

Professional Skin Care 2007 Multi-Region Series: Market Analysis and Opportunities

Published 1st Quarter 2008

Base Year: 2007

Regional Coverage

United States (5th Edition)
Published January 2008

Europe (3rd Edition)
Published March 2008

India (1st Edition)
Published January 2008

Kline's comprehensive report series on professional skin care brands sold through spas, salons, beauty institutes, physician offices, and retail stores, featuring:

- Industry trends and developments
- Market size and growth
- Product trends
- Competitive landscape
- Expanded geographic coverage
- Brand profiles
- New online database service

Includes Kline's *FutureView Scenario Forecasting Model*.

Report Scope

Professional Skin Care 2007 provides subscribers with an analysis of industry trends and developments, market size and growth, product trends, brand profiles, and competitive forces within the two largest markets of the professional skin care industry—the United States and Europe—as well as India, one of the largest emerging markets for professional skin care products.

Professional skin care is one of the fastest-growing segments within the cosmetics and toiletries industry. The global market for professional skin care products is estimated at nearly \$6 billion and has been growing at double-digit rates, compared with growth of only 4% for the global cosmetics and toiletries market.

In the United States and Europe, the professional skin care market continues to flourish, driven by baby boomers' demand for high-priced products, greater segmentation of product lines, and a consumer fascination with products that mimic the effects of cosmetic procedures performed in a doctor's office.

Marketers, retailers, and physicians continue to pay a great deal of attention to this industry. In 2007, consumer package goods giant Procter & Gamble entered the market with its purchase of DDF, one of the leading professional brands in the United States.

The study focuses on these industry trends and developments, as well as:

- Market size and growth
- Product trends and innovations
- Brand profiles, including established brands such as Decléor, La Roche-Posay, and SkinCeuticals, in addition to newer niche brands like MD Skincare and SkinMedica
- Competitive landscape
- Future outlook

Key Benefits

This report enables subscribers to exploit business opportunities by understanding market growth forecasts, future trends, and the competitive landscape for this high-margin sector.

Specifically, this report assists subscribers by providing:

- A highly reliable and independent assessment of professional skin care product sales and market share
- Planning data for retailers and other participants
- An examination of business opportunities regionally for personal care manufacturers, marketers, and retailers
- An unbiased appraisal of market trends and emerging product innovation
- Competitive intelligence for use in benchmarking
- A resource for screening potential merger and acquisition candidates

Professional Skin Care 2007 is also available through a new Web-based format for easy access anywhere throughout the world. Subscribers will have unlimited access to the report contents through via a sophisticated but easy-to-use database. The database features the following capabilities:

- Search capabilities by company, brand, and product type across multiple regions
- Flexible search options
- Subtotaling abilities
- Easy access to sales, market shares, growth rates, and forecasts

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Report Contents

EXECUTIVE OVERVIEW

This report provides an overview of the market in terms of sales, competition, regional differences, and opportunities. It is available only to subscribers of all three regional volumes.

1. INTRODUCTION

- Format
- Scope
- Sources and methods

2. EXECUTIVE SUMMARY

- Sales and growth
- Channels of distribution
- Geographic dispersion (where applicable)
- Competitive landscape
- Key product trends
- Key lessons learned
- Outlook to 2012

3. PRODUCTS

- Total sales and growth (value and unit sales)
- Take-home vs. back-bar sales
- Product trends
- Geographic differences (where applicable)

- New product activity
- Pricing
- Competitive landscape
- Channels of distribution
- Promotion
- Outlook to 2012

4. BRAND PROFILES

Brief profiles are provided for approximately 25 key brands/companies marketing skin care products that are offered in professional channels in each country/region, as listed in Table 1.

Information includes:

- Company overview
- Sales
- Product line
- New product activity
- Distribution
- Outlook to 2012

5. PURCHASE CHANNELS

Profiles are provided for each of the purchase channels listed in Table 2. Information includes:

- Number of outlets/doors
- Geographic dispersion (where applicable)
- Product sales for skin care
- Key skin care brands
- Product mix/pricing
- Outlook to 2012

Table 1
Brands Profiled in Each Volume

United States	Europe	India
Avancé	AgeraRx; Agera	Ayur Herbals
Aveda	Algotherm	Biotique
Avène	Babor	Christine Valmy
B. Kamins Chemist	Carita	Decléor
Bliss	Clarins	Fem
Cosmedix	Comfort Zone	Forest Essentials
Darphin	Darphin	Jolen
DDF Doctor's	Decléor	Kama Ayurveda
Dermatologic Formula	Dermalogica	Kaya Skin Clinic
Decléor	Dessange Beauté	Lakmé Beauty Salon
Dermalogica	Dr. Hauschka	Lotus Herbals
Glymed Plus	Elemis	Neostrata
Kerstin Florian	Ella Baché	Pevonia
International	Gatineau	Phytomer
Kinerase	Germaine de	Qurika
La Roche-Posay	Cappuccini	Reviderm
M.D. Forté	Guinot; Mary Cohr	Shahnaz Husain
MD Skincare	Janssen Cosmeceutical	Thal'ion
Murad	Klapp	Thalgo
N.V. Perricone M.D.	Matis	Vedaya
Cosmeceuticals	Natura Bissé	VLCC Personal Care
NeoStrata; Exuviance	Payot	
Obagi Medical Products	Phytomer	
Phytomer	SkinCeuticals	
Prevage MD	Sothys	
Repêchage	Thalgo	
SkinCeuticals		
SkinMedica		
Sothys		
Vivité		

Table 2
Purchase Channels Profiled in Each Volume

United States	Europe	India
Medical care providers (dermatologists, plastic surgeons, medical spas, others)	Beauty institutes (includes hair salons)	Beauty institutes and salons
Retail stores	Medical care providers and medical spas	Medical care providers
Spas and salons	Pharmacies	Retail stores
	Retail stores	Spas
	Spas	

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including professional skin care product manufacturers and marketers, distributors and suppliers, spas and medical professionals, key retailers, public relations executives, and other direct influencers on brand and supplier purchase decisions.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents the bulk of our research efforts; however, this analysis was supplemented by secondary research drawn from the review of suppliers' product literature and price lists; recent trade and technical publications; Internet sources; store checks; and company financial reports.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for nearly 50 years.

Kline's research and consulting services extend across the entire personal care industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com or visit our Web

Recently published or in-progress research for the personal care industry includes:

- Global Cosmetics & Toiletries
- Beauty Retailing
- Male Grooming Products
- Natural Personal Care
- Nutricosmetics: Nurturing Beauty through Nutrition - A Kline FlashPoint Series report
- Professional Skin Care
- Salon Hair Care

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Ordering Information & Contract

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- Direct access to the project team
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