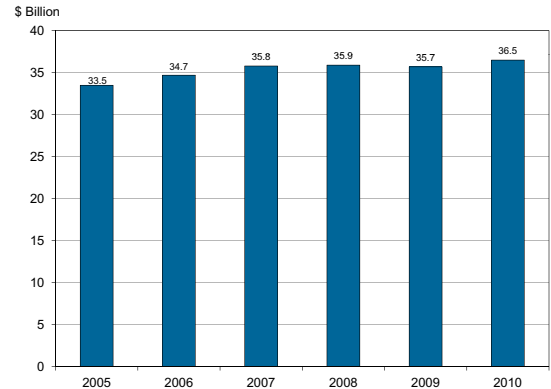


Cosmetics & Toiletries USA 2010

Fact Sheet

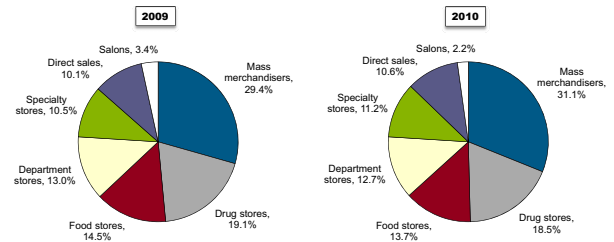
The Market

Sales of cosmetics and toiletries in the United States reach \$36.5 billion in 2010, increasing by 2.4% from \$35.6 billion in 2009. The six leading product categories—facial treatments, personal cleansing products, face makeup, eye makeup, shampoos, and fragrances for women—contribute to more than half of the total market sales in 2010.



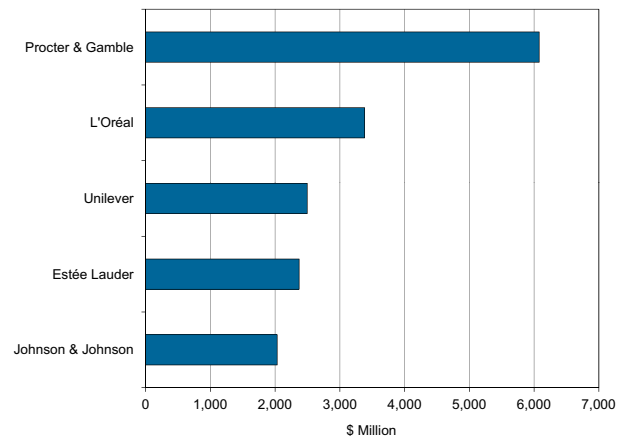
Companies

The top 10 cosmetics and toiletries marketers represent 63.4% of total industry sales in 2010, with each of the marketer's cosmetics and toiletries sales estimated at more than \$1 billion each. Procter & Gamble continues to be the undisputed industry leader by a wide margin, representing 16.7% of total cosmetics and toiletries sales in 2010.



Retail Channels

In terms of total sales volume, mass merchandiser outlets continue to be the most important purchase channel for cosmetics and toiletries. Mass merchandisers retains its lead to be the most preferred retail channel for cosmetics and toiletries, with total sales advancing 8.4% from \$10,483 million in 2009 to \$11,368 million in 2010. Strong surge in private-label products and value-priced brands drives the sales growth in mass merchandisers.



Future Outlook

U.S. sales of cosmetics and toiletries are expected to reach more than \$42.2 billion by 2015, increasing at a compound annual growth rate of 2.9%. The cosmetics and toiletries market comes back on growth trajectory in 2010, as consumers gain confidence in their spending patterns and marketers introduce products with technological advancement. Advancement in product types such as eyelash treatments, natural or organic products, and new product activity for most of the competing categories is expected to keep the growth rate progressing.

