



Skincare Category



VIETNAM FACIAL SKINCARE

MARKET SHIFTS & EVOLVING
CONSUMER DEMANDS (2024-2025)

REPORT



ABOUT BUZZMETRICS

The leading Social Media and E-commerce Market Research company

Buzzmetrics is the pioneering company in applying market research methodologies to social media since 2013. With over a decade of experience, we specialize in connecting and analyzing social media conversations and e-commerce data, helping brands uncover meaningful consumer insights.

By integrating these data sources, **Buzzmetrics** provides a holistic view of consumer behavior - empowering businesses to make smarter decisions and optimize their strategies for Digital Commerce success.



12+
Years of Experiences



300+
Strategic Partner Brands

FROM MMA

Vietnam's facial skincare market is entering a defining moment. As consumers become more informed, selective, and intentional, the category is moving beyond quick fixes and trend-driven routines toward long-term skin health, daily consistency, and real on-skin experience.

This shift reflects a broader transformation in how people relate to skincare. It is no longer just about solving isolated concerns, but about maintaining balance, protection, and resilience as part of everyday life. Social conversations, purchase behavior, and product expectations are converging around simplicity, comfort, and sustainability in routines that can truly last.

At MMA Vietnam, we believe that understanding these evolving expectations requires more than surface-level observation. It demands deep listening, rigorous data analysis, and the ability to connect market signals with real human behavior. That is why we are proud to collaborate with Buzzmetrics on the **Vietnam Facial Skincare Market Shifts & Evolving Consumer Demands (2024–2025) report**.

By combining large-scale social listening with market intelligence, this report offers brands, marketers, and industry leaders a grounded view of where the skincare category is heading, and why. More importantly, it highlights opportunities for brands to create meaningful value by aligning product development, communication, and experience with the realities of daily use.

We hope this report serves as both a source of insight and a practical guide for building strategies that are relevant, responsible, and resilient in a rapidly evolving skincare landscape.

Phan Bich Tam
Country Director
MMA Vietnam



OBJECTIVE

Designed for businesses, cosmetic brands, retailers, and market analysts, this report aims to provide actionable insights into changes in skincare demand, consumer behavior, and market drivers, in the context of the skincare industry clearly shifting from quick beauty solutions to sustainable skincare.

METHODOLOGY

Data Sources: Facebook, TikTok, Forums, YouTube, Threads, Reviews, Online News

Time Range: 01/10/2024 - 30/09/2025

Research Scope: Analysis of over 61 million skincare-related discussions, covering skincare needs, products, skin conditions, and usage behaviors among Vietnamese consumers

Market Intelligence Sources:

Secondary data from trusted publications including Global Market Insights, GlobeNewswire, B-Company, MISA AMIS, BrandsVietnam, and other official sources, to:

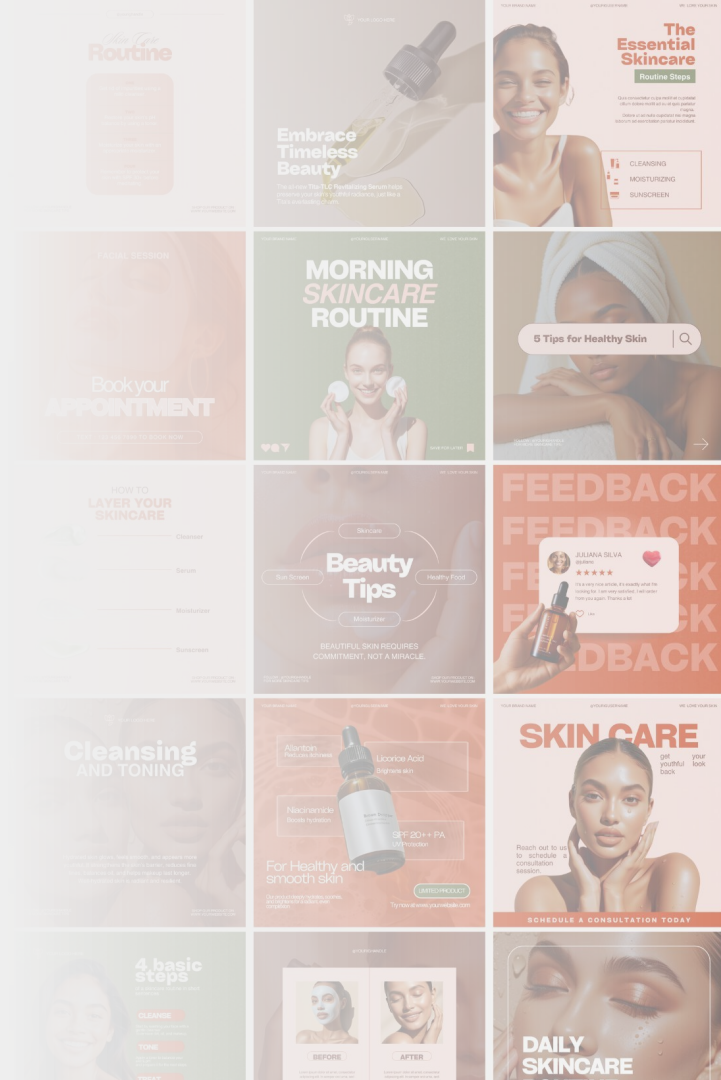
- Evaluate the size of the skincare and Beauty & Personal Care markets
- Track growth trends and demand shifts
- Contextualize social media discussions within the broader macro market landscape

OVERVIEW

Vietnam's facial skincare industry is entering an important transition phase, as growth is no longer driven by intensive treatments or complex routines, but increasingly revolves around the need to maintain healthy, stable, and long-term skin conditions.

This shift is happening simultaneously across both the market and social media discussions, clearly reflected in how consumers approach, select, and use skincare products.

In this context, the report **Vietnam Facial Skincare Market Shifts & Evolving Consumer Demands (2024-2025)** is conducted to synthesize and analyze millions of user discussions combined with market data, thereby explaining how skincare demand in Vietnam is shifting, as well as the factors truly driving consumer behavior in this new phase of the skincare industry.



AGENDA

01

GLOBAL & VIETNAM SKINCARE LANDSCAPE

How Skincare Evolves From Global Growth to Vietnam's Market Dynamics

02

SKINCARE ON SOCIAL MEDIA

Uncovering User Conversations, Behaviors & Emerging Skin Concerns

03

KEY DEMAND ANALYSIS

Deep Dive Into Sun-protecting & Moisturizing/Hydrating Needs





GLOBAL & VIETNAM SKINCARE LANDSCAPE

How Skincare Evolves From Global
Growth to Vietnam's Market Dynamics

GLOBAL SKINCARE MARKET LANDSCAPE

The global skincare industry continues steady long-term growth, reaching USD 151.8 billion in 2023 and projected to hit USD 231.6 billion by 2032 (CAGR ~5%). Facial skincare leads this expansion, driven not by more complex routines or intensive treatments, but by a shift toward skincare as long-term skin health maintenance rather than short-term problem solving.

Skincare Products Market

Global Forecast (2024-2032)

MARKET STATISTICS

Market Value (2023)

\$151.8 BN

Market Value (2034)

\$231.6 BN

CAGR (2024-2032)

5%

SEGMENT STATISTICS

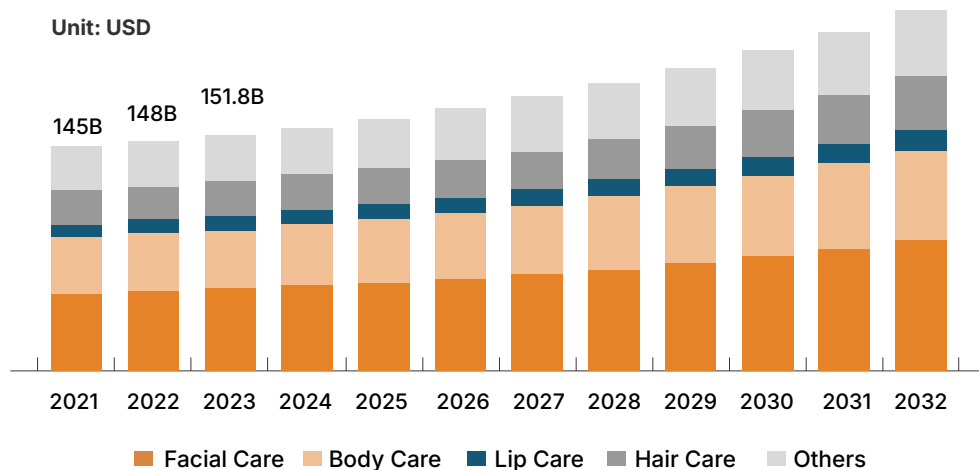
Facial Care Segment

Market Value (2032): **\$83.4 BN**

Chemical Segment

Market Share (2032): **64.5%**

GLOBAL SKINCARE PRODUCTS MARKET FORECAST BY PRODUCT



Reference sources:

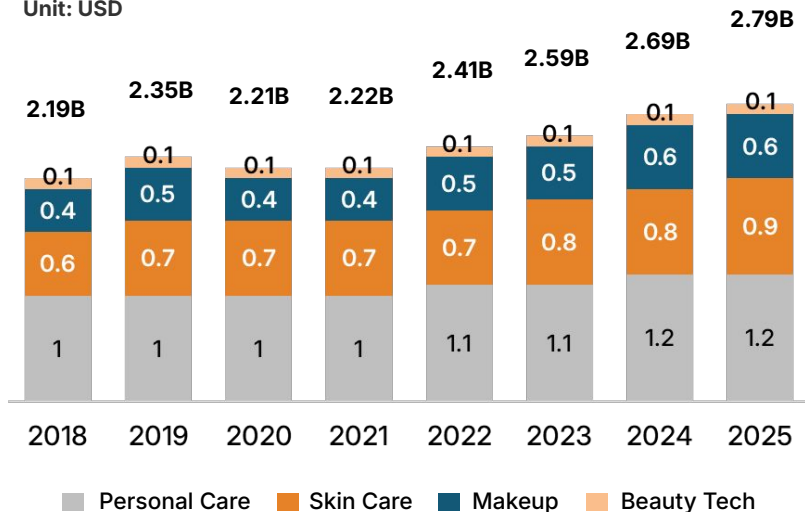
Global: Global Market Insights; GlobeNewswire, Vietnam: B-Company (2025); Vietnam Briefing

VIETNAM SKINCARE MARKET LANDSCAPE

In Vietnam, the Beauty & Personal Care market continues to show steady growth, with an estimated market size of approximately USD 2.74 billion, and is recognized as one of the faster-growing markets in Southeast Asia, with a CAGR of around 3.3% through 2029. Within this landscape, skincare remains a key growth segment, supported by the expansion of daily skincare habits and rising demand for gentle, naturally derived, and skin-friendly products that fit simple routines and support long-term use.

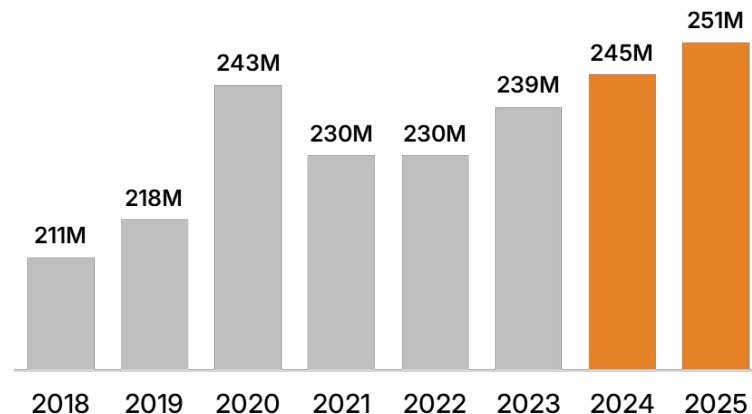
VIETNAM BEAUTY & PERSONAL CARE REVENUE

Unit: USD



VIETNAM NATURAL COSMETICS MARKET REVENUE

Unit: USD

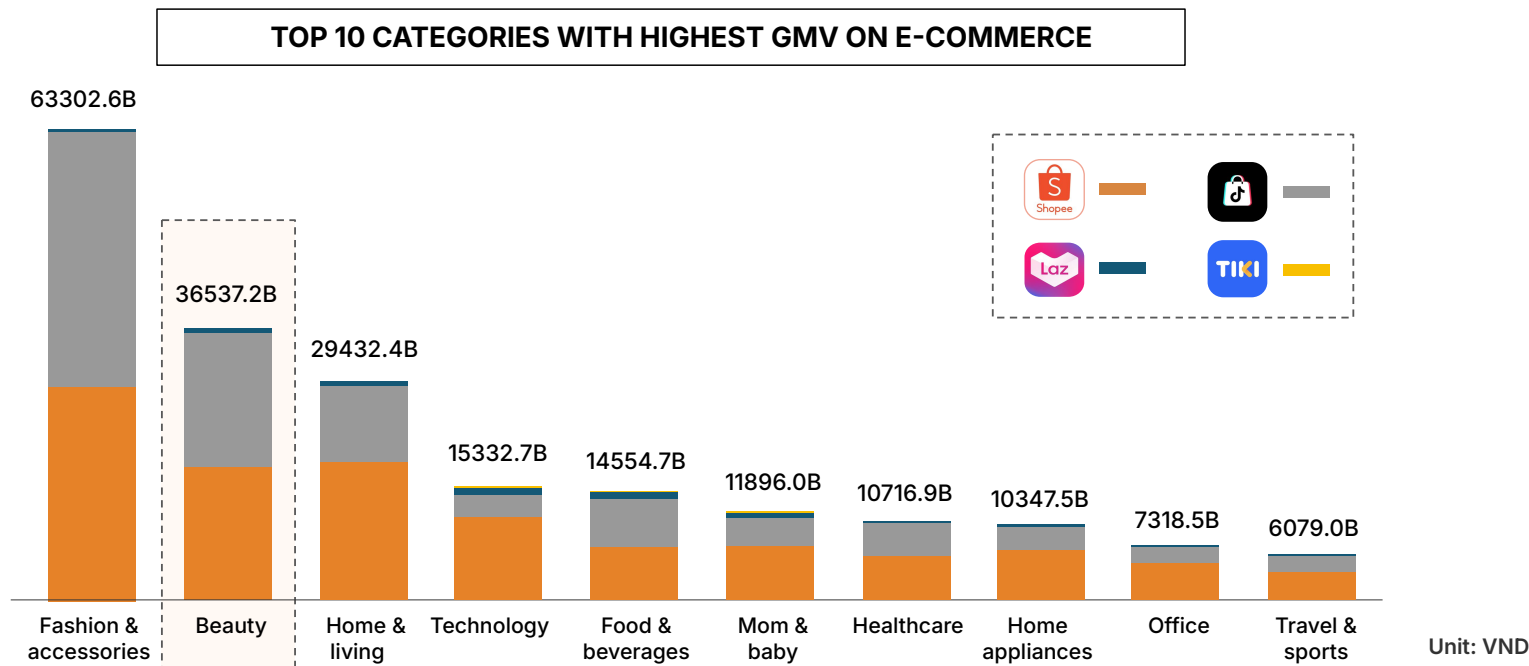


Source: Statista Market Insights

Reference sources:
Global: Statista Market Insights

CHANNELS & GROWTH SEGMENTS

According to YouNet ECI, Beauty ranks among the highest-GMV categories on e-commerce, reaching approximately VND 36.5 trillion, second only to Fashion & Accessories. This highlights beauty - especially skincare as a key growth driver of Vietnam's e-commerce market. At the same time, e-commerce and social commerce are increasingly central to the skincare purchase journey, as consumers actively research, compare, and make buying decisions online.



Reference sources:
 Buzzmetrics - VIETNAM E-COMMERCE INTELLIGENCE: Total E-Commerce Market Revenue Performance
 Deep Dive Report (H1/2025)



2

SKINCARE DISCUSSIONS ON SOCIAL MEDIA

Uncovering User Conversations,
Behaviors & Emerging Skin Concerns

SKINCARE DISCUSSION LANDSCAPE ON SOCIAL MEDIA

The skincare category is widely discussed on social media, with conversations largely driven by online sellers. However, when consumers actively participate, discussions tend to focus more on everyday usage needs, particularly moisturizing and Sun-protecting.

DISCUSSION OVERVIEW



61,402,944

buzz

DISCUSSION SHARE OF VOICE



Online Seller

81.4%



Consumer

16.0%



Brand

2.6%

DISCUSSION ABOUT SKINCARE DEMAND

Need/Demand	Total Buzz	% Buzz from Consumer
Moisturizing	15,595,488	12.50%
Whitening	10,746,480	25.78%
Cleansing	7,790,640	16.73%
Anti aging	6,860,112	20.04%
Anti acnes	6,382,680	30.27%
Sun-protecting	5,503,896	30.30%
Exfoliating	3,200,208	0.02%
Balancing	3,066,768	0.01%
Removing	2,256,672	0.03%

Time range: 01/10/2024 - 30/09/2025

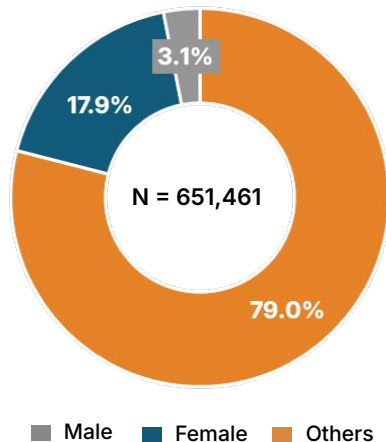
Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

KEY PARTICIPANTS IN SKINCARE DISCUSSIONS

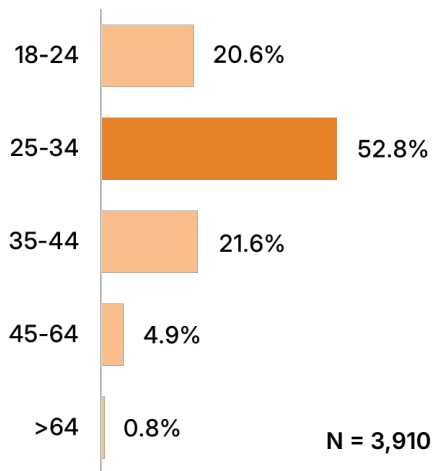
Discussions are mainly concentrated among young users, especially females aged 25-34, reflecting the leading role of this group in driving trends within the industry. In addition, the significant participation of male users indicates that skincare is gradually becoming a more common concern. Oily skin is the most frequently mentioned skin condition, reflecting common skin characteristics and typical issues in Vietnam.

CONSUMER PROFILE

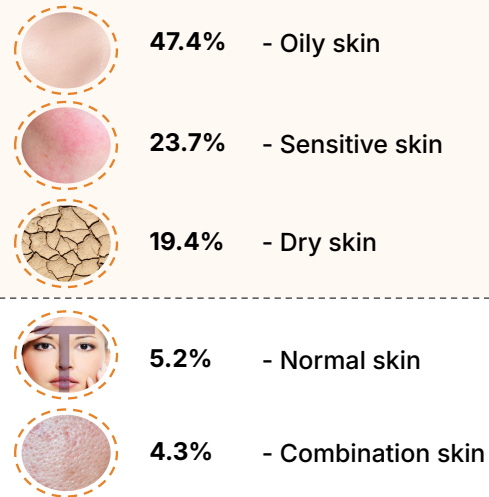
GENDER



AGE



SKINCARE TYPE DISCUSSION



N = 3,207,522

Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

THE SHIFT TOWARD FOUNDATIONAL SKINCARE ROUTINES

Based on market analysis and social media discussions, skincare demand is showing a clear shift toward foundational routines that can be maintained on a daily basis. Consumers are increasingly prioritizing daily usability, on-skin comfort, and long-term stability, rather than multi-step routines or intensive treatment-focused approaches.

Within this context, sun-protecting and moisturizing are appearing more frequently in daily skincare routines, as reflected in observations from dermatology-related materials in Vietnam:



Sun-protecting is linked to daily UV exposure

Dermatology-related materials in Vietnam indicate that UV exposure affects the skin on a daily basis, even under light or indirect sunlight, which is why sunscreen is commonly recommended to be used consistently as a basic skin-protection step.



Moisturizing is recommended for regular daily use

Skincare guidance typically recommends using moisturizers daily (morning and evening) to maintain skin hydration and support the skin barrier, rather than applying them only during specific treatment phases.



Both steps are easy to sustain in everyday routines

Sun-protecting and moisturizing serve protective and maintenance functions, offer comfortable on-skin experiences, and involve relatively low usage barriers, making them easy to retain and repeat in daily routines



KEY DEMAND ANALYSIS

Deep Dive Into
Sun-protecting & Moisturizing

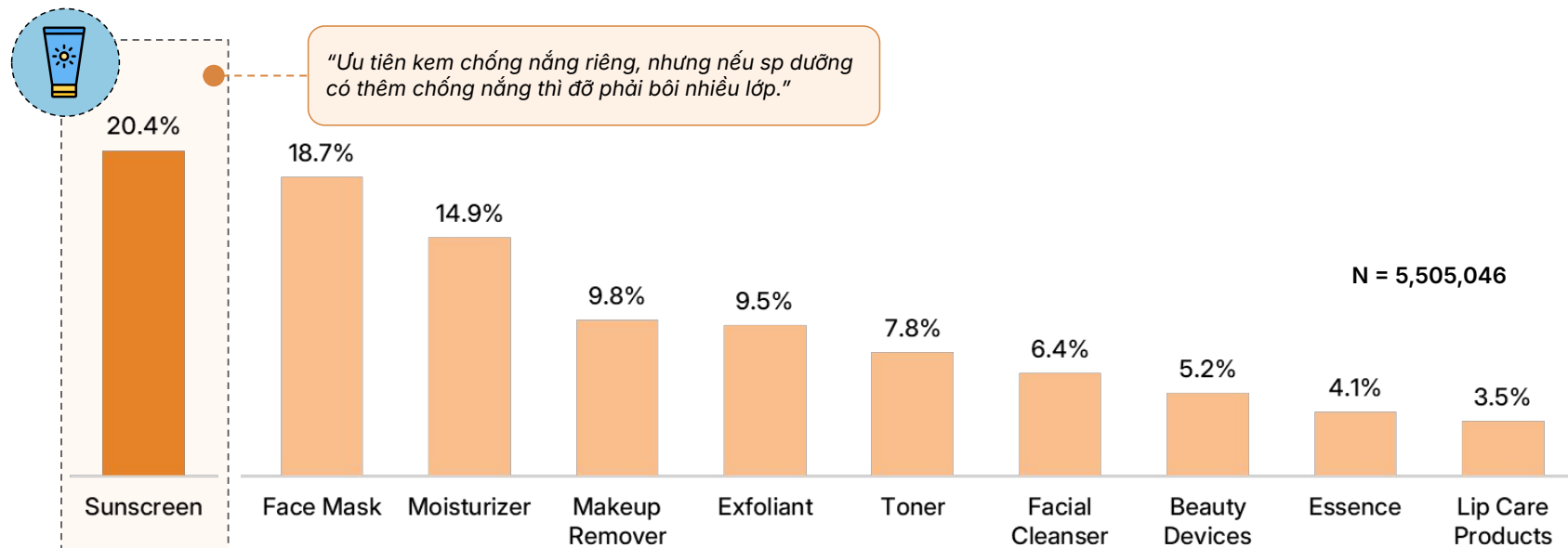


SUN-PROTECTING

SUN-PROTECTING: KEY PRODUCT TYPES

Sun-protecting demand is no longer confined to dedicated sunscreen products, but increasingly extends across skincare and makeup items. This reflects consumers' preference for multifunctional products that deliver protection while simplifying daily routines.

TOP PRODUCTS WITH SUN-PROTECTING BENEFITS



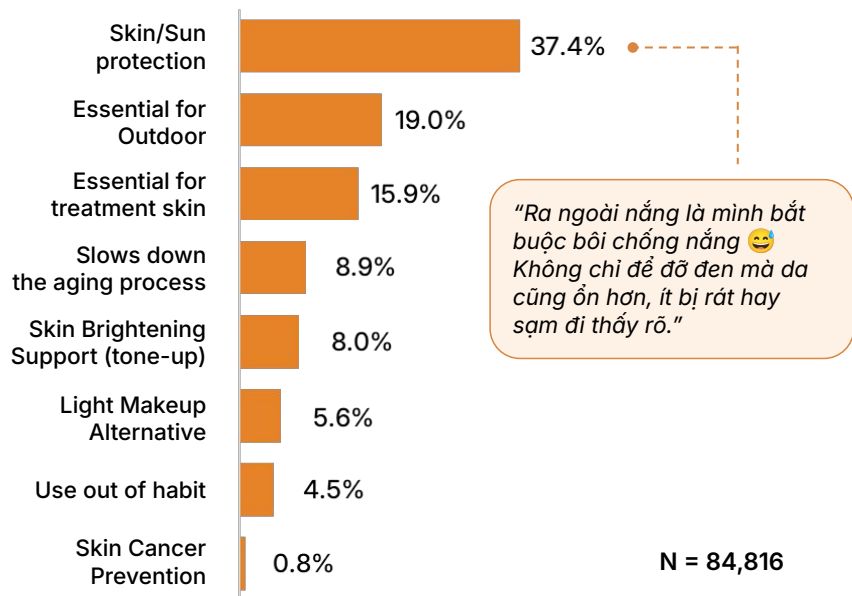
Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

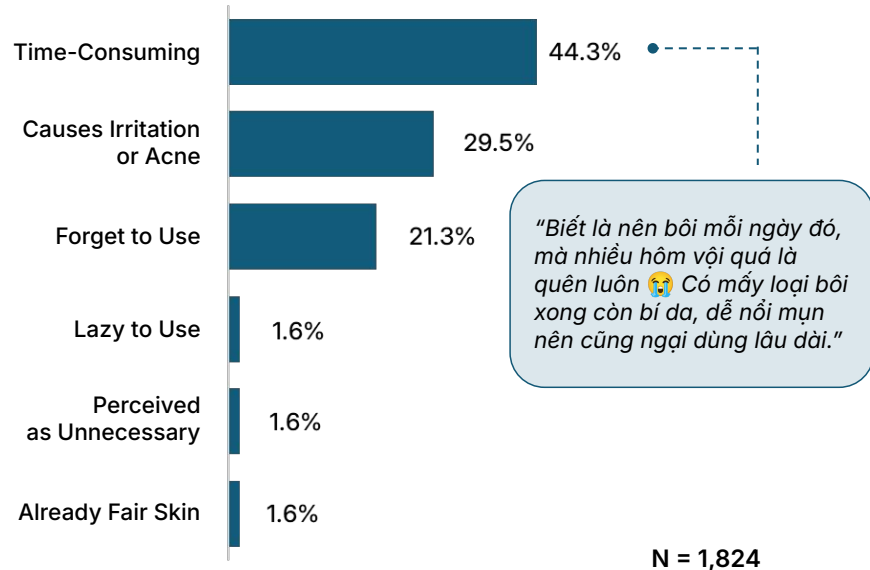
MOTIVATIONS & BARRIERS IN USING SUNSCREEN

Users primarily use sunscreen to protect their skin from sunlight and maintain stable skin conditions, particularly during outdoor activities and daily routines. In addition, tone-up is mentioned as a supporting factor for the usage experience, while barriers related to application time, irritation risk, and acne concerns continue to significantly affect long-term sunscreen usage habits.

MOTIVATIONS TO USE SUNSCREEN



BARRIERS TO SUNSCREEN USAGE



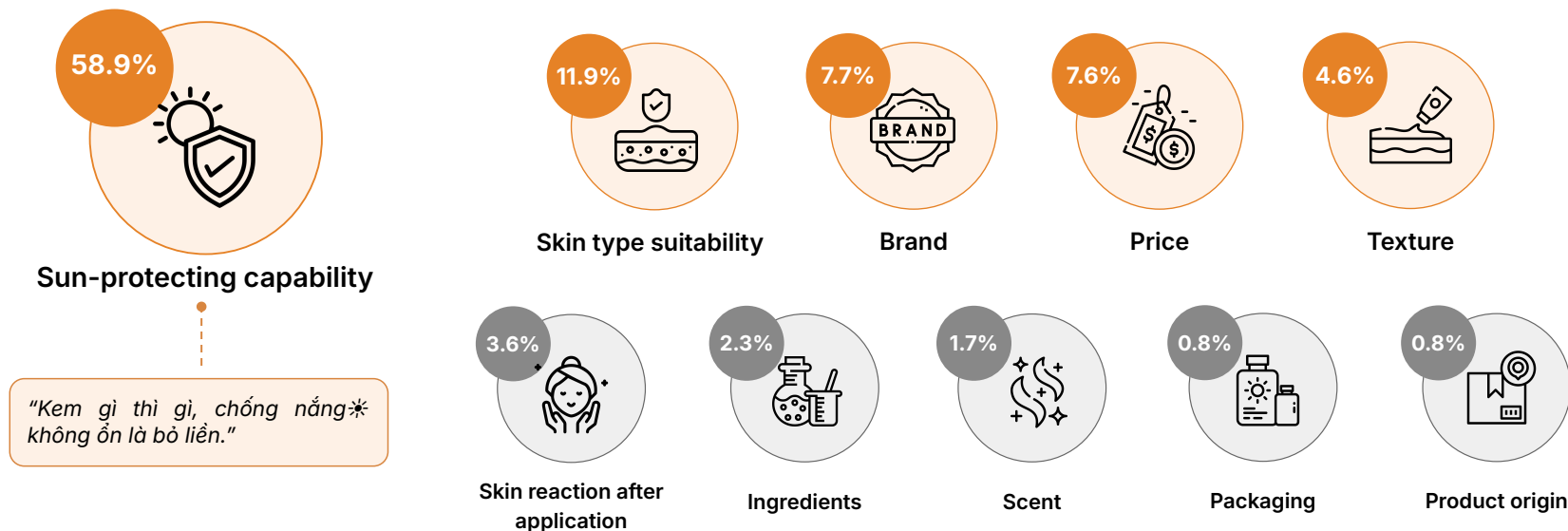
Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

KEY CRITERIA IN SUNSCREEN SELECTION

When choosing sunscreen, skin protection capability is considered the foundational factor. In addition, suitability for skin type and the skin feel after application are prioritized over brand or price, indicating that consumers are increasingly making decisions based on real on-skin experience.

CRITERIA IN CHOOSING SUNSCREEN



N = 490,677

Time range: 01/10/2024 - 30/09/2025

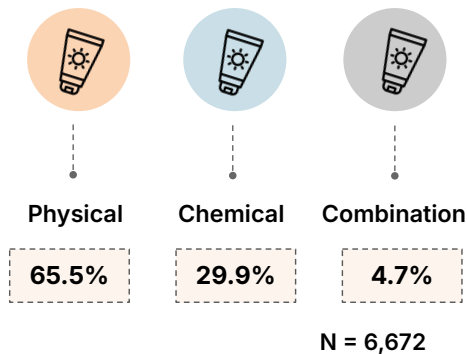
Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

PREFERRED SUNSCREEN CHARACTERISTICS

Across discussions, users show greater interest in products that are safe, easy to use, and suitable for daily application. Physical sunscreens, lightweight and easy-to-spread textures, and broad-spectrum SPF levels are frequently mentioned as familiar choices that support effective skin protection within long-term skincare routines.

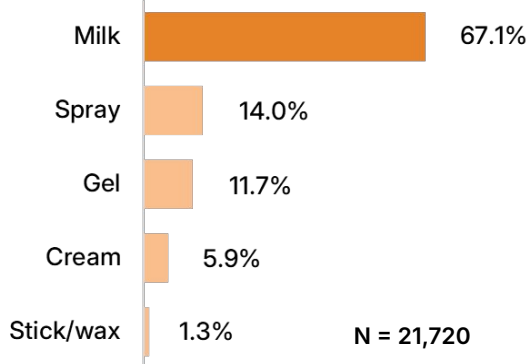
ANALYZING SUNSCREEN'S INGREDIENTS AND CHARACTERISTIC

SUNSCREEN TYPE



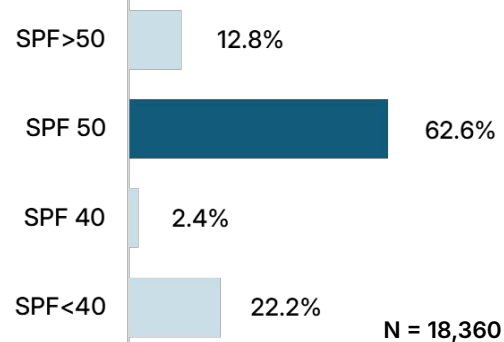
"Mình ưu tiên chống nắng vật lý vì dùng thấy yên tâm hơn, da đỡ kích ứng. Thường chọn loại không quá dày, dễ tán để dùng hằng ngày cho thoải mái."

SUNSCREEN TEXTURE



"Loại thấm nhanh, không dính rít là mình ưu tiên nhất, sáng bôi xong ra ngoài liền cũng ok."

SUNSCREEN PROTECTION LEVEL



"SPF 50 là mức mình luôn chọn, đủ yên tâm để dùng mỗi ngày mà không phải lăn tăn."

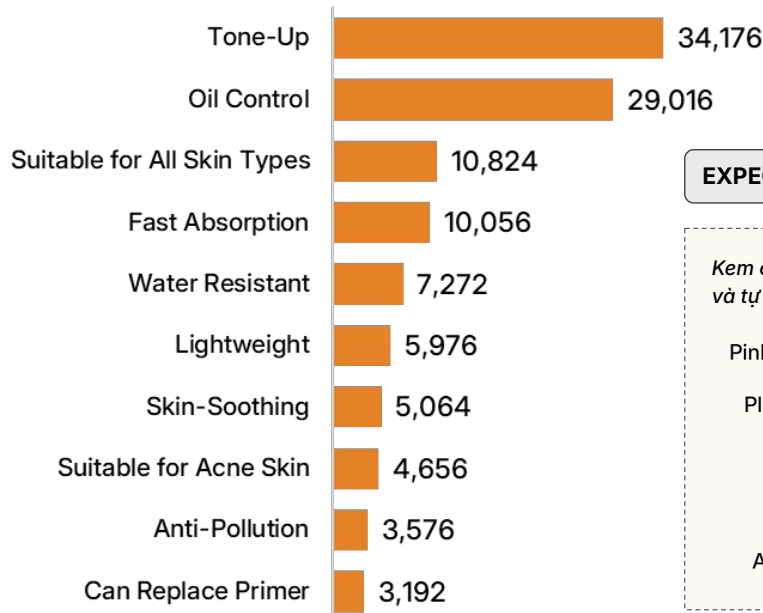
Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

SUNSCREEN EXPECTATIONS & UNMET NEEDS

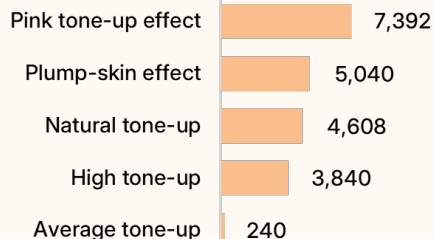
While tone-up and oil-control benefits are increasingly expected from sunscreens, real-world usage experiences reveal persistent issues such as stickiness, heavy texture, and pore-clogging sensations. This gap highlights a clear unmet demand for sunscreens that balance protective efficacy with lightweight, skin-friendly textures suitable for long-term daily use.

CONSUMERS EXPECTATION FOR SUNSCREEN

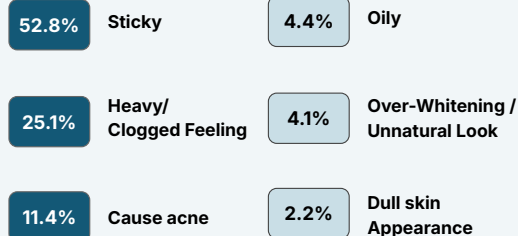


EXPECTATION FOR TONE-UP SUNSCREEN

Kem chống nắng được kỳ vọng nâng tone nhẹ và tự nhiên, không gây bóng dầu, nặng mặt.



UNMET CONSUMER DEMAND



N = 6,504

Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...



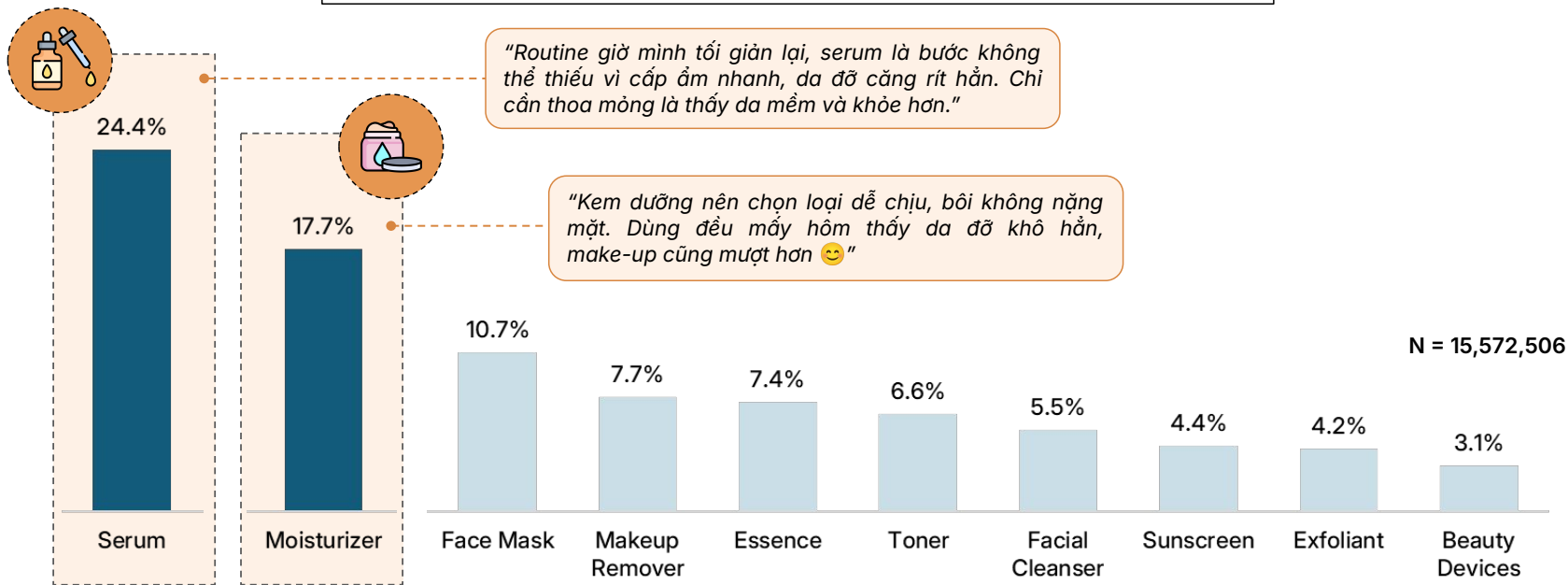
MOISTURIZING



KEY MOISTURIZING PRODUCT TYPES

In moisturizing and hydrating needs, serums and moisturizers play core roles in skincare routines. At the same time, hydration is integrated across multiple steps, showing that moisturizing is no longer a standalone step but has become the foundation of daily skincare.

KEY PRODUCT TYPES WITH MOISTURIZING BENEFITS



Time range: 01/10/2024 - 30/09/2025

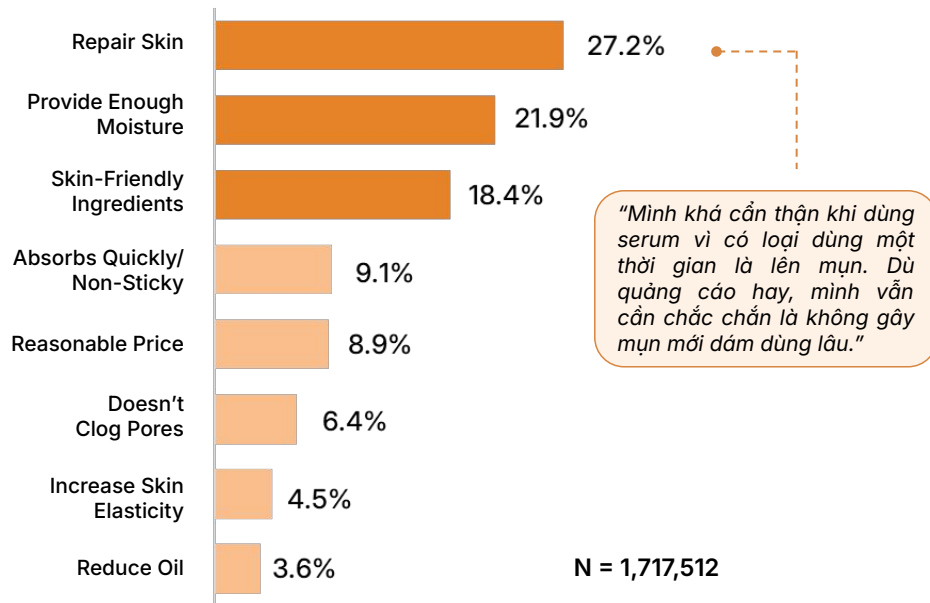
Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

SERUM: DRIVERS & BARRIERS

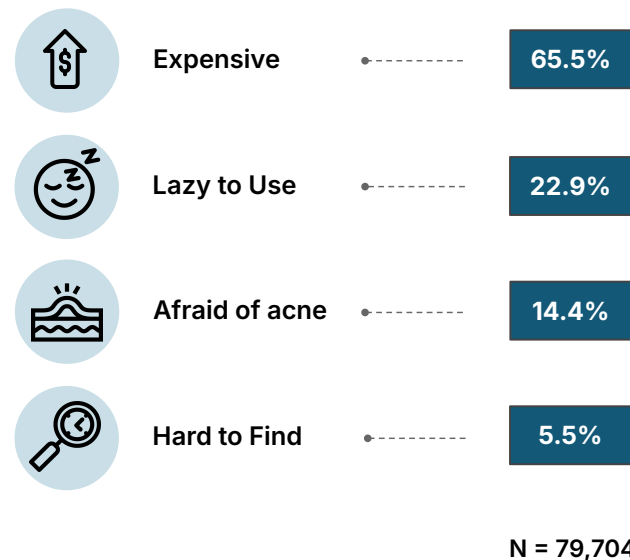
Serums are primarily chosen for their skin-repair and effective hydrating capabilities, along with high attention to ingredients and fast absorption. However, high price and acne concerns remain key barriers affecting long-term usage.



MOTIVATIONS TO USE SERUM



BARRIERS IN CHOOSING SERUM



Time range: 01/10/2024 - 30/09/2025

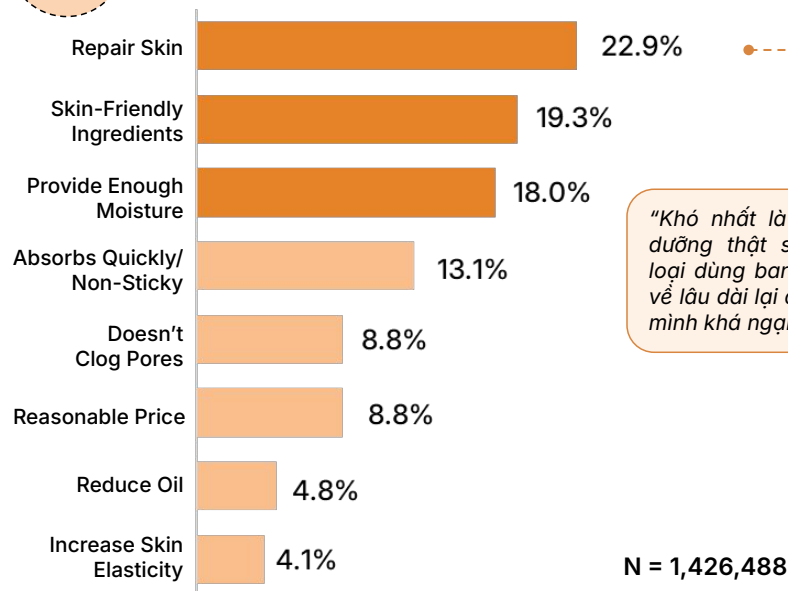
Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

MOISTURIZER: DRIVERS & BARRIERS

For moisturizers, users focus on skin recovery capability and gentleness to meet daily usage needs. However, difficulty in finding products suitable for specific skin conditions, along with price concerns and acne risks, makes consumers carefully consider before choosing and committing long term.

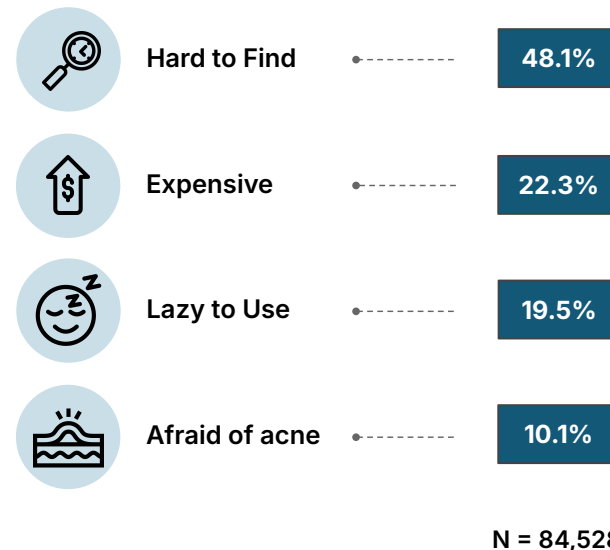


MOTIVATIONS TO USE MOISTURIZER



"Khó nhất là tìm được kem dưỡng thật sự hợp da. Có loại dùng ban đầu ổn nhưng về lâu dài lại dễ lên mụn, nên mình khá ngại dùng lâu dài."

BARRIERS IN CHOOSING MOISTURIZER



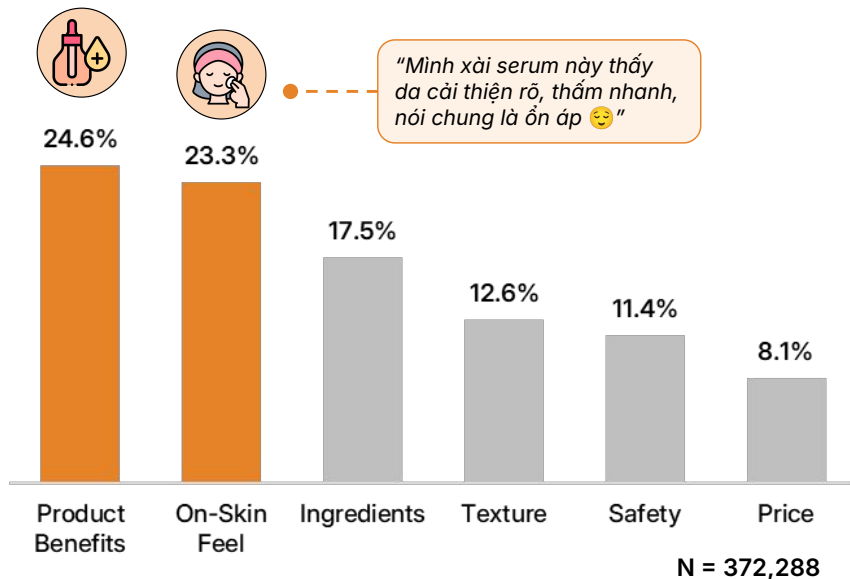
Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...

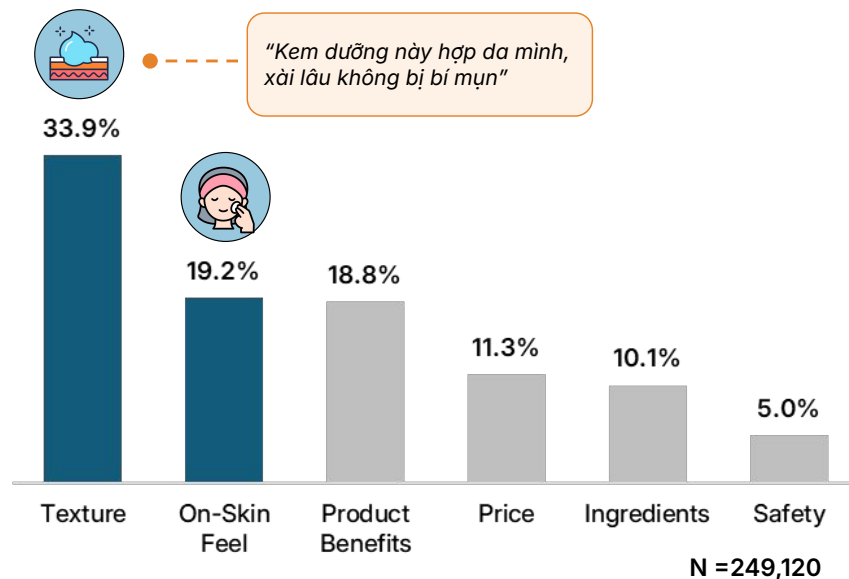
EVALUATION CRITERIA: SERUM VS. MOISTURIZER

Skin improvement benefits are the top criterion when choosing serums, reflecting expectations for clear and visible effectiveness. Meanwhile, for moisturizers, suitability for skin type is the primary concern, driving a preference for lightweight, fast-absorbing textures that are safe for long-term use.

CRITERIA FOR CHOOSING SERUM



CRITERIA FOR CHOOSING MOISTURIZER



Time range: 01/10/2024 - 30/09/2025

Sources: Facebook, TikTok, Online news outlets, YouTube, Forums, Threads,...



Skincare is gradually shifting from treatment-driven solutions to long-term skin health maintenance

Market and social media conversations indicate a growing consumer focus on protection, recovery, and maintaining stable skin conditions, rather than relying on aggressive, short-term, intervention-based treatments.



Simplified routines and real on-skin experience are becoming key evaluation criteria

The increasing emphasis on foundational steps such as sun protection and moisturizing suggests that skincare is being integrated more deeply into daily lifestyle habits. As a result, product consideration appears to place greater weight on skin-type suitability and actual usage experience, rather than brand-led messaging or immediate visible results.



Market opportunities lie in balancing efficacy with ease of use

Unmet needs - particularly within tone-up sunscreen and moisturizing segments-highlight opportunities for solutions that deliver functional effectiveness while maintaining lightweight textures, safety, and comfort for everyday use.



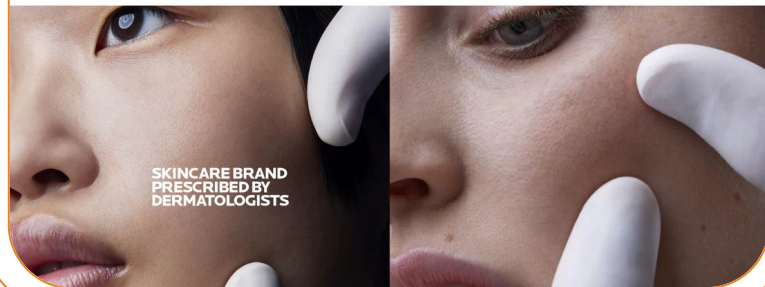
CASE STUDY



CASE STUDY | LA ROCHE-POSAY – ANTHELIOS

Sunscreen as a Daily Skincare Step

LA ROCHE-POSAY
LABORATOIRE DERMATOLOGIQUE



Anthelios within La Roche-Posay

Anthelios is La Roche-Posay's core sunscreen range, developed for daily sun protection and seamless integration into morning skincare routines, especially for oily, sensitive, and treatment-exposed skin.

About La Roche-Posay

La Roche-Posay is a French dermocosmetics brand focused on dermatology-based skincare solutions, with a strong emphasis on efficacy, safety, and long-term use, particularly for sensitive and problem-prone skin.



ANTHELIOS
DAILY SUN PROTECTION
FOR ALL SKIN TYPES
AND FOR ALL THE FAMILY

CASE STUDY | LA ROCHE-POSAY – ANTHELIOS

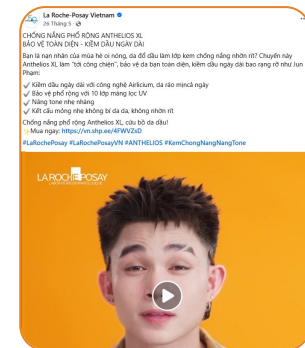
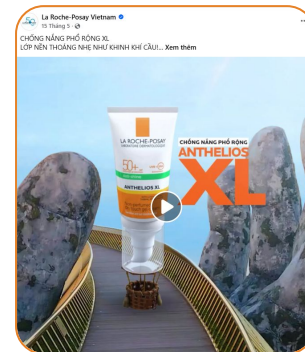
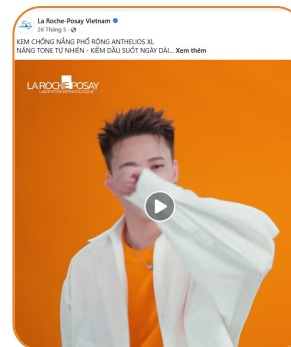
La Roche-Posay succeeds in the sunscreen category through Anthelios, a range designed for daily use that addresses key barriers of on-skin comfort and skin tolerance, rather than competing solely on “stronger” sun-protecting claims.

User & Category Context

- Awareness of UV exposure has expanded beyond sunburn to include aging, dark spots, and long-term skin health risks, driving the need for daily sun protection.
- World Health Organization recommends broad-spectrum (UVA/UVB) protection as part of a comprehensive sun-protecting approach.
- Key barriers to daily use include shine, white cast, heavy textures, and pilling under makeup.

Brand Strategy & Communication

- Anthelios is positioned as a dermatology-grade sunscreen for daily.
- The portfolio is structured around need-states, reducing barriers to routine integration.
- Always-on communication combines:
 - Scientific credibility & UV protection to build trust
 - Lightweight, comfortable on-skin experience to support long-term, consistent use



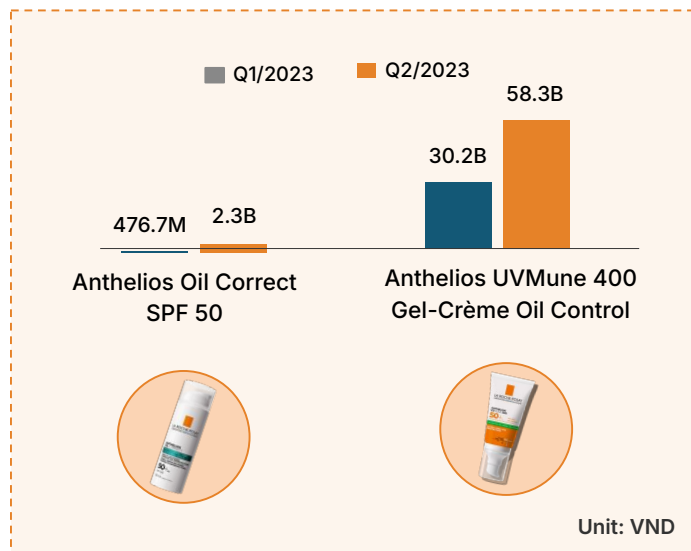
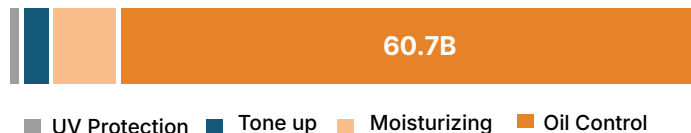
CASE STUDY | LA ROCHE-POSAY – ANTHELIOS

Performance Outcomes

- According to YouNet ECI (Shopee & Lazada, Q2/2023) indicates strong growth in the sunscreen category (+41%), making it one of the key growth drivers within skincare.
- In this context, La Roche-Posay's Oil Control portfolio generated approximately VND 60.7B in GMV in Q2/2023, underscoring the central role of this need-state in the brand's sunscreen performance.
 - Anthelios UVMune 400 Gel-Crème Oil Control recorded notable growth, increasing from ~VND 30.2B (Q1/23) to ~VND 58.3B (Q2/2023).*
 - Other Oil Control variants also delivered positive quarter-on-quarter growth, contributing meaningfully to overall performance.

La Roche-Posay's success demonstrates that addressing daily-use barriers and consistently translating insights into both product and communication strategies can deliver clear, measurable business impact. Combining scientific credibility with a positive usage experience supports sustained usage behavior and long-term growth.

LA ROCHE-POSAY
LABORATOIRE DERMATOLOGIQUE



RECOMMENDATIONS FOR BRANDS



Product & Portfolio

Prioritize product development around everyday-use skincare needs, with Sun-protecting and Moisturizing as core focus areas.

Lightweight textures, skin-type compatibility (especially for oily and sensitive skin), and comfortable on-skin feel should be treated as baseline requirements to encourage long-term use.

Consider multi-benefit formulations that help simplify routines while maintaining essential protection and hydration.



Communication & Positioning

Shift messaging away from short-term performance claims toward long-term skin stability and daily maintenance value.

Position Sun-protecting and moisturizing as foundational steps within daily skincare routines, rather than standalone problem-solving products.

Emphasize real usage experience comfort, ease of use, and suitability for daily application - to strengthen consumer trust and repeat usage.



Growth Opportunities

Explore white spaces in solutions that balance functional efficacy with everyday comfort and usability.

Brands that effectively support daily routine consistency are more likely to drive habitual usage, repeat purchase, and long-term brand loyalty.



THANK YOU

Contact Buzzmetrics today for expert consultation on
Social Media & E-Commerce Market Insight

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www.mmaglobal.com