



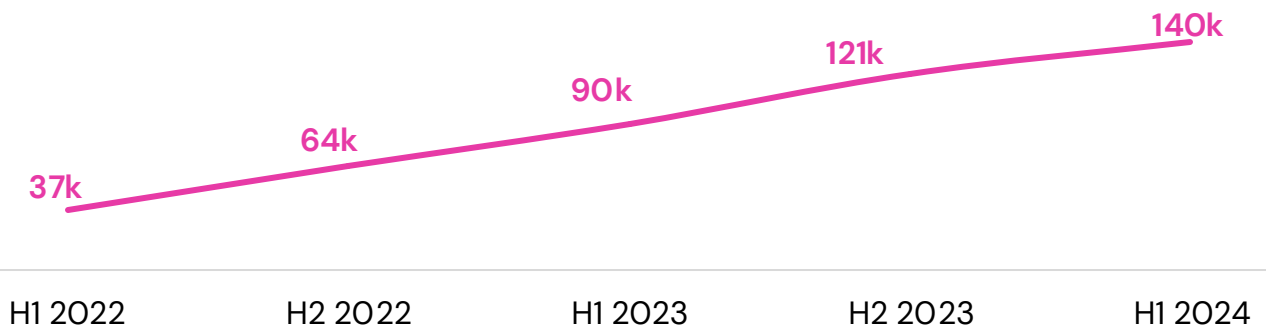
WHAT DRIVES THE GROWTH OF THE CLEANSERS CATEGORY IN THE US ?

THE TREND



THERE'S BEEN A CONTINUOUS GROWTH IN CLEANSERS CONVERSATIONS OVER THE LAST 2 YEARS

VOLUME OF CLEANSERS CONVERSATIONS
2022 - June 2024



A SHIFT IN FOCUS FROM JUST CLEANSING BENEFITS TO MORE GRANULAR FACE CARE CONVERSATIONS

FROM 2022

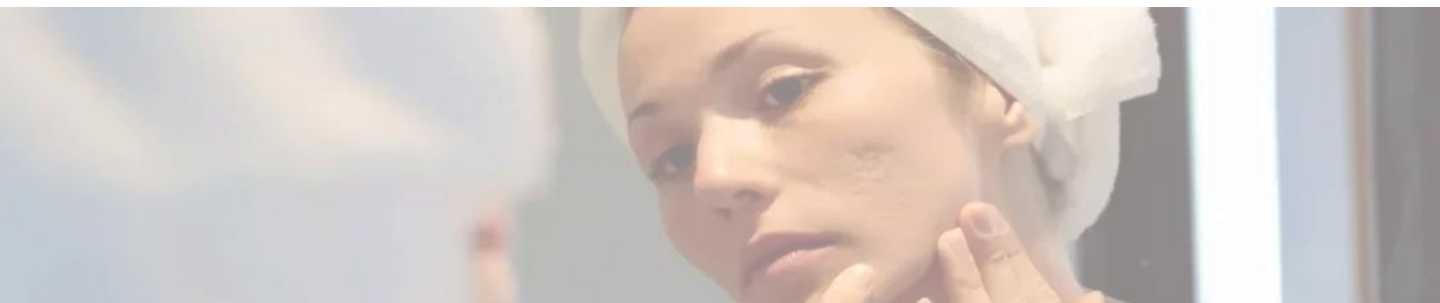


TO 2024

- INTERMEDIATE EXPERTISE
- MINIMALISTIC ROUTINE
- "CLEAN" EXPECTATIONS
- SIMPLE FORMATS
- BASIC INGREDIENTS
- DERM RECOMMENDED BRANDS

- HIGHER EXPERTISE
- MULTI-STEPS ROUTINE
- "TREAT" EXPECTATIONS
- INNOVATIVE FORMATS
- BUZZY INGREDIENTS
- KOL RECOMMENDED BRANDS

MAIN DRIVERS OF CONVERSATION



52%

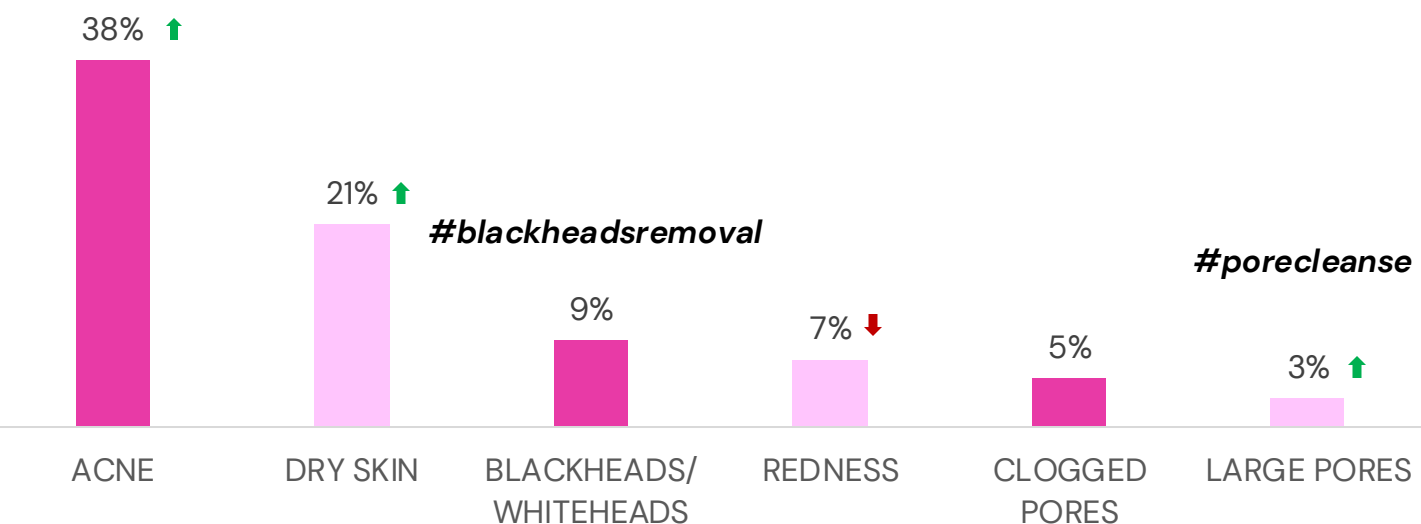
of conversations mention skin issues

ACNE IS THE PRIMARY CONCERN, IT CAN BE THE CAUSE OR CONSEQUENCE OF OTHER SKIN PROBLEMS

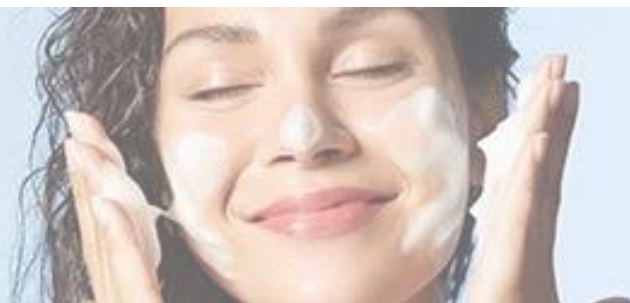
TOP MENTIONED SKIN ISSUES

% of total conversations about cleansers in the US (2022- June 2024)

#acnetreatment



MAIN DRIVERS OF CONVERSATION



44%

of conversations mention cleansers benefits

WHILE FUNCTIONAL BENEFITS ARE KEY, RISING

EXPECTATIONS FOCUS ON GLASSY AND FLAWLESS SKIN

TOP MENTIONED KEY BENEFITS

% of total conversations about cleansers in the US (2022- June 2024)

#cleanskin

36% ↓



21% ↑



18% ↓



11%



#glowingskin

9% ↑



7%



#glassskin

3% ↑



CLEANS WELL

HYDRATES

EXFOLIATION

HAS VISIBLE RESULTS

BRIGHTENS SKIN

IS GENTLE

SMOOTHENS SKIN

MAIN DRIVERS OF CONVERSATION



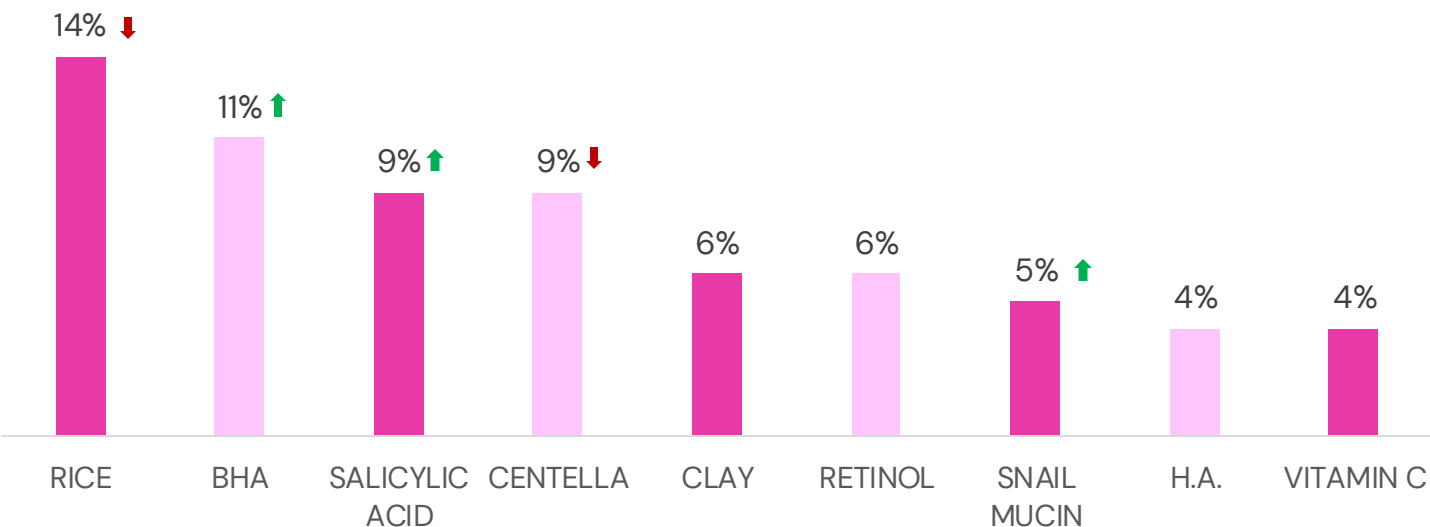
21%

of conversations mention ingredients

THE MOST MENTIONED INGREDIENTS ADDRESS KEY SKIN ISSUES LIKE ACNE, DRY SKIN, AND IMPERFECTIONS

TOP MENTIONED INGREDIENTS

% of total conversations about cleansers in the US (2022- June 2024)



MAIN DRIVERS OF CONVERSATION



13%

of conversations mention cleansing routines

CONSUMERS GO BEYOND SIMPLE CLEANSING,

INCORPORATING MULTIPLE STEPS INTO THEIR ROUTINES



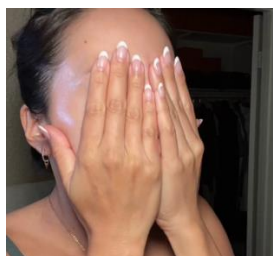
Double Cleansing
(6% of total US cleansers conversations):

“*Double cleansing is a must for me in my skincare routine. (...)*



Triple Cleansing (4%):

“*I decided to start triple cleansing a while ago, and my skin is getting better 🙄🙄*



7 Layer Toner Routine (3%):

“*Have you tried the korean 7 layer toner method? 🧡 #anua #cosrx #dralthea*

BRANDS MAPPING



21%

of conversations mention brands

KEY BRANDS ARE CATEGORIZED INTO 6 DISTINCT CLUSTERS

ACCESSIBLE MAINSTREAM
FAVORITES



SKINCARE
EXPERT
K BEAUTY



CELEBRITY-DRIVEN TRENDY
BRANDS

VIRAL PRODUCTS ANALYSIS

ECHOING VIRAL BRANDS, VIRAL PRODUCTS FEATURE TRUSTED ESSENTIALS LIKE CERAVE HYDRATING CLEANSER AND K-BEAUTY PRODUCTS

CERAVE – HYDRATING FACIAL CLEANSER



Consumers appreciate that it's dermatologist-approved, creamy, gentle, accessible, and effective for dry, acne-prone skin

“ I love this **Cerave facial cleanser** ! It made my skin get rid of little bumps on my face !

ANUA – HEARTLEAF 77% SOOTHING TONER

“ i literally bought the **Anua soothing toner** and i started clearing up in like a week , plz go buy im being fr 🤔🤔🤔🙌

Consumers appreciate that it's K-beauty, clean, gentle, and helps achieve glass skin while being effective and soothing for acne-prone skin



THE OPPORTUNITIES

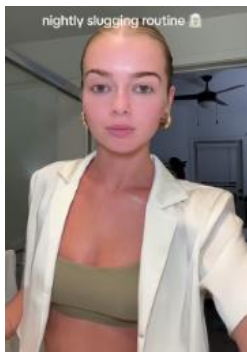


CLEANSERS PLAY A CRUCIAL ROLE IN POPULAR SKINCARE ROUTINES, CONSISTENTLY SERVING AS THE FIRST STEP

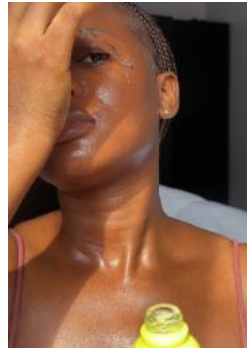
#skincycling



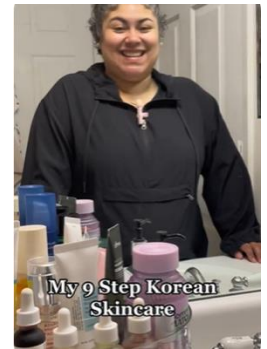
#slugging



#skincarelayering



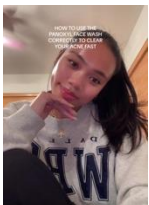
#10stepskoreanskin



CLEANSER TEXTURE IS KEY: CONSUMERS PREFER RICH, HYDRATING OPTIONS THAT GENTLY PURIFY, AIMING FOR A 'GLOWY' OR 'GLASS-LIKE' FINISH

“ I just discovered balms and girl!!!!, I am obsessed. I love that they go right over my eyes and the oily texture leaves my skin feeling SO smooth. #glassskin #smoothskin

SKINFLUENCERS AND EXPERTS DRIVE THE CONVERSATION, SHARING VIRAL PRODUCTS, TRENDS, AND EDUCATION



“ Is it okay to use oil cleanser if I have **oily acne prone skin**?

CONTACT US TO LEARN MORE:

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