



# Sun Care emerging brands

Celebrating the top new brands within  
sun care

October 2022

# Product attribute markers

**B**

Brand  
Extension

**O**

Omni

**I**

Non-  
binary

**Cf**

Cruelty  
free

**Pb**

Plant  
based

**C**

Clean

**M**

“Male-  
targeted”

**Og**

Organic

**Alf**

Aluminum  
free

**Free  
from**

Free from

**S**

“Social  
selling”

**N**

Natural

**Sf**

Sulfate  
free

**E**

Exclusive

**D**

DTC

**Af**

Alcohol  
free

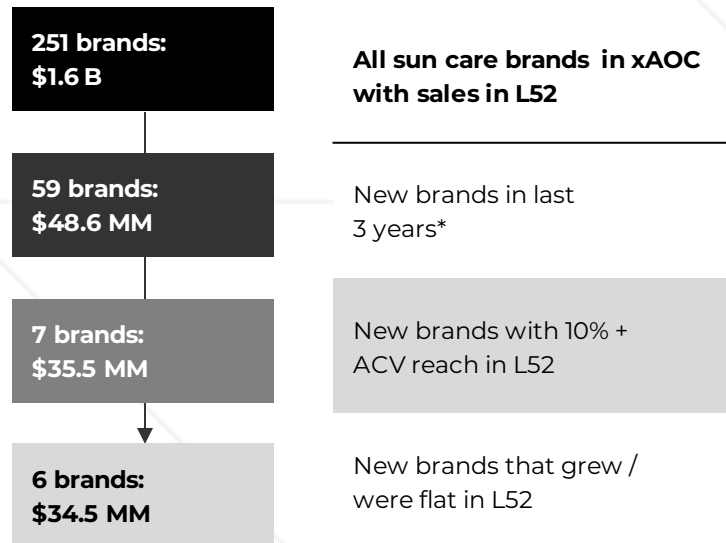
**V**

Vegan

“Omni” includes products that are available within xAOC (excludes specialty retailers) and online. Some online brands may not appear due to sample size.  
“Exclusive” badge is used for brands that can only be purchased through one retailer/merchant.

# Sun Care: framework for identifying the top emerging brands

## Sun Care – B&M



## Sun Care – Online



B&M Source: Nielsen Scantrack © xAOC | 52 WE10/08/22 | BC Department= Health & Beauty Care, BC Super Category = Sun Care, "Brand"= Brand High | Dollars listed above for L52 weeks |























eCom Source: NielsenIQ Total US eCommerce Measurement Powered by Rakuten Intelligence | 12 months through 10/08/22 | Sun Care

\*New Brands in last 3 years: Brands whose sales began in last 3 years, and if launched 2 YAG, then those sales were 20% or less of YAG sales | New brands that grew/were flat in L52: Includes brands whose sales exceeded -20% vs YAG

# In-Store Emerging Brands

Most in-store emerging sun care brands are clean

Category size (In-store)  
\$1.6B +8%


Brand name					
<b>Brand name</b>	<b>Cetaphil</b>	<b>Eucerin</b>	<b>Bliss</b>	<b>Kinlo</b>	<b>Pipette</b>
<b>Manufacturer</b>	Galderma Laboratories Inc.	Beiersdorf	Bliss World LLC	Kinlo Inc.	Amyris Inc.
<b>Launch date into Sun Care</b>	December 2020	November 2020	January 2021	April 2022	March 2021
<b>L52 week sales</b>	\$15.9 MM	\$14.7 MM	\$3.1 MM	\$0.4 MM	\$0.2 MM
<b>Product Positioning:</b>	Dermatologist recommended sun care products targeted toward sensitive skin	Line of sun care products with broad spectrum protection focused on anti-aging	Sunscreen that leaves a clear, vanishing, non-greasy finishing for a natural look	Celebrity owned by Naomi Osaka SPF skin care designed specifically for melanated skin, sold exclusively at Walmart	Baby-friendly sun care that is developed from natural ingredients to not leave a white-cast on skin
	  	  	    	  	  

# Online Emerging Brands

Most of the online emerging skin care brands are exclusive or DTC

Category size (Online)  
\$1.1B +11.7%



Brand name	<u>Arbonne</u>	<u>Black Girl Sunscreen</u>	<u>Thrive Causemetics</u>	<u>Native</u>
<b>Manufacturer</b>	Arbonne International, LLC	Black Girl Sunscreen	Thrive Causemetics	P&G
<b>Launch date into Sun Care</b>	April 2021	October 2019	March 2022	February 2022
<b>L52 week sales</b>	\$5.2 MM	\$5.1 MM	\$2.4 MM	\$0.7 MM
<b>Product Positioning:</b>	DTC brand that focuses on products that are natural and plant-based	All-natural sun care line made specifically for women of color	DTC brand that gives back to the community with every product purchased	Clean brand that pride's itself in being open and honest about all ingredients
	V Cf Free from E D	Free from V Cf N	E D	E Free from C 

Source: NielsenIQ Total US eCommerce Measurement Powered by Rakuten Intelligence | 52 WE 10/08/22 | Sun Care | Top 5 "new brands" by dollar sales, per criteria on slide 3



# Project Team

Integrating insights and expertise across organizations

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**Thank you.**