

Cosmetics & Toiletries USA 2008

34th Edition

Published July 2009

Base Year: 2008

A comprehensive analysis of the U.S. market for personal care products, focusing on key trends, developments, challenges, and business opportunities, and providing information on:

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

Featuring new quarterly podcasts

Report Scope

Cosmetics & Toiletries USA is considered the authoritative source of information on the personal care products industry. It contains market size and share data, retail sales, channel breakdowns, trends, and forecasts for 29 major product categories; detailed profiles of 26 leading marketers; and an analysis of media spending.

This report focuses solely on products sold through all domestic consumer outlets in the United States, including those marketed via direct sales from companies such as Avon and Mary Kay, in addition to nontraditional outlets such as specialty retailers.

Key Benefits

Kline & Company has been serving the personal care products industry for 50 years. *Cosmetics & Toiletries USA* is a detailed assessment of personal care products and the players who market them.

Benefits for subscribers are summarized below:

- Assess category and product trends
- Identify acquisition and alliance partners
- Capitalize on consumer trends
- Develop market-entry strategies
- Efficiently allocate financial, marketing, and manufacturing resources
- Develop competitive strategies for increased market share
- Understand industry dynamics, including:
 - Key competitors and market strategies
 - Channels of distribution
 - Key factors for success
 - Product trends
 - Advertising and promotional strategies
 - New product activity
 - Emerging and niche brands
 - Five-year forecasts

In addition, Kline has added an exciting new feature to provide subscribers with a wider and richer array of content. Each quarter, Kline will release **podcasts** for the personal care industry that review the latest trends and developments and comment on their impact on the market. The developments covered include key product launches, M&A activity, shifts in consumer behavior, changes at retail, and other timely market developments. Kline's experts assess and comment on the impact of these developments with a forward-looking view. The podcasts are available on your online account in audio and written format for easy access and distribution.

Cosmetics & Toiletries USA is available through a Web-based format for easy access anywhere throughout the world. Subscribers have unlimited access with no expiration date to the report contents via a sophisticated but easy-to-use database.

Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

An executive briefing covering developments in 2008, the impact of key trends and issues in the personal care business, and their future implications for industry participants.

3. INDUSTRY ANALYSIS

A summary of industry developments in 2008 and a five-year forecast.

- Market overview
- Companies
- Retail channels
- Private-label activity
- Advertising and promotion
- Outlook to 2013

4. THE PRODUCTS

Pertinent information and insightful analysis of 29 major categories, including category trends and developments; manufacturers' 2008 sales; sales and market shares for leading brands; new product activity; sales by retail channel; private-label sales; promotion; and outlook to 2013. The product categories covered are shown in Table 1.

5. MAJOR COMPANIES

Profiles for 26 major companies, including company activities; sales by product category and brand in 2008, and related analysis; recent developments including acquisitions and new products; corporate overview; and outlook to 2013. The major companies covered are shown in Table 2.

6. MINOR COMPANIES

Brief profiles of about 150 smaller marketers of personal care products. Profiles included descriptions of companies' business, location, sales for 2007 and 2008, major brands, new product activity, distribution and spending, and future outlook.

7. ADVERTISING

Media spending for 2008 is provided for each of the product categories and major companies.

Table 1
Product Categories Covered in the Study

Fragrances

- Fragrances for men
- Fragrances for women

Hair Care Products

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

Makeup Products

- Eye makeup
- Face makeup
- Lipsticks and lip glosses
- Nail polishes

Oral Care Products

- Denture products
- Lip balms
- Mouthwashes
- Toothbrushes
- Toothpastes
- Tooth whitening products

Skin Care Products

- Baby care products
- Facial treatments
- Hand and body lotions
- Skin care products for men
- Sun care products
- Talcum and dusting powders

Other Toiletries

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

Table 2
Major Companies Covered in the Study



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 approximately 3,000 in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including leading and niche cosmetic and toiletry manufacturers and marketers, distributors and suppliers, key retailers, and pertinent government agencies and trade organizations. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

In addition, this analysis is supplemented by secondary research drawn from a search of recent trade literature; Internet sources; an analysis of statistical data from government, industry, and trade associations and agencies; corporate financial reports and literature; store checks; and nonconfidential data from Kline's library and files.

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 50 years.

Kline's research and consulting services extend across the entire personal care 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, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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Recently published or in-progress research for the Consumer Products industry includes:

- Beauty Retailing
- Male Grooming Products
- Natural Personal Care
- Nutricosmetics
- Professional Skin Care
- Salon Hair Care
- Specialty Raw Materials for Cosmetics & Toiletries

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Ordering Information & Contract

The standard subscription includes:

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- Direct access to the project team
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