



Sun Care Industry

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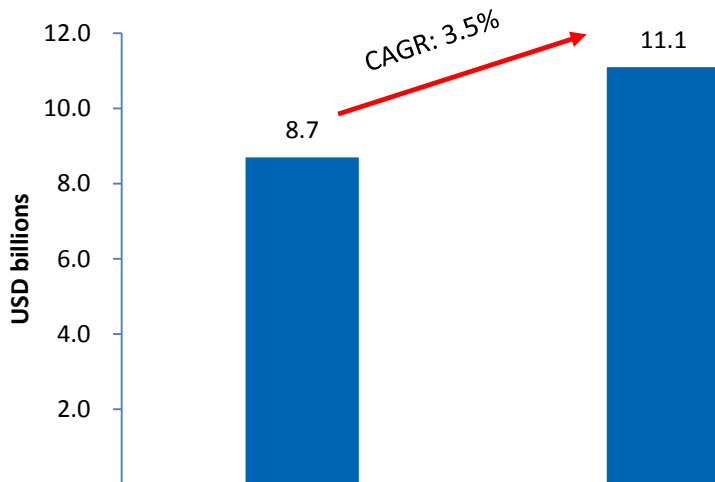
Global Sun Care Market

Global Sun Care Market

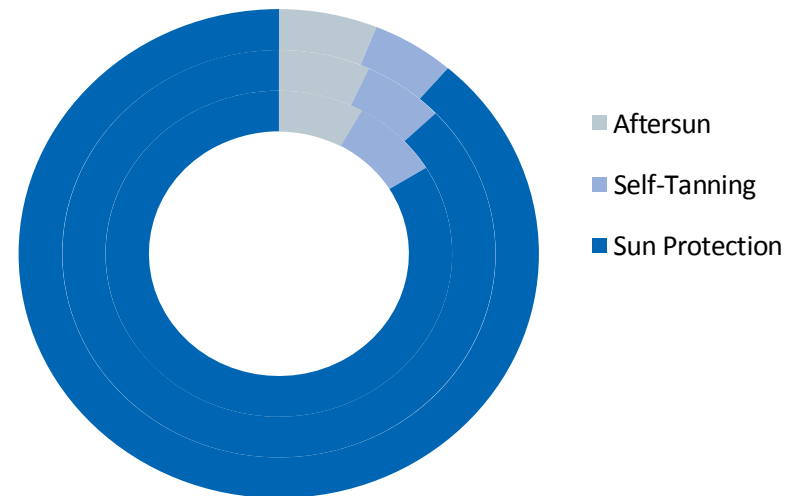
Overview

- Global Sun Care market size is estimated to be at **\$8.7 billion** at the end 20XX and is projected to grow at a **CAGR of 3.5%** to **\$11.1 billion by 20XX** driven by rising awareness over the importance of sun protection and launch of new products
- Growth in the coming years will also be driven by the development of more effective sun care formulations featuring natural and organic ingredients
- It is segmented into three product categories
 - Sun protection products
 - After-sun products
 - Self-tanning products
- Currently, Sun-protection products segment represents **~80%** of the overall sun care market

Market Size



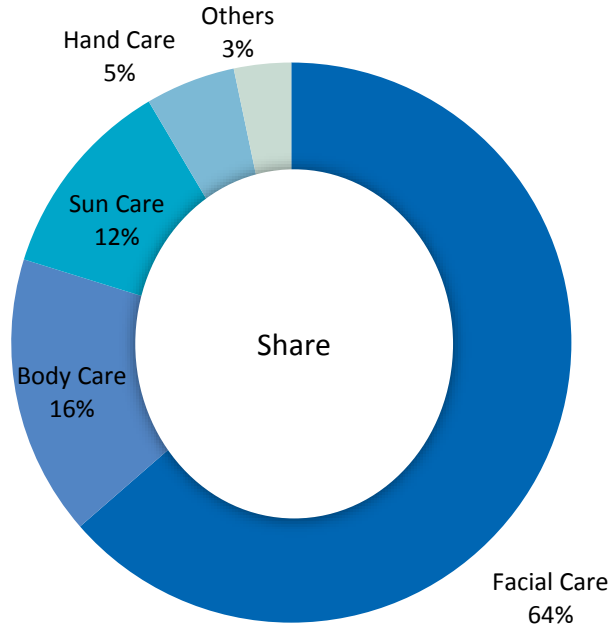
Product Segmentation



Note: Inner circle 20XX; middle 20XX; outer 20XX

Global Sun Care Market Overview

Global Skin Care Market - Segmentation



Sun Care represents **12%** of the overall global **Skin Care** product market

Largest Sun Care Market



Europe: The Largest Market

Most potential for growth



Latin America – CAGR of 10.2% through 20XX

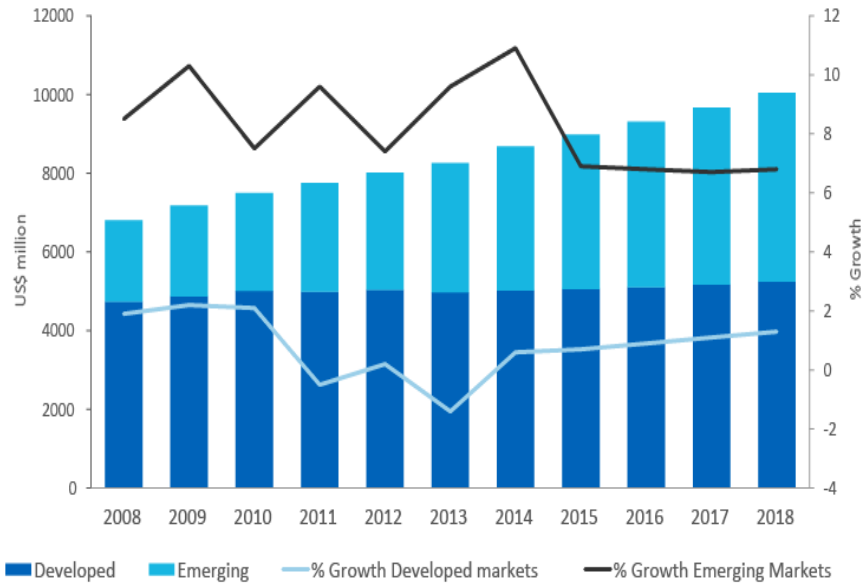


Asia-Pacific

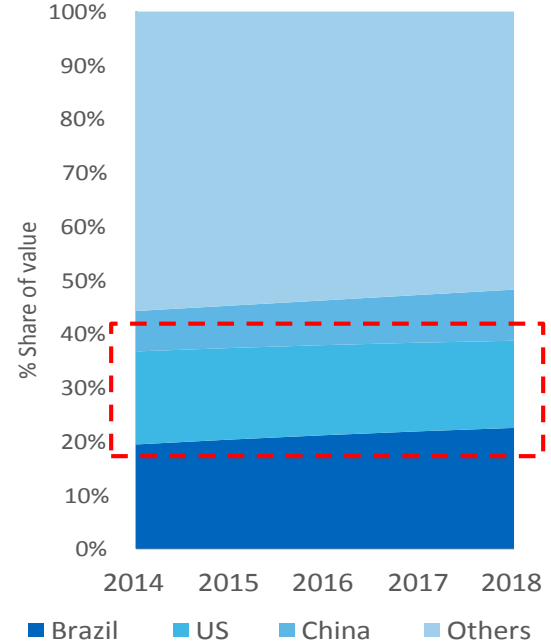
Global Sun Care Market

Geographical Segmentation

Developed vs. Emerging Markets 20XX-20XX



Sun Care's Revenue Share – 20XX-20XX

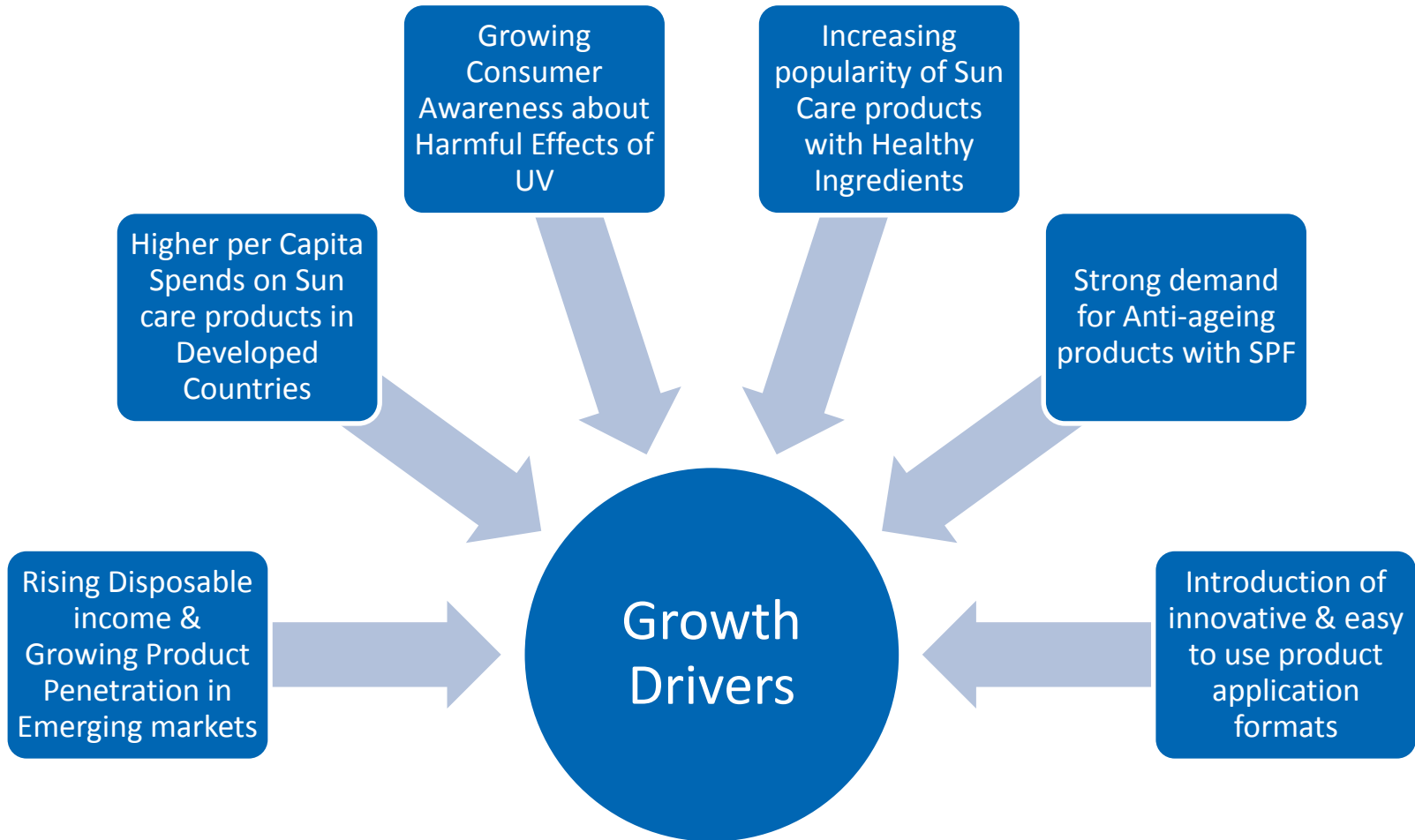


Sun Care market's growth in Developed markets has stagnated

U.S. Market Share is expected to remain constant till 20XX

Global Sun Care Market

Growth Drivers





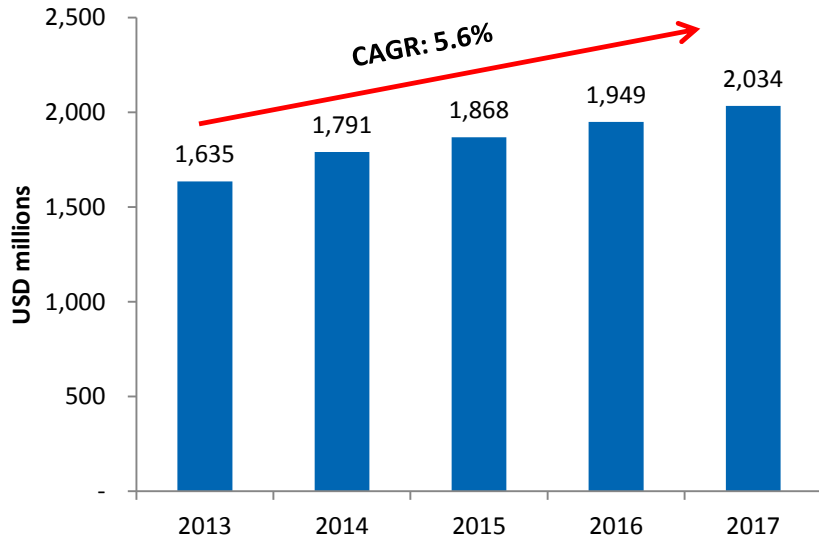
U.S. Market

U.S. Sun Care Market

Overview

- U.S. Sun Care Market was estimated at **\$1.6 billion in 20XX** and is expected to increase to **\$2.0 billion** at a CAGR of 5.6% by 20XX
- The volume of units sold over the next four years will see an increase from **232.4 million** in 20XX to 268.5 million in 20XX
- Sun Protection products is the most valuable product segment within the Sun Care market, worth \$1.4 billion in 20XX
 - After Sun Products and Self Tanning Products are the other two key sub-segments within the Sun Care market with share of 4% and 10% respectively

Market Size



Key Players in the U.S.



Johnson & Johnson

L'ORÉAL

AVON

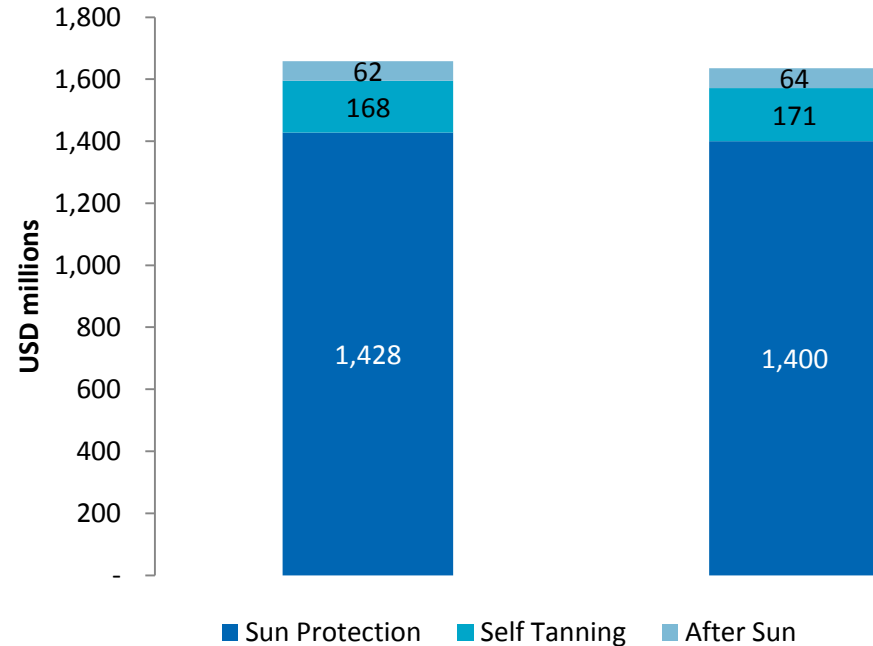


U.S. Sun Care Market

Product Segmentation

Product Segmentation

- 20XX marked the first year that sun care value sales declined in the last decade
- Sun protection, which accounts for **86% of overall value sales**, was the determining factor, with a current value decline of 2%, falling to **US\$1.4 billion**
- Self-tanning and Aftersun, which accounted for the remaining 10% and 4% shares respectively, both saw modest gains
- Self-tanning grew by **2%** in current value terms to reach **US\$171 million**
- Aftersun grew by **3%** to reach **US\$64 million**

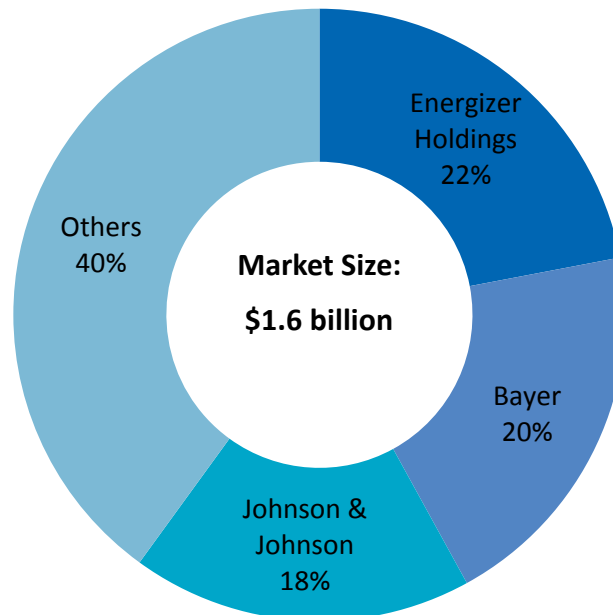


U.S. Sun Care Market

20XX Market Share

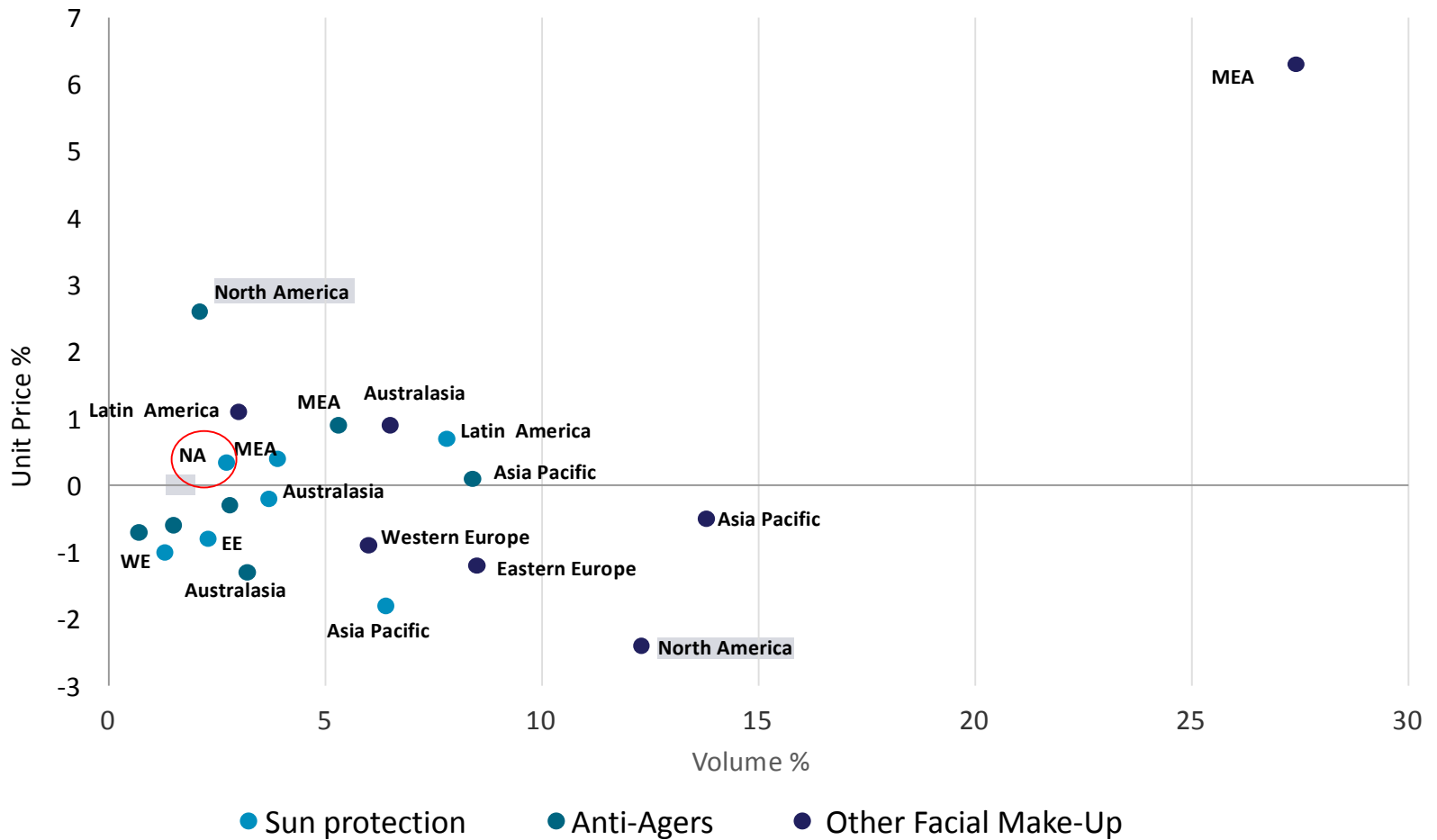
Market Share

- In 2013, Energizer Holdings, Merck & Co (acquired by Bayer) and Johnson & Johnson Consumer Products continued to account for the majority of value share in sun care in the US
- Energizer Holdings led with a 22% value share and sales of US\$376 million
 - followed by Merck & Co with 20% and US\$331 million
 - and Johnson & Johnson with 18% and US\$295 million
- Energizer Holdings has continued to generate the most retail value sales of all companies since its acquisition of Banana Boat and Hawaiian Tropic in 2007



U.S. Sun Care Market

Volume vs. Price Growth Trend – 2013 to 2018

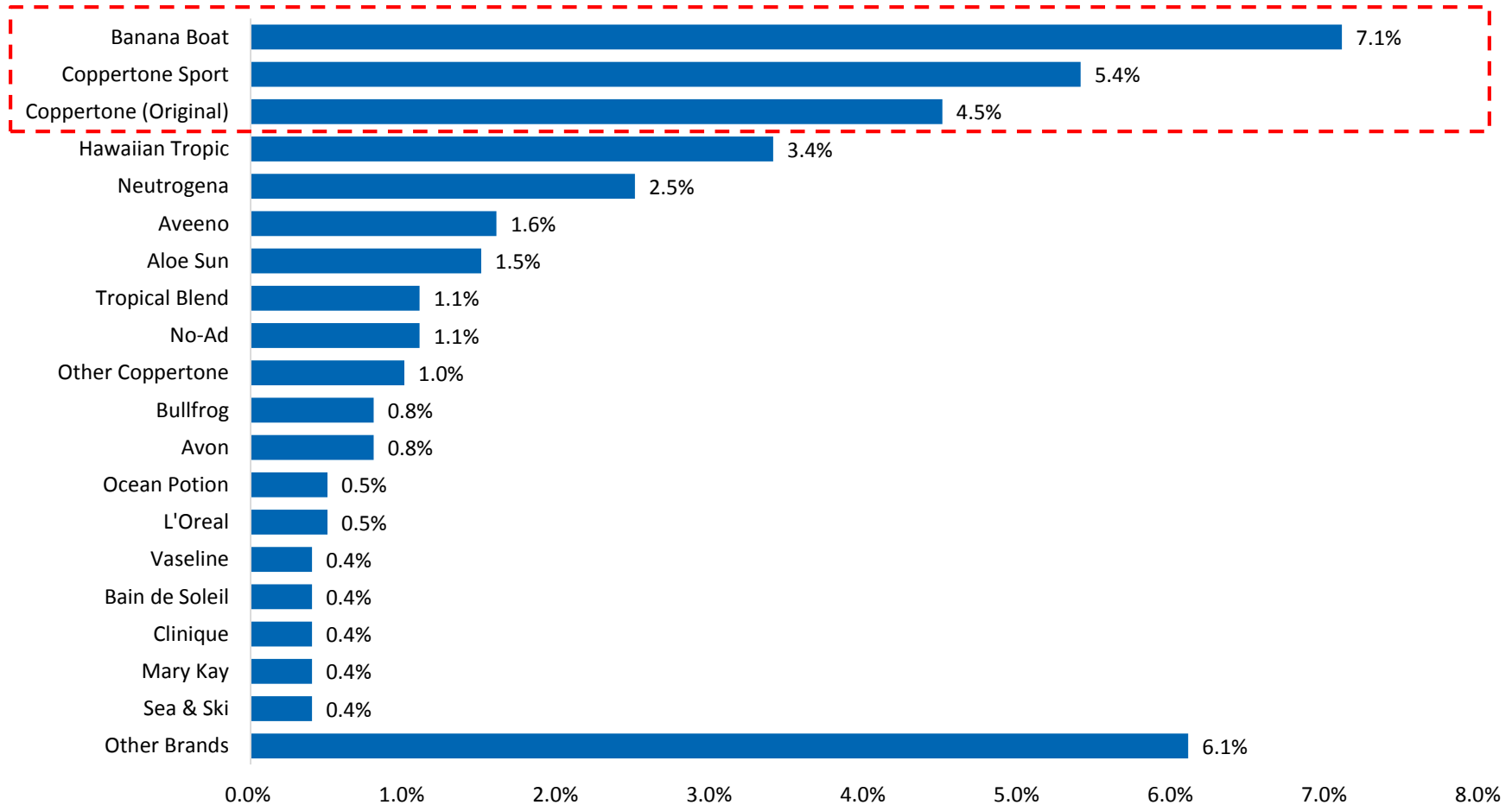


Increase in revenue per unit from Sun Protection products in North America will be primarily driven by volume growth, partially offset by marginal decrease in price per unit

Source: Euromonitor International

U.S. Sun Care Market

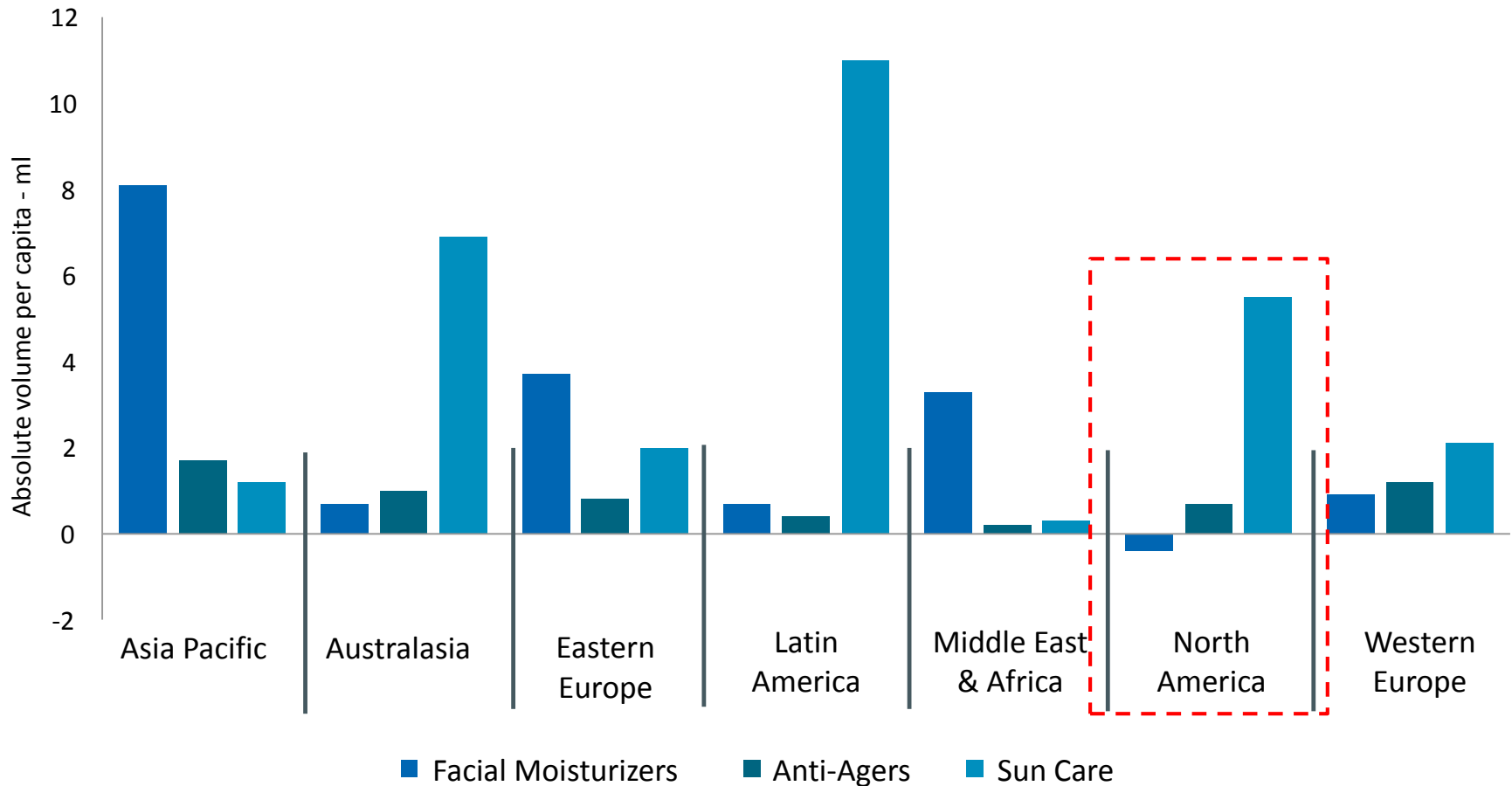
Top Brands Popularity



Coppertone (Bayer Group) and Banana Boat (Energizer Holdings) have the highest popularity in the U.S.

U.S. Sun Care Market

Per Capita Sun Care Consumption

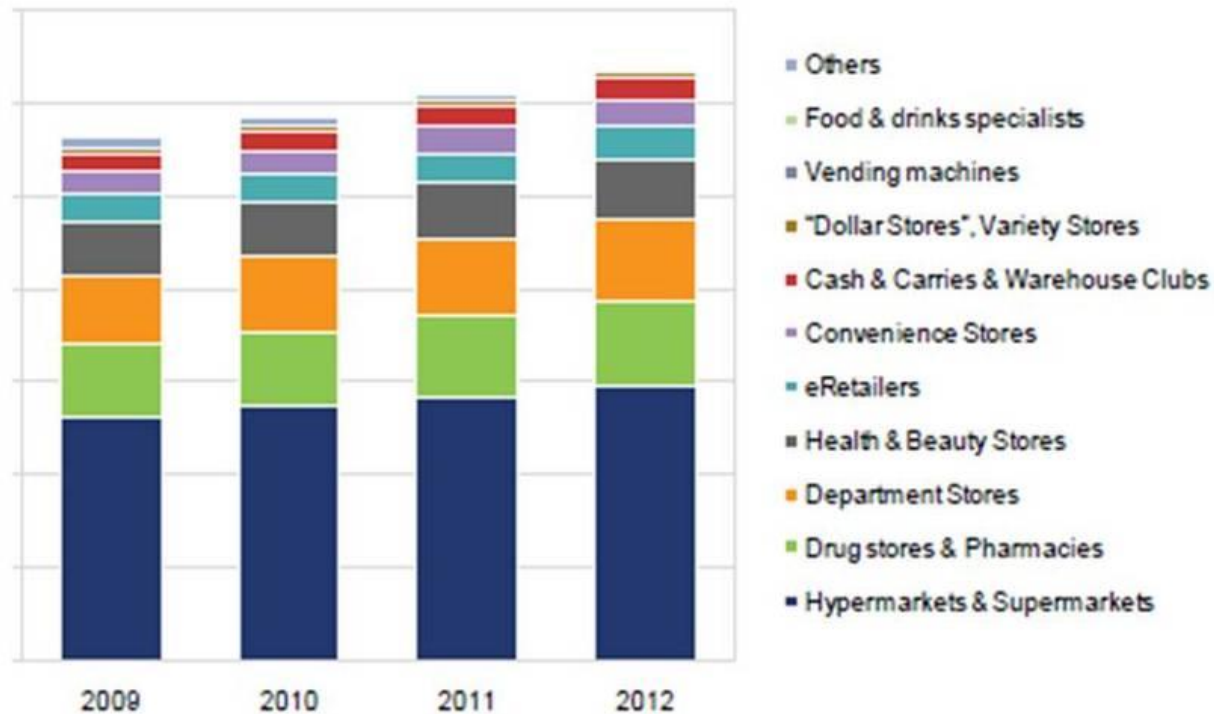


Growth in absolute volume per capita of Sun Care consumption will be highest in Latin America, followed by Australasia and North America

U.S. Sun Care Market

Market Value by Distribution Channel (USD mm), 2009-12

United States Sun Protection Market Value by Distribution Channel (USD m), 2009-12



Hypermarkets and Supermarkets are the most favoured distribution channel for the sale of Sun Care products in the U.S.