

Report Deck

*SUNSCREEN*

**THE  
BEAUTY  
INSIGHTER**

*“THE NEXT EVOLUTION OF  
SUNSCREEN IS DEFINED BY  
HOW SEAMLESSLY IT  
INTEGRATES INTO DAILY  
CARE HABITS.”*

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# 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

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## GLOBAL MARKET VALUE

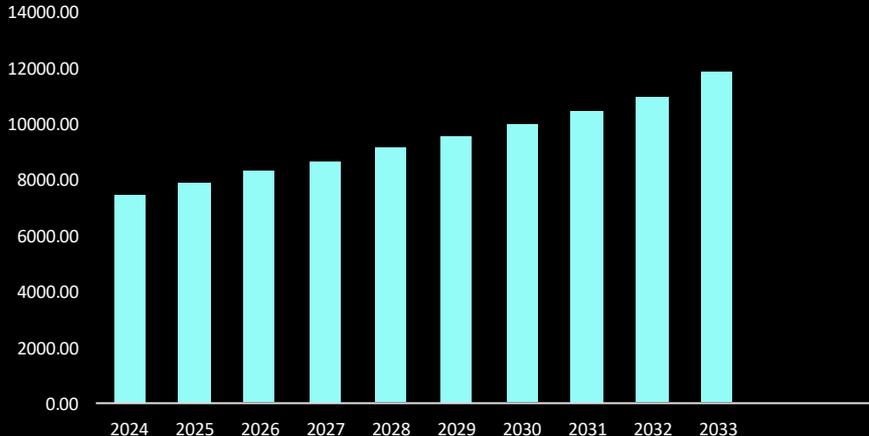
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\$7.47 B (2025) → \$11.8 B (2035)

## GROWTH RATE

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CAGR +5.2%



*The category now moves at two speeds:  
Asia-Pacific accelerates innovation through R&D and filter technology, while Western markets grow via premiumization and sensorial refinement.*

*Asia-Pacific (38 % of global volume)*

*Fastest-growing region (+11 % in 2023), led by China, Japan, and Korea. Growth is fueled by advanced filter technologies and skincare-driven innovation.*

*North America (27 %)*

*1.14 B units sold in 2023 (+7 % YoY).*

*The US dominates with 86 % of regional sales, supported by strong dermo-cosmetic positioning.*

*Europe (23 %)*

*970 M units sold in 2023 (+6 % YoY).*

*Premium and pharmacy-led market, focusing on mineral and clean formulations.*

*Middle East & Africa (12 %)*

*510 M units in 2023 (+5 % YoY).*

*Growth supported by tourism, rising incomes, and increased awareness of sun protection.*

## 1.2 CONSUMER INSIGHTS



*92 % of consumers agree sun protection is important*

Awareness is high, and usage is strengthening. The U.S. (54%) leads daily adoption, followed by Spain (51.6%), Germany (45.6%), France and Italy (41%). Sunscreen is becoming a routine behaviour, with clear headroom for growth beyond mature markets.



*Searches for “sunscreen for dark skin” have risen by nearly 400 % in recent years*

The growth reflects stronger interest from consumers previously underrepresented in the category. Inclusivity is becoming a measurable driver of engagement and market expansion.



*75 % of consumers now prefer tinted foundations with sun protection*

Hybrid SPF formats are recalibrating expectations. With searches for tinted SPF products up 84 % year-on-year, consumers now see UV protection as an essential feature of makeup performance.



*35 % of Gen Z and 47 % of Millennials increased their SPF use in the past year*

Younger consumers are embracing a preventive mindset and SPF is repositioning from summer category to daily maintenance. 49 % now look for anti-aging benefits in SPF, positioning protection as a standard of performance within skincare.

## 2.0

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# *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 innovator

2.3 The everyday optimist

2.4 The thoughtful sophisticate

## 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



## 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.

### Market notes

Average price point: €40 – €120

Retail focus: Selective retail · Department Stores · E-commerce

Dominant category: Premium skincare & make-up hybrids



## 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-commerce · 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



## 3.0

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# *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

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

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. By refining texture into a science of comfort, Korean brands redefined how protection fits into daily beauty. A ~8.7 % CAGR illustrates how consumer habit, regulation, and R&D alignment drive lasting market leadership.



## 3.2 TINTED PROTECTION

“People want formulas that protect and perfect at once”

Tinted SPF resolves two tensions: *white-cast exclusion* and *the need for tone correction*. People don't just want to be protected. They want to look good doing it.

SPF now competes in the beauty arena.

Shade range, finish, and skin-adaptive performance are becoming key purchase drivers.

Brands that approach SPF formulation and communication with the precision of makeup will own the next phase of category growth.



### 3.3 CLEAN REFORMULATION

*“Regulation is reshaping innovation”*

New limits on chemical filters are forcing brands to rebuild SPF from within. The focus has shifted from protecting only skin to protecting ecosystems too.

Clean formulation isn't a claim anymore. It's a design brief.

#### Formulas under new scrutiny

Mineral sunscreens now represent 43% of the market (in contrast to 17% in 2007).

The question is no longer if a formula works, but how responsibly it does.

Clean has become proof of performance.



## 4.0

# PACKAGING INNOVATION

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



## 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 (7.5% CAGR to 2033):*

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

#### *Sticks (7% CAGR to 2032):*

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

#### *Cushions & roll-ons:*

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

#### *Powders:*

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

#### *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*

LA ROCHE POSAY  
LABORATOIRE DERMATOLOGIQUE

# SOS

SAVE — OUR — SKIN

JOIN OUR MISSION AGAINST SKIN CANCER

99%  
OF SKIN CANCERS  
ARE CURABLE IF  
DETECTED IN TIME!

The advertisement features a close-up of a person's face with skin cancer lesions. A circular graphic highlights a specific lesion, and the text '99% OF SKIN CANCERS ARE CURABLE IF DETECTED IN TIME!' is overlaid on the image. The top of the ad has a blue background with the La Roche Posay logo and the 'SOS' text.



### 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.*

Skipping SPF does your future skin dirty.

ULTRA VIOLETTE

The advertisement shows a woman's face as she applies sunscreen. She is holding a small tube of Ultra Violette sunscreen and is applying it to her forehead. The background is a bright blue sky. The text 'Skipping SPF does your future skin dirty.' is at the top, and the Ultra Violette logo is at the bottom.

## 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.



### *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.



### *Collaborations & limited editions*

Co-branding reframes sunscreen as a desirable object.

These drops generate urgency, social talkability, and visual differentiation within a flat category.

## 5.3 CONTEXTUAL ACTIVATION

### Weather-triggered media

Digital campaigns use live data (UV index, temperature, daylight) to appear only when exposure risk is high.

This timing precision makes the message contextually relevant and *increases ad efficiency by 15–20%*.



### 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

Personalized reminders and UV-based messages encourages routine integration.

These data-driven touchpoints maintain engagement after purchase.



*“  
THE NEXT ERA OF BEAUTY STARTS WITH CARE THAT  
PROTECTS.  
SIMPLY, INTELLIGENTLY, EVERY DAY.”*

Juan Campderà

Founder of Aktiva

Thank *you!*

**THE  
BEAUTY  
INSIGHTER**