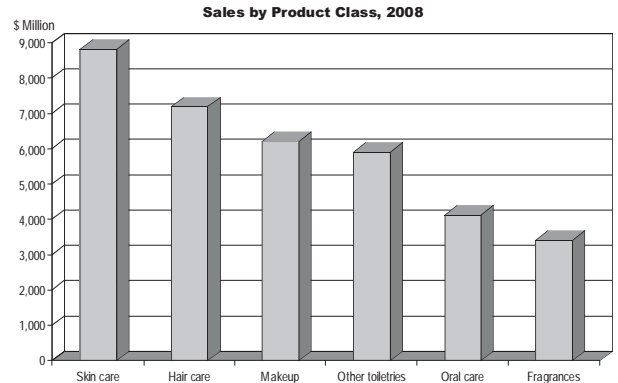


# Cosmetics & Toiletries USA 2008

## Fact Sheet

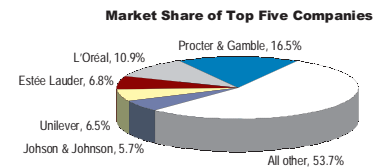
### The Market

In 2008, U.S. sales of cosmetics and toiletries grew slightly to \$35.7 billion. Skin care is the largest product class in terms of dollar value, at \$8.8 billion, and fragrances are the lowest dollar producer in 2008.



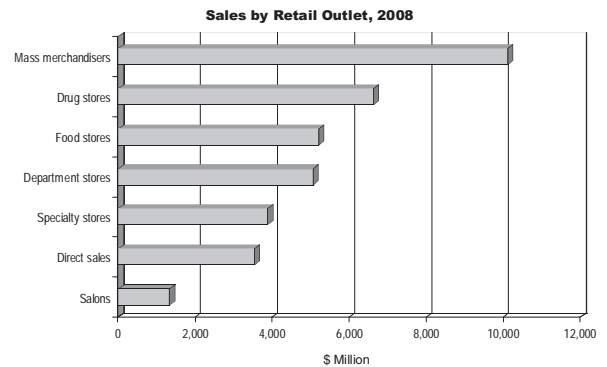
### Companies

The five leading marketers of cosmetics and toiletries in the United States account for approximately 46% of total sales in 2008. Nine of the top ten marketers report cosmetics and toiletries sales exceeding \$1 billion. Procter & Gamble is number one in sales in the industry.



### Retail Channels

Cosmetics and toiletries are sold through a wide variety of purchase channels, with the primary retail outlets for the industry shown in the chart. In terms of total sales volume, mass merchandiser outlets remain the most important purchase channel for cosmetics and toiletries. There are two main types of mass merchandiser outlets: discount department stores such as Walmart, Target, and Kmart; and general merchandise stores, including dollar stores like Dollar General and Family Dollar Stores.



### Outlook

Cosmetics and toiletries in the United States are expected to see moderate growth of 2.2% CAGR over the next five years as forecast in the base case scenario.

