

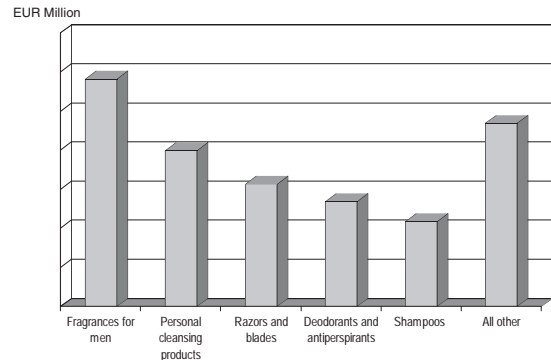
# Male Grooming Products 2007: Europe Market Analysis and Opportunities

## Fact Sheet

### The Market

Male grooming accounts for 23% of cosmetic and toiletry sales in Europe. Changing attitudes and other macro factors, such as women introducing products to men and a larger focus on overall health and well-being, spur growth. Of all the categories, fragrances is the largest.

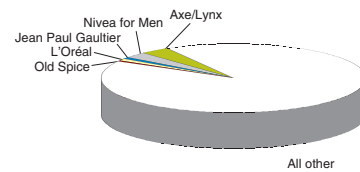
Sales by Product Category, 2007



### Competitive Landscape

Kline examined over 20 brands ranging with sales under EUR 1 million to EUR 400 million in 2007. Each of the brands covered promote themselves based on different core premises, such as professional expertise, comprehensive care, and understanding men's needs.

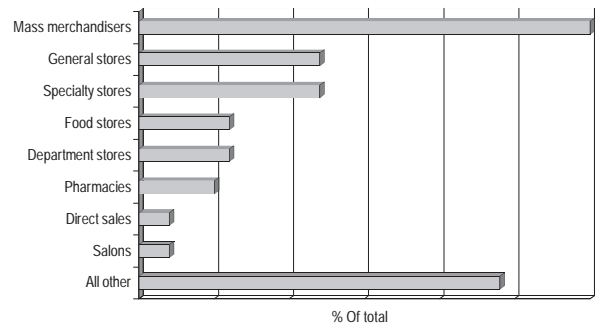
Market Share of Top Five Companies, 2007



### Distribution Channels

The mass and department store channels are most heavily penetrated. Retailers are setting aside more space for men's products and even creating special male grooming sections in stores.

Sales by Retail Channel, 2007



### Future Outlook

The male grooming products industry in Europe is projected to grow by 6.1% from 2007 to 2012, with skin care products showing the highest growth among product categories. As the male grooming market grows, more brands will enter and greatly intensify competition. Marketers will face a harder time reaching men through the clutter.

Forecast Growth of the Male Grooming Products Industry in Europe

