

# Suns CREEN

July 2026 / Sunscreen report



THE  
BEAUTY  
INSIGHTER

The next evolution of sunscreen

*“Is defined by HOW SEAMLESSLY it integrates into daily care habits.”*



# Index

## *1. Market context*

- 1.1 Market data
- 1.2 Consumer insights

## *2. Brand archetypes*

- 2.1 The clinical expert
- 2.2 The measured innovator
- 2.3 The everyday optimist
- 2.4 The thoughtful sophisticate

## *3. Emerging trends*

- 3.1 Invisible textures
- 3.2 Tinted protection
- 3.3 Clean reformulation

## *4. Innovations*

- 4.1 Application formats
- 4.2 Materials and finishes
- 4.3 Shapes and ergonomics
- 4.4. Refill and modularity

## *5. Promotion*

- 5.1 Scientific education
- 5.2 Cultural influence
- 5.3 Contextual activation



# *1. Market context*

The category's next growth cycle depends on its ability to shift from awareness metrics to behavioral consistency.

*1.1 Market data*

*1.2 Consumer insights*

# 1.1 Market data

Asia-Pacific leads volume and skincare-led SPF innovation, while West grow through higher protection expectations, pharmacy trust and premium formulation standards.

## Europe — leading market in 2025

Europe represents the largest regional share, with 29.56% of the global sun care products market in 2025. Growth is shaped by pharmacy trust, safety standards and premium dermo-cosmetic positioning.

## Asia-Pacific — innovation and expansion engine

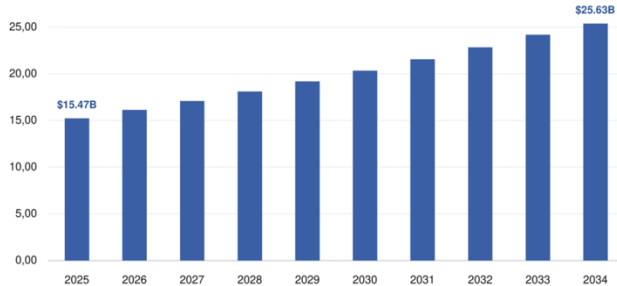
Asia-Pacific remains a key growth engine, supported by skincare-led routines, SPF integration into beauty, and rising adoption across China and other fast-growing markets.

## North America — mature trust-led market

North America reached \$2.98B in 2025, supported by high skin-health awareness, dermatologist influence and demand for multifunctional daily SPF.

## Emerging markets — access-driven growth

Growth in warmer and tropical markets is supported by rising UV awareness, higher disposable income and broader retail access.



Global market value

*\$15.47B (25) → \$25.63B (34)*

Growth rate

*CAGR +5.97%*



## 1.2 Consumer insights

*40% of consumers apply sunscreen daily*

Awareness is translating into stronger routine behaviour.

Consumers are no longer only buying SPF for holidays or summer exposure: 74% say they buy more sun protection products than five years ago, across both cosmetics and standalone sunscreens.

*Nearly 75% prefer tinted foundation with SPF*

Hybrid formats are recalibrating expectations.

With tinted SPF searches up 84% YoY, consumers increasingly expect UV protection to blend into beauty routines, offering coverage, finish and protection in one step.

*84% of Black sunscreen users want more skin-tone options*

Inclusivity is becoming a real growth driver.

The category still needs to solve white cast, shade mismatch and underrepresentation, especially for consumers with darker skin tones.

*Anti-aging SPF benefits drive +49% demand*

SPF is being judged like skincare.

Consumers are looking for more than UV defense, with demand rising for anti-aging, hydration and vitamin-enriched sunscreen formats.

A background image showing the back of a person wearing a tan baseball cap on the left, and two people smiling and looking up on the right. A hand is raised in the center, reaching towards the sky. The background is a clear blue sky.

## 2. Brand archetypes

As SPF becomes a commodity, visual and verbal identity become the new battleground.

Design now operates as a strategic differentiator; a language that signals efficacy, safety, and belonging simultaneously.

*2.1 The clinical expert*

*2.2 The measured*

*2.3 The everyday optimist*

*2.4 The thoughtful sophisticate innovator*

## 2.1 The clinical expert

Stricter safety standards are pushing brands toward controlled and clinical design, making clarity itself a signal of trust.

- Matte plastics and controlled geometry communicate lab-grade precision and hygiene.
- Powerful yet balanced palettes (often blue, white and orange) mix solar vitality with clinical authority.
- Large SPF numerals follow a pharmaceutical logic, where information equals trust and clarity becomes a design value.

### Market notes

Avg price point: €10 – €20

Retail focus: *Pharmacies · DTC · Specialist retailers*

Dominant Category: *Dermo-cosmetic & pharmacy*







#### Market notes

Average price point: €40 – €120

Retail focus: Selective retail, Department Stores, E-comm

Dominant category: Premium skincare & make-up hybrids

## 2.2 The measured innovator

*Rising expectations of performance are pushing brands toward precise, engineered design, where restraint communicates mastery.*

- Simple geometries and solid materials express engineered precision and high performance.
- White, black and metallic tones reduce visual noise and communicate modern technical luxury.
- Hard plastics and glass-like finishes signal durability and sophistication, making the object itself proof of performance.
- Metallic accents highlight key details, reinforcing the idea of measured innovation rather than excess.

## 2.3 The everyday optimist

*As protection merges with self-care, design turns functional SPF into a tool of positivity and ease.*

- Color-blocking and bright hues feel light, friendly, and emotionally intuitive.
- Rounded, portable formats enhance ease and approachability, encouraging spontaneous use.
- Inclusive naming and clear claims (“Everyday”, “Unseen”, “Glow”) replace fear-based language with warmth and trust.

### Market notes

Average price point: €15 – 35

Retail focus: Mass & Premium Masstige, E-com, Pharmacies

Dominant category: Daily skincare & sun hybrids





## 2.4 The retro dreamer

*In a category built on performance, nostalgia softens protection and reconnects it with feeling.*

- Soft colors and cream tones bring back the look of 70s sunscreen design, making protection feel familiar and nostalgic.
- Serif typography and centered layouts borrow from heritage cues to signal reliability and authenticity.
- Glossy surfaces and clean structures keep the look modern, proving that retro cues can feel clean and relevant in today's market.

### Market notes

Average price point: €25 – 55

Retail focus: DTC · Concept Stores · Selective Retail

Dominant category: Indie & Premium skincare



## 2.5 the thoughtful sophisticate

*Consumers are moving beyond flawless looks, seeking products that truly care and protect.*

- Soft, modern tones and clean tubes position SPF as part of everyday self-care: easy, friendly, and gender-neutral.
- Matte finishes and simple structures express sincerity and practicality, moving away from luxury or clinical codes.
- Clear typography and conversational tone build trust through openness, making efficacy feel effortless.



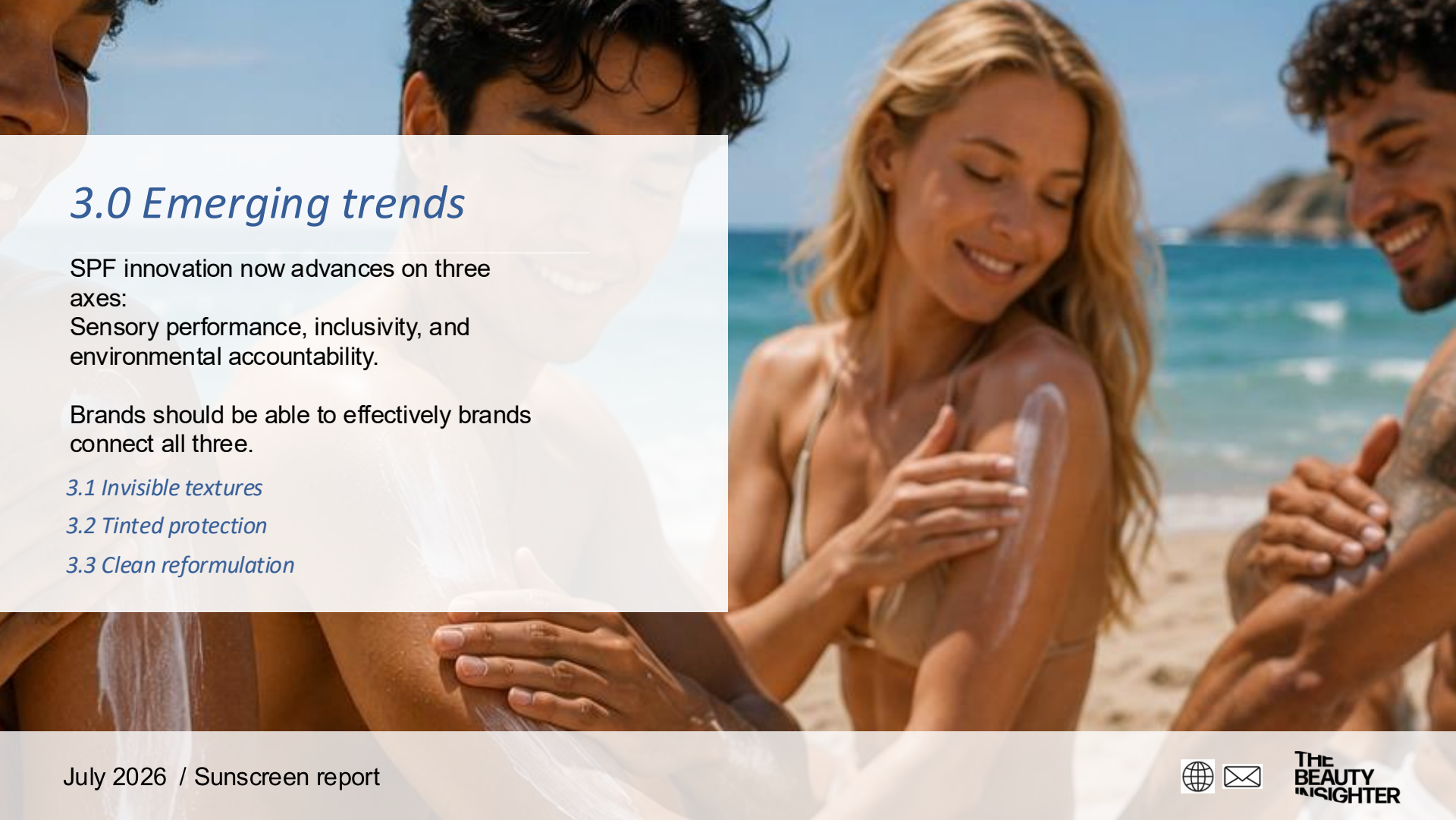
### Market notes

Average price point: €25 – 55

Retail focus: DTC · Concept Stores · Selective Retail

Dominant category: Indie & Premium skincare



A background image showing a young couple on a beach. A woman with blonde hair is applying sunscreen to her shoulder, and a man with dark curly hair is smiling and looking at her. The ocean and a rocky coastline are visible in the background under a clear blue sky.

## 3.0 Emerging trends

SPF innovation now advances on three axes:

Sensory performance, inclusivity, and environmental accountability.

Brands should be able to effectively brands connect all three.

*3.1 Invisible textures*

*3.2 Tinted protection*

*3.3 Clean reformulation*

## 3.1 invisible textures

*“Texture is now the barrier and the opportunity”*

33.7% of consumers cited dislike of sunscreen's feel or appearance as a barrier to use.

SPF now belongs to the “skinification” era. Formulas are lighter, faster to absorb, and refined in finish.

Performance is judged by comfort and cosmetic integration as much as UV protection.

Korea sets the global texture benchmark

SPF in Korea matured within skincare culture, where daily use depends on comfort, lightness and cosmetic elegance.

Korean brands helped redefine sunscreen as a skincare step: lighter, faster-absorbing and easier to layer under makeup.





## 3.2 Tinted protection

*“People want formulas that protect and perfect at once”*

SPF now competes in the beauty arena

Tinted protection is evolving beyond a simple tint. New formulas combine UV defense, tone correction, visible-light protection, and makeup-like finish in one daily step.

The tinted sunscreen market is projected to grow from USD 1.92B in 2025 to USD 3.75B by 2034, with a 7.8% CAGR.

Growth is being driven by hybrid formats that protect while improving how skin looks: shade-adaptive finishes, mineral tints, and formulas designed to sit naturally in beauty routines.



## 3.3 Clean reformulation

*“Regulation is reshaping innovation”*

### Formulas under new scrutiny

Consumers are paying more attention to what is inside sunscreen formulas.

They want protection, but also formulas that feel safer, clearer, and more responsible.

For brands, “clean” has to show in the ingredients, the texture, and the credibility of the claims.

In 2025, EWG found that only 498 out of 2,204 reviewed SPF products met its safer/effective criteria.

This creates room for formulas that are easier to trust: mineral filters, clearer ingredient choices, and claims that are backed by performance.







CONTINUOUS SPRAY

BROAD SPECTRUM  
UVA / UVB

WATER RESISTANT  
80 MINUTES



SUNSCREEN

SPF  
50

PROTECTIVE  
LOTION

BROAD SPECTRUM  
UVA / UVB

WATER RESISTANT  
80 MINUTES

SUNSCREEN

SPF  
50

DAILY MOISTURIZING  
CREAM

BROAD SPECTRUM  
UVA / UVB

MINERAL  
SUNSCREEN

BROAD SPECTRUM  
UVA / UVB

## 4.0 Packaging innovations

In a mature category, packaging becomes the visible frontier of innovation, teaching use, signaling quality, and framing responsibility.

4.1 Application formats

4.2 Materials and finishes

4.3 Shapes and ergonomics

4.4. Refill and modularity

SUNSCREEN

SPF  
50

PROTECT + GLOW  
FACE OIL

BROAD SPECTRUM  
UVA / UVB

CLEAR STICK

BROAD SPECTRUM  
UVA / UVB



## 4.1 Application formats

*SPF is evolving through design that teaches use.*

Design now educates: each applicator defines a motion, turning protection into a reflex rather than a reminder.

**Formats teaching the gesture:**



### Mists:

Diffuse protection in one effortless spray, light and makeup-safe.

### Sticks:

Glide cleanly over the skin with precision, ideal for quick touch-ups.

### Powders:

Brush over the face with grace, blending protection into daily elegance.

### Cushions & roll-ons:

Follow the rhythm of touch, offering smooth control and sensorial comfort.

### Serum drops:

The gesture of skincare meeting sun care.

## 4.2 materials & finishes

*Materials and finishes define how quality is seen and felt.*

Surface treatment translates formulation into perception, turning design into evidence of care.

**Each finish carries a distinct code:**



Pearl and chrome details

Express technology, clarity, and controlled performance.



Matte soft-touch tubes

Evoke purity, comfort, and contemporary simplicity.



Airless pumps & metallic details

Convey precision and clinical performance.



Glassy or translucent finishes

Suggest lightness, breathability, and refinement.

## 4.3 shapes & ergonomics

### *Form follows behavior*

Ergonomic design defines usability.

When form aligns with human movement, precision and comfort become effortless.

#### Shapes translating behavior into design:



#### Compact capsules

Enable one-hand precision and easy reapplication.

#### Rounded contours

Enhance comfort and smooth motion.

#### Stable bases and flat caps

Add control and balance.

#### Balanced proportions

Optimize grip and precision.

#### Portable formats

Integrate seamlessly into daily life.



## 4.4 refill & modularity

### *Refill design gives SPF a visible form of responsibility*

In sun care, refill turns protection into a lasting ritual.

Visible, functional systems give SPF packaging a sense of continuity and care.

#### **Architectures shaping responsible design:**



#### Visible cartridges

Communicate transparency and technical precision.



#### Soft refill pouches

Express simplicity and approachability.



#### Refillable brushes & built-in tools

Make reuse intuitive through touch and control.

## 5.0 Promotion

Category growth depends on cultural fluency. Brands that make SPF relatable will own everyday relevance.

*5.1 Scientific education*

*5.2 Cultural influence*

*5.3 Contextual activation*

## 5.1 scientific education

### Science-led storytelling

Data-driven visuals (UV-camera imaging and skin-ageing simulations), make protection tangible and measurable. Technical jargon is transformed into emotional clarity.

### Expert & institutional endorsement

Partnerships with dermatologists, pharmacists, and health organizations anchor brands in verified science. This positions SPF as a healthcare ritual.

### Public awareness activations

Brands use visual clarity, relatable tone, and cultural humor across public platforms to make protection accessible and emotionally engaging. SPF science is communicated through proximity and shared understanding.





## 5.2 Cultural influence



### Multi-tier influencer ecosystem

Combining dermatologists (trust), lifestyle creators (reach), and micro-UGC (authenticity) makes SPF feel credible yet relatable. This social validation accelerates daily adoption.



### Collaborations & limited editions

Co-branding reframes sunscreen as a desirable object. These drops generate urgency, social talkability, and visual differentiation within a flat category.



### Inclusive social storytelling

Featuring diverse skin tones, textures, and routines normalizes SPF for all audiences. It expands the category by making representation the new growth lever.



## 5.3 Contextual activation

### Weather-triggered media

UV data can turn SPF advertising into a real-time reminder.

Avène activated a DOOH campaign only when the UV index exceeded 3, generating 6.4M impressions, +16pts brand awareness, and +61pts brand consideration.

### Experiential & retail activations

Pop-ups, push notifications, and free mini formats are deployed in high-exposure areas such as beaches, parks, or festivals.

These activations convert awareness into real-world trial and drive immediate sell-out peaks.

### Smart CRM and continuity tools

UV-based reminders extend SPF beyond the campaign.

Apps already use UV index data to recommend sun protection times, and sunscreen reminder tools can send alerts for morning application and reapplication.



*“The next era of beauty starts with care that protects. Simply, intelligently, every day.”*

Juan Campderà

Founder of We Are Aktivists

# Thank *you!*

## WE ARE AKTIVISTS

### THE BEAUTY-FIRST CREATIVE THINK TANK

We are the first ecosystem of creative agencies specialized in the beauty sector. The first creative think tank focused on professionals and brands leading the industry.

With international reach, we strategically lead the value chain of creative services in the beauty, cosmetics, and fragrance sectors.

Our ecosystem of agencies delivers coordinated, tailored, and highly specialized solutions across every area of the value chain.

Our unique expertise puts you one step ahead of the market & competition.

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#### Kulture

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