

Beauty trending insights: Acne patches

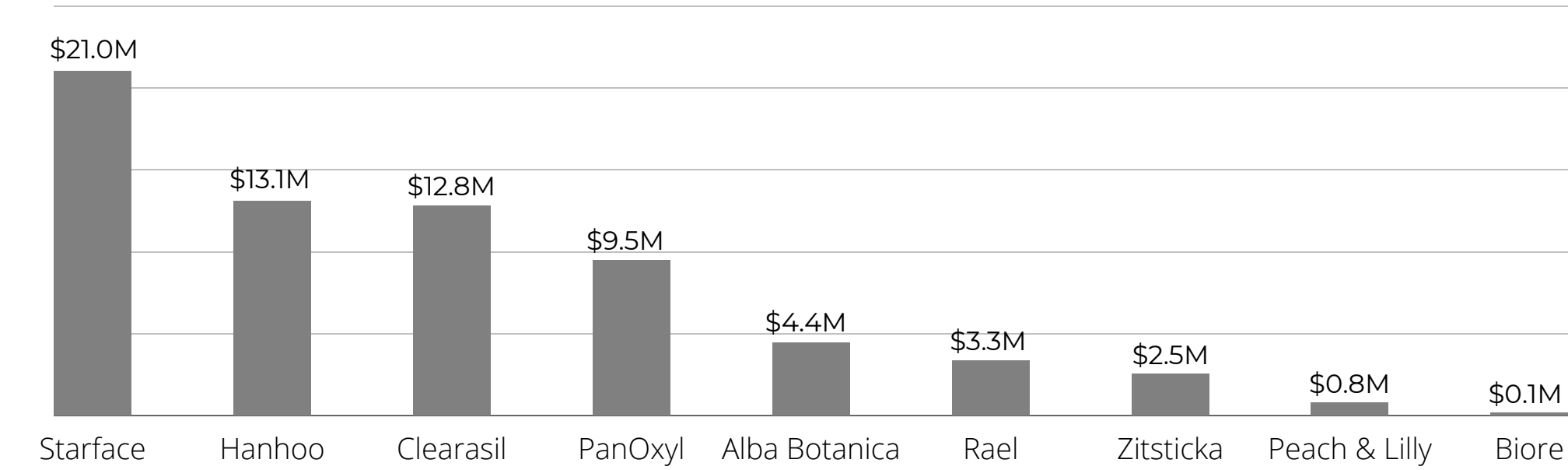
Acne patches have emerged as a standout in acne care, driven by Gen Z shoppers and a strong presence on social media. Acne patches are thought to be more gentle on skin than traditional acne medications or pore strips.

Key competitors and performance in-store

									
Brand	STARFACE	HANHOO	Clearasil	PanOxyl®	alba BOTANICA™	Rael	ZITSTICKA	PEACH & LILY	Bioré®
% \$ vs YA	+257.1%	+107.6%	+49.5%	+110.2%	+1.7%	-	-	-	-
Top Channel	Mass	Mass	Drug	Drug	Mass	Mass	Mass	Mass	Mass
% ACV	15.3	27.4	29.7	29.0	25.0	9.8	2.9	1.9	1.1
Avg. Item Price	\$13.30	\$3.60	\$11.72	\$8.67	\$7.92	\$6.29	\$16.70	\$5.49	\$8.33

*Hero has been omitted due to Target Private Label; Brands ranked by \$ vol

\$ Sales L52 Wks Patches



Total Category

\$187.7M

+88.6%

Source: Core FSC sum of Form Gel Patch, Gel Patches, Hydra Gel Patch, Hydro Gel Patch, Hydrogel Patches, Patch, Patches, Star Patch, Dot 52 WE 09/24/2022 xAOC

Brand Spotlight

Hero.



- Launched in 2017 with one product, it now sells over 30 SKUs with a focus on gentle ingredients
- Target exclusive
- +\$1.3M growth online

STARFACE



- Launched in 2019 as a Gen Z-focused acne patch DTC as part of the "acne positivity" movement
- Now available in stores
- +595.7% \$ growth online
- 1.4M followers on TikTok

Source: NielsenIQ Omnishopper Panel; Product: Health & Beauty Care Facial Skin Care Facial Treatment L52 WE 09.10.2022 vs YA



Pore strips



- \$67.9M - 5.8%
- 1.4M + 115.4%
- 2.1% of strip category

Pore strips as a category is declining; however, rising brands like Starface see growth in their pore strip products.

The consumer

\$50K+
indexes higher with mid to high income HHs

Asian HHs
have the highest index

<54 yrs old
indexes higher with younger middle-aged consumers

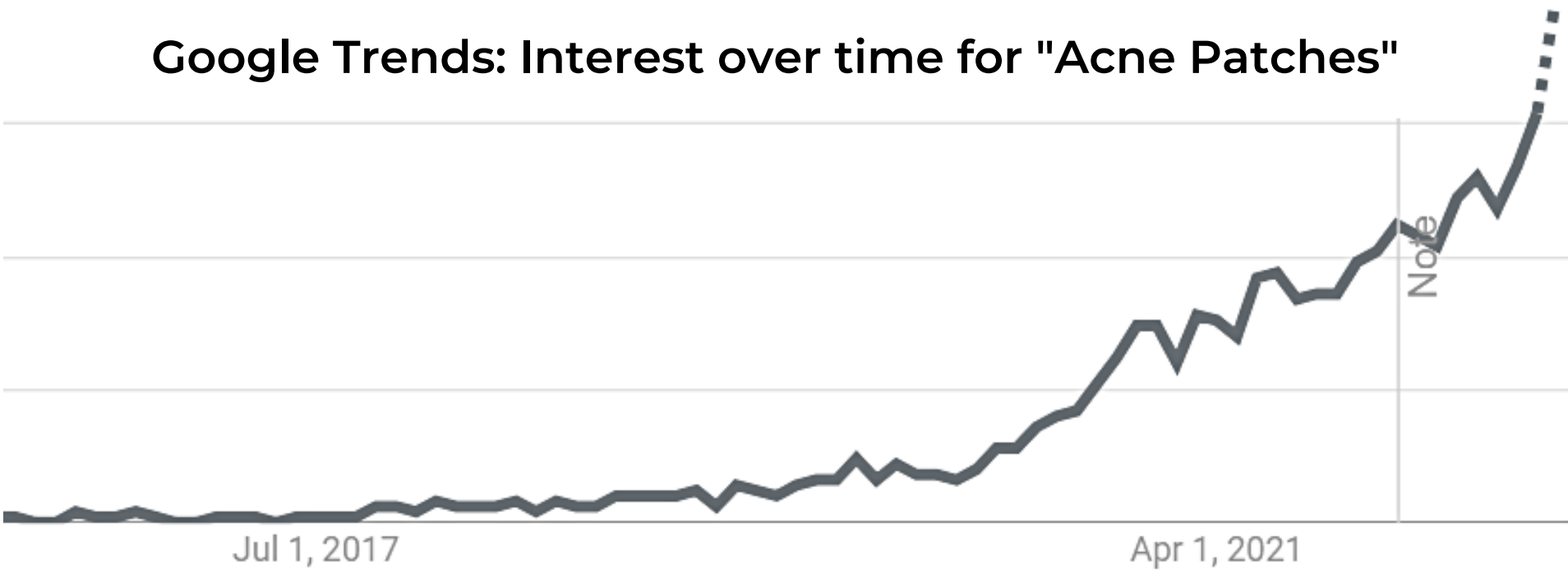
Cosmopolitan centers and affluent suburban trends concentrated

Source: NielsenIQ Homescan Panel Facial Skin Care sum of Form Gel Patch, Gel Patches, Hydra Gel Patch, Hydro Gel Patch, Hydrogel Patches, Patch, Patches, Star Patch, Dot 52 WE 09/10/2022 All Outlets

The conversation

Search interest reached its peak popularity in September 2022, and shows no sign of slowing

Google Trends: Interest over time for "Acne Patches"

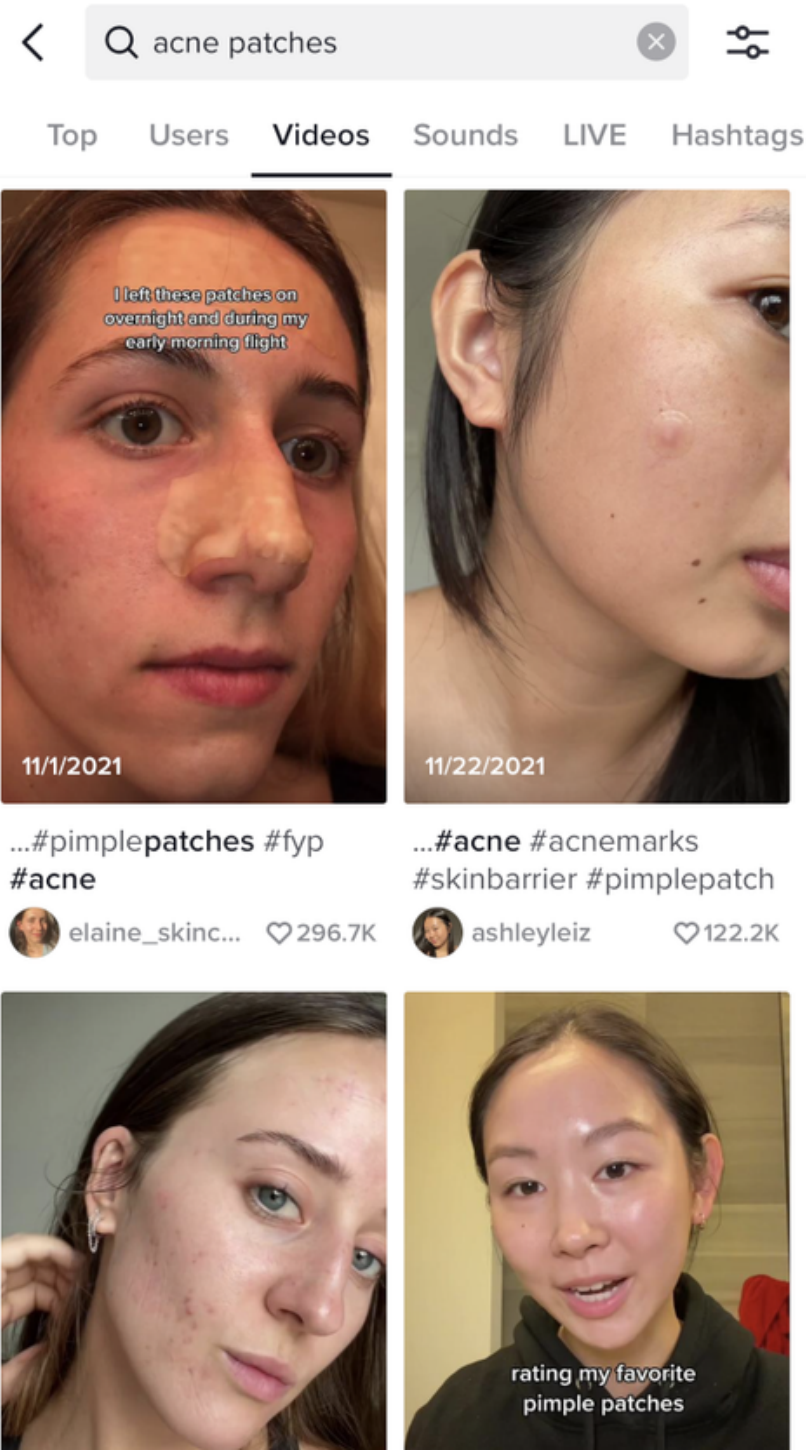


Bye-Bye Breakouts: How This Pimple Patch Cleared My Skin & Why I Love Hero Cosmetics

'This actually works miracles': Amazon shoppers swear by these \$13 pimple patches with almost 40,000 ratings

8 Best Pimple Patches To Use Instead of Picking Your Face

Social media



High engagement and following

acnepatch 171.1M views

acnepatches 110.5M views

@starface

170 Following 1.4M Follower 25.9M Likes

Follow

. ☆ more fun for your face ☆.

@target @walmart @cvs @bootsuk + starface.world

@herocosmetics

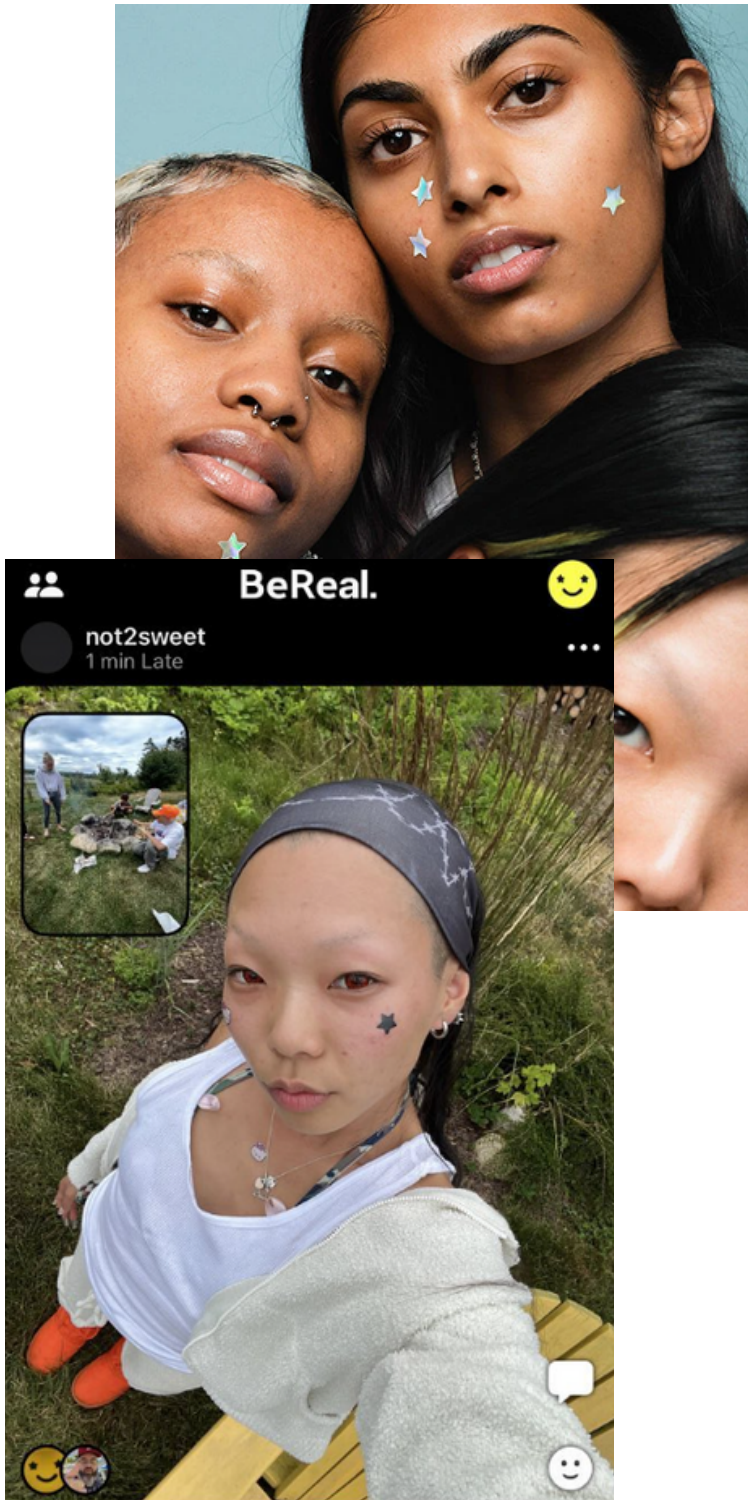
224 Following 122.0K Follower 4.4M Likes

Follow

Got a pimple emergency? 🤔

https://linkin.bio/herocosmetics

Q&A



Dr. Sandra Lee (aka Dr. Pimple Popper) 7.56M subscribers

7.6M subscribers

4.5M followers

The "ick" factor fascination, aided by platforms like Dr. Pimple Popper, has brought acne treatment into mass focus