

# Facial Skincare - US - 2023

Report Price: £3695 | \$4995 | €4400

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 COVID-19, inflation and other external factors on consumer behavior and the facial skincare market
- How usage trends impact the facial skincare market
- How consumers define quality and value within the category
- How category players are innovating offerings to stand out from the competition
- What consumers want from the category and why

62% of category users prefer to invest in their facial skincare routine more than in other personal care items (eg bodycare, haircare), which bodes well for the stability of the category.

With the democratization and wide availability of mass-market skincare products touting premium-inspired ingredients and claims, obstacles may be present for higher-priced offerings, especially in a cost-sensitive time period.

While usage of essentials such as moisturizers, cleansers and lip balm remain stable, consumer attitudes toward wasteful multi-step routines and sustainability initiatives may drive consumer behavior in the future. Brands must look to offer multifunctional products that are jam-packed with skin benefits or further prove the necessity of products within daily or weekly regimens.

A majority of users are taking a preventative approach to the category and are paying more attention to their skin health compared to a year ago. To create long-term customers, brands have started to segment their product ranges to speak to consumer lifestages such as teen years, pregnancy, menopausal needs and pro-aging, evolving what personalization means within the facial skincare category.



“Consumer engagement across foundational daily-use formats such as moisturizers, cleansers and lip balm continues to rise, leading to overall sales growth for the total category.”

– **Carson Kitzmiller, Senior Beauty & Personal Care Analyst**

## 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

- **What you need to know**
- **This Report looks at the following area**
- **Definition**
- **Market context**

### EXECUTIVE SUMMARY

- **Top takeaways**
- **Consumer trends**
- **Women and men differ in their usage and attitudes**  
 Figure 1: Product usage (NET), by gender, 2023  
 Figure 2: Select attitudes and behaviors toward facial skincare, by gender, 2023
- **Most are spending the same amount of time on their routine; holistic wellness concepts can drive further use**  
 Figure 3: Time spent on facial skincare routine compared to a year ago, 2023  
 Figure 4: Reasons for spending more time on facial skincare routine compared to a year ago, 2023
- **Trust at a brand level matters**  
 Figure 5: Defining value in facial skincare (ranked – up to three), 2023
- **A preventative and protective mindset reigns**  
 Figure 6: Select attitudes and behaviors toward facial skincare, 2023
- **Competitive strategies**
- **“Dupes” popular in value-focused environment**  
 Figure 7: Select trade-out attitudes, by age, 2023
- **Distribution evolves to gain consumer visibility**  
 Figure 8: Retailers shopped for facial skincare, 2023
- **Derma drives validity**  
 Figure 9: Dr. Shah and La Roche Posay Instagram video, 2023
- **Market predictions**  
 Figure 10: Total US sales and fan chart forecast of the facial skincare market, at current prices, 2017–27  
 Figure 11: Facial skincare category outlook, 2023–28
- **Opportunities**
- **Embrace customer life journey’s through “personalized” offerings**  
 Figure 12: Stripes menopausal skincare
- **Evolve occasion-based usage**

### 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: £3695 | \$4995 | €4400

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

Figure 13: Occasion-based approaches toward facial skincare, by gender and age, 2023

- **Treat purchases as a “skinvestment”**

Figure 14: Select attitudes and behaviors toward facial skincare, by generation, 2023

**MARKET SIZE AND FORECAST**

- **After years of growth, market expected to maintain but cool**

Figure 15: Total US sales and fan chart forecast of the facial skincare market, at current prices, 2017-27

Figure 16: Total US retail sales and forecast of facial skincare products, at current prices, 2017-27

Figure 17: Total US retail sales and forecast of facial skincare products, at inflation-adjusted prices, 2017-27

**SEGMENT PERFORMANCE**

- **Daily routines and skin concerns fuel growth**

Figure 18: Total US retail sales and forecast of facial skincare products, by segment, at current prices, 2017-27

Figure 19: Total US retail sales and forecast of facial skincare products, by segment, at current prices, 2017-27

- **The new face of anti-aging**

Figure 20: The Body Shop eliminates “anti-aging” language

**MARKET DRIVERS**

- **Democratization of claims and mass market innovation may create obstacles for higher-priced goods**

Figure 21: Percentage of US facial skincare formats launched with associated claims less than one year ago, by beauty price positioning, 2022-23

Figure 22: Joy Works by Kao exclusively in Dollar General, 2023

- **“Skinification” of wellness-adjacent categories could impact market**

Figure 23: Ritual’s HyaCera™ ingestible capsule, 2023

- **Price and convenience may overshadow eco-behaviors...for now**

**MARKET SHARE/KEY PLAYERS**

- **L’Oréal USA gains ground thanks to “derma” brands**

- **Garnier and Thayers cleansing: product expansion focused on skin types and concerns**

Figure 24: Garnier SkinActive Micellar Cleansing Water collection

**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

Report Price: £3695 | \$4995 | €4400

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

Figure 25: Thayers facial toner guide

- e.l.f wins with trendy collections at affordable price points**

Figure 26: multi-outlet sales, e.l.f. Cosmetics, rolling 52 weeks 2022 and 2023

Figure 27: e.l.f skincare collections

- Smaller brands see success with hydrocolloid acne patches**

Figure 28: Select multi-outlet sales acne treatment, by select companies, rolling 52 weeks 2022 and 2023

Figure 29: Acne treatment launches, by select brands, 2022-23

- Sales of facial skincare products by company**

Figure 30: Multi-outlet sales of facial skincare and anti-aging products, by leading companies, rolling 52 weeks 2022 and 2023

- Company/brand sales by segment**

Figure 31: Multi-outlet sales of facial anti-aging products, by leading companies and brands, rolling 52 weeks 2022 and 2023

Figure 32: Multi-outlet sales of facial cleansers, by leading companies and brands, rolling 52 weeks 2022 and 2023

Figure 33: Multi-outlet sales of facial moisturizers, by leading companies and brands, rolling 52 weeks 2022 and 2023

Figure 34: Multi-outlet sales of acne treatments, by leading companies and brands, rolling 52 weeks 2022 and 2023

Figure 35: Multi-outlet sales of lip balm, by leading companies and brands, rolling 52 weeks 2022 and 2023

### COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- Dupe culture thriving within the facial skincare segment**

Figure 36: Dupeshop

Figure 37: Dupe recommendations on TikTok, 2023

- Distribution evolves for accessibility and visibility**

- Premium skincare for men appeals**

Figure 38: Lumin skincare rebrand, April 2023

Figure 39: JB Skrub, 2023

Figure 40: Biotherm Skin Diag powered by AI now available for men

- Dermatologists: the new "skinfluencer"**

Figure 41: CeraVe's "Derms with signs" parade, New Orleans, 2023

Figure 42: Dr Whitney Bowe Beauty's Skin Cycling Program Kit

Figure 43: Coty relaunches philosophy brand with a stronger derma focus, 2023

### 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.

- **Professional treatments continue to inspire NPD**  
 Figure 44: Clearstem Skincare BOUNCEBACK™ "No Botox Serum"  
 Figure 45: Face Gym Acne Light Shot  
 Figure 46: Viktor Michael Injection Intervention™ Duo Pre and Post Injection Care Bundle

**THE FACIAL SKINCARE CONSUMER – FAST FACTS**  
**PRODUCT USAGE AND SPEND**

- **Facial moisturizers and cleansers become “essential”**  
 Figure 47: Product usage, 2021-23
- **5+ step routines becoming more common**  
 Figure 48: Product usage, repertoire, 2022-23  
 Figure 49: Product usage, repertoire, by generation, 2023  
 Figure 50: Honest B.Y.O.B. Build your own bundle subscription
- **Boost core product usage through skin-type messaging**  
 Figure 51: Select product usage, by skin type, 2023
- **Educate on daily usage to encourage spend**  
 Figure 52: Product spend, 2023  
 Figure 53: La Roche Posay Nutritic Lip Balm
- **\$16-30 is a sweet spot for men’s essentials**  
 Figure 54: Facial cleanser and facial moisturizer category spend, by gender, 2023
- **Acne treatments and rinse-off masks appeal to cash-strapped consumers**  
 Figure 55: Select product usage, by household income, 2023  
 Figure 56: innisfree Retinol Cica Overnight Patches  
 Figure 57: Peach Slices affordable Snail Rescue Intensive Wash-Off Mask

**CHANGES IN ROUTINE**

- **Save consumers time with easy-to-use offerings**  
 Figure 58: Time spent on facial skincare routine compared to a year ago, 2023
- **Connect category to health concepts for longevity of use**  
 Figure 59: Reasons for spending more time on facial skincare routine compared to a year ago, by gender, 2023  
 Figure 60: “Stress Affects Your Skin” online merchandising at Sephora, 2023
- **“Romanticizing” routines through self-care themes**  
 Figure 61: Spending more time on facial skincare routine to relax, by gender and age, 2023  
 Figure 62: Gryt Skincare for tweens and teens, 2023
- **Money may be a factor in time-reduced routines**

**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 63: Reasons for spending less time on facial skincare routine in the last year, 2023

**DEFINING QUALITY IN FACIAL SKINCARE**

- Quality attributes must be proven**  
 Figure 64: Defining quality in facial skincare (Ranked – up to three), 2023
- Proven ingredients and claims appeal to older generations**  
 Figure 65: Defining quality in facial skincare (any rank), by age, 2023  
 Figure 66: ROC focuses on 30-50 age group with Multi Correxion range, 2022
- Take sensitive skin needs to the next level for multicultural users**  
 Figure 67: Defining quality in facial skincare (Any rank), by select race and Hispanic origin, 2023

**DEFINING VALUE IN FACIAL SKINCARE**

- Brand-level trust as important as product attributes**  
 Figure 68: Defining value in facial skincare (ranked – up to three), 2023
- Women’s higher usage in category sees price focus, males spread in value definition**  
 Figure 69: Defining value in facial skincare (any rank – up to three), by gender and select generation, 2023
- Secondary convenience attributes may influencer parents further**  
 Figure 70: Defining value in facial skincare (any rank – up to three), by parental status, 2023

**ATTITUDES AND BEHAVIORS TOWARD FACIAL SKINCARE**

- Embrace skin health at every lifestage**  
 Figure 71: Select attitudes and behaviors toward facial skincare, 2023  
 Figure 72: Number of US facial skincare launches with skin-health-related language, 2018-22  
 Figure 73: Ulta’s “Skinfatuation” online merchandising for beauty lifestages, 2023
- Keep it simple for routine minimalists**  
 Figure 74: Select attitudes and behaviors toward facial skincare, by gender, 2023  
 Figure 75: Pretty Boy recovery gel cream moisturizer
- “What’s old is new” occasion-based direction can entice new users**

**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: £3695 | \$4995 | €4400

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

Figure 76: Occasion-based approached toward facial skincare, by gender and age, 2023

Figure 77: Futurewise slugging system, 2023

- **Treat skincare as an investment**

Figure 78: Select attitudes and behaviors toward facial skincare, by generation, 2023

Figure 79: STELLA by Stella McCartney skincare

**TRADE-OUT ATTITUDES**

- **Stock-up mentalities exist among most...**

Figure 80: Trade-out attitudes, 2023

Figure 81: Good Molecules daily moisturizer upgrade, 2023

- **...but dupes and multifunctional products appeal to younger consumers**

Figure 82: Select trade-out attitudes, by age, 2023

Figure 83: Magic Molecule's "The Solution"

- **Product usage education can go beyond traditional timestamps**

Figure 84: Skin Rocks by Caroline Hirons "use this much" cap

Figure 85: Select trade-out attitudes, by gender, 2023

**RETAILERS SHOPPED**

- **Mass merchants still key in shopping experiences**

Figure 86: Retailers shopped for facial skincare, 2023

- **Options, options, options**

Figure 87: Retailers shopped, by gender and age, 2023

- **DEI strategies can likely influence purchase channels**

Figure 88: Select retailers shopped, by select race and Hispanic origin, 2023

- **Spotlight on Ulta Beauty**

Figure 89: Ulta Beauty's AAPI-owned and founded brands digital merchandising strategy

- **Think beyond a consumer's financial situation**

Figure 90: Select retailers shopped, by financial situation, 2023

Figure 91: SpaceNK enters Walmart

**APPENDIX – DATA SOURCES AND ABBREVIATIONS**

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

**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.

APPENDIX – THE MARKET

Figure 92: Total US sales and fan chart forecast table of the facial skincare market with worst and best case forecasts, at current prices, 2022-27

Figure 93: Average annual household spending on facial skincare products, 2017-22

Figure 94: Total US retail sales of facial skincare products, by segment, at current prices, 2020 and 2022

Figure 95: Total US retail sales and forecast of facial anti-aging products, at current prices, 2017-27

Figure 96: Total US retail sales and forecast of facial anti-aging products, at inflation-adjusted prices, 2017-27

Figure 97: Growth of multi-outlet dollar sales and volume sales of facial anti-aging products, 2017-22

Figure 98: Total US retail sales and forecast of facial cleansers at current prices, 2017-27

Figure 99: Total US retail sales and forecast of facial cleansers, at inflation-adjusted prices, 2017-27

Figure 100: Growth of multi-outlet dollar sales and volume sales of facial cleansers, 2017-22

Figure 101: Total US retail sales and forecast of facial moisturizers, at current prices, 2017-27

Figure 102: Total US retail sales and forecast of facial moisturizers, at inflation-adjusted prices, 2017-27

Figure 103: Growth of multi-outlet dollar sales and volume sales of facial moisturizers, 2017-22

Figure 104: Total US retail sales and forecast of acne treatments, at current prices, 2017-27

Figure 105: Total US retail sales and forecast of acne treatments, at inflation-adjusted prices, 2017-27

Figure 106: Growth of multi-outlet dollar sales and volume sales of acne treatments, 2017-22

Figure 107: Total US retail sales and forecast of lip balm, at current prices, 2017-27

Figure 108: Total US retail sales and forecast of lip balm, at inflation-adjusted prices, 2017-27

Figure 109: Growth of multi-outlet dollar sales and volume sales of lip balm, 2017-22

Figure 110: Total US retail sales of facial skincare products, by channel, at current prices, 2017-22

Figure 111: US supermarket sales of facial skincare products, at current prices, 2017-22

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



## Facial Skincare - US - 2023

Report Price: £3695 | \$4995 | €4400

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

MINTEL

Figure 112: US drugstore sales of facial skincare products, at current prices, 2017-22

Figure 113: US sales of facial skincare products through other retail channels, at current prices, 2017-22

### APPENDIX—THE CONSUMER

Figure 114: Product usage (NET), by gender, 2023

### 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



## 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)**.