

Sun Savvy:

Global Sun Care Trends



NielsenIQ

Sun Care's Essential Role



NIQ

Sun Care isn't only about beauty; sun protection products also play a vital role in the health of the global population. The World Health Organisation relates the rising incidences of skin cancers over the past decade to UV exposure, stating that **4 out of 5 cases of skin cancer could be prevented with proper protection.**

Sun Care is a **highly variable category by region**, not only due to weather but the importance put on sun protection education and contrasting regional views on tanning; some cultures viewing a tan as desirable or attractive, while others place greater emphasis on avoiding the sun for health or cosmetic reasons.

In the social media landscape, misleading or often false claims can go viral and influence consumer behaviour. In the past year, popular videos on TikTok have questioned the role of sun care products, resulting in scepticism from younger consumers. Brands and trusted advisors play an essential role in **ensuring consumers have accurate information to make informed health decisions.**

Source: World Health Organisation <https://www.who.int/news-room/questions-and-answers/item/radiation-protecting-against-skin-cancer>

Source: Skincancer.org <https://www.skincancer.org/skin-cancer-information/skin-cancer-facts>

Source: Npr.org <https://www.npr.org/sections/shots-health-news/2024/06/17/nx-s1-5002030/sunscreen-tiktok-misinformation-melanoma>

Perceptions & Performance

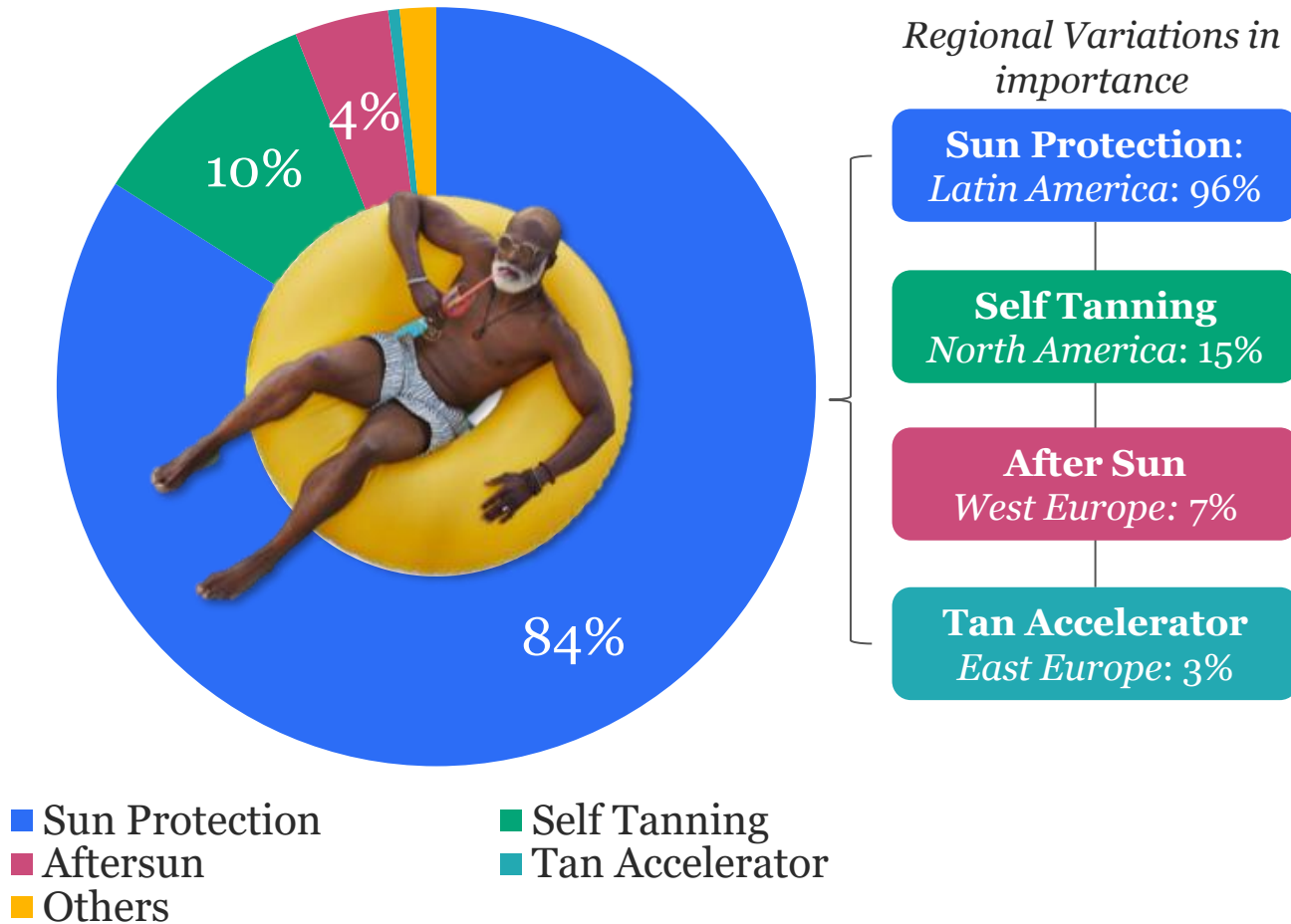
How does the role of sun care differ between regions and where are the emerging opportunities?



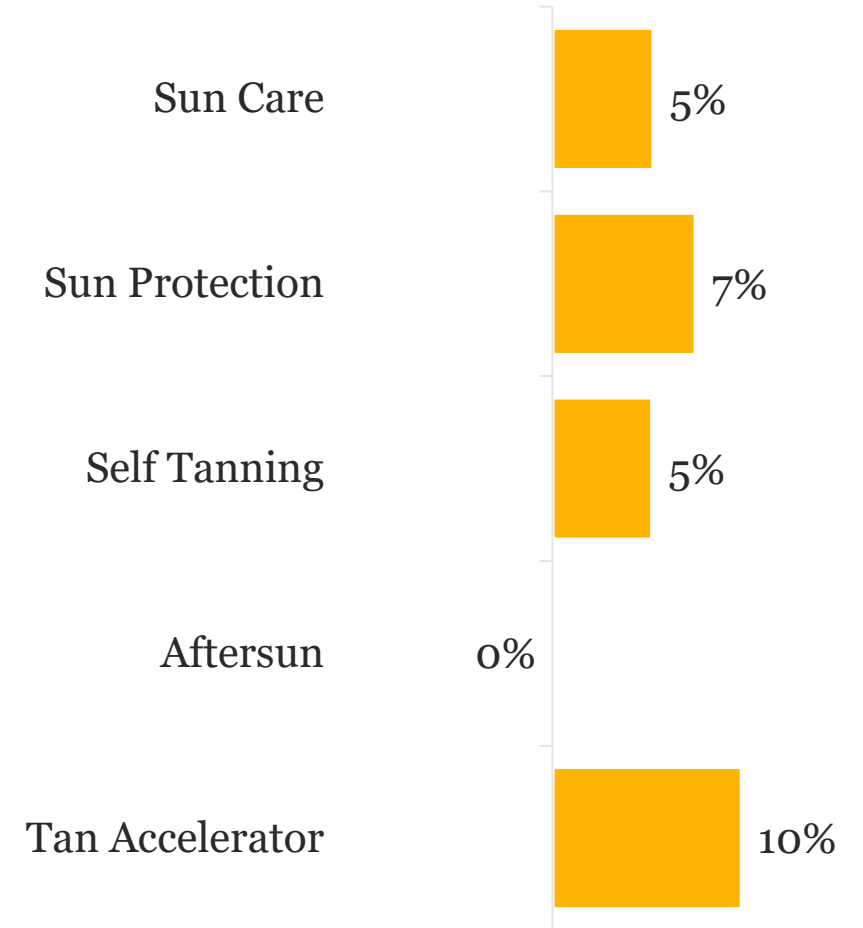
The Global Sun Care Landscape

Sun Care sales are shining across Africa Middle East, East Europe and Asia Pacific but stuttering in West Europe

Sun Care – Share of Value Sales (Global)



Value % Chg vs YA



Source: 53 Markets – Latest 52 Weeks MAT Feb 2025 – NIQ Global Strategic Planner, NIQ Retail Measurement, NIQ Omnishopper Panel (US, CA, AU), NIQ Omnisales (DE, IT, FR, ES, GB), China not included in sub sectors

Sun Care Conversations: Regional Views on Sun Care Performance

Consumer perceptions and knowledge of sun care shape different interactions with the category across the globe

+7% North America

Sunscreen is being re-invented by Gen Z as more than just sun protection, but a preventative anti-aging powerhouse that is an essential part of the daily beauty routine. Consumers are expecting more from their sun care products, looking for the inclusion of effective skin care ingredients, as well as new formats and packaging innovations.

Anna Mayo



+3% West Europe +17% East Europe

Sun care is a highly seasonal category mainly driven by weather. Poor weather compared to the previous year in France, Germany and the UK partially explains some of slowed momentum declines and penetration losses across the category in Europe in 2024. Consumers are also shifting into multi-functional makeup & skincare products including SPF benefits.

Kevin Chen



+1% China

Sun care has penetrated daily lives, with notable performance in both adult and baby/kids moisturizers. It holds high seasonal importance in spring for summer preparation, but in 2024 experienced the fastest growth in the smallest season, Q4 (+25%). Sun care is now increasingly combined with other skin functions, especially brightening & soothing repair.

Amber Yu



+8% Latin America

Skin care buzz has boosted facial sunscreen adoption as an important anti-aging step in daily routines. Mainstream and low-tier brands have enhanced accessibility, while premium products have a lower share, as consumers prefer function over prestige and often choose lower SPF to stay tanned. Body sunscreen is highly seasonal, mainly used to prevent burns and skin cancer during outdoor activities

Victoria Colonnese Piffer



+40% Africa Middle East

In this sunny region, sun care demand is on a strong upward trajectory, achieving double-digit growth in Egypt, Türkiye, the UAE, and KSA over the past two years. Organic growth is notable, especially in high-inflation areas like Egypt and Türkiye. Affordable brands and local challengers are gaining momentum, making the sun care market hotter than ever

Liza Ghaly



+13% Asia Pacific (excl China)

Sun care is a fast-growing category with >20% value growth in India, Indonesia, and South Korea and double-digit growth in Singapore and Thailand. The category is witnessing format innovation, like spray and gel formats in India, sport variants in Singapore, multi-benefit sun care like acne prevention in Indonesia, and tone-up sunscreen in Korea.

Rujuta Joshi

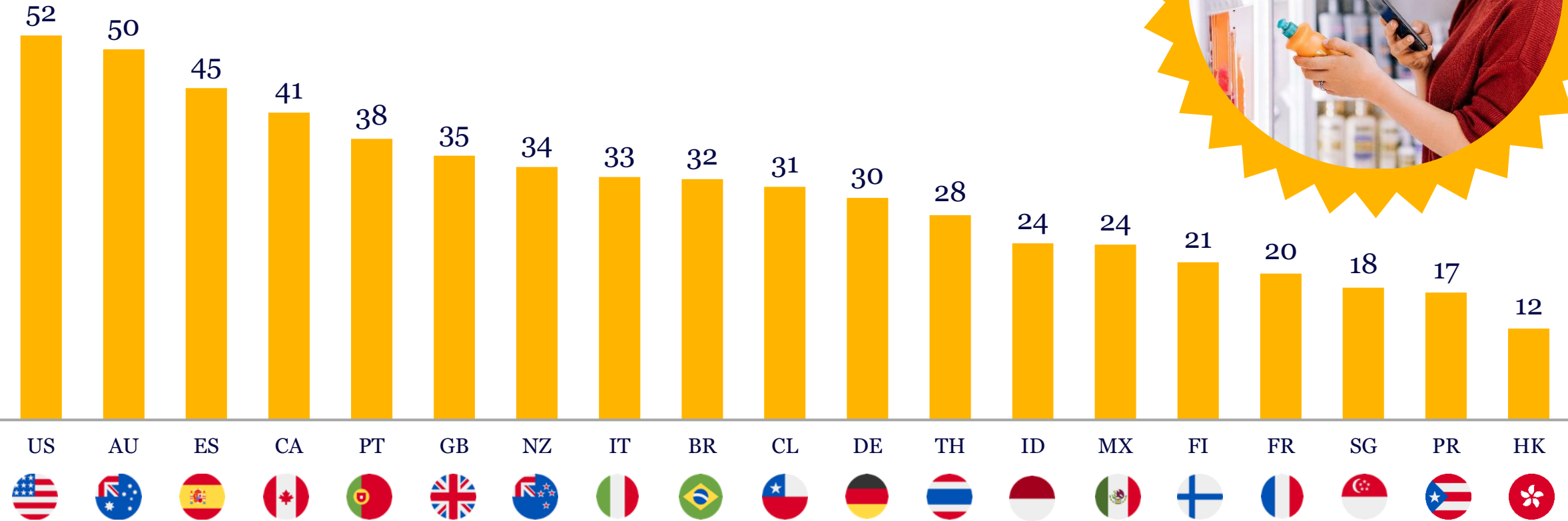


Source: 52 Markets – Latest 52 Weeks MAT Feb 2025 – NIQ Global Strategic Planner, NIQ Retail Measurement, NIQ Omnishopper Panel, NIQ Omnisales, China Online & mass offline 2024

Sun Care Penetration by Country

The importance and role of sun care varies across markets; divided by weather, affluency, culture and levels of sun protection education

Sun Care Penetration by Country – MAT TY

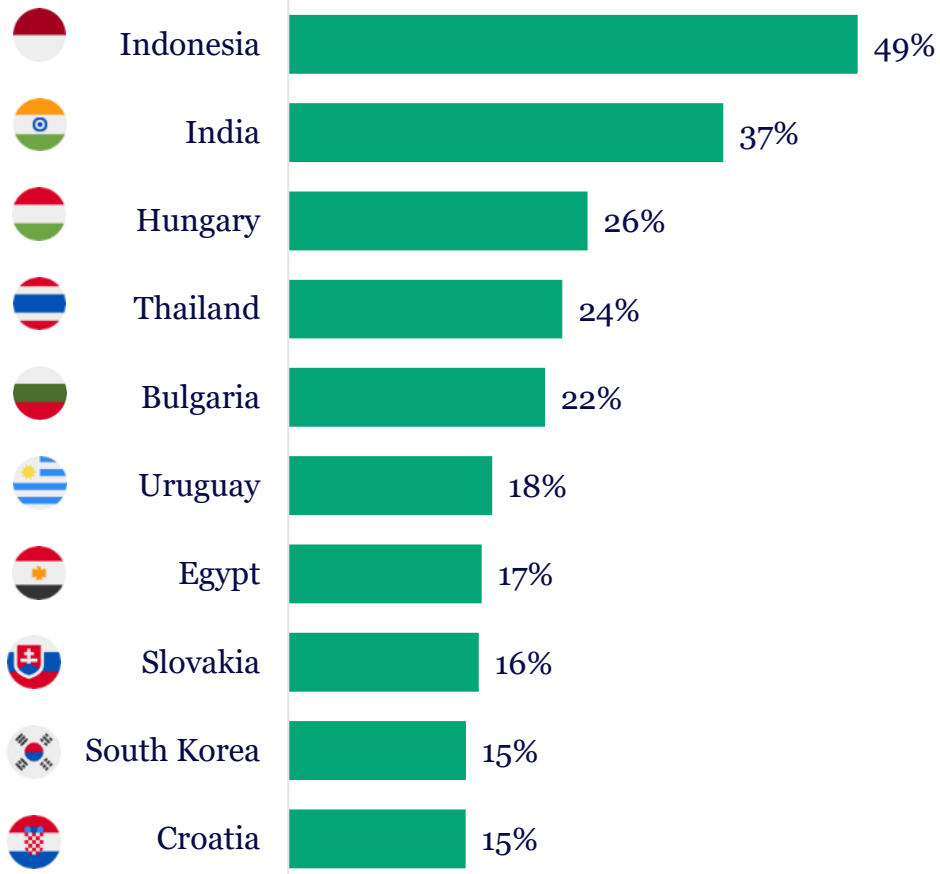


Source: NielsenIQ Consumer Panel Latest 52 Weeks Feb 2025 – Omnishopper panel Feb 2025 (US, AU, CA)

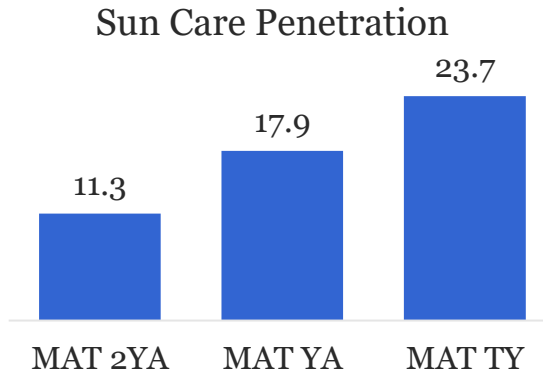
Where Sun Care is Shining: The Markets Driving Category Growth

Indonesia leads a growing market across Asia Pacific as category awareness and innovation continues to accelerate

Sun Care Unit % Chg vs YA



Indonesia's Booming Sun Care Market



Brands	Share of Trade
azarine®	20% ↑
Wardāh	20%
emina <small>BORN TO BE LOVED</small>	8%



Trish Victoria
Manager - NIQ

Indonesia's sun care market has accelerated in the past two years, adding an additional Rp 382B (\$82B USD) in value over the past 12 months. The category's growth can be attributed to increased awareness about the importance of sun care, innovation in the category and the expansion of online stores and e-commerce platforms like Shopee and Lazada increasing visibility and availability.

Brands succeeding in the market have met a wide range of local needs and preferences that not only caters to Indonesian climate but also offers formulations suitable for all skin types, such as Wardah's all-halal beauty range, helping local brands to outpace international brands.

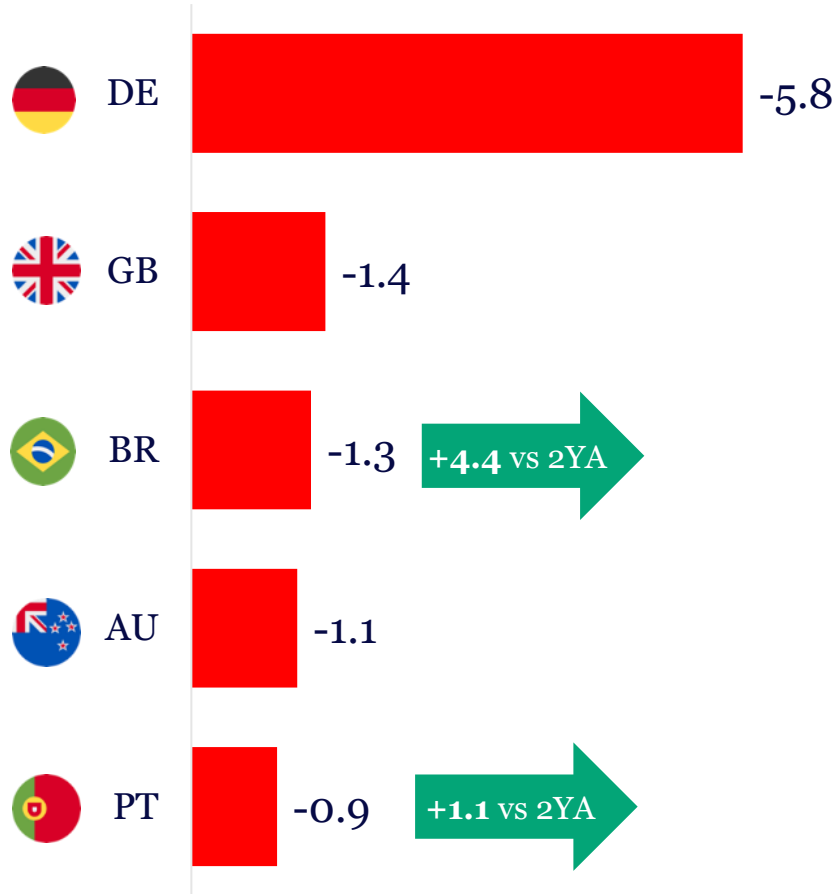
Source: NIQ Consumer Panel MAT Feb 2025 vs YA – NIQ Retail Measurement MAT Feb 2025 vs YA

Where Sun Care has Slowed: Markets Experiencing Slowing Momentum

Disappointing summer weather contributed to a slower season for sun care across Western Europe

Sun Care Penetration Chg vs YA

Latest 12 months – Feb 2025



Germany's Summer Stutter in Sales

Sun Care Value Sales – Germany



Madlen Gerleit
Analytic Consultant
NielsenIQ Germany

The Sun Care 2024 season in Germany suffered from **worse weather** compared to the previous year, with lower temperatures and instances of heavy rain and flooding in parts of Baden-Württemberg and Bavaria in June contributing to **lost shopper occasions** for Sun Protection. Throughout the rest of 2024, the category performed positively with **tan accelerators gaining momentum**, emphasising how important the weather during the peak period is for sales. Although Sun Care experienced a slowdown, **Facial Skincare with SPF sales growth outpaced the overall category**, highlighting the trend of sun care expanding into other areas of beauty.

Source: NIQ Consumer Panel MAT Feb 2025 vs YA – NIQ Retail Measurement MAT Feb 2025 vs YA

Sun Care's Emerging Market Opportunities

Markets with a smaller sun care relative category size exhibiting unit growth mark key opportunities



Source: NIQ Strategic Planner Global Feb 2025 – NIQ Omnishopper Panel Feb 2025 – NIQ Omnisales Feb 2025 – NIQ RMS Feb 2025 | Flag positions indicate location on chart – ID, IN, BR & IT illustrative positioning (points beyond axis bounds)

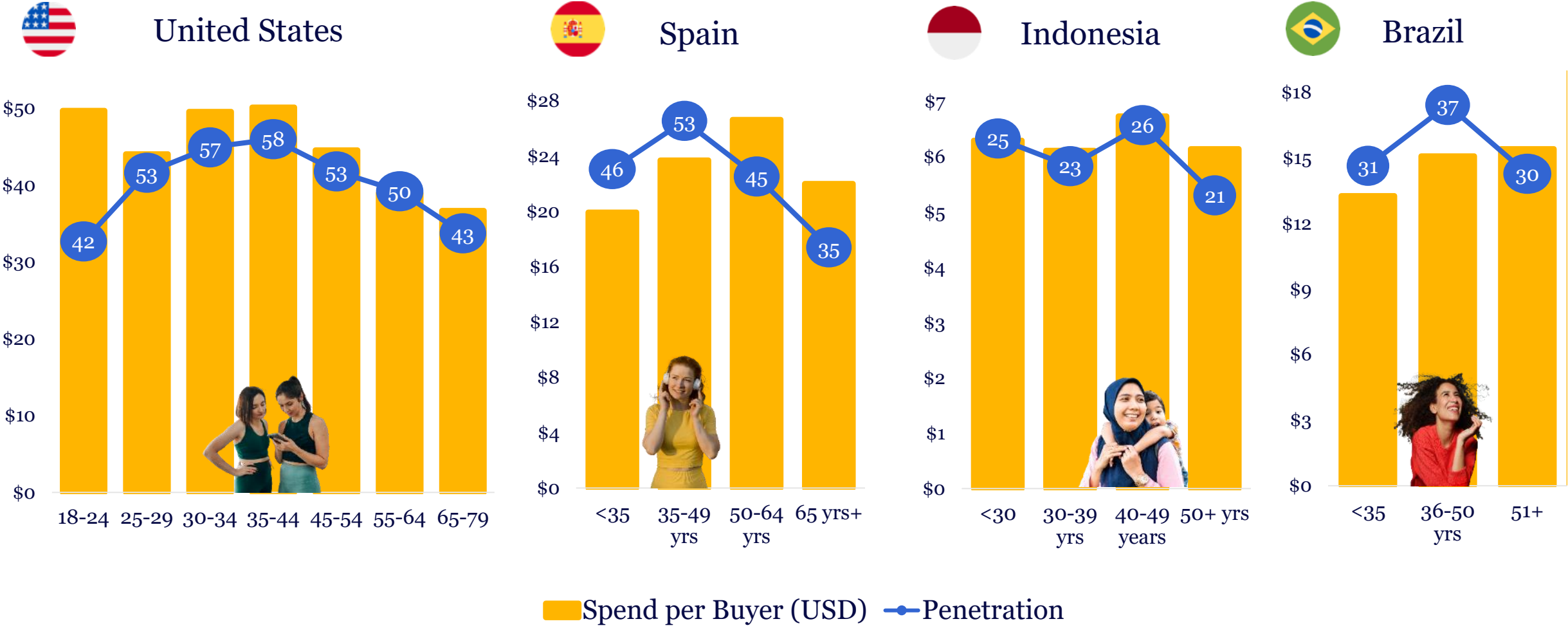
Demographic Drivers

Who is the Sun Care Consumer?



Millennials Drive The Greatest Sun Care Engagement

Typically, penetration from consumers in the eldest age bracket is lowest as social outdoor activity reduces

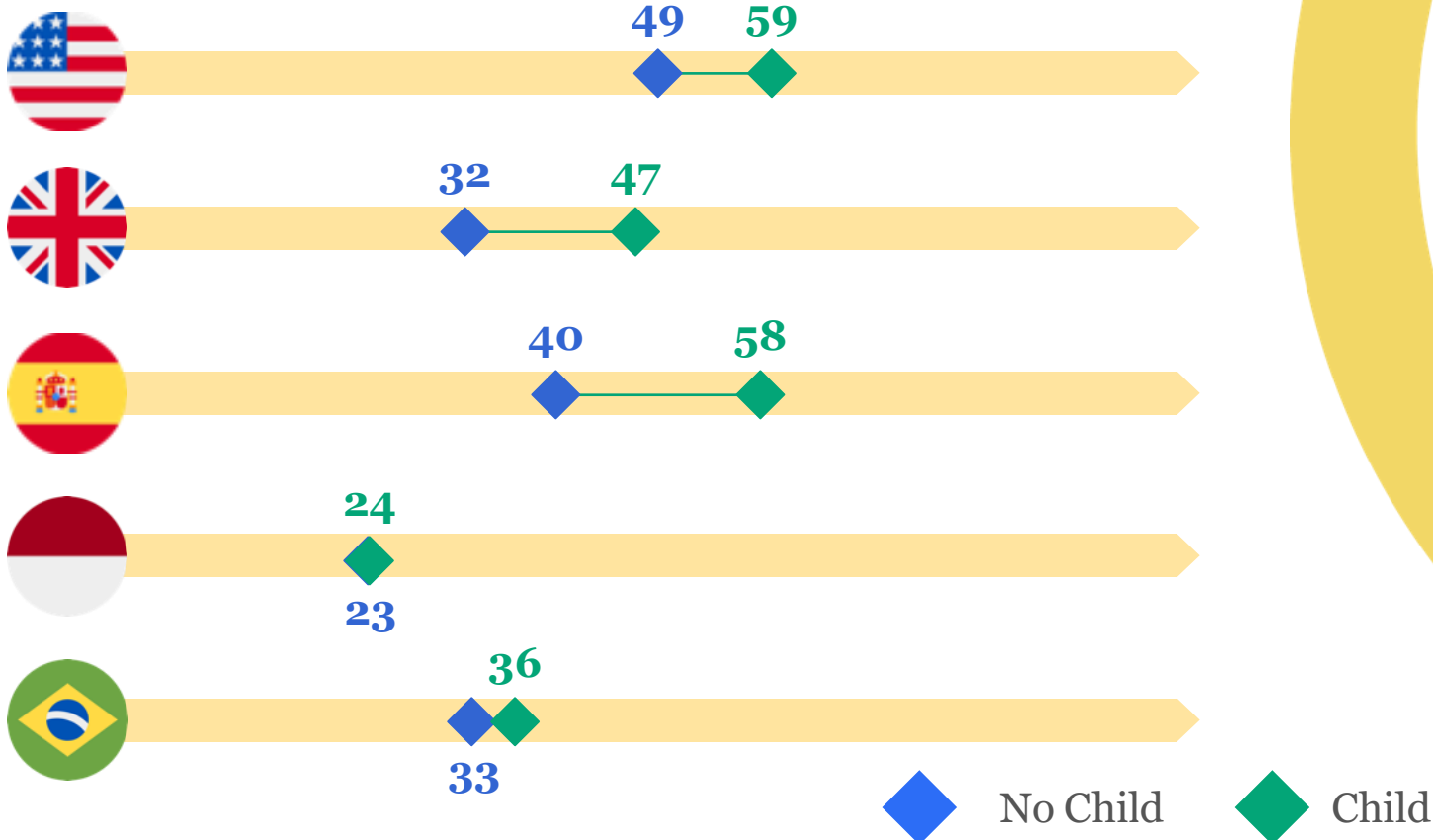


Source: NielsenIQ Consumer Panel – 52 Weeks ending Feb 2025 – US Omnishopper Panel Latest 52 weeks 28th Feb 2025

Children are often the catalyst driving household Sun Care Penetration

Sun care penetration in households with children is **8.6 points higher** than in households without children (16 markets avg)

Sun Care Penetration
Households with Children vs households with No Children



Source: NielsenIQ Consumer Panel / NIQ Omnishopper Panel Data – 52 weeks ending Jan 2025



Affluency Gaps Divide Sun Care Adoption

Affordable products can drive recruitment opportunities

Sun Care penetration in the lowest affluency households is **10.7pts** lower than the highest affluency households (17 markets avg)

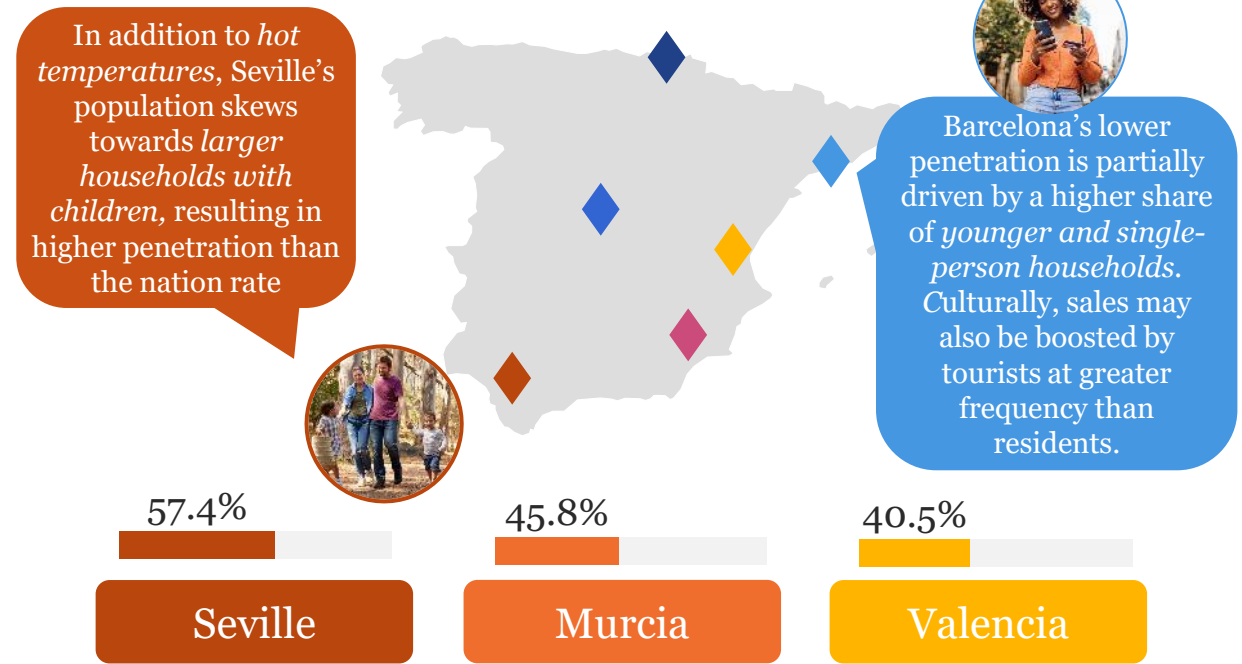
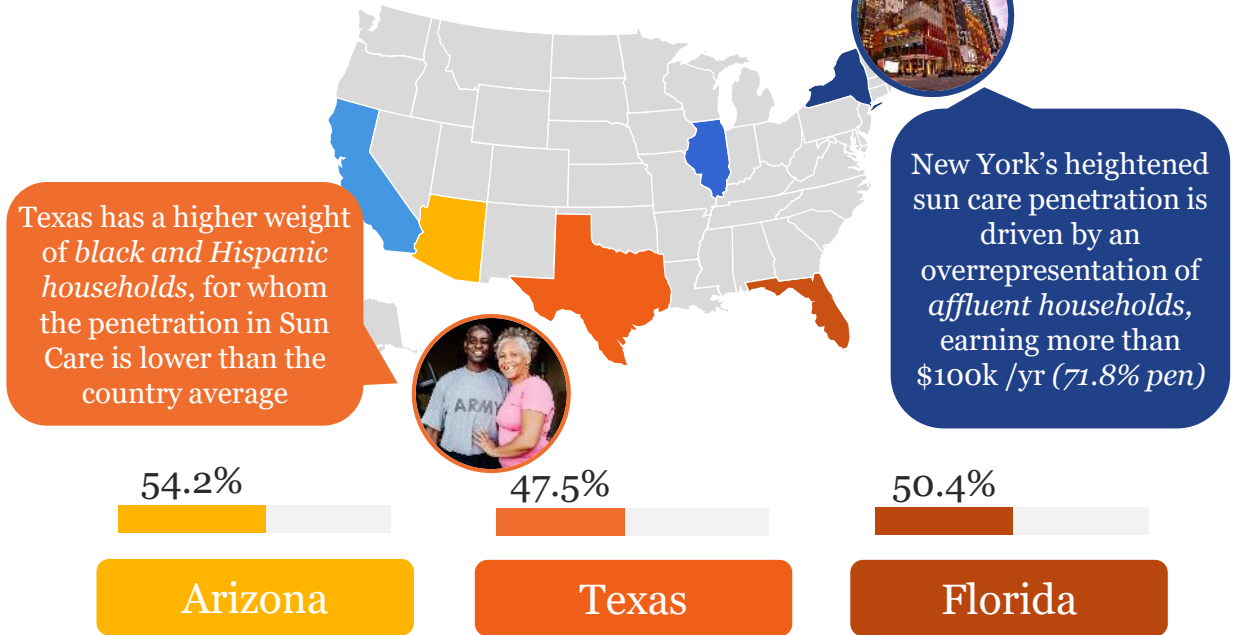
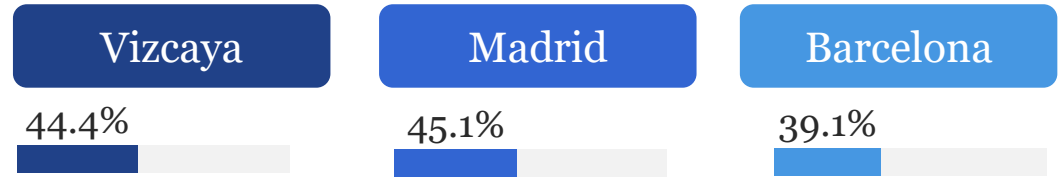
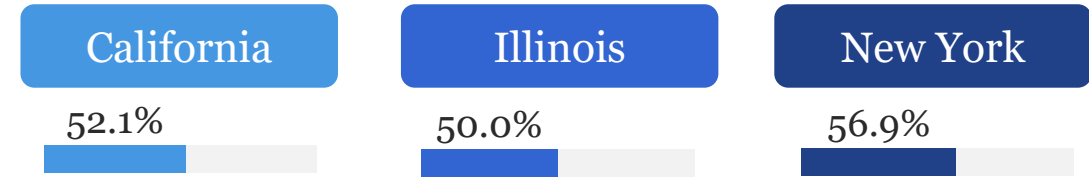
Sun Care Penetration Affluency Groups



Source: NielsenIQ Consumer Panel / NIQ Omnishopper Panel Data – 52 weeks ending Feb 2025 | SES = Socioeconomic Status | US Highest >\$100k, Lowest <\$25k | EU Highest = AB, Lowest = DE

The Result? Sun Care Adoption Patterns Aren't Simply Defined By Temperature

In addition to weather, differences in demographics and affluency are contributing factors to regional variations



Source: NielsenIQ Consumer Panel – 52 Weeks ending 23rd Feb 2025 – US Omnishopper Panel Latest 52 weeks 22nd Feb 2025

Sun Seasonality

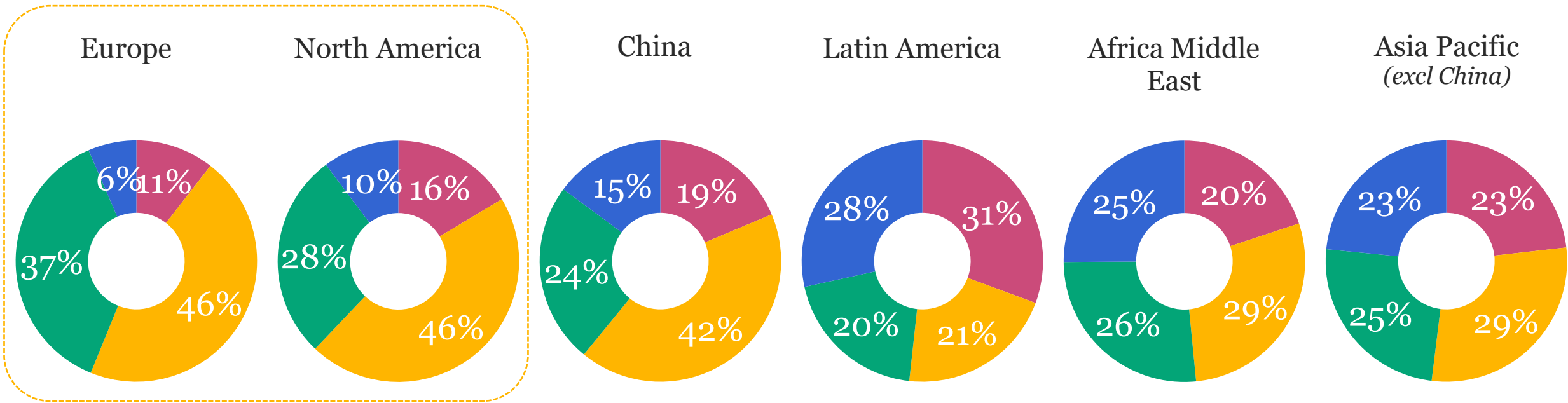
Do sales follow the summer seasons or is the category becoming year-round?



Seasonality Drives Sales, Most Prominently in The West

In Europe, the typically hotter months during Q2 and Q3 drive over 3 quarters of annual value – particularly in tourism hotspots

☀ Most Seasonally Driven Regions



% of 2024 sales between Q2 & Q3



98% 95% 94%

■ Q1 2024 ■ Q2 2024 ■ Q3 2024 ■ Q4 2024

Source: NIQ SPG Weekly, NIQ Omnishopper panel, NIQ Omnisales, China omni – Full Year 2024. **Europe** = Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, Ukraine, United Kingdom **Africa Middle East** = South Africa, UAE, Saudi Arabia, Turkey **Asia Pacific** = Australia, China, Hong Kong, India, Indonesia, South Korea, Malaysia, New Zealand, Singapore, Taiwan, Thailand, Vietnam **North America** = United States, Canada **Latin America** = Argentina, Brazil, Chile, Colombia, Mexico, Peru, Puerto Rico, Uruguay, Venezuela



Seasonal Sales Supported by Promotions

Sun Care is highly promoted category, particularly during peak seasons where the category gains precedence on store shelves

Europe – Full Year 2024

28% of Sun Care unit sales in Europe were sold on promotion in 2024
(33% globally)



Out of Season - September to March
(17% of annual unit sales)



In Season - April to August
(83% of annual unit sales)



17%
of units sold on promo



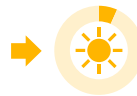
30%
of units sold on promo

Avg monthly promo support is **10x** higher during the summer season

What makes way for Sun Care on the shelf during peak season? (Spain)



0.6% share of promo TDPs



6.7% share of promo TDPs

Fragrances	-3.1%
Facial Treatment	-1.4%
Body Care	-1.1%
Body Hygiene	-0.7%
Make Up	-0.7%

Sun Care's Education Push

Brands are promoting education for **year-round** sun care usage

NIVEA - #SPF365

NIVEA nivea SPF is a year-round essential... even when it's not summer #SPF365

Nivea's #SPF365 campaign promoted daily use of sun care, inviting influencers to their labs to learn about and share the role of sun protection in daily skincare routines all year round.

Fixderma - #HarDinSunScreen (Sunscreen Every Day)

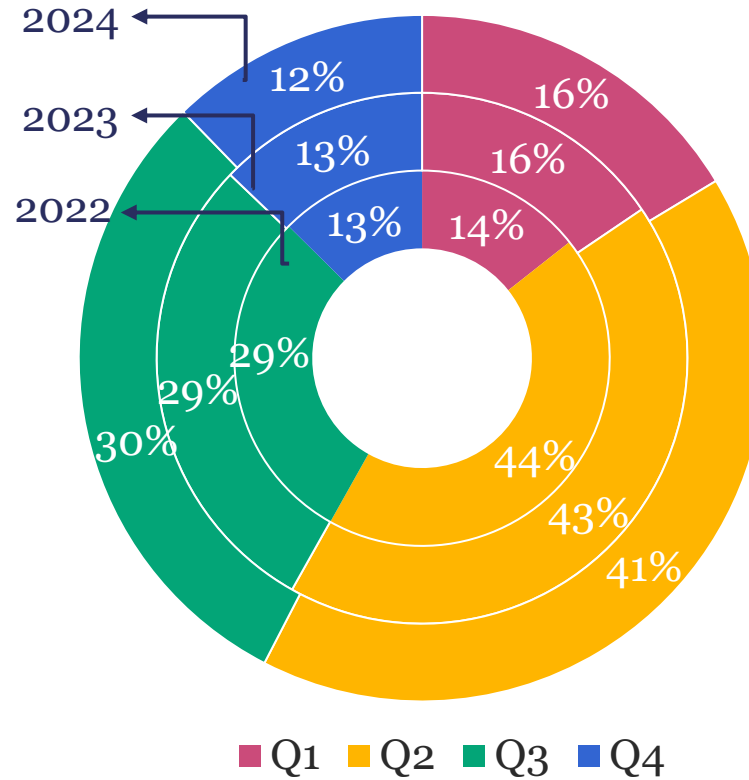


Fixderma's #HarDinSunscreen campaign launched in collaboration with the Delhi Capitals cricket team, aiming to debunk misconceptions including that sunscreen is only necessary for specific occasions.

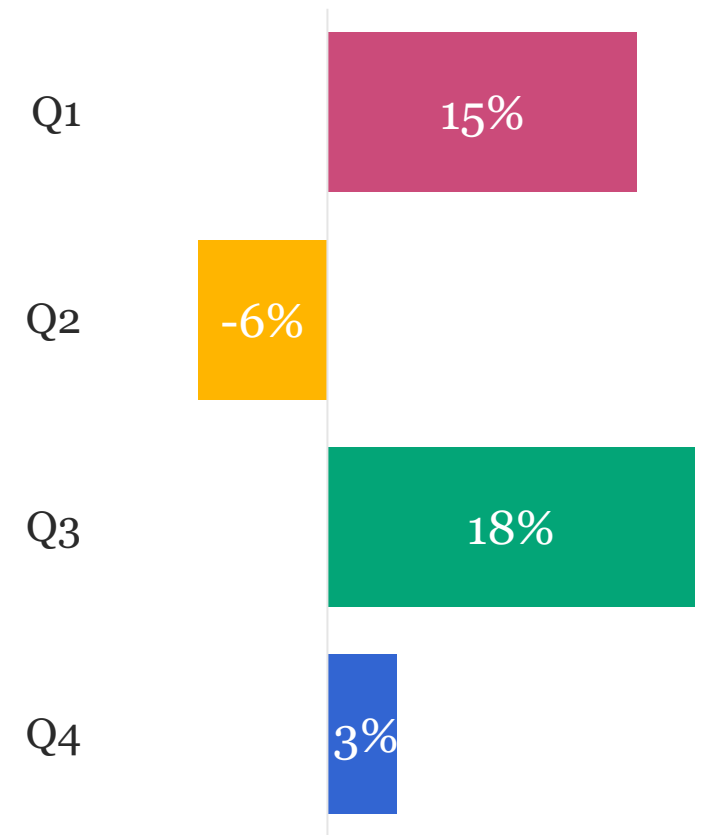
Is it Working?

Sales are slowly trending towards a more even annual distribution – but changing weather also contribute to shifting purchasing patterns

% Sun Care Sales by Season
Global



Europe - Value % Chg vs YA



Source: NIQ SPG Weekly, NIQ Omnishopper panel, NIQ Omnisales – Full Year 2024 – 50 Global Markets (excl China)

Future Forecasts

What's next for the sun care category



What Sets High Performing Sun Care Brands Apart?


Winning sun care brands include those differentiating with formats, formulations and shades

Market Share Chg – Latest 52 Weeks vs YA



 **Kahi**
+3.2 pts MS

 **Mistine**
+1.1 pts MS

 **Ollie**
+1.0 pts MS

 **Vacation**
+0.4 pts MS

 **Eucerin Sun**



Kahi Airy Fit Sun Stick

*KAHI, as well as competitor brand CURE, achieved significant growth in Korea, driven by their **premium sun stick** products.*



*Mistine is known for affordable yet high-quality products. The brand's growth is rooted in **innovation**, tackling barriers to daily use and catering to needs including waterproof and sweat-resistant formulas.*



Ollie Tinted Sunscreen Stick SPF 95

*One of Ollie's popular products is the Tinted Stick, **available in 6 shades**, offering medium coverage, long lasting and SPF 95.*



Vacation Classic Whip - SPF 30 Sunscreen Mousse

*Vacation's sun care range includes **format innovation** including the viral Classic Whip Sunscreen Mousse that brings novelty to the category.*



Eucerin Sun

*Eucerin Sun was a 2023 Breakthrough Innovation winner, creating a new value opportunity by expanding into sun care with a **targeted** line of products to meet **unique skincare needs** which had historically not been met by mass targeted sun care brands*

Source: Korea NIQ eCom, Facial sun care=100%, Value Share(%), YEP=DEC24, China NIQ NielsenIQ offline RMS 2412R, Brazil NIQ Retail Measurement ST, MAT 23.02.25, US Omnishopper Panel, MAT 25.01.25

The Next Evolutions in Sun Care

Sun Care's scope is expanding as research advancements and demand from heightened sun education fuels innovation



Tech Advancements

Technology evolutions are changing approaches to sun care; **wearable devices** such as **SunSense's** UV sensor monitor sun exposure, while other devices mimic natural sunlight.

The Light Therapy sector is worth **\$44.7m** including **Wake Up Light** & **Bright Light** segments, which account for 67% of the category. Advancements in this sector continue with consumers exploring products including **SAD Lamps** to combat seasonal affective disorder during winter months.



The Sun-ification of Beauty

Sun Care is expanding beyond the traditional category, with the rate of innovation from **skin care and makeup products with SPF** accelerating and attracting popularity from consumers.

Multi purpose moisturisers or daily use makeup products are **convenient routes to everyday SPF adoption** for consumers looking to minimize the steps of their routines or avoid the feeling of a **heavy face** from multiple products.



Format Evolution

Cream, Liquid & Spray formats dominate sun protection sales globally, but solid, multi-purpose and powder formats outpace category growth.

In one of beauty's foremost innovating markets, South Korea, **sun sticks** are the format with momentum accounting for 18% of value in 2024. Another format innovation from the region catching the eye on TikTok is **sun protection patches**, enhancing convenience with all-day protection without the need for reapplication.

Steps to Shine Bright in Sun Care

Continue to promote consumer education and advance innovations to ensure future of sun care shines bright

Forecasting for the Future

Sun Care remains a highly reactive category to forecast, with dynamics in the last 5 years shifting due in part to global weather trends with record temperatures and extreme weather events, as well as disruptions to travel and holidays following lockdowns and economic constraints.

Promote Sun Safety

Sun safety education is key to expanding the category and unlocking year-round usage beyond key summer moments. Work with influencers, dermatologists and other trusted advisors to ensure consumers have the correct information to make informed decisions.

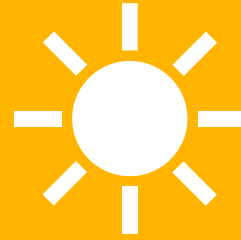
Expand Access & Adoption

The adoption of sun protection has significant gaps across consumer groups. Ensure affordability within the category for accessibility to consumers from lower socioeconomic statuses and expand adoption amongst the oldest & youngest consumer groups.

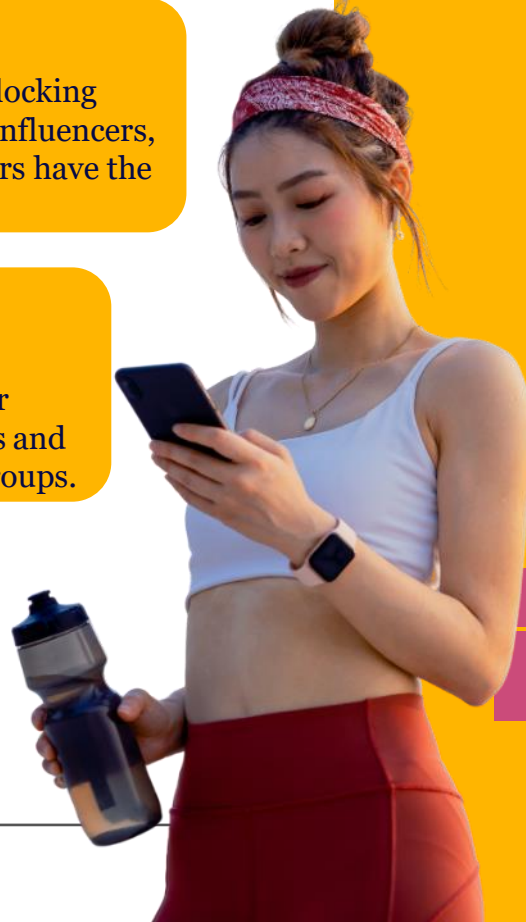
Excite with Innovation

Convenient on-the-go formats, formulations suitable for varied climates and multi-function products that fit into consumer's daily lives will be key to recruiting new buyers into the category and encouraging regular usage.

Let us know if this report brought some sunshine to your day...



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0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied