

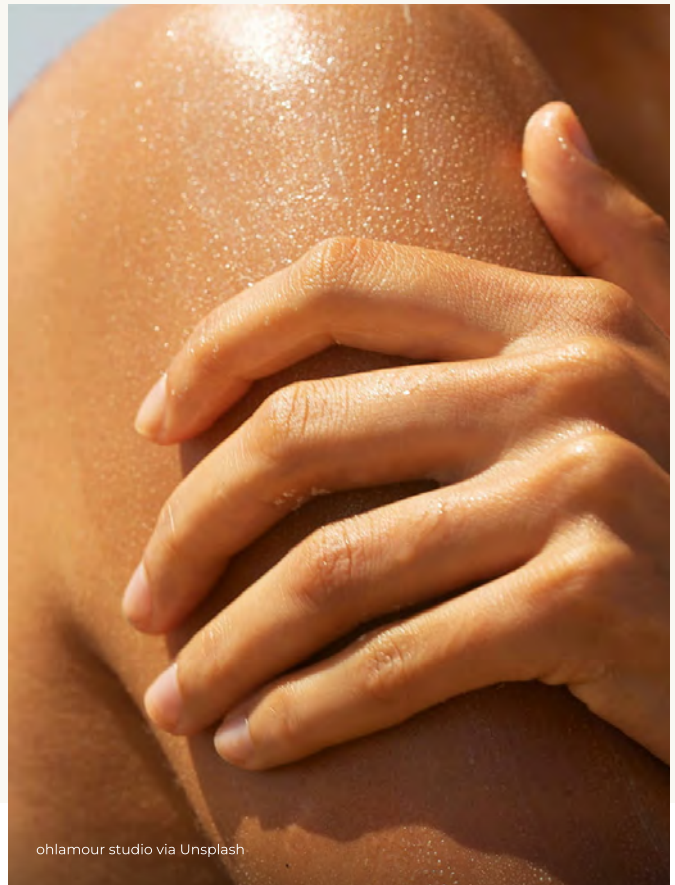
## FROM BEACH TO BATHROOM: WHY POST-SUN CARE IS SET TO BOOM GLOBALLY

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SKINCARE, TREND, BODY CARE



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### Key Takeaways:

- Post-sun care, aka sun repair, is surging globally, valued at \$884 million as of 2025.
- Brands are focused on skin regeneration, barrier support, hydration, and aging support.
- NPDP must consider cultural nuances, but universal approaches are likely to follow.

Sun repair is gaining momentum. Between 2020 and 2025, the global after-sun market surged 30% in retail value terms to reach \$884 million, according to Euromonitor International. And while still a drop in the bigger sun care ocean—worth \$18 billion in 2025 and up 58% since 2020—after-sun care continues to rise, driven by agile and innovative startups, forward-looking consumers, and overarching longevity desires worldwide.

The category, however, has long been defined by a small selection of aloe gels, after-sun lotions, and burn creams sold alongside a comparably huge array of sunscreens. And new product launches are still few and far between, accounting for just 5% of global sun care launches in 2025, according to Mintel.

But what if the next generation of leaders sees this space differently? And what if brands coming through the ranks flip after-sun on its head? BeautyMatter dives into what experts consider to be one of the most disruptive skincare movements: after-sun repair.

### Innovation Beyond Soothing Aloe Gels

“Post-sun care is becoming a highly opportune space because consumers increasingly understand sun exposure, not simply as an occasional source of sunburn, but as a cumulative contributor to visible

aging, pigmentation, dehydration, sensitivity, and loss of skin resilience,” explained Michael Nolte, SVP Creative Director of global trend insights platform Beautystreams.

There is an array of brands that understand this and are launching products and ranges to tap into these needs, Nolte told BeautyMatter. American skin and hair care brand Exoceuticals, for example, combines exosome technology with aloe-derived exosomes to target hydration, visible redness, and skin recovery after UV exposure. Shiseido-owned Japanese brand Annessa works with niacinamide for barrier-supportive hydration and wrinkle-care benefits in its Night Sun Care Serum. And emerging UK brand Zure Solaris is taking a premium and holistic approach to skin longevity and sun repair with biotech-inspired actives alongside highly sensorial textures.

“Innovation is moving post-sun care well beyond traditional aloe-based soothing gels. We are seeing a shift towards regenerative, barrier-supportive treatment formulas that target redness, dehydration, oxidative stress, uneven tone, and the longer-term visible effects of sun exposure,” Nolte said.

Sonali Jagadev, Senior Analyst at Euromonitor International, agrees. “Brands are increasingly moving beyond the traditional positioning of after-sun products as simple, soothing treatments. Instead, they are incorporating ingredients such as hyaluronic acid, antioxidants, barrier-repair actives, and skin-recovery technologies to address the longer-term effects of UV exposure.” Peruvian brand Yanbal, for example, uses a marine biotech extract alongside hyaluronic acid in its Total Block Moisturizing After-Sun Repair Gel, and American brand Pacifica integrates antioxidant-rich apple extract into its After Sun Soothing Body Gelato.

The space also now touts “barrier repair,” “deep hydration,” and “anti-inflammatory,” alongside a variety of longevity and skin recovery claims, Jagadev said. “This evolution aligns with broader beauty trends, such as skinification, preventative skincare, and multifunctional product innovation, creating opportunities for brands to extend consumer engagement beyond sun protection and build more holistic suncare regimens.”

## Bringing Sun Repair to Everyday Beauty

Samuel Cheney, co-founder of Zure Solaris, said the future of post-sun care certainly looks very different from what consumers have become accustomed to.

“Post-sun, sitting next to a line-up of innovative SPF launches, had been abandoned—left in the '80s as bright green aloe gels and mass-market afterthoughts predominantly focused on treating sunburn,” Cheney told BeautyMatter. “Nothing on the market took a holistic view of sun exposure, of the visible and biological effects that accumulate with every hour skin spends in the sun.”

Zure Solaris, founded in 2025 with a small range of serums, shower rinses, and body gels, aims to change this, by sitting at the “intersection of an underdeveloped sub-category of one of the fastest-growing categories in skincare,” he said. Their products contain a range of active plant, biotech, and synthetic ingredients designed to brighten, soothe, energize, and condition the skin, according to the company. “We knew there was another chapter in the sun care story,” Cheney said.

The brand's overarching goal is to bring sun repair into daily beauty routines and rituals rather than having it sit as a “vacation afterthought,” he explained. Zure Solaris wants to “take post-sun from a forgotten shelf in the pharmacy and establish it as an essential, year-round step in skincare, the same way SPF earned its place over the last decade.” The SPF category, he said, proved that consumers will adopt a sun-related habit year-round.

Dr. Robin Smith, co-founder of Exoceuticals, said sun repair certainly hasn't received the focus it deserves. “I've spent more than three decades studying regenerative medicine, stem cells, and how the body repairs itself. One thing that has always fascinated me is that while we've made incredible progress in preventing sun damage, we've paid far less attention to helping the skin recover after exposure,” Smith said.

Exoceuticals made its foray into sun repair in 2024 with the launch of Exo Sun, a lightweight face cream containing proprietary exosomes and an aloe vera extract designed to “repair, hydrate, and

restore sun-stressed skin,” according to the company. The product, Smith said, has already exceeded expectations. “What’s especially exciting is that consumers are beginning to use it differently from traditional after-sun products. Instead of waiting until they are sunburned, many are incorporating it into their routine after golf, tennis, boating, skiing, beach vacations, or simply spending time outside. That shift tells me we’re changing the conversation from treating damage to supporting healthy skin recovery every day.”

Looking ahead, Smith says after-sun products will likely evolve into daily recovery products that help address cumulative environmental stress from the likes of UV exposure, pollution, blue light, climate, and lifestyle factors. “That’s a much bigger opportunity than simply treating sunburn.”

"As consumers around the world become increasingly interested in longevity and healthy aging, I believe post-sun care will become a global category rather than a regional one."

BY DR. ROBIN SMITH, CO-FOUNDER, EXOCEUTICALS

## **Ingredient Innovation & Technology for Sun Repair**

Jagadev said that when it comes to new product development for after-sun care, future ingredient innovation will likely center around skin barrier health and longevity.

Smith agreed that the wider beauty industry is certainly shifting towards repair and restore functions, much like the regenerative medicine world, and innovation in sun repair and post-sun exposure is gaining ground. There are plenty of ingredient opportunities and technologies driving forward success, she said, including those that support cellular communication, reduce unnecessary inflammation, or encourage the skin's own natural repair mechanisms.

Sophisticated formulas that combine biotechnology, peptides, exosomes, antioxidants, and advanced hydration systems, for example, will continue to appear, she said, though many of these, for the time being, remain “in the early phase of innovations.”

“I believe exosome technology represents one of the most exciting frontiers, because these biological messengers help coordinate many of the cellular processes involved in healthy skin function. That opens entirely new possibilities for post-sun skin care and longevity-focused beauty,” Smith said.

According to Cheney, while there are very clear ingredient and tech opportunities for sun repair, he sees very little innovation happening today. For Zure Solaris, the focus is on repair and supporting the skin's recovery at a cellular level, which is a “fundamentally different proposition,” he said, and where the true opportunity lies for ingredient and technology innovation.

## **Growing with the Outdoor Lifestyle Boom**

Nolte said that as the outdoor-activity lifestyle market continues to boom globally, with activities like hiking, running, cycling, water sports, and festivals gaining traction worldwide, opportunities in post-sun care expand due to cumulative sun exposure. As these outdoor activities move into the

mainstream, he said there is a “particularly relevant opportunity for brands to make sun protection and recovery feel compatible with active lifestyles rather than beach culture alone.”

Smith said this is exactly what Exoceuticals aims to achieve, given that the brand's target consumers not only take exceptional care of their skin but also travel, exercise outdoors, and enjoy life. “[Our consumers] understand prevention, but they're equally interested in supporting recovery,” she said. “Rather than creating fear around the sun, I think we should empower consumers with better education. Enjoy the outdoors, protect your skin by wearing sunscreen, and support your skin afterward with products designed to help maintain, restore, and enable skin resilience.”

For Nolte, the most relevant sun repair products in the future will be those that are “easy to carry, enjoyable to reapply, and tailored to real outdoor conditions such as heat, sweat, friction, dehydration, and prolonged exposure,” both pre- and post-activity. Beyond this, he said the greatest promise lies in establishing post-sun care as a “legitimate skin recovery category, rather than a seasonal add-on.”

Rosalia Di Gesu, Associate Principal Analyst for Beauty & Personal Care at Mintel, agreed, adding that sun repair can also piggyback on another important movement—this time skin-related.

“Skin-barrier care is becoming a mainstream expectation across beauty, and after-sun can ride that momentum by positioning itself around recovery and resilience, not just soothing relief,” Di Gesu said. “There is room for growth, and for brands to drive engagement and usage by 'skinifying' and 'premiumizing' the segment.”

And innovators in the field are already tapping into this, she said. According to Mintel data, 10% of global after-sun products mentioned “skin barrier” on pack in 2025, double the 5% in 2023.

## Cultural Nuances and Suncare Narratives

While sun repair is absolutely a global market opportunity, Nolte said cultural nuances must be taken into account with new product development and innovation.

“Post-sun care is most immediately relevant in markets where tanning culture, outdoor lifestyles, and high seasonal UV exposure remain strongly embedded, particularly Europe, the United States, Australia, and parts of Latin America,” he said. In these regions, consumers are familiar with after-sun products, and so opportunities can be found in elevating post-sun products from basic soothing to more sophisticated recovery, anti-aging, and body care propositions.

“However, this is not exclusively a Western movement,” he added. In many Asian markets, especially Japan and South Korea, there has long been strong awareness around daily UV protection, pigmentation prevention, and the role of sun exposure in visible aging. “This creates fertile ground for more advanced post-exposure products, particularly those framed around barrier support, skin tone evenness, hydration, and nighttime recovery rather than 'after tanning.’”

China is also a “market to watch,” he said. While fair and even-toned skin remains an important beauty ideal for many consumers in this market, Nolte said there is a growing interest in natural warmth, outdoor lifestyles, and healthier-looking bronzed complexions among younger, fashion-led audiences. “This may create space for a more nuanced post-sun market that combines responsible protection with glow, skin recovery, and self-tanning alternatives.”

In Europe and the United States, contradictions are also emerging as consumer education on UV damage deepens. In these regions, a healthy summer look is still associated with tanned skin, even though tanning itself is linked to UV-induced skin damage. And this contradiction, Nolte said, is “accelerating interest in alternatives that deliver glow, warmth, and a sun-kissed appearance without requiring intentional sun exposure.”

On the other side of the coin, growing noise against sun protection and social media posts that aestheticize sunburn and tan lines are also gaining ground, despite the science on UV damage being unambiguous. Social media platform TikTok is where a lot of this content has gained ground, meaning Gen Z and Gen Alpha are particularly susceptible.

Cheney said, though, that “the noise and the numbers tell different stories.” While sun care is being questioned online, the reality is that more people than ever are protecting their skin, and the category continues to grow. He added, “While sentiment is volatile, behavior is broadly heading the right way. That's not to say the work is done: there's still trust to be earned and real education ahead.”

## **The Rise of a Global Category?**

Nolte said the key for brands is to “not export one sun care narrative globally.” Instead, companies should adapt the language, format, claims, and desired beauty outcomes to local exposure habits and cultural ideals.

Both Smith and Cheney, however, said it is only a matter of time before sun repair becomes a global category—in how it is defined and in how products are used.

“Different cultures certainly have different attitudes toward tanning and sun exposure, but environmental stress affects everyone,” Smith said. “Whether someone lives in Australia, Southern Europe, Florida, the Middle East, or Scandinavia, the biology of skin recovery remains remarkably similar. As consumers around the world become increasingly interested in longevity and healthy aging, I believe post-sun care will become a global category rather than a regional one.”

Cheney said Zure Solaris remains focused on building a universal brand despite cultural nuances globally. The reality is that the repair category still needs to be carved out in beauty. “Repair, as a defined [sun care] category, doesn't yet exist anywhere. Asia has soothing traditions, Australia has after-sun aisles, Europe has holiday rituals, America has the daily SPF habit—every region holds a different piece of it. Post-sun isn't a movement confined to certain parts of the world; it's a universal need each culture has been answering incompletely.”

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