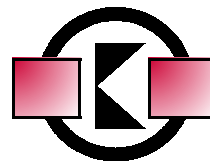


COSMETICS & TOILETRIES USA 2001



For over 30 years, the most authoritative and comprehensive annual source of information on the cosmetic, toiletry, and fragrance industry, providing:

- Industry trends
- Market shares
- Market size
- Company brand sales
- New product activity
- Retail distribution
- Advertising expenditures
- Five-year forecasts



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COSMETICS & TOILETRIES USA 2001 is an extensive industry resource used widely by marketing and other executives for competitive analysis, market investigation for new products, acquisition screening, and business planning. The report will be issued to subscribers as each of its sections is completed.

1. EXECUTIVE SUMMARY

An executive briefing covering developments in 2001, the impact of key trends and issues in the cosmetic and toiletry business, and their future implications for industry participants.

2. INDUSTRY ANALYSIS

A summary of industry developments in 2001 and a five-year forecast.

- Market overview 2001
- Companies
- Selling and distribution
- Private-label activity
- Government regulations
- Outlook to 2006

3. PRODUCTS

Pertinent information plus insightful analysis of 34 major categories, including category trends and developments; manufacturers' 2001 sales; sales and market shares for leading brands; new product activity; sales by retail channel; private-label sales; and outlook to 2006. The product categories covered are shown in Table 1.

4. MAJOR COMPANIES

Profiles for approximately 30 major companies, including company activities; sales by product category and for major brands in 2001, and related analysis; recent developments including acquisitions and new products; corporate overview; and outlook to 2006. The major companies covered are shown in Table 2.

5. ADVERTISING

Media spending for 2001 is provided for each of the 34 categories and for each of the 30 major companies. Data will be provided electronically.

6. MARKET WATCH BULLETIN

The *Market Watch Bulletin* contains information on new product introductions, acquisitions and divestitures, government regulations, and company developments for the 2001 calendar year.

Table 1

PRODUCT CATEGORIES

FRAGRANCES

- Fragrances for men
- Fragrances for women

HAIR CARE

- Conditioners
- Ethnic hair care products
- Hair coloring products
- Hair grooming products
- Hair perming products
- Hair sprays
- Hair styling products
- Shampoos

MAKEUP

- Blushers
- Eye makeup
- Face powders
- Lipsticks and lip glosses
- Makeup bases

NAIL CARE

- Miscellaneous nail care products
- Nail polishes

ORAL CARE

- Denture products
- Lip balms, jellies, and treatments
- Mouthwashes, rinses, and breath fresheners
- Toothbrushes
- Toothpastes

SKIN CARE

- Baby powders, oils, and lotions
- Bath additives
- Facial treatments
- Hand and body creams, lotions, and treatments
- Skin care products for men
- Sun care products
- Talcum and dusting powders

OTHER TOILETRIES

- Deodorants and antiperspirants
- Depilatories, waxes, and bleaches
- Miscellaneous products-a
- Personal cleansing products
- Shaving products

a- Includes eye makeup removers, foot care products, witch hazel, fade creams, and petroleum jelly.

Table 2

MAJOR COMPANIES-a

Alberto-Culver	Del Laboratories	LVMH
Elizabeth Arden	Dial	Estee Lauder
Avon	Gillette	Pfizer
Beiersdorf	GlaxoSmithKline	Playtex Products
Chanel	Intimate Brands	Procter & Gamble-c
Chattem	Johnson & Johnson	Revlon
Church & Dwight-b	S.C. Johnson	Schering-Plough
Clarins	Kao	Shiseido
Colgate-Palmolive	L'Oreal	Unilever
Coty	Mary Kay Cosmetics	

a- List subject to change.

b- Will include Carter-Wallace

c- Will include Clairol.

C&T ONLINE

COSMETICS & TOILETRIES USA is also available through Kline's Web-based delivery service. This option allows clients to purchase a site license from Kline & Company in addition to receiving one hard copy of the report. The site license will grant unlimited access to report data to users within the subscriber's company. These users can access the report from anywhere in the world as long as they have access to the World Wide Web.

C&T ONLINE will include both textual and tabular data. Like our CD-ROM, C&T ONLINE features searching and export capabilities, enabling users to search for specific companies and brands. Most importantly, subscribers to C&T ONLINE will have access to multiple years of data (1996 through 2001). In addition, subscribers will be able to view the sections as soon as they are completed.

Benefits of our Web-based product include ease of accessibility; unlimited user access; increased timeliness; the ability to search, cut, and paste; and access to historical data.

For special subscription options, please see the subscription agreement.

CONSULTATION

Subscribers needing more specific or related industry information not covered in the report may consult with our staff through telephone and e-mail contact or facsimile requests. One day of consultation time is provided at specified times during the publication of the study. Individual consultations are allocated in a minimum of one-hour increments. Consults pertaining to specific sections will only be addressed upon publication of the section.

ADVANCED DATA

Prior to the publication of the PRODUCTS and MAJOR COMPANIES sections of the report, sales data—arranged by category and company—are provided in spreadsheet form. This service is offered to provide clients with the most timely information possible. A publication schedule, including information on the timing of advance data and consultation services, is shown in Table 3.

METHODOLOGY

The most important source of information for the study is over 250 personal interviews conducted with cosmetic and toiletry companies, retailers, suppliers, and industry associations. This is supported through a rigorous search of secondary information plus a full-time, dedicated effort to the quality and delivery of this report.

CONSULTING CAPABILITIES

Through individual client projects, Kline's Consumer Group has assisted clients in making better business decisions regarding the cosmetic and toiletry industry since 1964. We offer a wide range of custom consulting services, including:

- **Competitive intelligence**
- **Acquisition and divestiture support**
- **New business development**
- **Profitability/financial analyses**
- **Strategic analyses**
- **R&D benchmarking**
- **Manufacturing economics**
- **Perceptual research**

Of unique benefit to our clients are our global capabilities and expertise in such related industries as healthcare, cosmetic and toiletry raw materials, and packaging.

In addition, Kline uses a multidisciplinary approach to ensure that all knowledge, facts, and logic that can affect a project are integrated into and considered in the final outcome.

This expertise allows us to identify potentially attractive opportunities and formulate sound strategies for our clients.

Complementing our consulting practice are other syndicated services offered by Kline, including:

– SALON HAIR CARE USA 1999 (2000 planned)

- COMPETITOR COST STRUCTURES—1998 edition
- NONPRESCRIPTION DRUGS USA (annual study)
- BEAUTY RETAIL 2000
- BEAUTY RETAILING: THE NEW PARADIGM
- HOME FRAGRANCES USA 2000 (2001 planned)

Table 3

PUBLICATION SCHEDULE - 2001



Quarter: Market Watch Bulletin; Advance Products sales data



Quarter: The Products; Advance Major Companies sales data; Major Companies



Quarter: Advertising; Industry Analysis; Executive Summary

NOTE: For subscribers to the Web-based delivery service, sections will be posted online as soon as they are completed.

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