

Professional Skin Care 2009 Global Series: Market Analysis and Opportunities

7th Edition

To Be Published 1st Quarter 2010

Base Year: 2009

Regional Coverage

Brazil

Europe

Japan

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

Report Scope

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

This series will cover 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 series will continue to include the United States and Europe. New to this edition are coverage of Japan and Brazil. Japan is the largest market for skin care products in the world, and Brazil is 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 will enable subscribers to exploit business opportunities by understanding market growth, forecasts, future trends, and the competitive landscape for this high-margin sector.

The report will 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 2009 is 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 will feature 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 will be 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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Tentative Report Contents

EXECUTIVE OVERVIEW

This report will provide 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 chapter will provide 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 will be provided for approximately 25 key brands/companies marketing skin care products that are offered in professional channels, as listed in Table 1. Information will include:

- Company overview
- Sales
- Product offerings
- New product activity
- Distribution
- Outlook to 2014

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 2014

**Table 1
Brands to be Profiled**

Brazil

- Adcos
- Anna Pegova
- BeBasic
- Bioage
- Buona Vita Profissional
- Clarins
- DeFleur Dermocosmética
- Dermage
- Dermatus
- Janssen Cosmeceutical
- La Vertuan
- Laboratórios Bel Química (BEL COL)
- Mary Cohr
- Medicatriz
- Payot
- Spa da Pele
- Valmari
- Veer Cosméticos
- Visage
- Vitaderm

Europe

- Babor
- Carita
- Clarins
- Comfort Zone
- Decléor
- Dermalogica
- Dessange Beauté
- Elemis
- Ella Baché
- Gatineau
- Germaine de Cappuccini
- Guinot; Mary Cohr
- Institut Esthederm
- Janssen Cosmeceutical
- Kéraskin Esthetics
- Klapp
- Maria Galland
- Matis
- Natura Bissé
- Payot
- Phytomer
- Pure Altitude
- SkinCeuticals
- Sothys
- Thalgo

Japan

- Albion (Kosé)
- Aveda
- Carita
- Cellcosmet
- Cosme Decorte (Kosé)
- Decléor
- DHC
- Dr. Renaud
- ESPA
- Institut Esthederm
- Guerlain
- Guinot; Mary Cohr
- Jurlique
- Kerstin Florian International
- Maria Galland
- Nippon Menard
- Pesca
- Pola
- Shiseido
- Sisley
- Sothys
- Twany (Kanebo)

United States

- Aveda
- B. Kamins Chemist
- Babor
- Biopelle
- Bliss
- Clinique Medical
- Cures by avancé
- Darphin
- Decléor
- Dermalogica
- Kerstin Florian International
- Kinerase
- La Roche-Posay
- M.D. Forté
- MD Skincare
- Murad
- NeoStrata
- Obagi Medical Products
- Phytomer
- Prevage MD
- Repêchage
- RevaléSkin
- SkinCeuticals
- SkinMedica
- Sothys
- Vivité

**Table 2
Purchase Channels to be Profiled**

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

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

NOTE: The list of brands for Japan is tentative.

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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 will 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 will represent the bulk of our research efforts; however, this analysis will be 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, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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

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

North America

+1-973-435-6262

Latin America

+55-11-3079-0792

Europe

+32-2-770-4740

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+81-3-3242-6277

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+86-21-6876-8600

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						Additional copies: _____ @ US\$ 500 each =
						Subtotal
For any 2 volumes, deduct \$2,000. For any 3 volumes, deduct \$3,000.						NJ only: 7% sales tax
						TOTAL

NOTE: All prices in U.S. funds.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at 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