

Facial Skincare and Anti-Aging - US - May 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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



"The facial skincare and anti-aging market has experienced moderate growth of 8% between 2011-16, driven by gains in the facial cleanser and facial moisturizer segments. Going forward, incremental sales could be achieved by broadening the appeal of natural skincare offerings. Additionally, new formats such as mists and essences can increase the repertoire of products that people own."

Margie Nanninga, Beauty & Personal Care Analyst

This report looks at the following areas:

- Moderate growth as specialty products slow sales
- Lackluster engagement, habitual buying pose challenges for brands
- Most products used on an as-needed basis

Definition

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

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

Facial Skincare and Anti-Aging - US - May 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Moderate growth as specialty products slow sales

Figure 1: Percent change of sales growth, by segment, 2016 (est)

Lackluster engagement, habitual buying pose challenges for brands

Figure 2: Share of facial skincare consumer segments, February 2017

Most products used on an as-needed basis

Figure 3: Product usage, by routine, February 2017

The opportunities

Natural offerings appeal to a range of buyers

Figure 4: Select attitudes toward natural skincare, by segment, February 2017

New formats can increase repertoire of skincare products used

Hispanics are highly engaged, but brands must combat value-driven approach

Figure 5: Select benefits of skincare products – Any agree (net)*, by all, Hispanic origin, and Black, February 2017

What it means

The Market – What You Need to Know

Facial skincare and anti-aging experience moderate growth

Facial cleansers dominate market, drive growth

Beauty category comprised of four consumer segments

Most skincare spend allocated toward face, direct sales brands on the rise

Population trends impact product usage

Market Size and Forecast

Historic and projected sales performance

Figure 6: Total US sales and fan chart forecast of facial skincare and anti-aging, at current prices, 2011-21

Figure 7: Total US sales and forecast of facial skincare and anti-aging, at current prices, 2011-21

Market Breakdown

Facial cleansers command largest share of market

Figure 8: Share of facial skincare and anti-aging market, by segment, 2016 (est)

Lip balms falter, anti-aging struggles continue

Figure 9: Percent change of sales growth, by segment, 2016 (est)

Facial Skincare Consumer Snapshot

Facial skincare consumers divided into four categories

**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

Facial Skincare and Anti-Aging - US - May 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 10: Share of facial consumer segments, February 2017

Figure 11: Beauty indifferent segment, February 2017

Figure 12: Frustrated but Engaged segment, February 2017

Figure 13: Natural Beauty segment, February 2017

Figure 14: Habitual Beauty segment, February 2017

Market Perspective

Facial skincare comprises most of skincare sales, staples drive growth

Figure 15: Share of sales in skincare market, by segment, 2016 (est)

Figure 16: Percentage change in skincare sales, by segment, 2016 (est.)

Direct sales and direct-to-consumer skincare brands are trending

Beauty from within increasingly mainstream

Skincare segments continue to blur

Enthusiasm for natural looks, product trial benefits skincare

Figure 17: Benefits of skincare products, February 2017

Market Factors

Population growth trends alter facial skincare landscape

Figure 18: Population by age, 2012-22

Hispanics over index for usage, but are value-oriented

Figure 19: Select benefits of skincare products – Any agree (net)*, by all, Hispanic, and Black, February 2017

Strong consumer confidence bodes well for higher priced offerings

Figure 20: Consumer sentiment index, January 2007-December 2016

Key Players – What You Need to Know

Market leaders struggle as middle players stay on-trend

Familiar ingredients, dermatologist brands, and single-use masks thrive

Men's facial skincare, EOS, and private-label lag behind

Science meets natural, formats continue to evolve

Company and Brand Sales of Facial Skincare and Anti-aging

Market leaders J&J and P&G struggle to maintain share

Sales of facial skincare and anti-aging by company

Figure 21: MULO sales of facial skincare and anti-aging, by leading companies, rolling 52 weeks 2016 and 2017

What's Working?

Cleansers touting familiar ingredients thrive

Figure 22: MULO sales of select natural skincare offerings, 52-week review period ending Jan. 27, 2017

Dermatologist brands continue to build momentum

Figure 23: Cetaphil Gentle Skin Cleanser | Commercial, 2017

Figure 24: The Next Generation of Healing Ointment, 2016

Figure 25: MULO sales of select dermatologist facial skincare products, 52-week review period ending Jan. 27, 2017

Single-use masks, sheet masks benefit from ease of use

**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

Facial Skincare and Anti-Aging - US - May 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 26: MULO sales of select single use masks, 52-week review period ending Jan. 27, 2017

For lip balm, consumers turn back to staples

Figure 27: MULO sales of select lip balm products, 52-week review period ending Jan. 27, 2017

What's Struggling?

EOS lip balms – A fleeting fad?

Figure 28: MULO sales for EOS lip balms, rolling 52-weeks 2016 and 2017

Men's facial skincare products fail to keep pace

Figure 29: MULO sales for select men's skincare products, rolling 52-weeks 2016 and 2017

Private label sales trends influence segment performance

Figure 30: MULO sales for private label facial cleansers and facial moisturizers, rolling 52-weeks 2016 and 2017

What's Next?

Blurring between "natural" and science

Korean skincare inspires a slew of new product formats

Skincare positioned as a way to boost overall health and wellness

The Consumer – What You Need to Know

Staples experience widespread use, specialty products reach niche audience

Most products are used on an as-needed basis, slowing sales

Natural brands commonly used, consumers adding steps to skincare routines

Attitudes toward natural skincare products are generally positive

Essences recognized for hydration, lack of awareness still exists

Lip balms primarily functional, added benefits can set products apart

Usage of Facial Cleansers

Facial cleansers experience widespread use

Figure 31: Facial cleanser usage – Any use (net)*, February 2017

Younger adults, women drive facial cleanser usage

Figure 32: Facial cleanser usage– Any use (net)*, by gender and age, February 2017

Young, affluent consumers over index across formats

Figure 33: Facial cleanser usage – Any use (net)*, by age and income, February 2017

Hispanics are key facial cleanser users

Figure 34: Facial cleanser usage – Any use (net)*, by race/Hispanic origin, February 2017

Usage of Facial Moisturizers and Specialty Products

Lip balm, moisturizers experience moderate usage

Specialty products reach niche audiences due to discretionary nature

Figure 35: Facial moisturizers and specialty products usage – Any use (net)*, February 2017

Younger women most engaged in skincare market

Figure 36: Facial moisturizers and specialty products usage – Any use (net)*, by gender and age, February 2017

Hispanics report strong usage, Black adults under index

Figure 37: Facial moisturizers and specialty products usage – Any use (net)*, by race/Hispanic origin, February 2017

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

Facial Skincare and Anti-Aging - US - May 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Skincare Routines

Younger women, Hispanics use more products

Figure 38: Product usage repertoire, by gender and age and race/Hispanic origin, February 2017

Moisturizers, cleansers used in the morning, anti-aging associated with evening

Figure 39: Product usage, by morning and evening routines, February 2017

Many products used on an "as needed" basis

Figure 40: Product usage, by as needed/occasional, February 2017

Skincare Behaviors

Natural products used more widely than premium, direct sales

Figure 41: Skincare behaviors – Brand types used, February 2017

Beauty from within going mainstream, steps added to skincare routines

Consumers hesitate to ask for advice from professionals

Figure 42: Skincare behaviors, February 2017

Younger women adding skincare steps, skipping make-up

Figure 43: Select skincare behaviors, by age, February 2017

Hispanics more likely to conduct skincare research

Figure 44: Select skincare behaviors, by all, Hispanic origin, and Black, February 2017

Natural beauties take holistic approach toward skincare

Figure 45: Select skincare behaviors, by beauty segment, February 2017

Attitudes toward Natural Skincare

Consumers hold generally positive views toward natural skincare

Natural offerings benefit from efficacy-related benefits

Belief that natural means pricey can hold natural brands back

Figure 46: Attitudes toward natural skincare, February 2017

Younger women see natural as being healthier and better for skin

Figure 47: Select attitudes toward natural skincare, by gender and age, February 2017

Hispanics hold positive views of natural, but may not be purchasing

Figure 48: Select attitudes toward natural skincare, by all, Hispanic origin, and Black, February 2017

Efficacy of natural products appeals to Frustrated but Engaged shoppers

Figure 49: Attitudes toward natural skincare, by segment, February 2017

Benefits of Essences

Essences recognized for hydration, ease of use

One third of consumers don't know much about essences

Perceptions that essences are expensive, for occasional use are a challenge

Figure 50: Benefits of essences, February 2017

Younger, affluent adults more familiar with essences

Figure 51: Select benefits of essences, by age and income, February 2017

Black and Hispanic adults more likely to recognize benefits of essences

**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

Facial Skincare and Anti-Aging - US - May 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 52: Select benefits of essences, by Hispanic origin and Black, February 2017

Attitudes toward Lip Balm

Lip balms used during winter and as-needed, slowing segment growth

Added benefits can set products apart

Figure 53: Attitudes toward lip balm, February 2017

Natural offerings, fun packaging appeal to younger adults

Figure 54: Attitudes toward lip balm, by gender and age, February 2017

Added benefits stand out for Hispanic consumers

Figure 55: Attitudes toward lip balm, by all, Hispanic, and Black, February 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 56: Total US sales and forecast of facial skincare and anti-aging, at inflation-adjusted prices, 2011-21

Figure 57: Total US retail sales and forecast of facial skincare and anti-aging, by segment, at current prices, 2011-21

Figure 58: Total US retail sales of facial skincare and anti-aging, by channel, at current prices, 2011-16

Figure 59: Population by race and Hispanic origin, percent change, 2017-22

Appendix – Key Players

Figure 60: MULO sales of anti-aging skincare, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 61: MULO sales of facial cleansers, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 62: MULO sales of facial moisturizers, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 63: MULO sales of acne treatment, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 64: MULO sales of fade/bleach, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 65: MULO sales of lip treatment, by leading companies and brands, rolling 52 weeks 2016 and 2017

Appendix – The Consumer

Figure 66: Types of facial cleansers/toners used, October 2011-November 2016

Figure 67: Types of facial cleansers/toners used, by select demographics, October 2015-November 2016

Figure 68: Brands of facial cleansers/toners used, October 2011-November 2016

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