

## Facial Skincare and Anti-Aging - US - May 2016

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.



"This highly competitive category saw sales dip in 2015, as specialty skincare segments and the previously fast-growing lip balm segment saw sales decline. Cleansers and moisturizers show positive growth, and natural products, Asian skincare inspired products, and no-rinse cleansing products are drawing consumer interest."

- Shannon Romanowski, Director - Health, Household, Beauty & Personal Care

### This report looks at the following areas:

- Limited growth in competitive, highly saturated market
- Challenges for anti-aging products and blurring of categories
- Many consumers see lifestyle factors as key to skin's appearance

This Report covers the US market for facial skincare and anti-aging products, which is defined as follows:

- Anti-aging facial products
- Facial cleansers including scrubs and toners
- Facial moisturizers
- Acne treatments
- Fade/bleach
- Lip balm

This Report covers only the at-home facial skincare market and does not include professional services or body care products such as body wash or hand and body lotion.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://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](mailto: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

# Facial Skincare and Anti-Aging - US - May 2016

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

Limited growth in competitive, highly saturated market

Figure 1: Total US sales and fan chart forecast of facial skincare and anti-aging products, at current prices, 2010-20

Challenges for anti-aging products and blurring of categories

Figure 2: Total US retail sales of facial skincare and anti-aging products, by segment, at current prices, 2010-15

Many consumers see lifestyle factors as key to skin's appearance

Figure 3: Factors that impact appearance of skin, March 2016

The opportunities

Young adults, women, and Hispanics key to future category growth

Figure 4: Usage of select facial skincare products, by female by age and Hispanics, March 2016

Natural, familiar ingredients spark interest

Figure 5: Interest in trying products with specific ingredients (any), March 2016

No-rinse cleansers offer growth opportunities

Figure 6: Correspondence analysis – Benefits of no-rinse cleansers, March 2016

What it means

### The Market – What You Need to Know

Growth is slow in competitive facial skincare and anti-aging category

Brand and retailer choice vary with products; traditional categories blur

Positive market factors include demographic growth, natural products

### Market Size and Forecast

Historic and projected sales performance shows tepid 10-year growth

Figure 7: Total US sales and fan chart forecast of facial skincare and anti-aging products, at current prices, 2010-20

Figure 8: Total US sales and forecast of facial skincare and anti-aging products, at current prices, 2010-20

### Market Breakdown

Anti-aging products continue to lose share to cleansers, moisturizers

Figure 9: Sales of facial skincare and anti-aging products, by segment, 2010-15 (est)

Specialized segments see continued declines

After strong gains, lip balms see sales falter in 2015

Figure 10: Share of facial skincare and anti-aging products, by segment, 2015 (est)

### Market Perspective

Although online sales growing, brick and mortar stores remain important

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Facial Skincare and Anti-Aging - US - May 2016

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 11: Total US retail sales of facial skincare and anti-aging products, by channel, at current prices, 2013 and 2015

Choice of brand, and thus retailer, varies with product type

Figure 12: Brand of current facial skincare products, March 2016

Blurring of categories within and beyond the facial skincare market

## Market Factors

Improving economy underpins greater spending on beauty products

Population growth among women 25-44 will help propel, shape market

Figure 13: Select product usage, by gender and age, March 2016

Hispanic women show robust interest in skincare and anti-aging

Figure 14: Population by race and Hispanic origin, 2010-20

Beauty from within trend presents opportunities

## Key Players – What You Need to Know

Leading suppliers see sales fall, especially in anti-aging segment

Natural and dermatologist-inspired cleansers and moisturizers grow

Lip balm faces challenges, with EOS settling disruptive lawsuit

Future of facial skincare lies in technology, new formats, lifestyle focus

## Manufacturer Sales of Facial Skincare and Anti-aging Products

The three largest companies see sales decline

Smaller brands fare well with natural products and mild formulations

Figure 15: Manufacturer sales of facial skincare and anti-aging, 2015 and 2016

## What's Working?

Facial cleansers perform well with new formats, natural formulations

Figure 16: MULO sales of selected top-selling skin cleansing brands, rolling 52-weeks 2015 and 2016

Figure 17: Select products from top-selling skin cleansing brands

Smaller brands integrating natural, organic ingredients

Dermatologist-associated brands build moisturizer share

Figure 18: MULO moisturizer sales for CeraVe and Cetaphil, rolling 52-weeks 2015 and 2016

## What's Struggling?

After strong growth, lip balm declines, EOS facing challenges

Figure 19: MULO sales for select lip balm, rolling 52-weeks 2015 and 2016

Major anti-aging brands struggle to grow sales

Figure 20: MULO sales of anti-aging skincare, by leading companies and brands, rolling 52-weeks 2015 and 2016

Leading acne brands continue to lose ground to private label

Figure 21: MULO sales of select acne treatments, by leading companies and brands, rolling 52-weeks 2015 and 2016

## What's Next?

No-rinse cleansers poised for ongoing growth

Figure 22: TV ad for simple micellar water, 2016

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Facial Skincare and Anti-Aging - US - May 2016

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.

Importance of lifestyle factors expands benefits of skincare products

"Food to Face" trend with natural, food-based products

Apps with information, customization, and on-the-go shopping

## The Consumer – What You Need to Know

Hydration and UV are top factors impacting skin appearance

Women and those 18-34 drive demand for facial cleansers

No-rinse cleansers associated with being convenient, gentle

Usage high for lip balm and facial moisturizers

Delaying and repairing signs of aging drive product usage

Natural ingredients are widely sought and evoke strong interest

## Factors that Impact Appearance of Skin

Hydration and UV exposure are top factors impacting skin appearance

Figure 23: Factors that impact appearance of skin, March 2016

Age and gender guide perception of what factors impact the skin

Figure 24: Lifestyle factors that impact appearance of skin (any rank), by age and gender, March 2016

Race/Hispanic origin shapes concern about UV exposure

Figure 25: Lifestyle factors that impact appearance of skin (any rank), by race/Hispanic origin, March 2016

## Use of Facial Cleansing Products

Facial cleansers continue positive growth trends

Figure 26: Usage of facial cleansing products, March 2016

Women and those 18-34 are core users of facial cleaners

Figure 27: Usage of facial cleansing products, by age and gender, March 2016

Hispanics show strong investment in the category

Figure 28: Usage of facial cleansing products, by race and Hispanic origin, March 2016

## Benefits of No-rinse Cleansers

Consumers cite a range of benefits to no-rinse cleansers

Figure 29: Correspondence analysis – Benefits of no-rinse cleansers, March 2016

Methodology

Young consumers post positive attitudes toward cleansing waters

Figure 30: Benefits of no-rinse cleansers, March 2016

## Use of Facial Moisturizer and Specialty Skincare Products

Usage highest for lip balm and facial moisturizers

Figure 31: Usage of facial moisturizers and specialty skincare, March 2016

Usage is high among women, even as product choice evolves with age

Figure 32: Usage of facial moisturizers and specialty skincare products, by age and gender, March 2016

Income drives usage of specialized skincare products

Figure 33: Usage of facial moisturizers and specialty skincare products, by household income, March 2016

Hispanics are heavy users of a wide range of products

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Facial Skincare and Anti-Aging - US - May 2016

**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 34: Usage of facial moisturizers and specialty skincare products, by race and Hispanic origin, March 2016

## Usage, Motivations, and Benefits of Anti-aging Products

Both repairing and delaying signs of aging motivate usage

Figure 35: Usage of and motivations for using anti-aging skincare, March 2016

Motivations for using anti-aging skincare changes with age

Figure 36: Usage of and motivations for anti-aging treatments, by gender and age, household income, and Hispanic origin, March 2016

Moisturizing and anti-wrinkle claims are important to anti-aging consumers

Figure 37: Claims considered most important in anti-aging skincare, March 2016

Anti-wrinkle and UV protection claims can yield maximum benefits

Figure 38: TURF analysis – Benefits of anti-aging skincare, March 2016

Figure 39: Table – TURF analysis – Benefits of anti-aging skincare, March 2016

TURF analysis – Methodology

## Influence of Ingredients

Facial skincare users want familiar, healthy-sounding ingredients

Figure 40: Any influence of ingredients (net), March 2016

Interest in trying natural ingredients outpaces current usage

Figure 41: Usage of and interest in trying products with specific ingredients, March 2016

Interest in natural ingredients peaks among younger adults, Hispanics

Figure 42: Any influence of select ingredients (net), by gender and age and Hispanic origin, March 2016

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

## Appendix – Market

Figure 43: Total US sales and forecast of facial skincare and anti-aging market, at current prices, 2010-20

Figure 44: Total US sales and forecast of facial skincare and anti-aging market, at inflation-adjusted prices, 2010-20

Figure 45: Total US sales of facial skincare and anti-aging, by segment, at current prices, 2013 and 2015

Figure 46: Total US sales and forecast of facial skincare and anti-aging market, at inflation-adjusted prices, 2010-20

Figure 47: Total US retail sales of facial skincare and anti-aging, by channel, at current prices, 2010-15

Figure 48: Female population by age, 2010-20

## Appendix – Key Players

Figure 49: MULO sales of anti-aging skincare, by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 50: MULO sales of facial cleansers, by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 51: MULO sales of facial moisturizers, by leading companies and brands, rolling 52-weeks 2014 and 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Facial Skincare and Anti-Aging - US - May 2016

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 52: MULO sales of acne treatment, by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 53: MULO sales of fade/bleach, by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 54: MULO sales of lip balm, by leading companies and brands, rolling 52-weeks 2015 and 2016

## Appendix – Consumer

Figure 55: Types of facial cleansers/toners used

Figure 56: Brands used of facial cleansers/toners, October 2009-December 2015

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)