

India Sunscreen Market By Product Type (Cream & Lotions, Sprays, Sticks, Gels), By Application (Sun Protection, After Sun Products, Tanning Products), By Distribution Channel (Retail Stores, Pharmacies & Drug Stores, Online), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Sunscreen Market was valued at USD 893.12 Million in 2024 and is expected to reach USD 1325.37 Million by 2030 with a CAGR of 6.8% during the forecast period. The India Sunscreen Market has seen significant growth, driven by increasing awareness of skin health, rising disposable incomes, and a growing preference for sun protection products. The market is segmented by product type, application, and distribution channel, with each contributing to its expanding reach. By Product Type, the market is divided into creams and lotions, sprays, sticks, and gels. Creams and lotions segment has high demand due to their ease of use, widespread availability, and long-lasting protection. Sprays are increasingly gaining popularity due to their convenience and quick application, especially in the hot and humid climate of India. Sunscreen sticks offer a compact, travel-friendly option, while gels are favoured for their non-greasy and lightweight texture, especially for individuals with oily skin.

By Application, the primary segments include sun protection, after-sun products, and tanning products. Sun protection remains the largest and most critical application area as people become more conscious of the harmful effects of UV radiation. After-sun products, which help soothe the skin after sun exposure, are gaining traction, particularly in the summer months when outdoor activities peak. Tanning products, including self-tanners and bronzers, cater to those seeking a sun-kissed look without direct sun exposure, although they currently hold a smaller share compared to the other

applications.

The increasing levels of ultraviolet (UV) exposure in Kerala, as highlighted by the study on the UV index over the past 18 years, present a significant factor driving the demand for sunscreen products in the region. With more than 88% of daily observations indicating UV index values above 5, and a notable 46% of readings falling within the high category (8-10), the need for effective sun protection is becoming more critical. This heightened awareness of UV risks, lead to the growing consumer awareness about the importance of skincare and sun protection. Consequently, this trend is expected to significantly contribute to the expansion of the sunscreen market in India as individuals seek to protect themselves from harmful UV radiation. The India sunscreen market is experiencing robust growth, spurred by increased consumer awareness and the desire for skin protection amidst rising outdoor activities. Product innovation, expanding retail and online distribution networks, and the growing middle-class population are key drivers of the market's future expansion.

Key Market Drivers

Increasing Awareness About Skin Health and UV Protection

One of the most prominent drivers behind the growth of the sunscreen market in India is the increasing awareness about the harmful effects of UV radiation on skin health. Historically, sunscreen use was not a common practice in India, but over the past decade, there has been a noticeable shift. Factors such as increasing access to information via the internet, social media platforms, and educational campaigns by dermatologists and skincare professionals have played a pivotal role in educating the population about the risks of excessive sun exposure. UV radiation is known to cause skin damage, aging, and various skin conditions such as sunburns, pigmentation, and even an increased risk of skin cancer. As more people understand the long-term benefits of sun protection, there is growing adoption of sunscreen products as an essential part of daily skincare routines. This shift in consumer behavior has led to a surge in demand for sunscreens, especially those that offer broad-spectrum protection and are formulated for different skin types. The growing awareness is not limited to urban areas but is also spreading to semi-urban and rural regions, where more consumers are opting for sunscreen products to protect their skin from the harsh Indian sun.

Growing Disposable Incomes and Changing Lifestyles

India's economy has been growing steadily, leading to higher disposable incomes, particularly among the urban middle class. This has made skincare products, including sunscreens, more affordable and accessible to a larger population. With rising incomes, there is also a significant shift toward more health-conscious consumer behavior. According to the Household Consumption Expenditure Survey for 2023-24, non-food items now account for about 53% of per capita spending in rural areas and 60% in urban areas. A younger, more educated demographic is increasingly investing in personal care products to maintain healthy skin, and sunscreen is seen as an essential part of daily grooming. Along with higher disposable incomes, lifestyle changes are contributing to the increased use of sunscreen. As more people lead busy, outdoor-centric lives, the need for sun protection has become more apparent. The rising trend of fitness and outdoor activities, including cycling, hiking, and beach outings, has further bolstered the demand for sunscreen products. Additionally, urbanization and increased use of air conditioning, which reduces natural sunlight exposure indoors, have led to a greater focus on external sun exposure, prompting individuals to use sunscreen as part of their skincare regimen. Furthermore, with global beauty trends gaining traction, Indian consumers are now more inclined to use skincare products that offer specialized protection against the harmful effects of UV radiation, such as anti-aging or whitening benefits. The rise in online shopping has made it easier for consumers to access a wider variety of sunscreen products catering to their specific skin needs.

Growth of E-commerce and Availability of a Wide Range of Products

Another significant driver for the Indian sunscreen market is the rapid growth of e-commerce platforms and the increasing availability of a wide range of sunscreen products online. E-commerce has transformed how consumers purchase skincare products, making it easier for them to access international and local brands, compare prices, and read reviews before making a purchase. Online platforms provide consumers with the convenience of shopping from home, and the growth of digital marketing has made sunscreen products more visible to a broader audience. India's internet user base has expanded significantly, Under the Amazon Global Selling program, nearly 150,000 small exporters across India are expected to sell products worth about USD 5 billion in 2024 to international markets, up from USD 3 billion in 2023. With the rise of beauty influencers and online content creators promoting sunscreen use, especially through video tutorials and skincare routines, there is greater emphasis on incorporating sun protection into daily life. The ability to shop online also caters to a younger audience, who may prefer the convenience of purchasing skincare products without having to visit physical stores. In addition, e-commerce platforms have allowed niche and specialized sunscreen brands to enter the market. Consumers now

have access to a wider range of formulations, such as organic sunscreens, mineral sunscreens, and sunscreen products that cater to specific skin concerns, such as acne or sensitive skin. This has led to increased demand for a variety of sunscreen products tailored to individual preferences and needs, driving further growth in the market.

Key Market Challenges

Lack of Awareness in Rural and Semi-Urban Areas

Although awareness about the harmful effects of UV radiation and the importance of sun protection is growing, there is still a significant knowledge gap, especially in rural and semi-urban areas. In urban centers, sunscreen use is increasingly becoming a part of daily skincare routines, driven by social media campaigns and dermatological recommendations. However, in less urbanized regions, sunscreen use is still not widespread, and the concept of using sunscreen regularly is often undervalued.

In rural areas, traditional skincare practices and local remedies often take precedence over commercial sunscreen products, and many people do not see the need for sun protection unless it's for specific events, such as weddings or festivals. The challenge lies in educating this large segment of the population about the long-term health risks of sun exposure, such as skin aging and skin cancer, and convincing them of the importance of incorporating sunscreen into their daily routines. To address this challenge, brands need to focus on targeted educational campaigns, community-based outreach, and partnerships with local healthcare providers to raise awareness about the benefits of sunscreen use. Additionally, pricing strategies that cater to the income levels of rural and semi-urban populations will be crucial for ensuring sunscreen products reach a broader demographic.

Price Sensitivity and Affordability

Price sensitivity is a significant challenge in India, where a large portion of the population remains cost-conscious, particularly in rural and lower-income urban segments. Sunscreen products, especially premium and imported brands, can be perceived as expensive, limiting their widespread adoption. While the market for skincare and beauty products is expanding, consumers in many regions are reluctant to spend on products they consider non-essential.

In particular, sunscreens with higher SPF ratings, dermatologically tested formulations, and those marketed as organic, or luxury products tend to be priced higher. For price-

sensitive consumers, this can create a barrier to regular sunscreen use, as they may opt for cheaper alternatives or skip sunscreen altogether due to perceived high costs. To overcome this, companies must balance product quality with affordability. This could involve offering budget-friendly sunscreen options, introducing smaller-sized products for trial, or implementing tiered pricing strategies. Local brands can capitalize on cost-effective formulations tailored to the needs of Indian consumers while ensuring that products are accessible to a wide range of income groups. Collaborating with online platforms to offer discounts, promotions, or bundling deals may also help make sunscreens more affordable to the public.

Regulatory and Quality Control Issues

Another challenge in the Indian sunscreen market is the regulatory and quality control framework. The Indian government's regulatory environment for skincare products, including sunscreens, is still evolving. There is a need for clearer guidelines and stringent enforcement to ensure that products sold in the market meet safety and efficacy standards. The presence of unregulated or poorly regulated products could lead to consumer mistrust, as many sunscreens on the market may not deliver the promised benefits or could even cause adverse reactions due to poor quality ingredients.

The Indian government has set some standards for cosmetics and skincare products, but the implementation and enforcement of these regulations can sometimes be inconsistent. The influx of foreign brands that may not adhere to local quality norms or certifications poses additional challenges. Furthermore, consumers may struggle to differentiate between high-quality sunscreens and those that make exaggerated claims about their efficacy, creating confusion in the marketplace. To address this challenge, brands need to focus on maintaining high product quality and compliance with regulatory standards, ensuring transparency regarding ingredients and their benefits. Third-party certifications, such as dermatologically tested labels, can also build consumer trust and confidence in sunscreen products. Additionally, brands should work closely with regulatory bodies to ensure that new guidelines for sunscreen products are clearly communicated and adhered to, which can help protect consumers and ensure the long-term sustainability of the market.

Key Market Trends

Growing Popularity of Natural and Organic Sunscreens

As consumers become more conscious of the ingredients in their skincare products, the

demand for natural, organic, and chemical-free sunscreens is on the rise. This trend is particularly driven by the increasing awareness of the potential side effects of synthetic chemicals, such as parabens, sulfates, and oxybenzone, commonly found in conventional sunscreen formulations. Many consumers, especially those with sensitive skin or those concerned about long-term health risks, are opting for sunscreens made with natural ingredients like zinc oxide, titanium dioxide, aloe vera, and green tea extract.

Organic sunscreens, often marketed as 'clean beauty' products, are formulated with plant-based ingredients that promise to protect the skin from UV rays without harmful chemicals. These products are also considered more eco-friendly, as they typically avoid the use of harmful chemicals that could damage coral reefs and marine life when washed off in water. The growing trend toward sustainability and environmentally conscious consumption has further fueled the demand for natural and organic skincare products. Brands are increasingly responding to this demand by launching sunscreens that are free from artificial fragrances, parabens, and other harsh chemicals. They are also incorporating certifications like 'organic,' 'cruelty-free,' and 'reef-safe' to appeal to consumers who are willing to pay a premium for products that align with their values. This trend is not only boosting the popularity of natural and organic sunscreens but is also prompting established skincare brands to innovate and reformulate their sunscreen products to meet these preferences.

Shift Toward Multi-Functional Sunscreens

The trend toward multi-functional sunscreens is gaining momentum in the Indian market, particularly among busy consumers who prefer skincare products that offer multiple benefits in one. With the rise of minimalist skincare routines, multi-functional sunscreens are becoming highly sought after as they combine sun protection with other skincare benefits, such as anti-aging, moisturizing, brightening, and even treatment for acne or pigmentation. For example, sunscreens that incorporate added ingredients like Vitamin C, hyaluronic acid, and niacinamide are becoming increasingly popular. These ingredients not only protect the skin from UV rays but also offer additional advantages like boosting collagen production, hydrating the skin, and reducing dark spots or fine lines. This trend is particularly appealing to the younger demographic, who are looking for products that streamline their skincare routine without compromising on effectiveness. Tinted sunscreens, which provide added coverage and protection against both UV rays and visible light, are also gaining traction. These products cater to consumers who want to avoid the harmful effects of sun exposure while simultaneously achieving a more even skin tone. The combination of sun protection with makeup-like

benefits is particularly appealing to those who wear minimal makeup but still want a polished, flawless appearance. The rise of multi-functional sunscreens also speaks to the increasing consumer desire for convenience. By consolidating multiple skincare steps into one product, these sunscreens help save time while ensuring that users are still getting optimal protection and skincare benefits. Brands are likely to continue focusing on innovation in this area, offering sunscreens that address a wider range of skincare concerns in one easy-to-use product.

Rise in Online Sales and E-commerce Platforms

The rise of e-commerce is one of the most significant trends influencing the Indian sunscreen market. With the increasing penetration of smartphones and internet access, more consumers are turning to online platforms to purchase skincare products, including sunscreens. E-commerce offers convenience, a wide range of options, the ability to compare prices, and often better discounts and promotions than physical stores. Online platforms also provide consumers with detailed product information, reviews, and ratings, helping them make informed purchasing decisions. Social media and influencer marketing have further fueled the growth of online skincare sales, as influencers and beauty experts recommend sunscreens through tutorials, reviews, and sponsored posts. This has increased consumer trust in online shopping, particularly for skincare products, which can often be confusing or intimidating to buy without firsthand experience. As a result, traditional brick-and-mortar stores are no longer the only point of sale for sunscreen products. E-commerce giants like Amazon, Flipkart, and Nykaa, along with direct-to-consumer (D2C) brands, are capitalizing on this trend by offering a vast selection of sunscreens, including both global and local brands. The ease of doorstep delivery, along with the rise of subscription models and loyalty programs, has further boosted the online shopping experience for sunscreen consumers.

Segmental Insights

Creams and lotions remain the leading product type in the Indian sunscreen market, holding the largest share in terms of both volume and value. This segment's dominance can be attributed to several factors. First, creams and lotions are the most widely available and commonly used form of sunscreen. They offer a traditional, easy-to-apply option that has been used for generations. These products cater to a wide range of skin types, from dry to normal and sensitive skin, making them versatile and accessible for a large portion of the population. In addition, creams and lotions generally provide long-lasting sun protection, which is a critical factor for consumers in India who often experience prolonged sun exposure. The familiarity of these products, combined with

their effectiveness, makes them a preferred choice for the majority of consumers, particularly in urban areas where sunscreen use is increasingly becoming a regular part of skincare routines. Moreover, creams and lotions often come in a range of formulations with added benefits, such as anti-aging, moisturizing, or whitening properties. This makes them appealing to a broad demographic, including both women and men, as they address multiple skincare concerns in one product. The availability of different SPF levels in creams and lotions also adds to their popularity, as consumers can choose a product based on their specific sun protection needs.

Regional Insights

The South region of India, which includes states like Tamil Nadu, Karnataka, Andhra Pradesh, Telangana, and Kerala, leads the sunscreen market due to a combination of factors that contribute to high demand for sun protection products. South India experiences a predominantly hot and humid climate, with longer summers and intense sun exposure, which makes sunscreen an essential part of daily skincare for many consumers. The high level of awareness regarding the harmful effects of UV radiation is another key factor driving sunscreen sales in the South. With increasing literacy rates, urbanization, and exposure to global skincare trends, consumers in South India are becoming more conscious about skin health, resulting in greater adoption of sunscreen products. The popularity of skincare products, particularly in urban centers like Bengaluru, Chennai, and Hyderabad, is higher in the South compared to other regions. Additionally, South India has a well-established retail infrastructure, with widespread availability of both local and international sunscreen brands. The urban population in South India is also more likely to invest in premium and specialized skincare products, such as sunscreens with higher SPF levels or organic formulations. As a result, the South region holds the largest market share in the India sunscreen market.

Key Market Players

L'Oréal S.A.

Beiersdorf AG

Coty Inc.

The Estée Lauder Companies Inc.

Hindustan Unilever Limited

Clarins Pte Ltd

Shiseido Company, Limited

Lifevision India

Galderma Laboratories, L.P.

Uprising Science Pvt Ltd.

Report Scope:

In this report, the India sunscreen market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Sunscreen Market, By Product Type:

Cream & Lotions

Sprays

Sticks

Gels

India Sunscreen Market, By Application:

Sun Protection

After Sun Products

Tanning Products

India Sunscreen Market, By Distribution Channel:

Retail Stores

Pharmacies & Drug Stores

Online

India Sunscreen Market, By Region:

North

South

East

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India sunscreen market.

Available Customizations:

India sunscreen market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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