

Sun Protection and Sunless Tanners - US - November 2013

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“The sun protection and sunless tanners category is starting to show signs of struggle. There are some specific challenges that need to be addressed. Companies need to better engage with men to educate them around sun protection and grow their usage. Determining ways to increase regular sunscreen usage is also important, as is breaking the category’s seasonal perceptions.”
– Gabriela Elani, Home & Personal Care Analyst

This report looks at the following areas:

- Men need more education and outreach
- Increase regular sunscreen usage among consumers
- Break seasonal perceptions

Total US retail sales for the sun protection and sunless tanners market are \$1.3 billion in 2013. Though the market performed well during the years following the recession, it is starting to show signs of struggle, posting its first sales decline in several years during 2012-13. Though organizations and brands have sought to increase consumers’ usage of sunscreen through skin cancer awareness campaigns, sun protection continues to carry strong seasonal connotations. Most consumers only use sunscreen on a seasonal basis. Another challenge for the category is that consumers are gravitating toward personal care and cosmetic products that offer SPF protection for their daily sun protection needs. Private label products also strongly compete with branded products on price. Mintel expects that sales will fluctuate in the coming years, with the projection that the market will decline by 3% during 2012-18. By 2018, sales are expected to fall to \$1.2 billion.

Accounting for 89% of category sales, the performance of sunscreen dictates how the overall market performs. Companies and brands will have to better engage with low users and nonusers of sunscreen such as men, Hispanics, and Black consumers to reinvigorate sales. In addition, brands will need to consider integrating added skincare and functional benefits into sunscreen so that the product form can better compete with private label and personal care/cosmetic products with SPF benefits. Skin-type-specific and age-specific sunscreen products are strong opportunities for this category.

The key topics of focus for the 2013 report include understanding consumers’ current usage of sun protection, tanning, and personal care products with SPF benefits, what tactics may be needed to increase usage frequency of sunscreen products, and what new innovation opportunities for the category could look like.

This report builds on the analysis presented in Mintel’s *Sun Protection and Sunless Tanners—US, November 2012* and previous reports with this same title in October 2011 and October 2010. It also builds on the *Suncare—US, August 2008* and previous reports with this same title in October 2007, August 2006, June 2005, and March 2003.

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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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