingredient

Factors Influencing Appearance

Appearance of skin is impacted by both lifestyle and product usage

Figure 14: Factors impacting appearance of skin, any ranking (net*), October 2015

Older adults focus on genetics and environmental factors

Figure 15: Factors impacting appearance of skin, any ranking (net*), by age groups 18-34 and 55+ and household incomes of >\$25K and \$150K+, October 2015

Black adults less likely to consider role of sun in skin's appearance

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Skincare Ingredient and Format Trends - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 16: Factors impacting appearance of skin, any ranking (net*), by race/Hispanic origin, October 2015

In their words

Product Usage

Skincare use is higher among younger adults, women

Figure 17: Use of skincare products, by gender, age, and race/Hispanic origin, October 2015

Use of wipes increases as adults seek more convenient formats

Figure 18: Types of facial cleansing products used, April 2010-June 2015

Products used for anti-aging despite declining anti-aging sales

Figure 19: Reasons for using facial cleansing products, April 2010 -June 2015

Purchase Influencers

Younger consumers do research, older consumers stick with what's familiar

Figure 20: Skincare purchase influencers, by age, October 2015

Black consumers less likely to consider product recommendations

Figure 21: Select skincare purchase influencers, by gender and race/Hispanic origin, October 2015

In their words

Format Perceptions

Wipes viewed as convenient, opportunity to improve perception of gels

Figure 22: Correspondence analysis of attributes by product format, October 2015

In their words

Packaging Features

Consumers seek simplicity, functional benefits in skincare packaging

Figure 23: Interest in skincare packaging features, by gender, October 2015

Younger consumers more interested in packaging features

Figure 24: Interest in skincare packaging features, by age, October 2015

Figure 25: Interest in skincare packaging features, by race/Hispanic origin, October 2015

In their words

Packaging Innovations

Consumers willing to pay more for functional packaging innovations

Figure 26: Interest in skincare packaging innovations, October 2015

Younger consumers interested in packaging innovations

Figure 27: Willing to spend more on skincare packaging innovations, October 2015

Those in urban areas, Hispanics more interested in diagnostic features

Figure 28: Interest in skincare packaging innovations, any (net*), by race/Hispanic origin and area, October 2015

Benefits of Natural Ingredients

Opportunities exist to improve education surrounding ingredients

Figure 29: Correspondence analysis of natural ingredient benefits, October 2015

Men, Hispanics more likely to associate ingredients with specific benefits

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Skincare Ingredient and Format Trends - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 30: Consumers that associate ingredients with cleansing, by gender and race/Hispanic origin, October 2015

In their words

Appendix – Data Sources and Abbreviations

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Appendix – Key Initiatives

Figure 31: Percentage of skincare products containing common ingredients, Jan 2010-Nov 11, 2015

Appendix – Consumer

Figure 32: Types of moisturizers used, by gender, age, and race/Hispanic origin, April 2014-June 2015

Figure 33: Types of facial cleansing products used, by gender, age, and race/Hispanic origin, April 2014 – June 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com