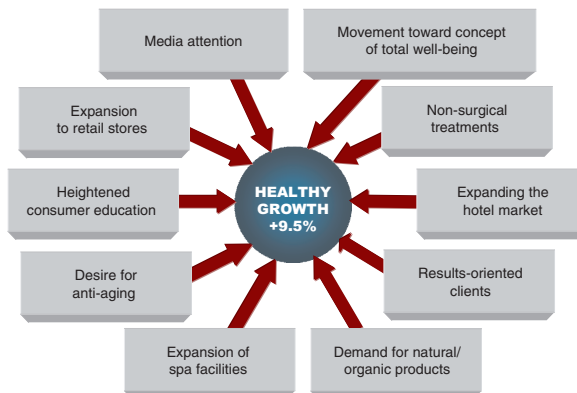


Professional Skin Care 2007: Europe Market Analysis and Opportunities

Fact Sheet

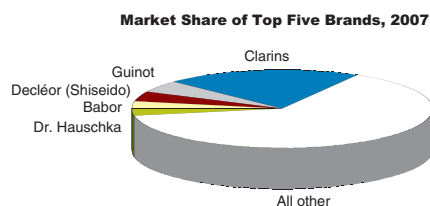
The Market

The European professional skin care market has received tremendous attention over the past few years due to heightened consumer education, increased media attention, and a strong demand for natural/organic products. The market grew a substantial 9.5% to reach €1.8 billion in 2007.



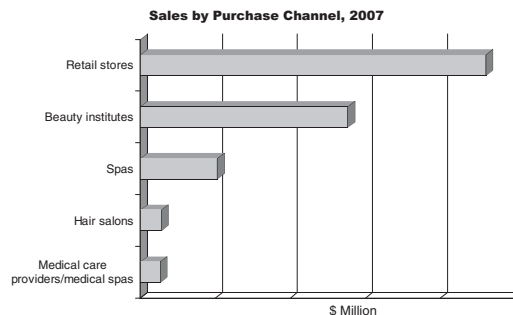
Competitive Landscape

The market remains highly fragmented with a number of players across Europe. Clarins is by far the leader, with dozens of smaller companies having sales under €5 million. The high number of companies present in institutes and salons makes the professional skin care market fairly saturated and highly competitive, which limits room for new players.



Channels of Distribution

Traditional retail stores account for the majority of the professional skin care product market while the medical channel exhibits the strongest growth rate. The number of professional treatment facilities in Europe has grown to more than 600,000 doors in 2007.



Future Outlook

The professional skin care market is projected to enjoy a dynamic growth under the base case scenario, increasing by 8.0% annually to total €2.6 billion by 2012. The market will be driven by a number of factors, including marketers targeting specific demographic groups, a wider scope of consumer profiles, and the increasing demand for natural ingredients.

