

Professional Skin Care 2008 Global Series: Market Analysis and Opportunities

6th Edition

Published February 2009

Base Year: 2008

Regional Coverage

China

Europe

United States

A comprehensive series of reports on professional skin care brands sold through spas, salons, beauty institutes, physician offices, and retail stores, focusing on key trends, market developments, competitive landscape, and opportunities. This report series will address such questions as:

- What are the fastest-growing product segments?
- How will a recessionary economy in the United States affect this market?
- Where is the growth for the dispensing physician segment coming from?
- What are the truly innovative new product introductions for the year?
- What is the best case scenario for future growth?

Report Scope

This report series provides comprehensive analysis and commentary on sales of skin care products through professional channels such as spas, beauty institutes, and medical care providers. It offers detailed brand profiles of the key players in this fast-growing market and examines the key channels of distribution for these brands.

This series covers consumable skin care products sold via professional channels, including take-home (retail) and back-bar (used for services performed in a beauty institute, spa, or office) products.

The geographic scope for the 2008 series includes the United States, Europe, and China.

Key Benefits

To identify the opportunities in this fast-growing yet hard-to-track industry, marketers should fully understand the companies that participate in it. Kline provides a highly reliable and independent assessment of professional skin care product consumption and market share. This report series enables subscribers to exploit business opportunities by understanding market growth forecasts, future trends, and the competitive landscape for this high-margin sector.

The reports provide subscribers with:

- An examination of business opportunities regionally for personal care manufacturers, marketers, and retailers
- A resource to augment business plans with reliable insights and data
- An appraisal of market trends and emerging product innovations
- Competitive intelligence for use in benchmarking
- An unbiased resource for screening potential merger and acquisition candidates, alliance partners, and/or customers

Professional Skin Care 2008 is also available through a Web-based format for easy access anywhere throughout the world. Subscribers will have unlimited access to the report contents through via a sophisticated but easy-to-use database. The database features the following capabilities:

- Search capabilities by company, brand, and product type across multiple regions
- Flexible search options
- Subtotaling abilities
- Easy access to sales, market shares, growth rates, and forecasts

Forecasts in the report series 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.

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Report Contents

EXECUTIVE OVERVIEW

This report provides a comprehensive overview of the market in terms of sales, competition, regional differences, and opportunities. It is available only to subscribers of all three regional reports.

Table of Contents for Each Report

1. INTRODUCTION

- Format
- Scope
- Sources and methods

2. EXECUTIVE SUMMARY

This chapter provides an overview of key industry statistics and trends, including:

- Sales and growth
- Channels of distribution
- Geographic dispersion (where applicable)
- Competitive landscape
- Key product trends
- Key lessons learned
- Outlook to 2013

3. PRODUCTS

- Total sales and growth (value and unit sales)
- Take-home vs. back-bar sales
- Product trends
- Geographic differences (where applicable)
- New product activity
- Pricing
- Competitive landscape
- Channels of distribution
- Promotion
- Outlook to 2013

4. BRAND PROFILES

Brief profiles are provided for approximately 25 key brands/companies marketing skin care products that are offered in professional channels, as listed in Table 1. Information includes:

- Company overview
- Sales
- Product line
- New product activity
- Distribution
- Outlook to 2013

5. PURCHASE CHANNELS

Profiles will be provided for each of the purchase channels listed in Table 2. Information will include:

- Number of outlets/doors
- Geographic dispersion (where applicable)
- Product sales for skin care
- Key skin care brands
- Product mix/pricing
- Outlook to 2013

**Table 1
Brands Profiled**

United States

Avancé
Aveda
B. Kamins Chemist
Bliss
Cosmedix
Darphin
DDF Doctor's Dermatologic Formula
Decléor
Dermalogica
Glymed Plus
Kerstin Florian International
Kinerase
La Roche-Posay
M.D. Forté
MD Skincare
Murad
N.V. Perricone M.D. Cosmeceuticals
NeoStrata; Exuviance
Obagi Medical Products
Phytomer
Prevage MD
Repêchage
SkinCeuticals
SkinMedica
Sothys
Steifel Laboratories
Vivité

Europe

AgeraRx; Agera
Algotherm
Babor
Carita
Comfort Zone
Decléor
Dermalogica
Dessange Beauté
Elemis
Ella Baché
Fermes de Marie Beauty
Gatineau
Germaine de Cappuccini
Guinot; Mary Cohr
Ingrid Millet
Institute Esthederm
Janssen Cosmeceutical
Klapp
Maria Galland
Matis
Natura Bissé
Payot
Phytomer
SkinCeuticals
Sothys
Thalgo
Yon-Ka

China

Amitabha (Anglee)
Chants
Chilitina
Darphin
Decléor
Deynique
Doctor Bai
Energy
Gatineau
Germaine De Capuccini
HK Plant
La Colline
Mary Cohr
Matis
Museum
Natural Beauty
Routing
SkinCeuticals
Sothys
Toplink
Your-Life

**Table 2
Purchase Channels Profiled**

United States

Medical care providers-a
Retail stores
Spas and salons

China

Beauty institutes and salons
Medical care providers-a
Retail stores
Spas

Europe

Beauty institutes and salons
Medical care providers-a
Retail stores
Spas

a- Includes dermatologists, plastic surgeons, medical spas, and others.

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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 in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including professional skin care product manufacturers and marketers, distributors and suppliers, key retailers, public relations executives, and other direct influencers on brand and supplier purchase decisions.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents the bulk of our research efforts; however, this analysis is supplemented by secondary research drawn from suppliers' product literature and price lists; recent trade and technical publications, Internet sources, store checks, and company financial reports.

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 industry 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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- Global Cosmetics & Toiletries
- Beauty Retailing
- Natural Personal Care
- Salon Hair Care
- Male Grooming
- Nutricosmetics

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