

# Suncare - UK - 2022

Report Price: £2195 | \$2995 | €2600

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

## This report looks at the following areas:

- The impact of the rising cost-of-living on the sun protection, aftersun and sunless tanning market.
- Launch activity and opportunities for innovation in sun protection, aftersun and sunless tanning products.
- Usage and purchase of sun protection and aftersun in the last 12 months with brand preferences.
- Pre-purchase research behaviours when buying sun protection and aftersun products.
- Usage of sunless tanning products in the last 12 months and purchase drivers to encourage usage.

In the UK, 55% of adults who have used suncare products in the last 12 months would like more skincare products to be designed for use after being in the sun. This data solidifies the aftersun segment outperforming in 2022, and highlights a potential growth opportunity going forward, to embed aftersun products into daily skin routines.

The rising cost-of-living concerns pose a threat to value growth in suncare, as consumers are adopting savvy shopping behaviours in all areas of their spending, making it more crucial for brands to assert their value proposition, not only with low-cost products, but with efficacy and multifunctional claims that influence purchase decisions.

A threat within the category is consumers choosing to reduce their day-to-day beauty/grooming routines and not seeing suncare as an essential step all year round. Brands can pivot with innovation that promotes the health benefits of using both sun protection and sunless tanning as a safer alternative to natural tanning, and an opportunity to spend more time on holiday enjoying activities instead of sunbathing.



"Value sales of suncare products in 2022 continued to increase, surpassing pre-pandemic levels as a result of eased international travel restrictions post COVID-19 and the 2022 heatwave. The consumer's heightened focus on skin health is making suncare an increasingly essential step in beauty/grooming routines."

- Shiyan Zering, BPC and OTC Research Analyst, December 2022

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Report Price: £2195 | \$2995 | €2600

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

An opportunity for the category is taking advantage of the heightened focus on skin health, with a demand for added skin benefits across all segments. Brands can emphasise the role these products play in slowing skin ageing, as this can drive premiumisation by encouraging consumers to use products more frequently and buy more expensive products.

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

## Table of Contents

### OVERVIEW

- **Key issues covered in this Report**
- **Products covered in this Report**

### EXECUTIVE SUMMARY

- **The five-year outlook for suncare**  
Figure 1: Category outlook for suncare, 2022-27
- **The market**
- **Value sales in 2022 surpass pre-pandemic levels**  
Figure 2: Market size for suncare, 2017-27
- **Aftersun achieved the strongest growth**
- **Companies and brands**
- **Leading sun protection and aftersun brands benefit from category growth**  
Figure 3: UK retail value sales of mass-market sun protection and aftersun products, by brand, 2022
- **Mixed performance seen among the sunless tanning market leaders**  
Figure 4: UK retail value sales of mass-market self-tan products, by brand, September 2022
- **Format and claim trends in NPD are driven by convenience**  
Figure 5: New product launches in the suncare category, by sub-category, 2019-22
- **The consumer**
- **Makeup and skincare with SPF interest continues to grow**  
Figure 6: Usage of suncare products in the last 12 months, 2020, 2021 and 2022
- **Mass-market brands lead in suncare brand preferences**  
Figure 7: Brand preferences for suncare products in the last 12 months, 2022
- **Varying skin concerns impact purchase decision**  
Figure 8: Suncare research behaviours in the last 12 months, 2022
- **Brand preferences will be impacted by financial concerns**  
Figure 9: Suncare usage behaviours, 2022
- **Reposition self-tan to drive usage**  
Figure 10: Sunless tanning products and services used in the last 12 months, 2022
- **Maximise on the skincare ingredient opportunity**  
Figure 11: Usage drivers in sunless tanning products, 2022

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

## ISSUES AND INSIGHTS

- **Cost-of-living crisis concerns will place value at the forefront of consumer purchase choices**
- **Position suncare and sunless tanning as integral steps in skincare**

## MARKET SIZE AND PERFORMANCE

- **Sun protection and aftersun are in recovery mode**  
Figure 12: Market size for suncare, 2017-22
- **Sunless tanning faces more challenges post-COVID-19**

## MARKET FORECAST

- **The suncare category forecast to grow despite economic pressures**  
Figure 13: Category outlook for suncare, 2022-27
- **Leverage skin benefits to combat barriers to suncare and sunless tanning**  
Figure 14: Market forecast for suncare, 2017-27  
Figure 15: Market forecast for suncare at constant and current price, 2022-27
- **Learnings from the last income squeeze**
- **Forecast methodology**

## MARKET SEGMENTATION

- **Aftersun outperforms as it gains a place in skin routines**  
Figure 16: UK retail value sales of suncare products, by segment, 2021 and 2022
- **Sunless tanning struggles with reduced usage occasions**
- **Sun protection benefits from travel resurgence, heatwaves and skinification**

## CHANNELS TO MARKET

- **H&B retailers take a stand on value and safety**  
Figure 17: UK retail value sales of children's suncare products, by outlet type, 2021 and 2022
- **Grocers and discounters benefit from own-label ranges**

## MARKET DRIVERS

- **Inflation is a key concern for consumers and brands...**
- **...and despite government support, energy prices are still a major concern**
- **Consumer spending power will be curbed**
- **Consumers' financial wellbeing has fallen from the highs of 2021...**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

- **...and most people are feeling the effects of price rises**
- **Spotlight anti-ageing benefits to boost usage among older consumers**

Figure 18: Trends in the age structure of the UK population, 2016-26

- **More holidays were taken with eased restrictions**
- **Travel issues were still prevalent**
- **UK summer heatwave boosted demand for suncare**
- **Streamlined routines could affect suncare usage and purchase**

Figure 19: Beauty and grooming behaviours since COVID-19, 2021

- **Cost of suncare comes under scrutiny**

**MARKET SHARE**

- **Mass-market suncare brands thrive**
- Figure 20: UK retail value sales of mass-market sun protection and aftersun products, by brand, 2021 and 2022

- **Hawaiian Tropic outperforms the competition**
- **Ultrasun’s medical positioning drives growth**
- **Bondi Sands is the best-selling self-tan brand...**

Figure 21: UK retail value sales of mass-market self-tan products, by brand, 2021 and 2022

- **...while Skinny Tan and own-labels face challenges**
- **Dove benefits from advertising investment and social media activity**

**LAUNCH ACTIVITY AND INNOVATION**

- **Sun protection and aftersun**
- **Sun protection takes the spotlight in NPD post-pandemic**

Figure 22: New product launches in the sun protection and aftersun category, by sub-category, 2019-22

Figure 23: Examples of aftersun product launches by Germaine de Capuccini, 2022

- **Time/speed claims align with demand for convenience**
- Figure 24: Top 10 claims in the sun protection and aftersun category (based on leading claims in 2021), 2020-22
- Figure 25: Examples of sun protection product launches carrying time/speed claims, 2022
- **Eco and ethical claims increase as an expected standard despite taking a backseat in consumer focus**

Figure 26: Examples of sun protection product launches carrying eco/ethical claims, 2022

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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

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

- Pair natural and eco claims for maximum appeal**  
 Figure 27: Examples of sun protection product launches formulated with natural ingredients, 2022
- Moisturising/hydrating claims have opportunity to reach a wider audience**  
 Figure 28: Examples of sun protection product launches carrying moisturising/hydrating claims, 2022
- Watermelon is a trending ingredient**  
 Figure 29: Examples of sun protection product launches formulated with watermelon, 2022
- Product testing claims are on the rise**  
 Figure 30: Product-tested claims in the sun protection and aftersun category, 2020-22  
 Figure 31: Example of a sun protection product launch carrying tested-for-sensitive-skin claims, 2022
- New product formulations focus on 'milky' consistencies**  
 Figure 32: New product launches in the sun protection and aftersun category, by launch type, 2019-22  
 Figure 33: Examples of sun protection and aftersun product launches with 'milk' formats/textures, 2022
- L'Oréal continues to lead NPD in sun protection**  
 Figure 34: New product launches in the sun protection and aftersun category, by ultimate company, 2022
- Sunless tanning**
- New sunless tanning product launches pick up in 2022**  
 Figure 35: New product launches in the sunless tanning category, by launch type, 2019-22  
 Figure 36: Examples of sunless tanning product launches with mist format/textures, 2022
- Celebrities tap into the sunless tanning opportunity**  
 Figure 37: Examples of celebrity sunless tanning product launches, 2022
- Private-label innovation caters for economic challenges**  
 Figure 38: New product launches in the sunless tanning category, branded vs private label, 2019-22  
 Figure 39: Examples of private-label sunless tanning product launches, 2022
- Time/speed claims see a boost**  
 Figure 40: Top 10 claims in the sunless tanning category (based on leading claims in 2021), 2020-22  
 Figure 41: Examples of sunless tanning product launches carrying time/speed claims, 2022
- Self-tan continues to blur with skincare**

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
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

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

Figure 42: Example of a skincare-led sunless tanning product launch, 2022

- **Explain the functionality behind botanical/herbal ingredient claims**

Figure 43: Examples of sunless tanning product launches carrying botanical/herbal claims, 2022

- **Durability claims tap into convenience and financial concerns**

Figure 44: Examples of sunless tanning product launches carrying long-lasting claims, 2022

- **Relaunch activity boosts Vita Liberata**

Figure 45: New product launches in the sunless tanning category, by ultimate company, 2022

Figure 46: Examples of sunless tanning product launches by Vita Liberata, 2022

### ADVERTISING AND MARKETING ACTIVITY

- **TV advertisement dominates adspend**

Figure 47: Total above-the-line, online display and direct mail advertising expenditure on suncare, by media type, 2019-22

- **Dove promotes its self-tanning popularity via TV and social media**

Figure 48: Total above-the-line, online display and direct mail advertising expenditure on suncare, by advertiser, 2021

- **L'Oréal highlights La Roche-Posay's expertise in sun damage reduction**

- **Bondi Sands take on natural products**

- **Piz Buin gets creative with outdoor campaigns**

Figure 49: Piz Buin's "Get it On" campaign, 2022

- **Dermalogica continues partnership with Skcin**

- **NIVEA Sun and Cancer Research UK celebrate a 10-year partnership**

Figure 50: NIVEA campaign, 2022

- **Boots x Macmillan focus on safety**

- **Escentual continues its #SunPoverty 2022 campaign**

- **Nielsen Ad Intel coverage**

### BRAND RESEARCH

- **Brand map**

Figure 51: Attitudes towards and usage of selected brands, 2022

- **Key brand metrics**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

Figure 52: Key metrics for selected brands, 2022

- **Brand attitudes: Boots Soltan is a trusted brand**  
Figure 53: Attitudes, by brand, 2022
- **Brand personality: Isle of Paradise and Supergoop! are perceived as fun**  
Figure 54: Brand personality – Macro image, 2022
- **Bondi Sands stands out as glamorous**  
Figure 55: Brand personality – Micro image, 2022
- **Brand analysis**
- **Boots Soltan offers value with care for health/wellbeing**
- **Solait by Superdrug associated with affordability and naturalness**
- **Supergoop! rated highly on satisfaction**
- **Hello Sunday is highly recommended among users**
- **Bondi Sands is highly endorsed and recommended**
- **Isle of Paradise benefits from youthful and quirky perceptions**

**SUNCARE USAGE**

- **Suncare usage remains consistent but needs further education**  
Figure 56: Net usage of suncare products in the last 12 months, 2021 and 2022
- **Non-traditional formats appeal to skin-conscious consumers**  
Figure 57: Usage of suncare products in the last 12 months, 2020, 2021 and 2022
- **Makeup and skincare with SPF interest continues to grow**
- **Aftersun usage frequencies are rising**
- **Haircare with SPF requires better positioning**  
Figure 58: Examples of La Biosthétique Soleil new product launches, 2022
- **Higher SPF levels are increasing as a result of skin education**  
Figure 59: SPF levels used in the last 12 months, 2022
- **Improve education on SPF levels for men**  
Figure 60: SPF levels used in the last 12 months, by gender, 2022
- **Boost usage of high SPFs among consumers with melanin-rich skin**  
Figure 61: SPF levels used in the last 12 months, by ethnicity, 2022

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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



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

- **Expand repertoires to boost consumer engagement with suncare brands**

Figure 62: Repertoire of suncare products used in the last 12 months, 2022

### SUNCARE BRAND PREFERENCES

- **Mass-market brands lead in suncare**

Figure 63: Brand preferences for suncare products in the last 12 months, 2022

Figure 64: Examples of mass-market sun protection product launches, 2022

- **Private-label appeal boosted by cost-of-living concerns**

Figure 65: New product launches in the sun protection and aftersun category, branded vs private label, 2019-22

Figure 66: Examples of private-label sun protection product launches, 2022

- **Expert backing will create an advantage for pharmacy brands**

Figure 67: Example of La Roche-Posay product launch, 2022

- **Emphasise the value in quality for premium price points**

Figure 68: Examples of premium sun protection product launches, 2022

- **Indie brands are innovative but have room to grow**

Figure 69: Examples of Ultra Violette product launches, 2022

### SUNCARE RESEARCH BEHAVIOURS

- **Efficacy and protection are important to consumers**

Figure 70: Suncare research behaviours in the last 12 months, 2022

- **Varying skin concerns impact purchasing decisions**

Figure 71: Example of Spots & Stripes product launch, 2022

- **Diversity in sun protection products is desired**

Figure 72: Examples of sun protection product launches positioned as inclusive, 2022

- **Eco-friendly/ethical products are of a lower priority, but still should be a focus for brands**

- **Consumers are influenced to purchase by online reviews**

- **Position sunscreens carefully to women aged 55+**

### SUNCARE USAGE BEHAVIOURS

- **Encourage frequent body skin protection with innovation**

Figure 73: Suncare usage behaviours, 2022

- **UV detecting stickers are a fun and functional formats to support suncare education**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

- Integrate beauty and skincare benefits into aftersun products**  
 Figure 74: Examples of facial skincare product launches designed for post-sun exposure, 2022
- Added skin benefits in suncare products pique consumer interest**
- Create compatible makeup/skincare suncare products with powder and spray formats**  
 Figure 75: Examples of SPF powder and setting spray product launches, 2022
- Expiration dates are a cause for concern**
- Better education and innovative formats needed for correct application**
- Brand preferences will be impacted by financial concerns**

**SUNLESS TANNING USAGE**

- Reposition self-tan to drive usage**  
 Figure 76: Sunless tanning products and services used in the last 12 months, 2022
- Lotions can tap into familiarity**  
 Figure 77: Sunless tanning products and services used in the last 12 months, 2021 and 2022
- Encourage trade-up behaviours through professional messaging**
- Self-tan drops maintain usage levels due to easy incorporation**
- Serums can emphasise skincare benefits**  
 Figure 78: Example of a sunless tanning launch which incorporates skincare ingredients, 2022
- Boost self-tan repertoires among over-55s**  
 Figure 79: Repertoire of sunless tanning products and services used in the last 12 months, 2022

**PURCHASE DRIVERS FOR SUNLESS TANNING PRODUCTS**

- Maximise on the skincare ingredient opportunity**  
 Figure 80: Usage drivers in sunless tanning products, 2022  
 Figure 81: Example of sunless tanning product launches with added skin benefits, 2022
- Sunless tanning brands struggle to attract new users**  
 Figure 82: Usage drivers in sunless tanning, by sunless tanning product/service users, 2022
- Align durability claims with cost-saving benefits**
- Tackle barriers around scent**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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

Report Price: £2195 | \$2995 | €2600

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

- **Appeal to young men through texture and format innovation**  
Figure 83: Example of a self-tanning wipe launch, 2022
- **Cater for a wider range of skin tones**

**APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION**

- **Abbreviations**
- **Consumer research methodology**

**APPENDIX – MARKET SIZE AND FORECAST**

- **Market forecast and prediction intervals**  
Figure 84: UK Retail value sales of suncare, 2022-27
- **Market drivers and assumptions**
- **Forecast methodology**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.