

Beauty Retailing 2008 Global Series:

Channel Analysis and Opportunities

8th Edition with Expanded Geographic Coverage

Published October 2009

Base Year: 2008

Regional Coverage

Asia

Europe

Latin America

United States

A comprehensive analysis on the dynamic retailing environment for cosmetics and toiletries in 11 leading markets. This study series provides:

- Detailed profiles for the key purchase channels in each country
- A thorough and accurate assessment of alternate channels, such as perfumeries, direct sales, and specialty stores
- Profiles of 32 key retailers around the world
- Insights into the challenges that marketers face in order to effectively compete in a changing retail environment
- Information to help marketers identify opportunities at the retail level in each local market

Report Scope

Beauty Retailing 2008 Global Series: Channel Analysis and Opportunities provides subscribers with insights into retailing challenges and opportunities. This report series, offered as a series of 11 country reports and a world volume, analyzes the latest channel developments in each country.

The report series examines the global market with a focus on the most important countries, as follows:

- Asia: China, India, Japan
- Europe: France, Germany, Italy, Russia, Spain, United Kingdom
- Latin America: Brazil
- North America: United States

The report focuses on the personal care market. The category scope matches Kline's *Cosmetics & Toiletries* program and encompasses 21 product categories across the following product classes: fragrances, hair care, makeup, oral care, skin care, and other toiletries.

For each country, this program analyzes the major purchase channels, providing an accurate, detailed examination of the competitive landscape at the retail level.

Profiles are provided for 32 key retailers around the world. A presentation-style executive summary provides a roll up analysis to the global level.

Key Benefits

This comprehensive report enables subscribers to exploit business opportunities by illustrating the retailing dynamics in the most important markets of the personal care industry.

Specifically, this report can assist subscribers by:

- Identifying and explaining key purchase channels for cosmetics and toiletries in each country in a clear and consistent fashion
- Clearly illustrating the rapidly changing landscape in the emerging markets of Brazil, China, India, and Russia
- Quantifying industry sales by purchase channel, focusing on non-traditional channels
- Developing sales forecasts by purchase channel to predict changes that will occur in cosmetics and toiletries sales by class of trade through 2013
- Explaining the business practices and strategies of specific types of retailers, supported by profiles of key cosmetics and toiletries retailers
- Delivering the information and insights required to capitalize on changes at retail

Forecasts in the World Volume of the report are generated with Kline's *FutureView Scenario Forecasting Model*. With the enhanced forecasts, subscribers can see how adjustments in the assumptions behind the forecasts can bring about different outcomes.

Beauty Retailing 2008 Global Series: Channel Analysis and Opportunities

Contents for World Overview Report

1. INTRODUCTION

2. EXECUTIVE SUMMARY

Includes a global view of the retail environment, global summaries by purchase channel, insights into current trends affecting the market globally, and forecasts to 2013 using Kline's FutureView Scenario Forecasting Model.

3. RETAILER PROFILES

Profiles of 32 retailers from around the globe (as shown in Table 1) will be provided with specific discussion pertaining to the cosmetics and toiletries business of these companies. Each profile includes the following:

- Overview
- Corporate sales
- Number of doors/stores
- Competitive focus and strengths
- Role of cosmetics and toiletries
- Role of private-label products
- Recent developments
- Marketing activities
- Outlook to 2013

Contents for Each Country Report

1. INTRODUCTION

2. EXECUTIVE SUMMARY

3. PURCHASE CHANNELS

A review of key purchase channels for cosmetics and toiletries as listed in Table 3. At least four channels are profiled per country. Each profile includes the following:

- Channel developments
- Analysis by store type
- Number of doors/stores
- Leading retailers
- Role of cosmetics and toiletries
- Retail sales by product category for 2003 and 2008
- Promotional and advertising activity
- Role of private-label products
- Outlook to 2013

Table 1
Retailers Profiled in World Overview Report

■ A.S. Watson Group (Asia/Europe)	■ L'Etoile (Russia)
■ Bath & Body Works (U.S.)	■ L'Occitane (France/Global)
■ The Body Shop (U.K./Global)	■ Matsumotokiyoshi Holdings (Japan)
■ Boots (U.K.)	■ Natura (Brazil)
■ Carrefour Group (Global)	■ Nordstrom (U.S.)
■ Companhia Brasileira de Distribuição (Brazil)	■ O Boticário (Brazil)
■ Costco (U.S.)	■ Pantaloon Retail Limited (India)
■ CVS (U.S.)	■ Parkson (China/Asia)
■ DHC (Japan)	■ Printemps (France)
■ DM Drogerie (Germany/Europe)	■ Sa Sa (Hong Kong/Asia)
■ Douglas (Germany/Global)	■ Schlecker (Germany/Spain)
■ Drogeria Onofre (Brazil)	■ Sephora (France/Global)
■ Galeries Lafayette (France)	■ Shopper's Stop (India)
■ Health & Glow (India)	■ Space NK (U.K./U.S.)
■ Ile de Beaute (Russia)	■ Ulta (U.S.)
■ Isetan (Japan)	■ Yves Rocher (France/Global)

Table 2
Countries Covered in Separate Country Reports

Brazil	Germany	Japan	United Kingdom
China	India	Russia	United States
France	Italy	Spain	

Table 3
Purchase Channels Covered

Retail outlet	Types of stores	Examples of retailers
Department stores	<ul style="list-style-type: none"> ■ Traditional ■ Specialty ■ Lower-end 	Bon Marche, Dillard's, Galeries Lafayette, Harrods, J.C. Penney, Kohl's, Lojas Americanas, Macy's, Marks & Spencer, Neiman Marcus, Nordstrom, Printemps, Sears, Selfridges, Shanghai No. 1 Department Store
Direct marketing	<ul style="list-style-type: none"> ■ Person-to-person ■ Home shopping networks ■ Infomercials ■ Internet/e-commerce ■ Catalogs and other direct response 	Avon, DHC, Mary Kay, Natura, Oriflame, Pola, QVC, HSN
Drug outlets/pharmacies	<ul style="list-style-type: none"> ■ Chain drug stores ■ Independent drug stores ■ Pharmacies/para-pharmacies 	Boots, China Nepstar Chain Drugstore, CVS, Farmacia Guadalajara, Medicine Shoppe, Pao de Açúcar, Superdrug, Watson's, Droghada Onofre
Food outlets	<ul style="list-style-type: none"> ■ Supercenters ■ Traditional supermarkets ■ Natural health food stores ■ Convenience stores ■ Deep discounters 	Carrefour, ParknShop, Safeway, Sainsbury's, Tesco
General stores	<ul style="list-style-type: none"> ■ Open air markets ■ Kiranas ■ General stores 	
Mass merchandisers	<ul style="list-style-type: none"> ■ Big box retailers ■ Hypermarkets ■ Warehouse clubs ■ Dollar stores 	Target, Wal-Mart, Carrefour, ASDA, JUSCO, Real
Specialty stores	<ul style="list-style-type: none"> ■ Vertically integrated ■ Cosmetic specialty ■ Beauty supply ■ Apparel ■ Perfumeries 	The Body Shop, L'Occitane, Douglas, Sephora, Sally Beauty, H&M, Zara, Marionnaud, The Face Shop, Missha, Ikesaki, Space NK, Uita

Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's 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 retail executives, category managers, buyers, store/counter managers, distributors, sales representatives, manufacturers, and marketers in the beauty industry.

Primary research represents the bulk of our research efforts. 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 the review of annual reports, 10ks, company literature and other reports, trade publications, and non-confidential information from Kline's extensive database. Extensive store and website checks will also be conducted to obtain information on product selection and availability, display and sales techniques, and other merchandising trends. Kline's *Global Cosmetics & Toiletries* market research program and previous editions of our *Beauty Retailing* series will be used as a foundation.

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.

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North America

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+55-11-3079-0792

Europe
+32-2-770-4740

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