

Category Spotlight: Sun Care

NielsenIQ



More Than A *Beauty* Concern

Sun care plays an essential role in protecting skin health and longevity

“UV damage is mostly avoidable. **The rise in the incidence of skin cancers over the past decades is strongly related to occupational and recreational UV exposure.** Overexposure to UV radiation is recognized as the underlying cause for harmful effects on the skin, eye, and the immune system... And adopting simple precautions can make all the difference.

You should generally be **careful between spring and early autumn** when the sun's rays are most intense. In the tropics and near the equator, **year-round protection from UV radiation may be necessary** depending on your skin type.

Always use a sunscreen that filters out **both UVA and UVB** and has an **SPF of 30 or higher.** To achieve good protection, apply the sunscreen thickly and evenly to all exposed parts of your body **20 to 30 minutes before** going outside... You should **re-apply the sunscreen every two hours**, and especially after bathing and sweating.

A number of studies have shown that **most people do not apply sufficient amounts of sunscreen** and therefore do not achieve the specified SPF. Approximately **35 ml of sunscreen must be applied** to the total body surface of an adult to result in the quoted SPF. It is better to apply too much sunscreen than too little.”

“With proper protection, **four out of five cases of skin cancer could be prevented.**”



**World Health
Organization**

Source: [Radiation: Protecting against skin cancer](#)

Why Sun Care is in the Spotlight

The convergence of climate, culture and skincare innovation is redefining a once seasonal category

Rising Temperatures

Climate-driven heat waves and rising UV index levels are driving demand for sun care and extending sun exposure beyond traditional summer months.

Sun-ification of Beauty

Sun protection is merging into skincare, haircare and makeup routines with tinted sunscreens, SPF-infused serums and hybrid formats.

Sun Scepticism

Viral misinformation questioning sunscreen safety and efficacy is spreading on social media, forcing brands to counter with ingredient education and dermatologist-backed messaging.

Sun Safety Education

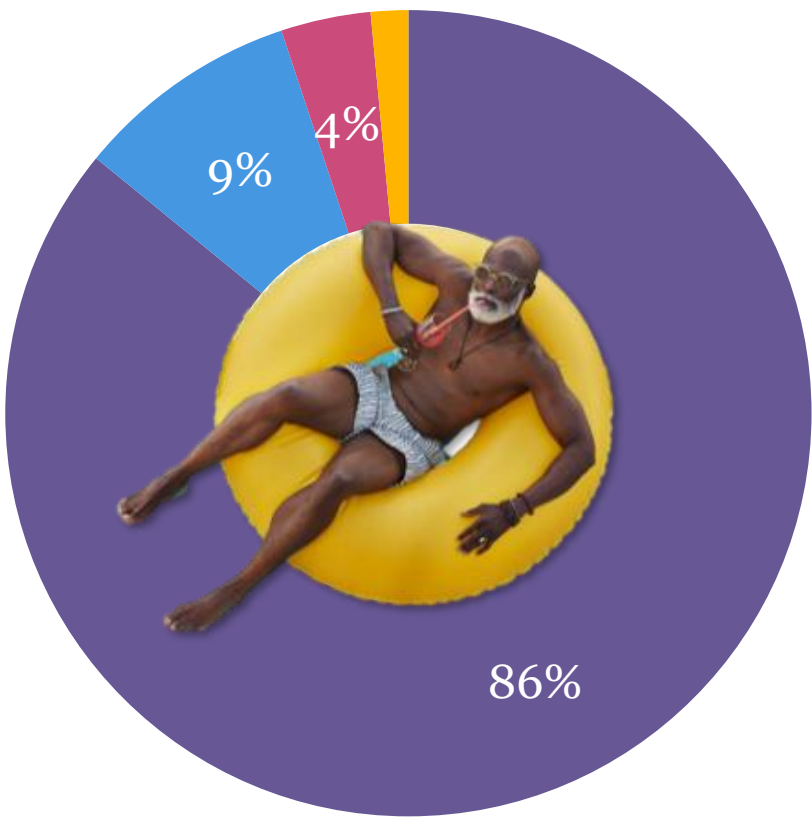
Growing awareness of skin cancer risks and long-term UV damage is driving demand for sun care and year-round protection.



Sun Protection Leads, But Every Segment Is Growing

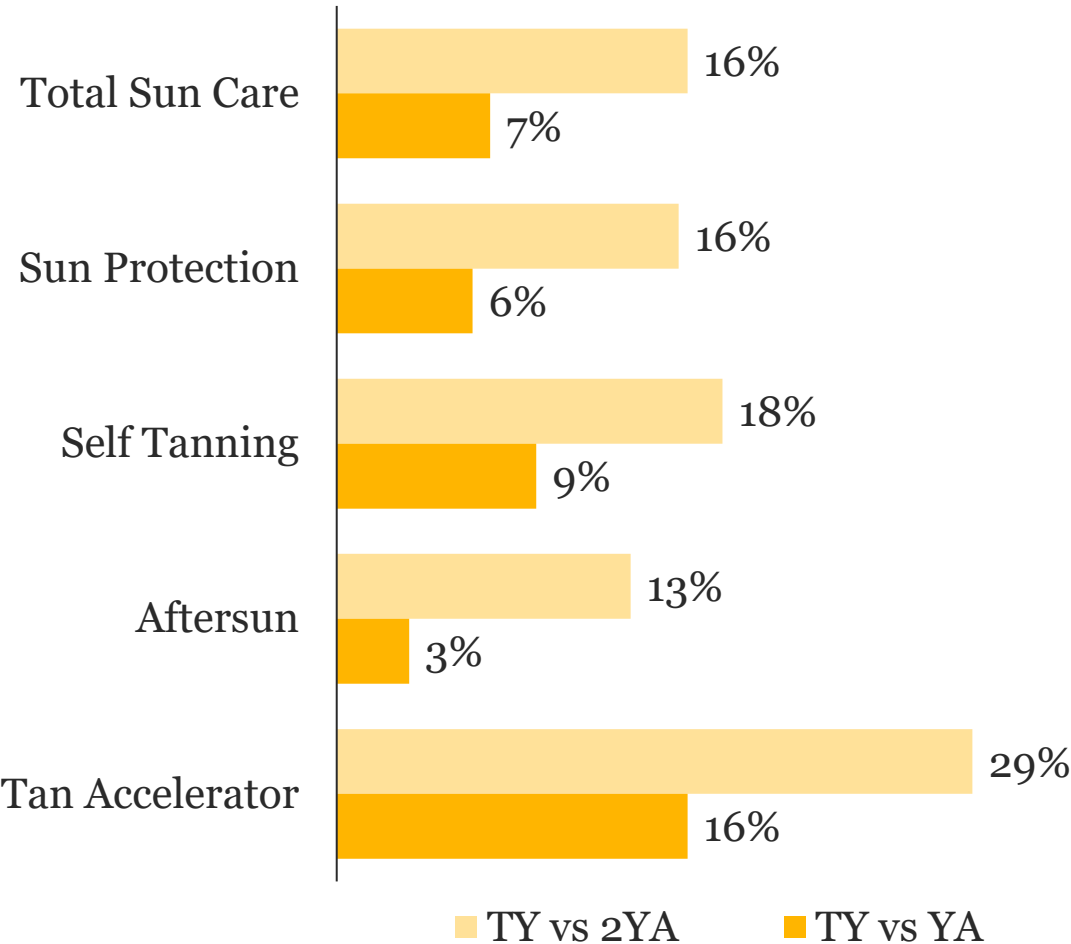
Protection remains the core of the category, yet growth is broad-based from tanning to aftercare

Sun Care – Share of Value Sales



■ Sun Protection ■ Self Tanning ■ Aftersun ■ Others

Value % Change



Source: 53 Markets – Latest 52 Weeks MAT June 2026 – NielsenIQ Global Strategic Planner, NielsenIQ Retail Measurement, NielsenIQ Omnishopper Panel (US, CA, AU), NielsenIQ Omnisales (DE, IT, FR, ES, GB), China not included

Sun Protection Now Expands Beyond the Sun Care Shelf

The sun-ification of being now sees sun protection and SPF embedded throughout the beauty routine

Skin



7% of *facial moisturizer* value sold contains SPF

Makeup



8% of *facial cosmetics* value sold contains SPF

Hair

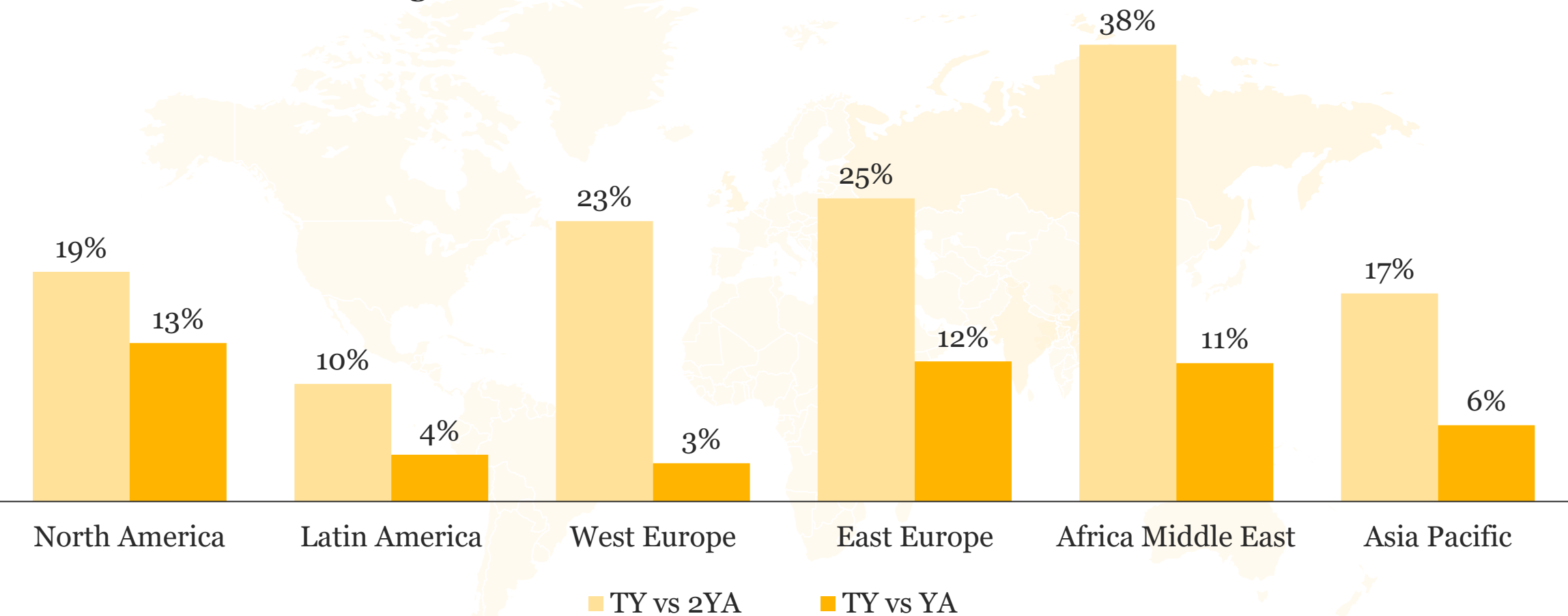


Sources: NielsenIQ Omnishopper Panel Latest 52 weeks ending 13th June 2026 | NielsenIQ Product Attributes, Sun Protection Factor included | images sourced from brand websites

Sun Care Sales Continue to Heat Up

Consumers around the world are continuing to invest heavily in sun care

Total Sun Care Value % Change – Latest 12 Months

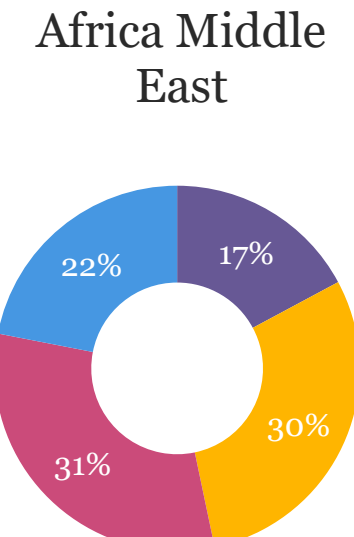
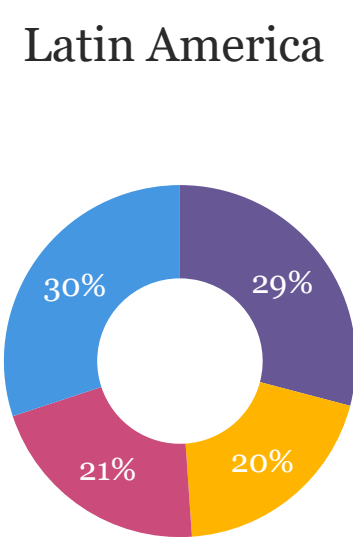
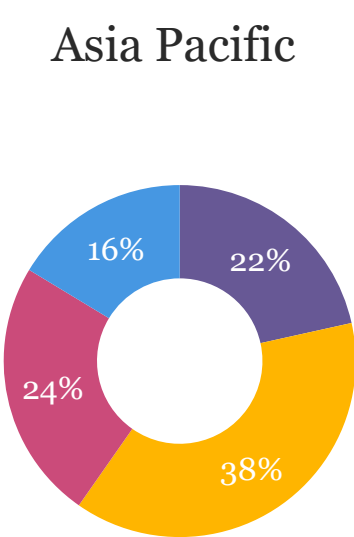
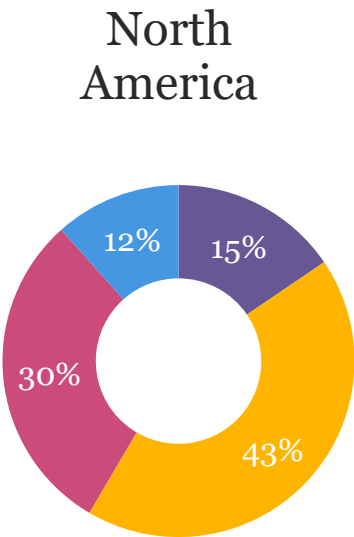
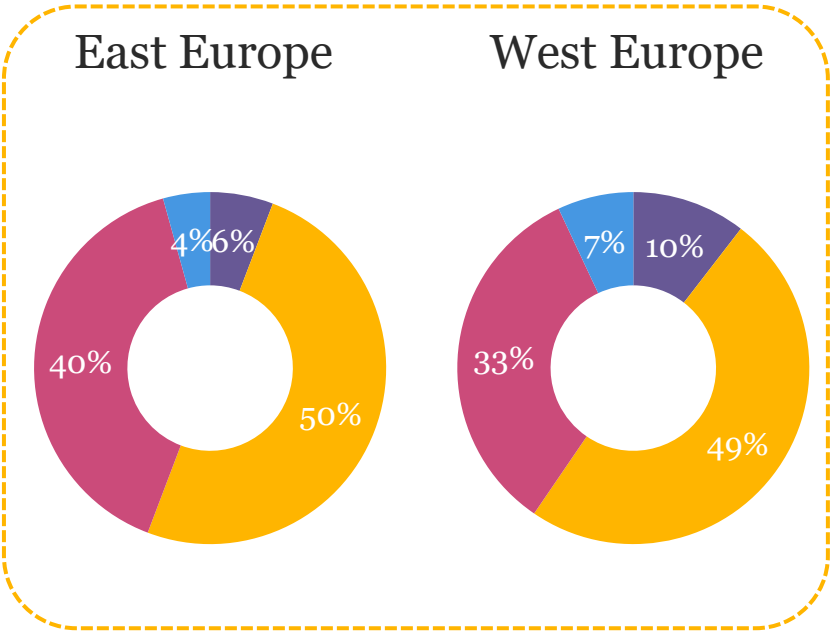


Source: NielsenIQ Omnishopper panel, Omnisales, SPG Monthly | Latest 52 weeks ending June 2026 | Europe = Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, Ukraine, 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 = Brazil, Chile, Colombia, Mexico, Peru

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 2025 sales between Q2 & Q3



■ Q1 ■ Q2 ■ Q3 ■ Q4

Source: NielsenIQ SPG Weekly, NielsenIQ Omnishopper panel, NielsenIQ Omnisales– Full Year 2025. 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 = Brazil, Chile, Colombia, Mexico, Peru



Record Breaking Temperatures Fuel Rising Sun Care Demand

Global temperatures are hitting new heights, particularly across Europe, prompting heightened sales

 The Guardian

Record May highs sweep across France as extreme heat hits western Europe

Mercury in Spain also climbs to well above normal with weather event set to continue for several more days.

 World Meteorological Organization WMO

Western Europe has hottest June on record

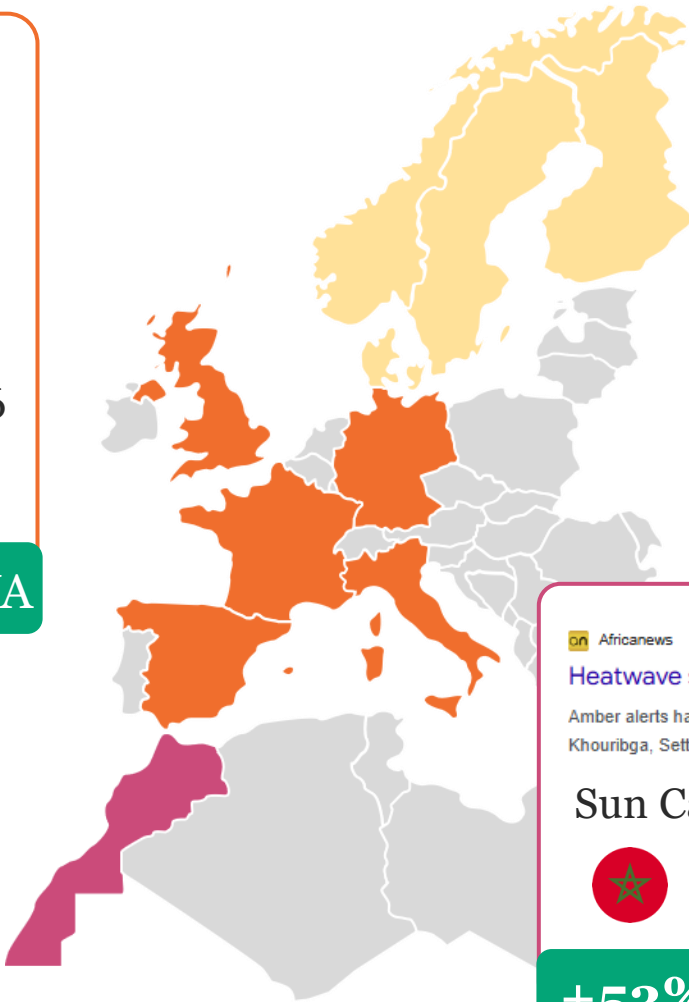
June 2026 was the hottest June recorded for western Europe and the second warmest globally, driven by the highest sea surface temperatures...



Sun Care – West Europe - May/June 2026



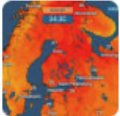
+31% value sales vs YA



 Earth.Org

Nordic Countries Bake in Unprecedented and Prolonged Summer Heat Not Seen in Decades

Temperatures surpassed 30C in parts of Finland, Norway and Sweden, which is significantly higher than average summer temperatures.



Sun Care - Nordics - Latest 12 Months



+27% unit sales vs YA

 Africanews

Heatwave scorchs Morocco as temperatures top 45°C

Amber alerts have been issued for the provinces of Sidi Kacem, Sidi Slimane, Khouribga, Settat, and Marrakech.



Sun Care - Morocco - Latest 12 Months



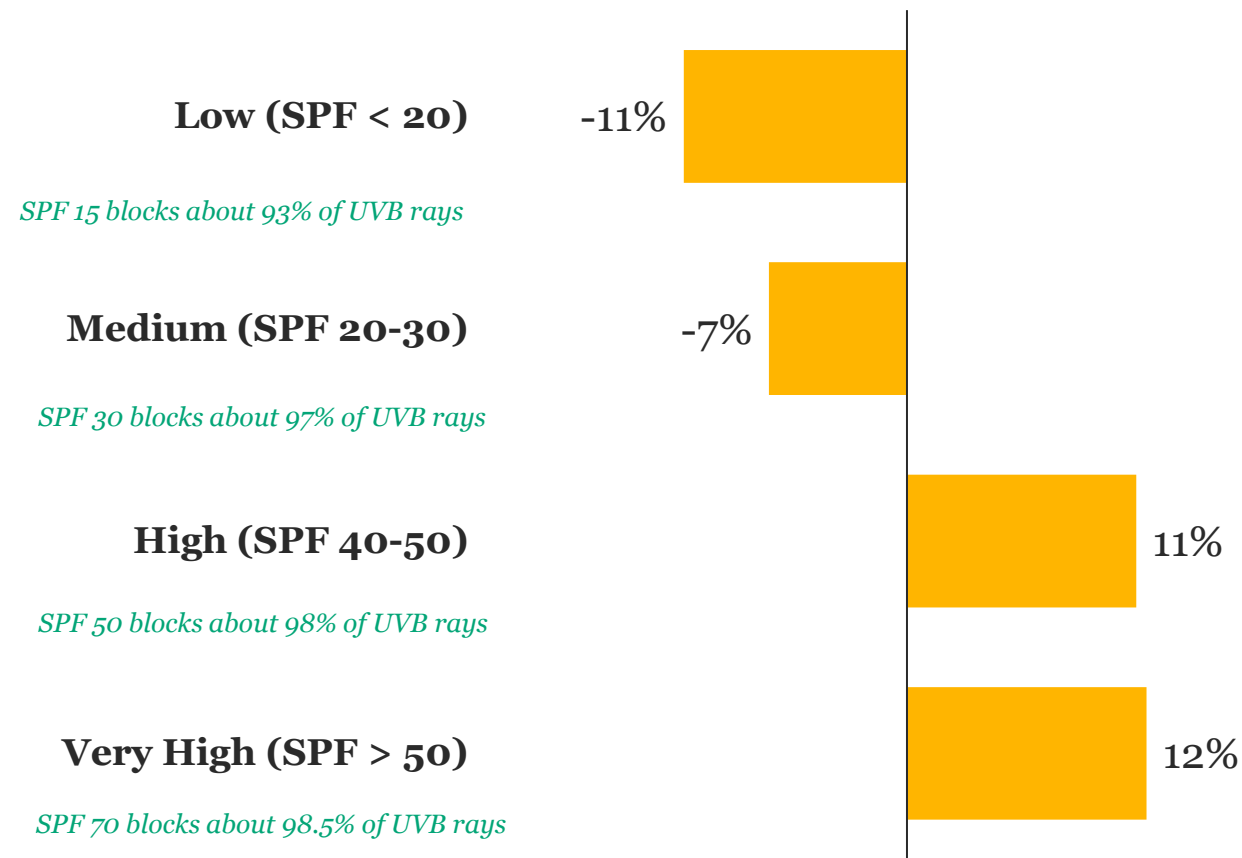
+53% unit sales vs YA

Source: NielsenIQ Strategic Planner Monthly, Consumer Panel, Omnisaes, Latest 52 weeks ending June 2026

Increased Temperatures Turn Attention to Increased Protection

European consumers are increasingly shifting towards the highest SPF ratings

Value % Change by Sun Protection Factor – West Europe

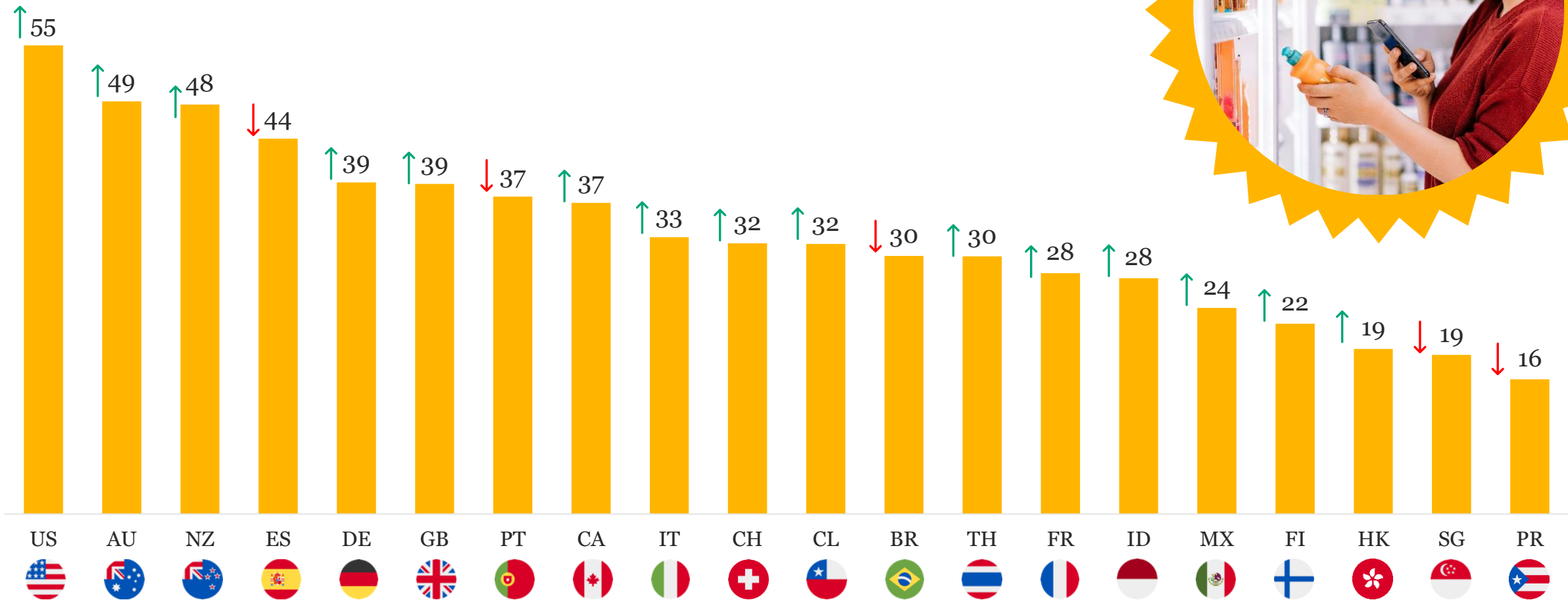


Source: NielsenIQ Omnisaales Latest 52 weeks ending June 2026

Sun Care Adoption Spans a Spectrum

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

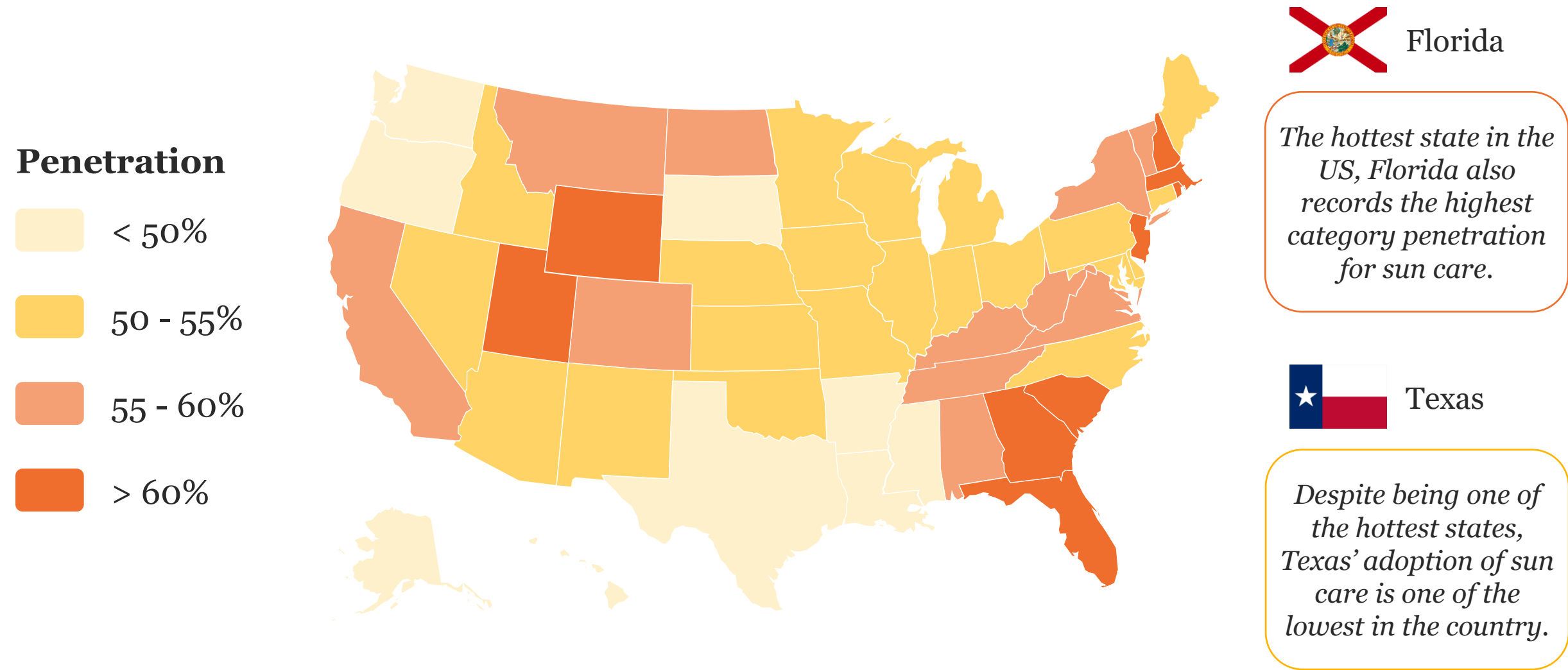
% Penetration – Sun Care – Latest 12 months



Source: NielsenIQ Consumer Panel Latest 52 weeks ending June 2026

The Habit Goes Beyond Temperature

Environmental and demographic factors can influence the use of sun care within a country or region

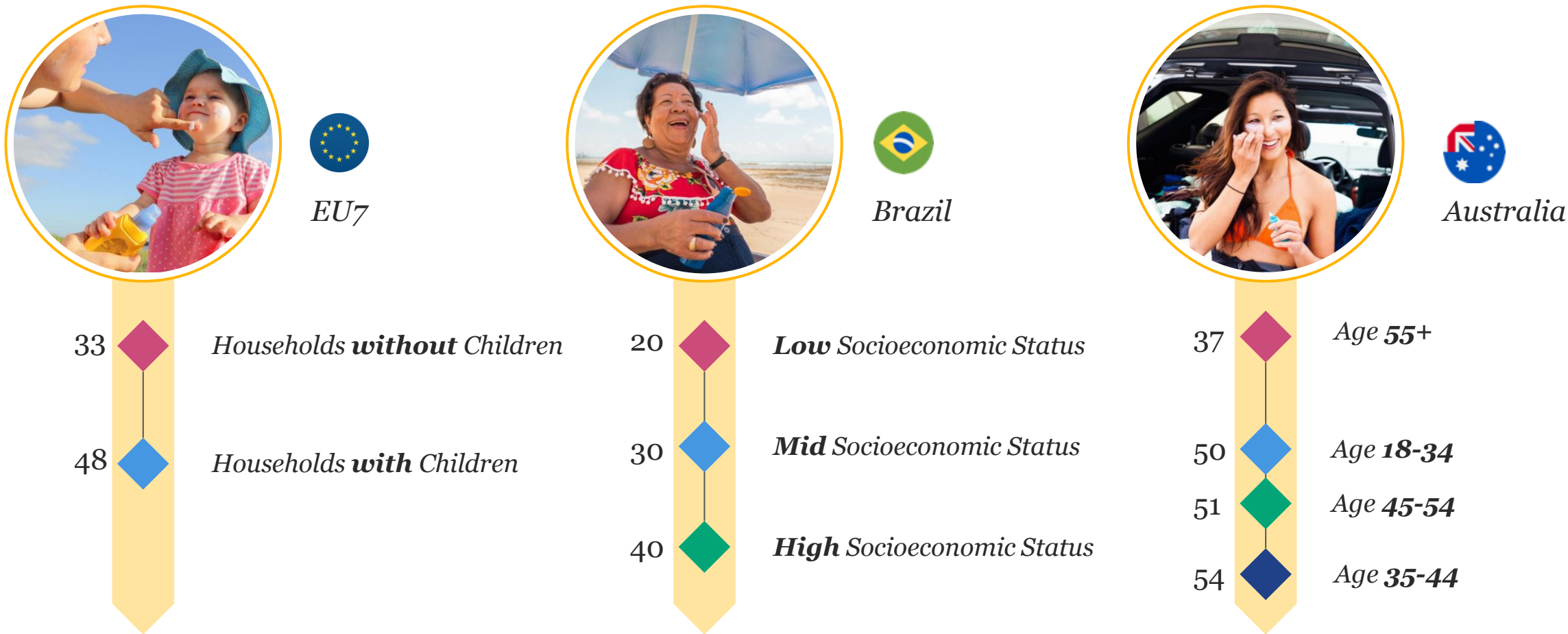


Source: NielsenIQ US Omnishopper Panel Latest 52 weeks ending June 2026

Children, Affluence & Age Drive Sun Care Habits

Life stage is a key determinant of sun care adoption, with middle-aged households with children the highest adopters

Sun Care Penetration Households by Demographic Group



Source: NielsenIQ Consumer Panel, Omnishopper Panel, Latest 52 weeks ending June 2026 | Affluency = Socioeconomic Level (NSE)

Sun Care on Social: Scepticism, Debate and the New Tan Culture

From the silly to the serious, the legitimate to the dangerous, social media encourages new methods to achieve the perfect tan

Chemical vs Mineral



Chemical sunscreens
AVOID ❌

These fall into the category of "chemical sun..."

Chenyce
2 may 2025
17,1 mil

Tan Maxxing



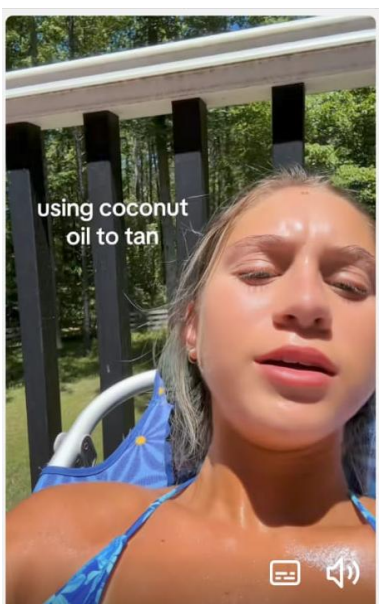
Con más me gusta

TREND
TAN MAXXING

Il Tan Maxxing è il trend skincare più pericoloso de...

InesMorden...
hace 3 día(s)
22,1 mil

Coconut Oil Tanning



using coconut
oil to tan

unicornprince...
5 jun
1,8 mill.

Carrot Maxxing



day 1 of drinking
carrot juice until
i turn orange

carrotmaxxing 🥕 carrot
juice until day 1 of drinkin...

regin
hace 3 día(s)
12,3 mil



“Amid growing skin cancer rates in the U.S., falsehoods around sun protection run rampant online, spread by social media “stars” whose legions of devoted fans have transformed them into vectors of misinformation.”

- [Skin Cancer Foundation](#)

+43% 

Mineral Based Sunscreen - Stated

 +24%

Sources: NielsenIQ Product Insights Latest 52 weeks ending June 2026 | Marcon A, Zenone M, Boniface V, Peters CE, Caufield T (2026) Sunscreen is overwhelmingly promoted on TikTok, but content with misinformation exhibits proportionally high levels of audience interaction. PLOS Digit Health 5(6): e0001440. <https://doi.org/10.1371/journal.pdig.0001440> | <https://www.skincancer.org/blog/skin-health-misinformation-the-dark-side-of-social-influencers/> | TikTok videos linked in images

Format Innovation Keeps the Category Fresh

Creams, gels, mousses, sticks and mists are adding options for how to stay protected from the sun



+30% sun sticks value sales vs year ago

Source: images sourced from brand/retailer sites | NielsenIQ SPG Packaging, Omnishopper Panel, Latest 52 weeks ending May 2025

Go Inside the Bottle to Understand What's Driving Growth

NielsenIQ Product Insights combines NIQ's market measurement with deep product attribute data to unify package claims, certifications, and ingredient attributes – helping you identify key drivers of performance and emerging trend

Free From Parabens ←

Mineral Sunscreen ←

Reef Safe ←

Waterproof ←

Moisturizing ←

Cruelty Free ←

Hyaluronic Acid ←

Dermatologist Tested ←



Available in West Europe & North America

- US
- Canada
- France
- Germany
- Ireland
- UK
- Belgium
- Netherlands
- Austria
- Switzerland
- Portugal
- Spain

**Coming soon in
EEMEA & LATAM**

Available product attributes may vary by market

Contact Your NielsenIQ Team to Know More

Sun Care's Future

Sun Care is at a key moment as rising temperatures raise attention, and social media scepticism challenges the category's status

Sun Care Isn't Just For Summer

Climate heat is changing seasonal patterns and bringing increased attention to the category; stock and marketing need to be prepared.

Beyond the Sun Care Shelf

Growth is migrating into skincare, makeup and new formats. Brands that hybridise capture it first.

Own the Narrative Before Misinformation Does

Trust is the battleground; credible, dermatologist-backed messaging is now a growth lever.



Thank You

Sources used in this report: NielsenIQ Omnishopper Panel, NielsenIQ Omnisales, NielsenIQ Retail Measurement, NielsenIQ Consumer Panel, NielsenIQ Digital Purchases,

Category Coverage: Sun Care in this report is defined as Sun Protection, Self Tanning, After Sun, Tan Accelerator, Tanning Devices and All Remaining Sun Care. Excludes other beauty categories with SPF or sun protection claims e.g. skin care with SPF *Coverage varies by market

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