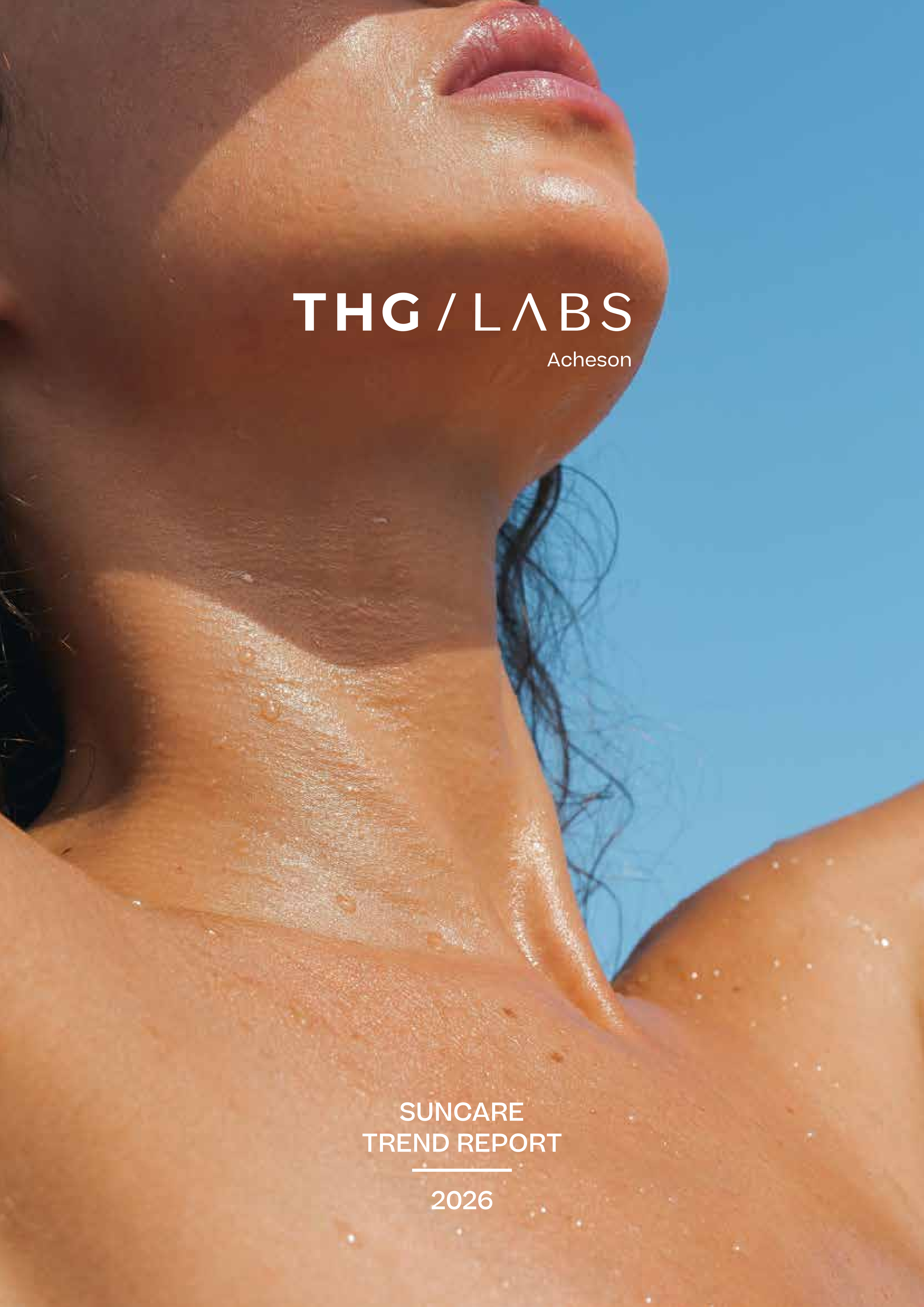

THG / LABS

Acheson

# SUNCARE
# TREND REPORT

2026

# THG / LABS

## Your partners in beauty

For the last three decades, THG LABS has been the trusted UK-based private label product development and cosmetics manufacturing, partner for global beauty brands from household names to insurgent indie start-ups. Our track record of fruitful partnerships and industry recognition is testament to our dedication to deliver to the best standards for our customers.

Starting with bespoke concept right through to your products landing on shelf, our full-service model, cutting-edge facilities and in-house expertise flex to support with seamless solutions when and where your brand needs them – whether it's one, some or all of THG LABS' services.


## Why Choose THG LABS?

**UNPARALLELED EXPERTISE**
State-of-the-art laboratories and beauty manufacturing facilities with top tier specialists in Innovation, R&D, Regulatory, Packaging & Production.

**TAILORED AGILITY**
Adapt seamlessly to market demands with custom solutions flexing to meet your ambitions.

**AWARD-WINNING BEAUTY**
Future-proof global formulas that set new industry benchmarks for quality and innovation in haircare, skincare, suncare and fragrance.

**INTEGRATED FULL-SERVICE**
Streamline product lifecycles with a unified team for swift transition from concept to market, enhancing time and cost efficiency.

### SUNCARE DEVELOPMENT SPECIALISTS

Working from our state-of-the-art R&D and Testing Labs, our dedicated Suncare Development team have 40+ years combined industry experience.

In close collaboration with our in-house Innovation, Regulatory, Packaging and Production departments, our Suncare division are experts at creating sophisticated sun protection formulations with light, luxurious textures that meet future market demands and match consumer expectations with efficacy and elevated sensorial performance.

**THG LABS** UK manufacturing facility is registered with the US FDA which enables us to manufacture OTC Sunscreen Drug Products for the US market.

> *Our Suncare Formulation team work closely with our expert in-house Regulatory Team who provide guidance on the development, testing and manufacturing processes required to launch a compliant formulation. This enables us to tailor formulations to the requirements of specific markets around the globe, both in terms of compliance and consumer preference around formats and texture so your launch lands successfully.*
>
> Roger Rowson - Account Head of R&D, **THG LABS** Acheson

### UNIQUE SPF FORMULAS THAT SHINE IN THE MARKET

This report contains a snapshot of highlights from our more comprehensive suncare presentation which is packed with data insights, an in-depth analysis of current trends in SPF and our predictions for what's coming next.

For further information, please get in touch
businessdevelopment@thglabs.com

THG / LABS
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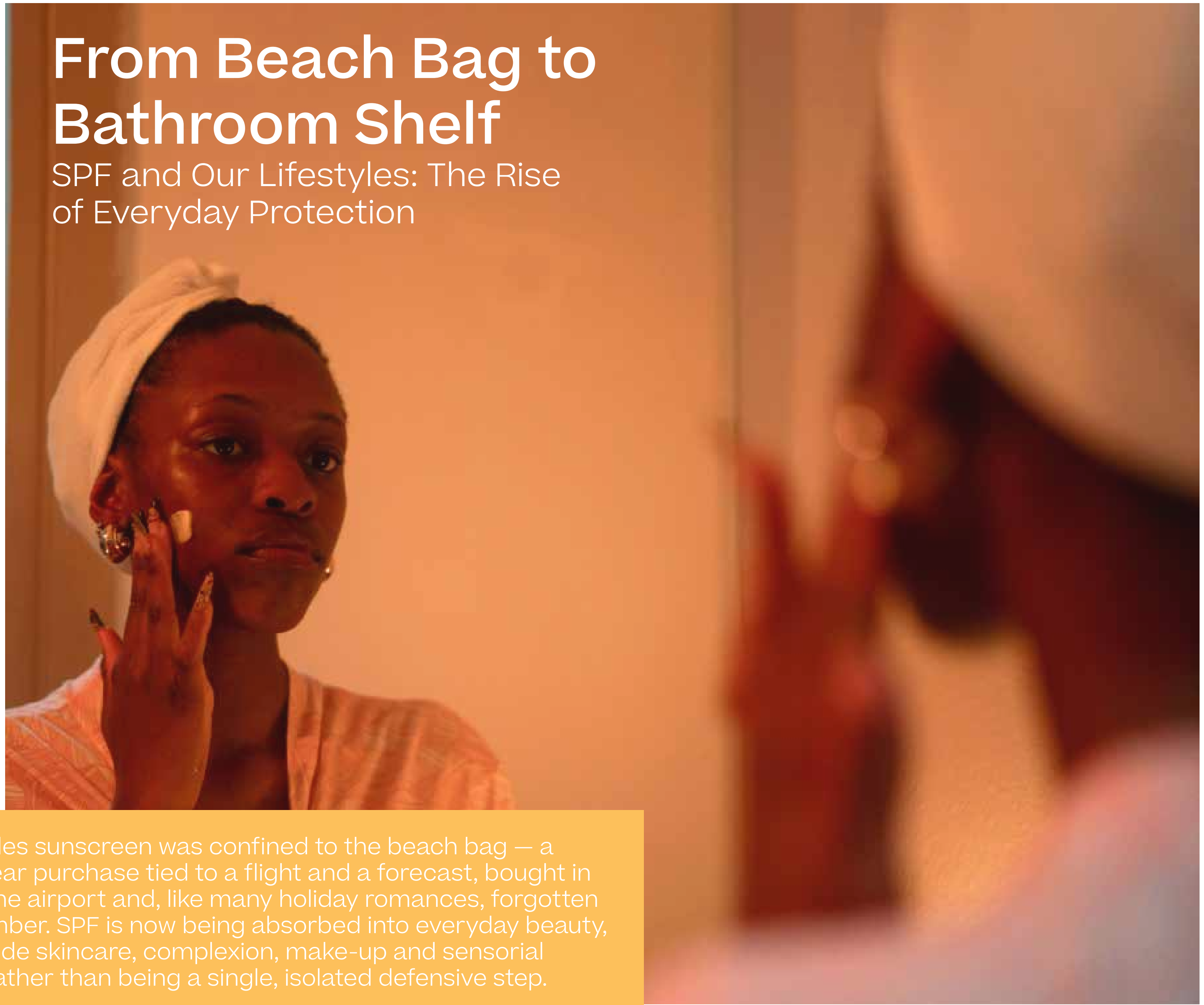
# From Beach Bag to Bathroom Shelf

## SPF and Our Lifestyles: The Rise of Everyday Protection



For decades sunscreen was confined to the beach bag — a once-a-year purchase tied to a flight and a forecast, bought in panic at the airport and, like many holiday romances, forgotten by September. SPF is now being absorbed into everyday beauty, sitting inside skincare, complexion, make-up and sensorial formats rather than being a single, isolated defensive step.

We're seeing this play out in the numbers. In 2024, 74% of US women bought more sun protection than they did five years ago*, and in 2025, 65% of European consumers said they like buying beauty products containing SPF, rising to 78% among millennials**.

SOURCE:
*THE BENCHMARKING COMPANY FOR GLOBAL COSMETIC INDUSTRY - CONSUMERS' SUN CARE WISH LIST: NEW CONSUMER DATA, MAY 2024
** CIRCANA, JUNE 2025 FROM COSMETICS BUSINESS REVEALS THE TOP 5 SUN CARE TRENDS OF 2025 IN NEW REPORT

### Rising awareness

According to Cancer Research UK, an estimated **86%** of melanoma skin cancer cases and **90%** of non-melanoma skin cancers are entirely preventable.

The CTPA (Cosmetic, Toiletry and Perfumery Association) runs an annual Sun Protection Campaign to promote life-saving UV awareness. It combats dangerous viral social media trends and informs the public about proper application and the critical regulation behind UK sunscreens.

SOURCE : CTPA '24-'25

### > ROUTINE POWERED BY SUNIFICATION AND SKINIFICATION

For some, SPF is a daily, 365-day habit woven into the morning routine. In this new reality, UV protection is simply the baseline expectation. Sunification is expanding protection across skincare, haircare and make-up, while skinification is raising demands for greater all-round performance with hydration, radiance, repair, smoothing and make-up readiness being judged too, borrowing the textures, claims and price architecture of prestige skincare. Together, these dynamics are transforming SPF from seasonal commodity into year-round, treatment-led beauty essential.

### > THE BEHAVIOUR BARRIER

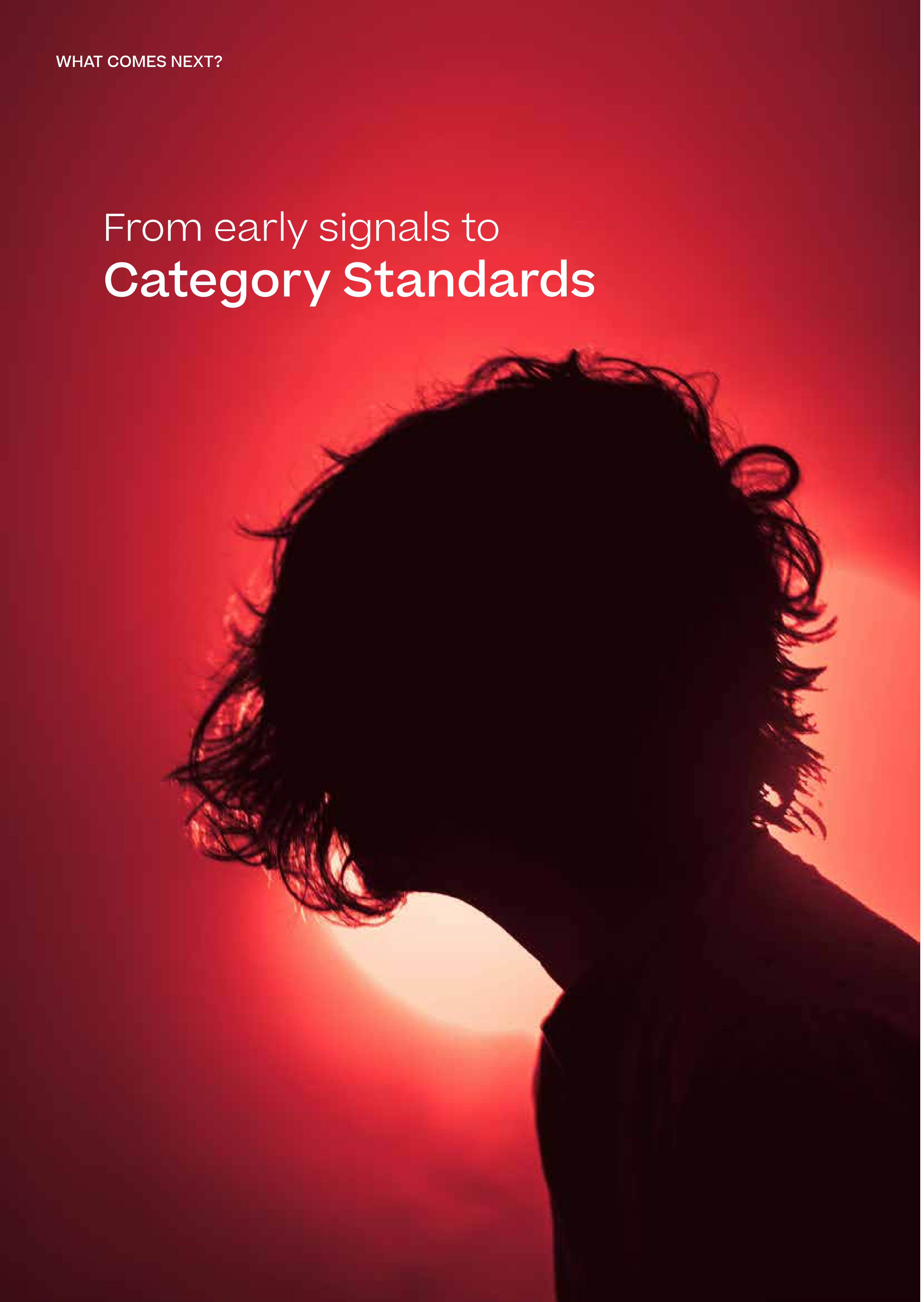
SPF has won the awareness battle however, converting awareness into consistent daily behaviour remains challenging. While adoption is gaining traction, only 12% of US adults wear sunscreen daily, while 28% never wear it at all[†]. 73% of UK consumers can't identify the UV index at which protection should begin[††]. The contradiction is striking: people know sun protection matters, but that knowledge isn't translating into habitual usage. This gap — between belief and action — is both the category's greatest growth opportunity and its most pressing responsibility, given that 86-90% of melanoma and non-melanoma skin cancers are considered preventable[†††].

SOURCE:
[†] CIVICSCIENCE, SUNSCREEN USAGE IN 2025: SKEPTICISM AND SKINCARE INTEREST SHIFT USAGE AND GROWTH, PUBLISHED 21 JULY 2025
[††] UK APPG UV SAFETY WORK / A PREVENTABLE CRISIS: THE CASE FOR A NATIONAL UV SAFETY STRATEGY
[†††] SKIN CANCER RESEARCH UK

### > SPF CROSSES OVER INTO PRESTIGE SKINCARE

A new wave of indie brands have reimagined the category, and they're not competing on science or heritage. They're winning on story, aesthetic and social currency. By 2024, indie brands represented 39% of sunscreen sales, up from 34% two years prior (NIQ, 2024).

The products tell the same story. At an average launch price of $30, SPF now sits firmly in prestige skincare territory. Formulas lead with niacinamide, hyaluronic acid and zinc oxide; the claims that dominate aren't about UV protection at all, they're about hydration, barrier support, invisible finish and make-up compatibility. A once adjacent category, we're seeing SPF compete directly on skincare's terms.



# From early signals to **Category Standards**

In our 2024 Suncare Report, we identified key signals shaping the category: full wavelength coverage as the new baseline, sensoriality as a growing force, and climate as an emerging formulation frontier. Two years on, each has moved from signal to standard. This 2026 report picks up where that one left off, setting out what comes next.

| 2024: WE IDENTIFIED | 2025/26: THE MARKET VALIDATED | NEXT: THE SIGNALS WE'RE SEEING |
|---|---|---|
| SUN-SORIAL  | Texture, finish, scent and reapplicatxon formats become core compliance drivers. | **A FULL SPECTRUM OF FORMATS** SPF designed for reapplication inspired by routines, occasion and self-expression. |
| FULL WAVELENGTH COVERAGE  | Protection expanded beyond UVB and UVA with brands addressing visible light, pigmentation and tone-inclusive protection. | **PROTECTION FOR EVERY BODY** Inclusivity expands beyond skin tone to encompass barrier-respectful SPF for different body zones, skin conditions and life stages. |
| CREATE FOR TOMORROW'S CLIMATE  | Climate adaptation became formulation reality, with heat, pollution, UV intensity and environmental stress shaping product development. | **CREATE FOR TOMORROW'S SKIN HEALTH** Longevity becomes the new horizon for protection talking to a new-generation of prevention-first consumers. |

The global Sun Protection market represented £11bn in 2025 and is projected to grow by +43% in 2030

# reaching £15.7bn

## 2025 KEY INSIGHTS

- Suncare is forecasted to outperform the growth of the BPC market (projected +34.1% by 2030), driven by daily SPF adoption, skinification and prevention.
- 1/3 of all sun protection products are being sold in APAC, supported by strong SPF culture and beauty-led protection formats.
- Key accelerating markets: India, MEA and Indonesia as suncare is still recruiting new users and moving from occasional protection into daily beauty routines.
- Sun protection remains a mass category, with 66.8% of retail in that price position
- Baby & Child-specific sun care is one of the fastest growing segments with a projection of +48.4% by 2030, moving the market from £0.9bn in 2025 to £1.5bn in 2030. It reflects higher parental concerns around safety, sensitivity and prevention.

The Adult Suncare category is divided into 3 main categories

GLOBAL MARKET RETAIL VALUE IN 2025

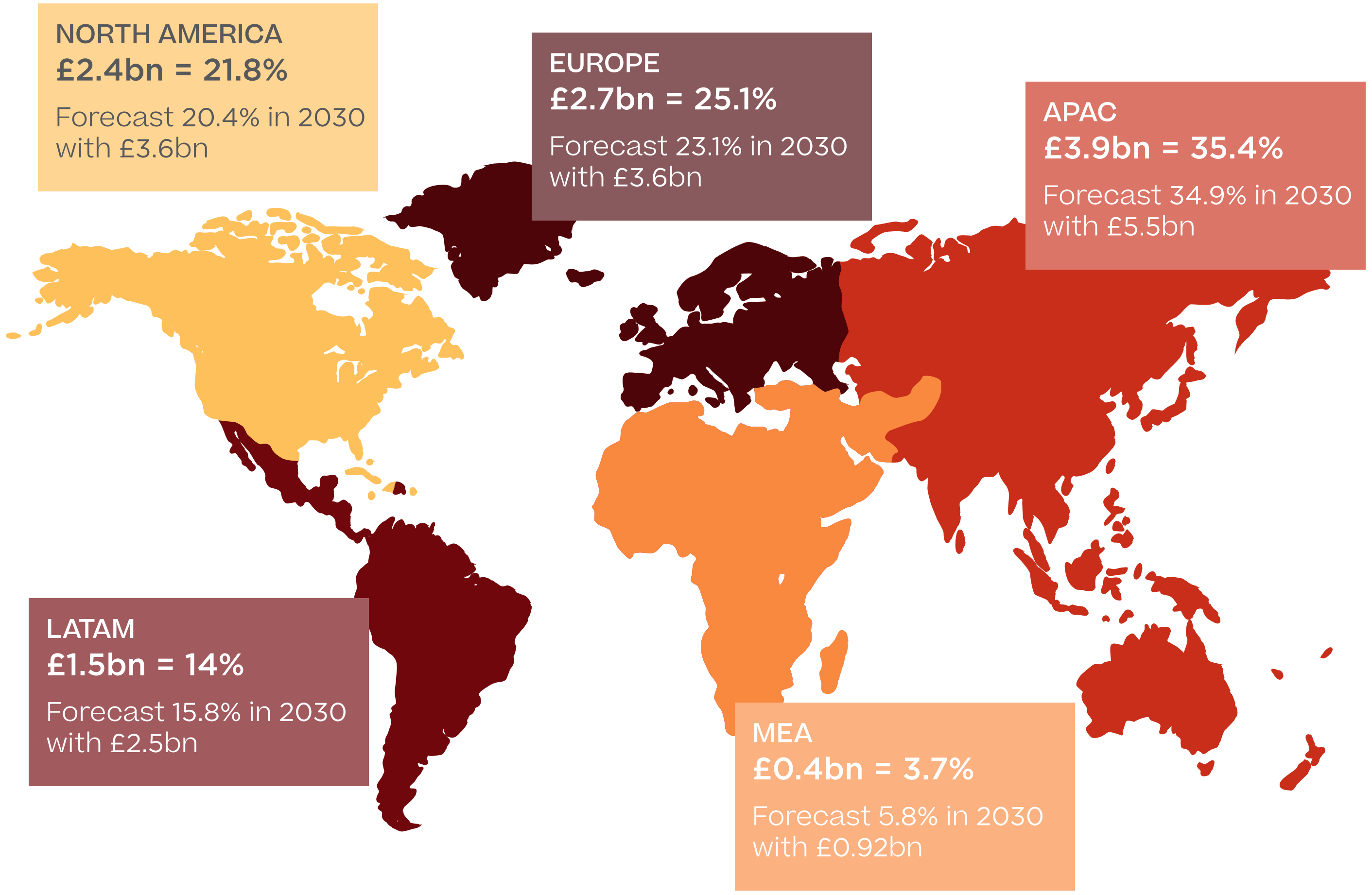
| 86.6% | 6% | 5% |
|---|---|---|
| SUN PROTECTION | AFTER SUN | SELF-TANNING |
| vs 89% for 2023 | VS 5% FOR 2023 | VS 6% FOR 2023 |



## SUN PROTECTION REGIONAL DATA

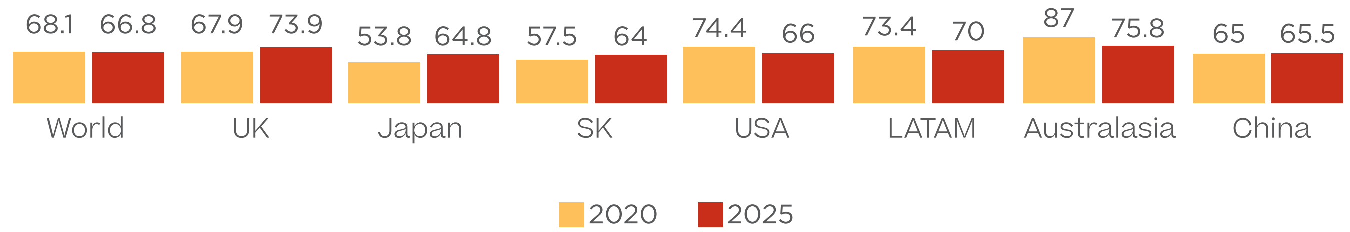
### Key Countries

USA is the largest market with 20.7% of the global market retail shares, followed by China with 15.7% and Brazil with 7%.



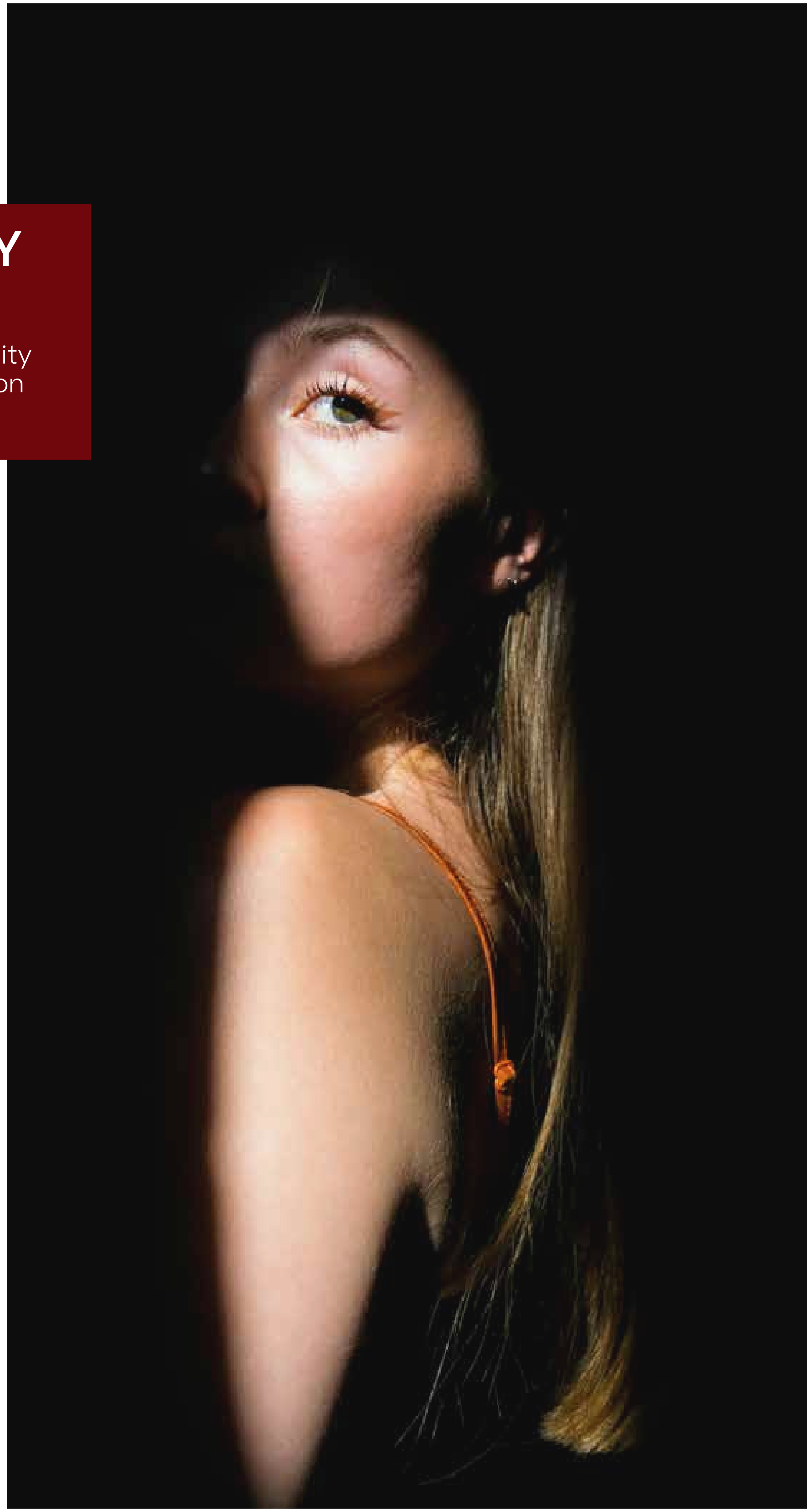

### Regional evolution of mass price positioning over the last 5 years

% SHARE OF MASS PRICE POSITIONING IN SUNCARE CATEGORY ( Retail Value RSP | GBP)



# BUILDING THE DAILY SPF HABIT

The UK market is gaining value, credibility and beauty relevance, but daily adoption still lags behind



### The Premiumisation of Protection

UK suncare is growing in sophistication to become a more premium, skincare-led category. Daily SPF intent has nearly doubled, rising from 22% in 2024 to almost 48% in 2025 (SOURCE: YOUGOV, 2025), while consumers are trading up to higher protection, with SPF50 suncare up +25.5% YoY as SPF30 declined (SOURCE: CIRCANA UK PRESTIGE BEAUTY EPOS, REPORTED IN PROFESSIONAL BEAUTY, JULY 2025). Prestige suncare reached its highest value to date in 2024 despite lower sunshine hours (SOURCE: CIRCANA UK PRESTIGE BEAUTY EPOS, REPORTED IN PROFESSIONAL BEAUTY, JULY 2025).

### Beauty Hybrids Are the Growth Engine

Face creams featuring SPF generated £29.7m, with SPF50 face creams up +32.2%, while foundation and tinted moisturisers with SPF reached £123.4m (SOURCE: CIRCANA UK PRESTIGE BEAUTY EPOS, REPORTED IN PROFESSIONAL BEAUTY, JULY 2025).

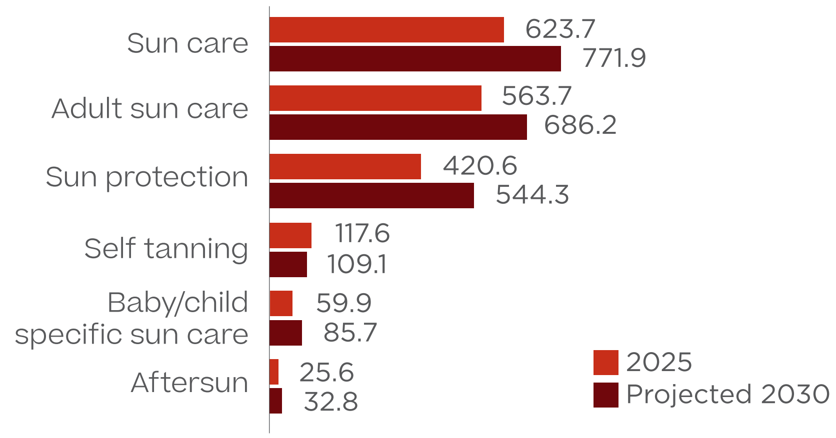
The SPF make-up segment is also becoming more discerning. SPF25+ complexion products grew +8.3%, while SPF24 and below declined -3.3%, confirming consumers increasingly want meaningful protection, not just SPF as a cosmetic claim (SOURCE: CIRCANA UK PRESTIGE BEAUTY EPOS, REPORTED IN PROFESSIONAL BEAUTY, JULY 2025).

### The Belief-Behaviour Gap

78% of people in the UK say SPF is necessary, yet only 1 in 6 wear it every day (SOURCE: FACE THE FUTURE, 365 DAYS OF SPF REPORT, 2026). More than three-quarters still treat SPF as a seasonal or weather-dependent step, while 37% believe the UK climate means protection is not needed for most of the year (SOURCE: FACE THE FUTURE, 365 DAYS OF SPF REPORT, 2026]). Closing the gap to make usage more consistent is the category's next frontier.

**Suncare sales reached record levels in the UK in 2024,** despite fewer sunshine hours, driven by year-round SPF awareness and SPF use before/within makeup.
SOURCE: CIRCANA, JULY 2025

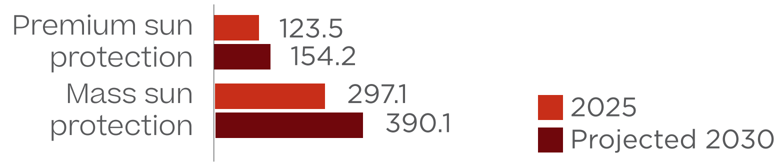
### SUNCARE SUB-CATEGORIES IN THE UK
Retail Value RSP | Million GBP
SOURCE: EUROMONITOR PASSPORT 2026




### A PUBLIC-HEALTH CRISIS – KEY NUMBERS

- Skin cancer is estimated to cost the NHS around £128m per year.
- Non-melanoma skin cancer is the most common form of skin cancer in the UK, with cases estimated to have risen from over 156,000 annually in 2016-2018 to as high as 250,000 in 2024. Melanoma cases are projected to rise by 9% by 2038 (SOURCE: SKIN CANCER RESEARCH UK)
- 88% of UK adults say sunscreen is essential to their family's skin health — the awareness battle is largely won. (SOURCE: CTPA/OPINIUM '24)
- LOOKFANTASTIC SPF SURVEY 2025: 9 out of 10 respondents also believe that the government should do more to educate the public about SPF and sun protection.

### UK RETAIL VALUE RSP | MILLION GBP
SOURCE: EUROMONITOR PASSPORT 2026



### Affordability and Accessibility - The Case For VAT Reform

SPF is still treated as a cosmetic under UK regulation and subject to 20% VAT, despite growing calls to reposition sun protection products as a public healthcare essential.

Lookfantastic research in 2025 shows strong public support for change, with 8 in 10 respondents believing SPF should be VAT exempt. The All-Party Parliamentary Group (APPG) on Skin has also called for VAT on children's SPF 30+ products to be cut to 0% and adult SPF 30+ to 5%, arguing that sunscreen should be treated as essential preventative healthcare rather than a luxury cosmetic.

A report commissioned by Melanoma Focus found that zero-rating VAT on SPF 30+ sunscreen would lead to a 23% increase in consumption and could save the NHS £128 million in a single year.

### Inclusivity remains a major white space

In the UK, 69% of black people do not use sunscreen, and even in summer, 63% do not apply SPF products on face and body (SOURCE : NIVEA X CANCER RESEARCH UK, 2024). This highlights the need for more inclusive education, better imagery, no-cast textures and products designed for melanin-rich skin, particularly as 39% of melanin-rich consumers say they specifically seek out sunscreens for darker skin tones.

### The channel shift: 2020 vs. 2025

Over the past five years, where Britons buy suncare has continued to evolve. E-commerce increased from 31.7% to 33.5% of value, pharmacies from 12.4% to 14%, and beauty specialists from 4.7% to 5.9%, while supermarkets declined from 17.1% to 14.6%.

The trade-up is as much about channel and credibility as it is about the product itself.

> More than half of all suncare units sold in the UK are priced under £20, positioning the category as one of the most accessible across prestige beauty.
>
> SOURCE: CIRCANA 2025

## WHERE DOES THE BRITISH CONSUMER SHOP FOR SUNCARE?

% Retail Value RSP in GBP

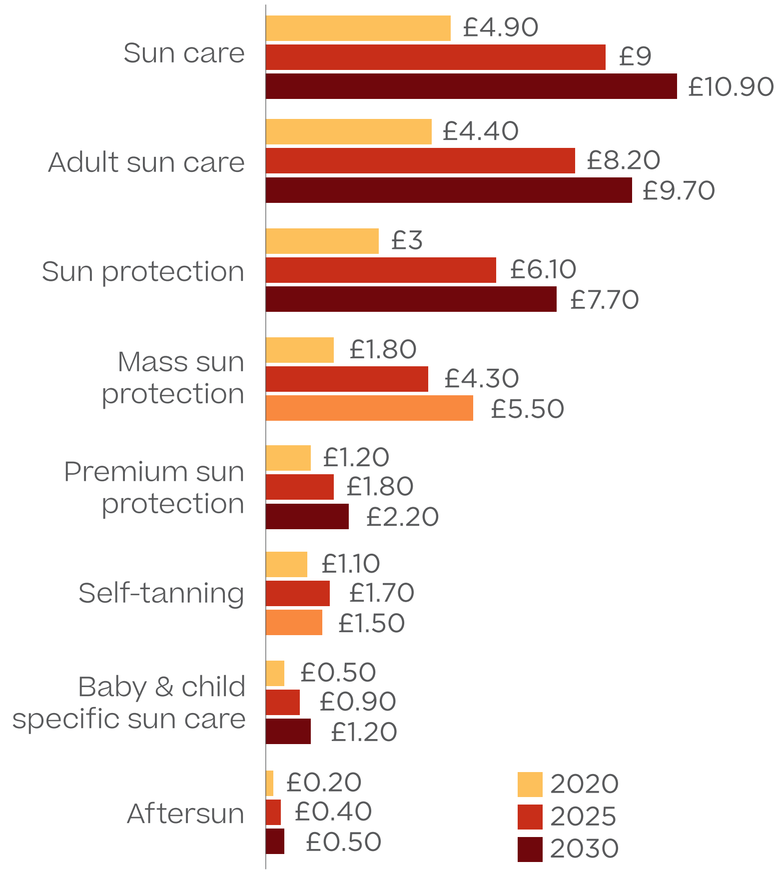
SOURCE: EUROMONITOR 2026

| OUTLET TYPE | 2020 | 2025 |
|---|---|---|
| Retail E-Commerce | 31.7 | 33.5 |
| Retail Offline | 68.3 | 66.5 |
| Non-Grocery Retailers | 33.3 | 34.6 |
| **Health and Beauty Specialists** | **31.3** | **32.9** |
| Health and Personal Care Stores | 14.2 | 13 |
| Pharmacies | 12.4 | 14 |
| Beauty Specialists | 4.7 | 5.9 |
| **Grocery Retailers** | **33.8** | **31** |
| Supermarkets | 17.1 | 14.6 |
| Hypermarkets | 11 | 11 |

## SPEND PER CAPITA IN GBP IN THE SUNCARE CATEGORY IS GROWING

**EUROMONITOR SPEND PER CAPITA IN GBP IN THE UK**

UK suncare spend per capita is rising across the board, with the steepest gains in daily-use and treatment-led segments. Britons aren't just buying more; they're spending more per person, per year.




### SUNSCREEN PRODUCTS TOP SUBCATEGORIES ON SPATE

UK MARKET ONLY / SPATE POPULARITY INDEX (ACROSS GOOGLE, INSTAGRAM AND TIKTOK)

1. Sunscreen Cream (21.4M | -25.5% YoY)
2. Sun Lotion (14.6M | -35.1% YoY)
3. Tinted Sunscreen (8.1M | +89.2% YoY)
4. Korean Sunscreen (6.2M | +192% YoY)
5. Mineral Sunscreen (4.1M | +82.6% YoY)

### TOP RELATED CONCERNS FOR SUNSCREEN PRODUCTS

1. Sunburn
2. Oily Skin
3. Skin Cancer
4. Sensitive Skin
5. Acne
6. Melanoma
7. Fungal Acne
8. Hyperpigmentation
9. Menopause

### TOP RELATED BENEFITS FOR SUNSCREEN PRODUCTS

1. SPF
2. SPF50
3. Sun Protection
4. Tan
5. Tinted
6. Glowy
7. Tanning
8. Anti ageing
9. Hydrating

In a category so heavily informed by online conversations, trust could become the industry's most valuable differentiator

# SPF: The digital tension

## Digital screens, sunscreens and where trends override truth

### SPF has never been more visible...

Sunscreen is getting a full beauty-category makeover. Invisible textures, tinted SPF, lip oils and hybrid formats bring beauty-first appeal to a new generation of consumers. Digital platforms are accelerating discovery, trend adoption and purchase, with e-commerce accounting for 30.6% of global suncare retail sales in 2025, up from 22.4% in 2020 (SOURCE: EUROMONITOR PASSPORT, 2026).

As SPF becomes increasingly integrated into beauty routines, consumers are engaging with the category in new ways, driven as much by aesthetics, convenience and lifestyle as by protection alone.

### ...But sun protection content has never felt more controversial

The same platforms expanding the category are also influencing how consumers understand it. Celebrity-led misinformation, DIY skincare content (the trad-wife trend for example) and anti-sunscreen narratives are contributing to growing confusion around UV damage, filter safety and sunscreen chemistry. In the US, 14% of adults under 35 believe the myth that wearing sunscreen every day is more harmful than direct sun exposure (SOURCE: ORLANDO HEALTH CANCER INSTITUTE, 2024). Meanwhile, tan lines, sun-kissed skin and #Tanmaxxing continue to circulate as aspirational visual codes across social media.

TikTok remains a powerful influence on attitudes towards sun exposure, with "tan lines + sunburn" the fastest-growing combination of related hashtags across social platforms, increasing 100.6% year-on-year (SOURCE: SPATE, MAY 2026). Yet as tanning content proliferates, dermatologists and science-led creators are using the same channels to champion prevention and skin health. The result is a category shaped by competing narratives, where consumers are exposed to more information than ever before, but not always greater clarity.

Only around 4% of dermatology content online is created or verified by dermatologists.

SOURCE: BRITISH JOURNAL OF DERMATOLOGY, 2025

### Trust Will Be The Next Competitive Advantage

The boost in the visibility of sunscreen presents brands with an opportunity to become more influential. As well as formulating effective products, the next generation of suncare brands will need to communicate with greater transparency, explain increasingly complex formulation choices and guide consumers through a crowded information landscape. From clarifying the differences between UV filter technologies to reinforcing reapplication behaviours and profile efficacy claims with confidence, education will be an integral part of the product experience.

Digital channels should therefore be viewed not simply as sales platforms, but as behaviour-change tools. The brands most likely to succeed will be those that combine compelling product experiences with credible, engaging education.

**GLOBAL MARKET**

Total views on Tiktok related to tan lines

#summer 553M

#relatable 183.7M

#trending 109.8M

#sunburn 81.2M

SOURCE: SPATE MAY 2026

### Digital Penetration: Accelerating Global Suncare Influence

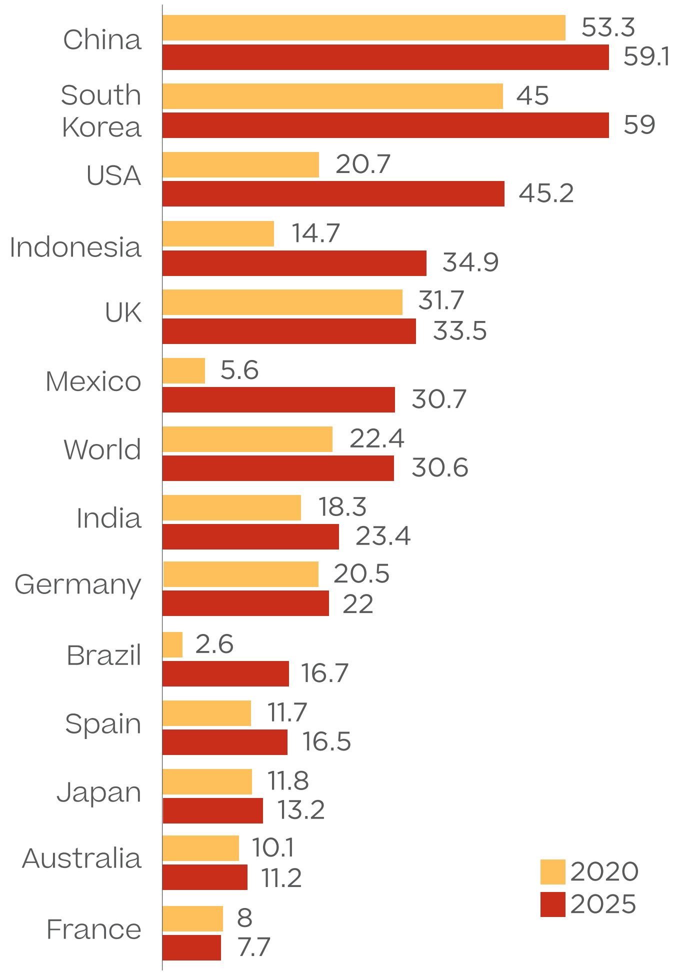
Digital commerce is determining not only how consumers buy sunscreen, but what they buy.

Online channels have reduced traditional geographic barriers, allowing formulation trends, textures and technologies to travel rapidly across markets. This is particularly evident in the growing influence of Korean sunscreen. In the US, South Korea-made suncare is projected to grow by 43% in e-commerce sales, reflecting strong consumer appetite for lightweight textures, cosmetic elegance and innovation-led UV protection (SOURCE: SAMSUNG SECURITIES, 2025).

As consumers gain access to a broader range of products and perspectives, expectations are rising.

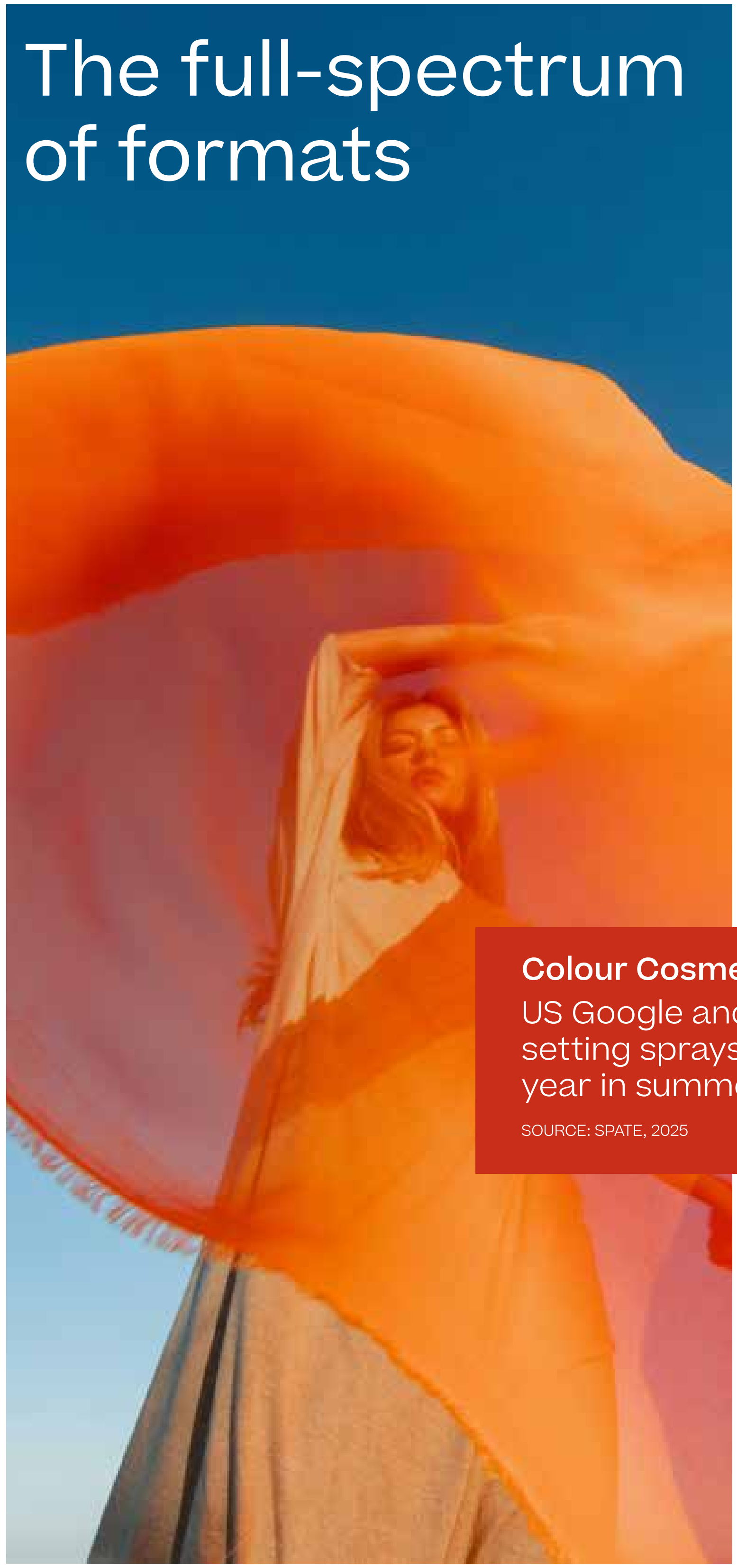
**EVOLUTION OF % RETAIL E-COM PER COUNTRY FOR SUN CARE CATEGORY**

SOURCE: EUROMONITOR PASSPORT 2026



# SUN-SORIAL

## The full-spectrum of formats



### Sensory as Standard

Suncare has outgrown its functional brief, with wearability determining whether protection converts into loyalty. Cue sensoriality as the vehicle to drive compliance, reapplication and repeat purchase. The traditional sunscreens - thick, sticky, white - are being replaced by lighter, smarter and more desirable formats. Korean suncare proved that high-performance protection and a genuinely enjoyable texture were never mutually exclusive. Now the expectation has spread across skincare, complexion, lip care and everyday formats.

### The Next Growth Space is the Second Application

Historically, the biggest behavioural challenge in suncare was once whether someone owned a sunscreen. Now it's whether they maintain protection across the hours they are exposed, making use, dosage and reapplication crucial.

A 2025 U.S. survey reported that only 41% of adults wear sunscreen for more than 60 days per year, while 13% rarely use it (SOURCE: TALKER RESEARCH FOR MELANOMA RESEARCH ALLIANCE, MAY 2025; REPORTED BY NEW YORK POST, JUNE 2025).

The winning SPF? The one people want to apply again...and again.

For formulators the opportunity is to engineer a sensory experience compelling enough to make the second, third, and fourth application feel like a pleasure rather than a chore. Sun-sorial innovation builds positive emotions, freshness, scent and convenience into SPF so it moves from rule to ritual.

**Colour Cosmetic Hybrids:**

US Google and TikTok searches for 'SPF setting sprays' rose by 185.5% year on year in summer 2025.

SOURCE: SPATE, 2025

**TOP BENEFITS RELATED TO SUNSCREEN PRODUCTS – GLOBAL MARKET**

SOURCE: SPATE, MAY 2026

1. SPF
2. SPF50
3. Sun Protection
4. Suncare
5. Glowy
6. Healthy Skin
7. Tinted
8. Anti ageing
9. UV Protection
10. Brightening

### Lightweight Textures are Heavy Lifting

Format is central in solving the SPF compliance issues. Sticks, mists, patches and powders make protection portable, intuitive and easy to reapply, even mid-sport. Gels deliver fast spread, weightless wear and better transparency across skin tones, while milks, waters and sprays transform SPF into a cooling, refreshing and repeatable gesture. The momentum is evidenced by the data: reapplication-friendly formats are surging on the Spate Popularity Index, with cushion compacts up +3,700%, face powder SPF +245.2%, SPF setting spray +185.5%, SPF skin tint +154.4%, tinted moisturiser SPF +65.8% and lip sunscreen +41.7% (SOURCE: SPATE, US MARKET, 2025–26). Solid formats are also gaining ground, with SPF bars, solids and sticks capturing 5% of US dollar share, worth $4m, and growing +19% YoY (SOURCE: CIRCANA, 2025).

### Finessing the Finish

When it comes to format preference, the US still favours lotion (52%) and spray/aerosol (39%), with clear (26%), white (12%) and tinted (5%) trailing (SOURCE: TALKER RESEARCH FOR MELANOMA RESEARCH ALLIANCE, MAY 2025; REPORTED BY NEW YORK POST, JUNE 2025). However, the direction is unmistakable: an invisible finish is important to 73% of American women when buying sunscreen (SOURCE: THE BENCHMARKING COMPANY, 2024). Mineral innovation is feeding the same shift, with the global mineral sunscreen market projected to grow from $4.2bn in 2024 to $8.9bn by 2030 (CAGR 13.5%), as formulation advances overcome the historic problem of thick texture, white cast and poor blendability (SOURCE: GRAND VIEW RESEARCH, 2025).

### Scent As A Habit builder

Fragrance presents a significant opportunity within suncare, particularly in body formats where sensitivity concerns are less pronounced than in facial SPF. While fragrance-free formulations will remain important, especially for sensitive facial and dermocosmetic applications, scent can play a valuable role in making sun protection feel more desirable, memorable and rewarding to use.

Beyond simple sensoriality, fragrance can act as a behavioural cue. A positive scent experience helps transform SPF from a purely functional product into a product consumers actively want to apply and reapply. This is particularly relevant at a time when the industry's greatest obstacle is habit formation.

The opportunity is especially compelling among younger consumers. Gen Z's relationship with fragrance extends beyond smell alone, with scent increasingly viewed as a form of self-expression and an extension of personal identity. According to Unilever research (2025), 64% of Gen Z consumers are willing to pay more for a personal care product because they like the way it smells, compared with 47% of adults overall.

**MILK SUNSCREEN**

Reddit conversations reveal a strong market demand for high-performing, mattifying sunscreens capable of withstanding humidity and activity. However, there is a clear and unmet need for comfortable matte formulations that provide effective oil control without inducing dryness or irritation, especially for sensitive skin types.

SOURCE: REDDIT ANALYSIS BY SPATE 2025/202

**WHAT'S BREAKING THE SUNSCREEN EXPERIENCE**

Consumers expect seamless protection — friction in feel, reaction, and reapplication breaks trust.

1. **Texture Issues**
   Greasy
   Pilling
   Heavy Feel
2. **Skin Reactions**
   Sensitive
   Breakouts
   Eye Sting
3. **Reapplication Friction**
   Over Makeup
   Stick Debate
   Powder Doubt

SOURCE: REDDIT ANALYSIS BY SPATE 2025/2026

> As SPF borrows from bodycare and fine fragrance, sophisticated gourmand notes, skin scents and mood-led fragrance profiles are emerging as a route to create stronger emotional connections with consumers, making protection feel less like an obligation and more like a desirable part of everyday life.

# Protection for **EVERY BODY**

## UV Defence Meets Barrier Beauty: Protection Without Compromise

### Barrier-first suncare

Next gen SPFs focus on skin-compatible defence, built around soothing textures, non-comedogenic claims, fragrance-free profiles and barrier supporting actives. Informed by the trend for Barrier Beauty, broad-spectrum protection promises to deliver daily tolerance, calm and confidence. In a category still fighting compliance issues, the most inclusive SPF will be the one sensitive skin can trust.

The opportunity is especially strong in dermo-inspired, acne-safe and post-procedure territories. Consumers want an SPF that offers high protection and skin comfort as well as a product that sits well under make-up, does not clog pores, sting the eyes, inflame redness and feels safe enough to use every day.

### SPF and Sensitivity

As more consumers identify as sensitive, the very product designed to protect can be perceived as the trigger — redness, stinging, breakouts and heaviness all suppress daily use. The base is large: 71% of consumers across 18 countries self-report sensitive skin (SOURCE: CHEN ET AL., JEADV, 2020), and 43% across 27 countries experienced at least one dermatological condition in the past 12 months (SOURCE: RICHARD ET AL., JEADV, 2022). The perception problem is just as real as the clinical one. In the UK, 1 in 2 adults (51%) believe SPF can cause irritation such as redness, stinging or itching (SOURCE: FACE THE FUTURE, "265 DAYS OF SPF", 2026), and nearly 3 in 4 Brits associate SPF with negative side-effects, from allergic reaction to breakouts and premature ageing (SOURCE: FACE THE FUTURE, 2026).

**Sunscreen is applied most often to the face (74%), arms (71%) and legs (62%),** while hairline and lips are protected by only 19%, and eyelids by 14%.

SOURCE: MELANOMA RESEARCH ALLIANCE / TALKER RESEARCH, 2025 (N=2,000 U.S. ADULTS)

**MOST POPULAR INGREDIENTS RELATED TO SUNSCREEN PRODUCTS**

1. Vitamin C
2. Mineral
3. Zinc
4. Retinol
5. Centalla Asiatica
6. Niacinamdie
7. Hyaluronic Acid
8. Collagen
9. Glutathione
10. Tretinoin
11. Beta Glucan

SOURCE: SPATE POPULARITY INDEX - SPATE MAY 2026

**HOW CONSUMERS DEFINE A "GOOD" SUNSCREEN**

Reddit insights highlight performance, finish, and international benchmarks

1. **Skin Compatibility**
   Sensitive skin friendly, Breakout-safe and No stinging
2. **Cosmetic Elegance**
   Non-greasy, No white cast, No pilling
3. **Global Innovation**
   Asian sunscreens, European sunscreens

SOURCE: REDDIT ANALYSIS BY SPATE 2025/2026

### Protection gets anatomical

Inclusivity also means coverage, and coverage remains inconsistent across the body. Consumers protect the face (78%), arms (71%) and legs (62%) reasonably well, but far fewer remember vulnerable areas such as the hairline (19%), lips (19%) and eyelids (14%) (SOURCE: MELANOMA RESEARCH ALLIANCE / TALKER RESEARCH, 2025).

Scalp, hands, neck, décolleté, tattoos and post-procedure skin are still under-served, creating opportunities for formats designed specifically for these overlooked zones. Non-greasy mists, primers, foundations, lip oils, hand creams, sticks and precision applicators can transform missed areas into meaningful innovation spaces.

The opportunity lies not simply in higher SPF, but in formats engineered into existing habits and use occasions, designed for specific zones and matching sensorial expectations.

### SPF Joins the Longevity Conversation

Barrier-supporting, comfort-led ingredients such as Ectoin, Cica, panthenol, beta-glucan, ceramides, allantoin, bisabolol, colloidal oatmeal and postbiotics (SOURCE: STYLUS, 2025) are now well established within SPF. The next wave of innovation focuses on skin resilience, collagen preservation and healthy skin ageing.

Rather than being judged solely on UV defence, SPF can also support consumers with barrier function, environmental stress, skin quality and long-term skin health. As longevity gains traction across beauty, sunscreen occupies a credible position within the conversation. Few product categories offer such a direct link between daily use and preventative skin health.

# Create for
# TOMORROW'S SKIN HEALTH

In the context of the longevity movement, UV defence has acquired a new and more durable purchase rationale:

A daily investment (even on overcast days) in future skin quality that transcends sunburn to guard against photoageing, inflammation, collagen breakdown, pigmentation and long-term cellular stress. Through the lens of prevention, the motivation for use changes and SPF becomes the single most important step in our routines in terms of supporting skin longevity

### A Prevention-First Generation

A product that visibly supports skin longevity — through antioxidants, peptides, barrier actives — speaks to an audience of consumers already primed to understand the investment they are making, and therefore more likely to make it every day. 61% of Gen Z are very or somewhat concerned about ageing (NIQ, 2024) and 58% of Gen Z begin worrying about ageing by age 23 (SOURCE : GLOBAL COSMETIC INDUSTRY, COLLAGEN BANKING: BEAUTY'S LONG GAME, OCT 2024).

One of the strongest illustrations of this is the practice of collagen banking: preserving collagen during peak production years rather than attempting to restore it later. For this cohort, they treat daily SPF as a core part of self-care and the foundational anti-ageing step, ahead of any serum or treatment.

### Precision Protection

More and more SPF formulations are being enriched with ingredients such as regenerative PDRN (+>1000% YoY on Tiktok avg. weekly views - SPATE), advanced antioxidant systems, photoprotective botanicals, SPF boosters, microbiome-supportive ingredients and biotech-derived molecules that help skin respond better to UV stress. A new vocabulary is forming around protection as a whole ecosystem with the preventative treatment layer designed to slow visible ageing before it starts.

### DEMAND SIGNALS CONFIRM THE APPETITE

Consumers are actively pulling SPF toward treatment benefits: products with anti-ageing claims drive a +49% uplift in demand, followed by hydrating (+33%) and vitamin C (+23%) (Veylinx, 2024). The market wants its sunscreen to earn its place in the routine by doing more than blocking UV.

### After Sun and Recovery

There's clear, under-developed territory around after sun and recovery. As skin ages, the recovery window after a burn lengthens and UV-induced DNA damage continues even at night, making recovery and resilience natural extensions of a prevention-first story. Incorporating post-sun care as part of a continuous skin-longevity ritual, elevated through actives and serious positioning rather than treated as an afterthought, is one of the category's clearest open opportunities.

### GLOBAL MARKET DATA

SKIN LONGEVITY
**3.5M** avg. weekly views on Tiktok
**+135%** YoY

SUNSCREEN PRODUCT + FACIAL AGING
+ >1000% YoY Spate Popularity Index

KOREAN SUNSCREEN + HEALTHY AGEING
+> 1000% YoY Spate Popularity Index

**+255%** YoY Google Searches Increase For **"UV DAMAGE"** with top search queries : "How does UV light damage DNA"

**Searches for "Anti Wrinkle with SPF" on Google grew by** +>1000% since the beginning of the year – from 0 searches in Feb 26 to 42.8K searches in Apr 26

AFTER SUN CARE
**4.2M** avg. weekly views on Tiktok
1M avg. monthly searches on Google (+49.5% YoY)

AFTER SUN CARE + RECOVERY
+89% YoY Google Searches

SOURCE: SPATE JUNE 2026

CURIOUS TO KNOW MORE?
Contact businessdevelopment@thglabs.com

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## 1 CATER FOR ALL

Broad-spectrum is baseline. Differentiation lives in barrier-first, sensitive-friendly, inclusive protection that delivers an experience across every skin type and tone, visibly solving the white-cast problem. The brand that makes daily SPF genuinely tolerable and desirable for those consumers that the category has historically failed, captures the clearest unclaimed demand in suncare.

> **THG LABS** expertise in meeting global regulatory standards, backed by comprehensive clinical testing, ensures that your SPF products will be market-ready, compliant, and effective for all skin types and concerns. **THG LABS** factory facilities in the UK are registered with the US FDA for the manufacture of Sunscreen Drug Products.

## 2 RETHINK TEXTURE, FINISH AND FORMAT

Sensoriality drives reapplication and repeat purchase, so invest in invisible finishes, lighter milks and waters, on-the-go sticks, mists and compacts. Format and feel are a value proposition: they are what make SPF pleasurable, repeatable and easy to reapply. Portability, texture, fragrance and finish will determine whether protection becomes a habit.

> With an extensive R&D division and a specialist SPF development team, **THG LABS** excels in every aspect of sunscreen manufacturing—from creating diverse textures and formats to delivering innovative packaging solutions. Our bespoke formulations empowers brands to seamlessly integrate SPF into everyday beauty routines, enhancing consumer loyalty and satisfaction.

## 3 POSITION SPF AS PREVENTATIVE AGEING

Suncare and safety should always be the number one priority. UV is a major cause of premature aging and skin damage, which makes year- round protection from exposure the best defence against early signs of ageing.

Help broaden appeal and compliance by connecting daily protection to skin longevity and recovery and speak the language of a prevention-first generation.

> Our R&D team leverages cross-disciplinary expertise in skincare and haircare to meet the demands of hybrid product briefs.

This close collaboration means **THG LABS** delivers custom, multi-functional SPF solutions that address a wide range of consumer needs and uses.

## 4 BUILD DIGITAL TRUST

Misinformation is the single biggest threat to category growth, so treat digital as a behaviour-change tool: decode the myths, explain the chemistry, and make verified education part of the product itself. The brands owning transparency will earn credibility and trust – crucial if you want to make SPF use habitual.

> Colleagues across our teams are active members of respected industry organisations, including CTPA. **THG LABS** in-house experts can advise on consumer facing communication relating to key topics around science, safety and regulatory.

**Explore what this means for your brand.**
**Contact: businessdevelopment@thglabs.com**



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## Co-Authors


- Aurelie Brunel
  Technical Innovation Manager, THG LABS
- Kristal Goodman
  Head of Product Innovation, THG LABS
- Jessica Lawther
  Head of Marketing & Communication, THG LABS


## Design


- Sara Burgess
  Head of Studio, THG LABS


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**THG LABS**
Meridian Business Park
North Bradley
Trowbridge
Wiltshire BA14 0BP