Sun Protection and Sunless Tanners - US - November 2012

Scope and Themes

"As skin cancer and sun protection awareness campaigns continue to warn consumers about the dangers of UV exposure and the FDA continue to propose tightened product regulations, manufacturers will need to stay ahead of the curve in order to maintain consumer confidence in the category."

– Shannon Romanowski, Beauty and Personal Care Analyst

In this report we answer the key questions:

- **What are the new product regulations impacting the sun protection category?**
- **How does consumer confusion about claims on sun protection products impact the category?**
- **How can brands offset losses to private label and increase value perception of suncare products?**

The sun protection and sunless tanner category has seen steady growth since 2007, despite the economic recession. The category is predicted to reach nearly $1.5 billion in sales by the end of 2012, though sales are expected to decline slightly for the first time since 2007. The category fared well over recent years due to increased use of sunscreen/ sunblock driven by increased consumer awareness regarding the importance of sun protection to help prevent skin cancer as well as early signs of skin aging. However, private label and store brands continue to offer similar benefits as those seen in branded products, likely curbing sales growth in the category. Also, as more skincare and color cosmetics continue to add a Sun Protection Factor (SPF) to their products, consumers (particularly women), may be turning

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DID YOU KNOW?

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

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to those products to get their daily dose of sun protection. Finally, as the market becomes more saturated with a wide range of SPF levels and added functional benefits, incremental growth is harder to achieve.

While growth is predicted to slow in the category, opportunities exist to engage consumers with added skincare benefits, potentially encouraging them to trade up to branded/specialty products. Consumers report a high level of interest in added benefits like anti-aging ingredients and natural ingredients in sun protection products. Additionally, engaging consumers that historically have low participation in the category, like men and multiculturals, will be critical for continued success in the category.

his report builds on the analysis presented in Mintel's *Sun Protection and Sunless Tanners—U.S., October 2011* as well as the October 2010 report of the same title, and *Suncare—U.S., August 2008,* and the October 2007, August 2006, June 2005, and March 2003 reports of the same title.

This report covers the U.S. market for sun protection and sunless tanners and includes the following segments:

- Sunscreen/sunblock
- Suntan lotion and oil (includes lotions/oils for indoor tanning beds)
- Sunless tanners (brands identified from suntan lotion and oil category)

Beauty products with SPF such as facial moisturizers and color cosmetics are not included in market/sales data but are included in consumer analysis.

The following are **excluded** from the scope of this report:

- After-sun products
- Insect repellents with sunscreen

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