

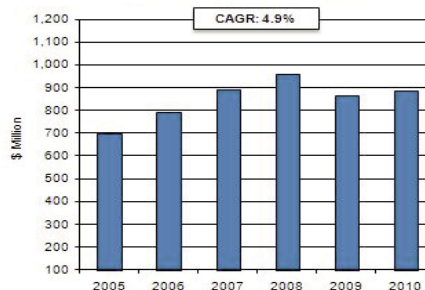
# Professional Skin Care 2010: U.S. Market Analysis and Opportunities

## Fact Sheet

### The Market

The U.S. market for professional skin care products starts to show signs of recovery in 2010 as consumers come back to professional outlets for skin treatments. Sales of products increase by 2.7% to \$885.6 million in 2010.

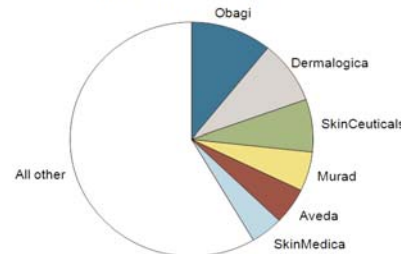
Historical Sales of Professional Skin Care Products in the United States, 2005 to 2010



### Competitive Landscape

Obagi is the leading brand in 2010, followed by Dermalogica and SkinCeuticals (L'Oréal). Most of the leading professional skin care brands show sales growth in 2010. Larger brands and brands with a stronger position in the medical care providers channel perform better than others.

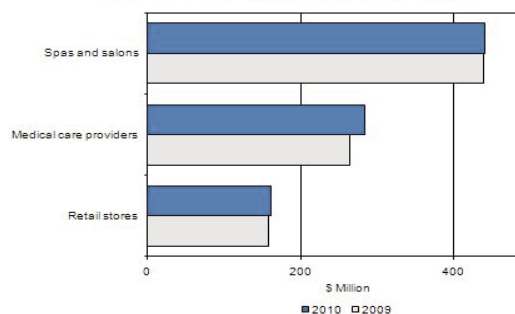
Professional Skin Care Market Sales of Leading Marketers in the United States, 2010



### Channels of Distribution

Spas and salons remains the largest purchase channel, but its market share continues to decline in 2010. All channels experience sales growth during the year; however, medical care providers channel increases the most.

Manufacturers' Sales of Professional Skin Care Products in the United States by Purchase Channel, 2009 to 2010



### Skin Care Conditions

Anti-aging continues to be the most commonly addressed skin care concern by professional skin care products. Sales for this concern account for just over 40% of total product sales of facial treatments in 2010.

Manufacturers' Sales of Professional Take-home Facial Treatment Products in the United States by Skin Care Concern, 2010

