

# Professional Skin Care 2009 Global Series: Market Analysis and Opportunities

## 7th Edition

**Published May 2010**  
**Base Year: 2009**

### Regional Coverage

Brazil (1st Edition)  
Published May 2010

Europe (5th Edition)  
Published April 2010

United States (7th Edition)  
Published March 2010

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 addresses such questions as:

- What are the latest innovations in skin care?
- How did the economic downturn affect this market?
- Which are the fastest-growing brands?
- What does the future hold?

## Report Scope

This report series provides a comprehensive analysis of skin care products sold and used in professional channels such as spas, beauty institutes, and doctors' offices. It offers detailed brand profiles of the major players and examines the key channels of distribution.

This series covers consumable topical skin care products sold via professional channels, including take-home (retail) and back-bar (professional use) products.

The geographic scope for the 2009 includes the United States and Europe. New to this edition is coverage of Brazil, one of the fastest-growing markets for skin care.

## 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 report provides 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 2009 Global Series: Market Analysis and Opportunities* is available through a Web-based format for easy access anywhere throughout the world. Subscribers 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 region
- 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.

# Professional Skin Care 2009 Global Series: Market Analysis and Opportunities

## Report Contents

### EXECUTIVE OVERVIEW

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

### Table of Contents for Each Regional Report

#### 1. INTRODUCTION

- Format
- Scope
- Sources and methods

#### 2. EXECUTIVE SUMMARY

*This PowerPoint presentation 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 2014

#### 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 2014

#### 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 offerings
- New product activity
- Distribution
- Outlook to 2014

#### 5. PURCHASE CHANNELS

*Profiles are provided for each of the purchase channels listed in Table 2. Information includes:*

- Number of outlets/doors
- Geographic dispersion (where applicable)
- Product sales for skin care
- Key skin care brands
- Product mix/pricing
- Outlook to 2014

**Table 1  
Brands Profiled**

#### Brazil

- Adcos
- Anna Pegova
- BeBasic
- BioAge
- DeFleur
- Elemento Vital
- Germaine de Capuccini
- Janssen Cosmeceutical
- Mary Cohr
- Payot
- Spa da Pele
- Veer
- Vita Derm

#### Europe

- Babor
- Carita
- Clarins
- Comfort Zone
- Decl or
- Dermalogica
- Dessange Beaut 
- Elemis
- Ella Bach 
- Gatineau
- Germaine de Capuccini
- Guinot; Mary Cohr
- Institut Esthederm
- Janssen Cosmeceutical
- K raskin Esthetics
- Klapp
- Maria Galland
- Matis
- Natura Biss 
- Payot
- Phytomer
- Pure Altitude
- SkinCeuticals
- Sothys
- Thalgo

#### United States

- AFA and Auriderm
- Aveda
- B. Kamins Chemist
- Babor
- Bliss
- Clinique Medical
- Cures by avanc 
- Darphin
- Decl or
- Dermalogica
- Kerstin Florian International
- Kinerase
- La Roche-Posay
- M.D. Fort 
- MD Skincare
- Murad
- NeoStrata
- Obagi Medical Products
- Phytomer
- Prevage MD
- Rep chage
- Reval Skin
- SkinCeuticals
- SkinMedica
- Sothys
- Vivit 

**Table 2  
Purchase Channels Profiled**

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

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

# Professional Skin Care 2009 Global Series: Market Analysis and Opportunities

## 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 conduct 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, spas, doctors, beauty institutes, 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.

For more information about this study or Kline's other services, e-mail us at [sales@klinegroup.com](mailto:sales@klinegroup.com), visit our website at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below.

### North America

+1-973-435-6262

### Latin America

+55-11-3079-0792

### Europe

+32-2-770-4740

### Japan

+81-3-3242-6277

### Asia

+86-21-6876-8600

### India

+91-124-4546-100

### Recently published or in-progress research for the Consumer Products industry includes:

- Cosmetics & Toiletries
- Beauty Retailing
- Salon Hair Care
- Natural Personal Care
- Male Grooming
- Nutricosmetics
- Personal Care: Competitor Cost Structures

# Professional Skin Care 2009 Global Series: Market Analysis and Opportunities

## Ordering Information & Contract

The standard subscription includes:

- Unlimited enterprise-wide online access to contents via MyKline.com
- Downloadable PDF files of contents via MyKline.com
- 1 hard copy of the report
- Direct access to the project team
- 1 day of consultation time to be used within six months of the publication date

Prices do not include sales tax. (NJ add 7% sales tax.) Ground shipping within the contiguous U.S. is included in the subscription price. Overnight and international shipping are available for an additional fee and will be added to the total amount. This study is available by subscription only. Once the study is launched, you will be invoiced for the full amount, payable within 15 days upon receipt of the invoice. Expenses related to any travel made at the request of the subscriber are to be reimbursed by the subscriber.

**An authorized signature agreeing to the subscription terms below is necessary to confirm your order.**

We agree that, for a period of three years after its date of issue, we will: (1) restrict its circulation to employees of our corporation, to subsidiaries and joint ventures in which our corporation holds more than a 50 percent interest, or to any parent organization that holds more than a 50 percent interest in our firm; (2) use all reasonable precautions to prevent the disclosure of its contents to any other persons or organizations. We may however use or disclose any information in this report that is public knowledge, that was already in our possession before receipt of the report, or that comes to us from third parties independently of this report. Kline & Company, Inc. similarly agrees that it will use all reasonable precautions to prevent the disclosure of the contents of this report to any person or organizations other than subscribers for three years after its date of issue. We understand that this agreement is fully binding on the corporation and non-cancelable.

We have indicated our subscription preferences on the following page.

*We have completed and signed this subscription agreement. Please indicate your acceptance of this subscription by countersigning and returning one copy for our files.*

COMPANY _____	
SIGNATURE _____	DATE _____
NAME _____	
TITLE _____	
E-MAIL _____	
PHONE _____	

Send invoices to:

NAME _____
TITLE _____
ADDRESS _____
_____
E-MAIL _____
PURCHASE ORDER # _____

Shipping address (if different than billing address):

NAME _____
TITLE _____
ADDRESS _____
_____
E-MAIL _____

Kline use only:

ACCEPTED _____
SIGNATURE _____
NAME _____
TITLE _____
DATE _____

**METHOD OF PAYMENT:**

Send invoice



Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Name (as it appears on credit card): \_\_\_\_\_

Fax the signed agreement to **+1-973-435-3395**  
or e-mail to [Lisa\\_Carnevale@KlineGroup.com](mailto:Lisa_Carnevale@KlineGroup.com)

Signature (for credit card authorization): \_\_\_\_\_

## SUBSCRIPTION OPTIONS AND RATES

Volume	Standard price	Amount (please fill in price)
Full-Service Program-a	US\$ 75 000	
Additional copies: _____ @ US\$ 500 each =		
United States	US\$ 20 000	
Additional copies: _____ @ US\$ 500 each =		
Europe	US\$ 24 000	
Additional copies: _____ @ US\$ 500 each =		
Brazil	US\$ 15 000	
Additional copies: _____ @ US\$ 500 each =		
Subtotal		
7% sales tax (NJ only)		
<b>TOTAL</b>		
<p>a- Includes all three regional reports and an Executive Overview.</p> <p>NOTE: All prices in U.S. funds.</p>		