



3rd Edition

# Beauty Devices: Global Market Brief

Published March 2014

Base Year: 2013

Regional Coverage: Asia ■ Europe ■ United States

A robust analysis of the global market for at-home skin care devices focusing on key trends, developments, and business opportunities and addressing such issues as:

- How fast is the beauty devices market growing?
- Which types of devices are the most popular?
- What are the latest technological advancements?
- Who are the market leaders?
- Which regions and brands are growing the fastest, and why?
- What are the consumer attitudes and usage patterns?
- What are the opportunities in this market?

*Featuring a new consumer research section to be published 2nd quarter 2014*



## Report Contents

### Introduction

#### Global Market Overview

- Key findings at a glance
- Total global industry size and growth (2012 and 2013)
- Performance by skin care concern segment
- Regional overviews
- Competitive landscape
- Outlook to 2018

#### Global Brand Profiles

Brief profiles for the key companies/brands that market beauty devices, as listed in Table 1. Information provided includes:

- Overview
- Manufacturers' global sales and growth (2012 and 2013)
- Product offerings and skin care concerns addressed
- Regional sales
- Marketing activity
- Distribution
- Outlook to 2018

### Regional Brand Profiles

Very brief profiles for other important, interesting, and/or local companies/brands competing in the beauty devices market. Each profile includes an overview, estimate of sales, and description of geographical scope. A list of brands profiled is shown in Table 2.

### Consumer Research

A structured online survey will be completed with a nationally representative sample of consumers in the countries listed in Table 3. Three types of consumers and potential device consumers will be surveyed, as listed in Table 4.

- Attitude and usage patterns
- Brand preference
- Skin care concerns
- Propensity for at-home beauty device usage
- Shopping channels and attitudes
- Influences on treatment choice
- Unmet needs





**Table 1: Global Brands/Companies Profiled**

Clarisonic (L'Oréal)  
 No!No! (PhotoMedex)  
 Galvanic Spa (Nu Skin)  
 TRIA (TRIA Beauty)  
 Silk'n (Home Skinnovations)

**Table 3: Countries Where Consumers are Surveyed**

China  
 France  
 Germany  
 Japan  
 United Kingdom  
 United States

**Table 4: Types of Consumers Surveyed**

Consumers who treat skin concerns using topical only  
 Consumers who use beauty devices to treat skin concerns  
 Consumers who have skin concerns treated professionally

**Table 2: Regional Brands/Companies Profiled**

**China**

MKS (Nvision Electrical Appliance)  
 SKG (Foshan SKG Electric Appliance)  
 Talika (Talika)  
 U-Life (Yejen Plastic Electrical and Mechanical)

**Europe**

Olay and Braun (Procter & Gamble)  
 Philips (Philips)  
 Remington (Spectrum Brands)  
 Sqoom (Schick Medical)  
 Tanda (Syneron Medical)

**Japan**

Ke-Non (Mrock)  
 Panasonic Beauty (Panasonic)  
 ReFa (MTG)  
 Ya-Man (Ya-Man)

**South Korea**

AmorePacific (AmorePacific Corporation)  
 BBS (BBS Care)  
 Kyowon (Kyowon Group)  
 Lotts (Lotts)

**United States**

Baby Quasar (Quasar Bio Tech)  
 LightStim (LightStim)  
 NuFace (Carol Cole Company)  
 Olay and DDF (Procter & Gamble)  
 Tanda (Syneron Medical)



## Scope

The report examines the non-invasive forms of at-home skin care that mimic results that were once only achieved in doctor's offices and spas. All devices analyzed in the report are power-operated. Hair removal devices include laser and light-powered products. The analysis covers beauty devices sold to consumers through all channels of distribution, including direct sales, mass, prestige, and other outlets. Devices that offer the following benefits are covered:

- Acne elimination
- Cellulite reduction
- Cleansing
- Facial and body firming/toning
- Facial rejuvenation
- Hair removal

The analysis is global in nature and focuses most heavily on the United States, which accounts for nearly half of global beauty device sales. Research will also be conducted in Asia and Europe. There are some regional breakdowns and analysis, but this report does not contain in-depth details on each individual region or country. This report does not include implements, hair appliances, or waxing equipment. Devices and appliances used by physicians and aestheticians in professional outlets are also excluded.

## Key Benefits

This report enables subscribers to identify business opportunities by analyzing the dynamics in one of the most important emerging markets of the personal care industry. Specifically, this report will assist subscribers by:

- Identifying opportunities that may be appropriate for product marketers
- Explaining key skin care concerns that devices address in a clear and consistent fashion
- Quantifying the key areas that devices treat, such as cellulite, facial hair removal, cleansing, acne, and wrinkles
- Providing perspective on the leading players, as well as the smaller, up-and-coming ones

## Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

#### We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Distributors
- Government agencies
- Marketers/manufacturers
- Retailers
- Suppliers
- Trade organizations

### Secondary Research

#### We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. 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 over 50 years.

#### A FULL SPECTRUM OF SERVICES



North America  
+1-973-435-3407

Latin America  
+55-11-3079-0792

Europe  
+32-2-770-4740

China  
+86-21-6012-6500

India  
+91-124-4546-100

Japan  
+81-3-3242-6277