



14th Edition

Beauty Retailing: U.S. Channel Analysis and Opportunities

Published July 2020
Base Year: 2019
Forecasts to 2024

Regional Coverage: United States

Kline's 14th edition of the coverage of the beauty retailing landscape encompasses all retailers offering cosmetics & toiletries to consumers. The report focuses on all channels across key product categories and pays special attention to growing retailers. Changing retailer formats and new shopping experiences are captured within the channel snapshots, while the overall shifts in sales are depicted in the comprehensive database.

This Report Helps Subscribers Answer the Following Questions:

- Who are the rising retailers, and what are they offering to consumers?
- How are online apparel retailers making strides in beauty and personal care space?
- What are the new shopping malls, and what brands do they target?
- How is technology renewing interest in physical beauty shopping?
- What is the future of retail, and how will the landscape continue to change?



Report Contents

This program consists of two deliverables: a presentation-style executive summary and a database with data by channel and sub-channel as shown in Table 1.

Introduction

Executive Summary

- Key takeaways
- Noteworthy developments
- Data highlights
- Channel snapshots
- Outlook and assessment

Purchase Channel Snapshots

Detailed analysis of each purchase channel listed in Table 1 with data for each of the categories listed in Table 2, including the following information:

- Channel developments
- Sales breakdowns by channel and sub-channels
- Role of cosmetics and toiletries
- Retail sales by beauty category for 2018 and 2019
- Marketing activity
- Outlook to 2024

Retailer Snapshots

Profiles of 10 retailers, as listed in Table 3, include:

- Retailer Overview
- Beauty initiatives
- Product offerings
- Marketing and loyalty programs
- Outlook and opportunities

Contents of Database

The database contains detailed information for all channels and subchannels, featuring the following:

Fields in database	Values in database
■ Channel and sub-channel (see Table 1)	■ Retail level sales
■ Product category (see Table 3)	■ Growth rates
■ Years (2018 and 2019)	■ Channel shares
	■ Forecasts to 2024



Table 1: List of Purchase Channels and Sub-channels Covered

Purchase channel	Sub-channel
Department stores	<ul style="list-style-type: none"> ■ Low-end ■ Specialty ■ Traditional
Direct sales	<ul style="list-style-type: none"> ■ Social selling ■ Home shopping networks ■ Infomercials ■ E-commerce
Drug outlets	<ul style="list-style-type: none"> ■ Chain and independents drugstores
Food outlets	<ul style="list-style-type: none"> ■ Health/natural food stores ■ Supermarkets
Mass merchandisers	<ul style="list-style-type: none"> ■ Big box retailers ■ Dollar stores ■ Warehouse clubs
Specialty stores	<ul style="list-style-type: none"> ■ Apparel ■ Beauty supply ■ Cosmetic specialty ■ Vertically integrated

Table 2: Categories Covered

Fragrances	<ul style="list-style-type: none"> ■ Fragrances for men ■ Fragrances for women
Hair care	<ul style="list-style-type: none"> ■ Shampoos and conditioners ■ Multicultural hair care products ■ Hair coloring products ■ Hair styling products and sprays
Makeup	<ul style="list-style-type: none"> ■ Eye makeup ■ Face makeup ■ Lipsticks and lip glosses ■ Nail polishes
Skin care	<ul style="list-style-type: none"> ■ Facial skin care ■ Baby care products ■ Hand and body lotions ■ Lip treatment products ■ Skin care products for men ■ Sun care products
Other toiletries	<ul style="list-style-type: none"> ■ Deodorants and antiperspirants ■ Personal cleansing products ■ Shaving products

Table 3: Retailers Covered

Amazon
Cos Bar
Credo Beauty
Dermstore
H-E-B
Morphe
Sephora
QVC
Violet Grey
Walmart

Scope

Beauty Retailing U.S.: Channel Analysis and Opportunities provides subscribers with insights on retailing challenges and opportunities in the United States. The report focuses on the beauty and personal care market and changes that have occurred from 2018 to 2019.

- Category scope mirrors Kline's Cosmetics & Toiletries program, encompassing 20 product categories across the following product classes: fragrances, hair care, makeup, skin care, and other toiletries
- Reporting at retail sales levels
- Coverage of both major and alternate purchase channels, providing an accurate, detailed examination of the landscape at the retail level

Key Benefits

This comprehensive report enables subscribers to exploit business opportunities by illustrating the retailing dynamics in one of the most important markets of the personal care industry: the United States. The report also:

- Identifies and explains key purchase channels for cosmetics and toiletries in a clear and consistent fashion
- Quantifies industry sales by purchase channel, focusing on hard-to-track non-traditional channels
- Delivers the information and insights required to capitalize on changes at retail
- Includes one day of consultation time with members of the research team which can be used for assistance with plans or to explore related industry information

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 60 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:

- Retailers – at both a corporate level and store level
- Store managers and sales associates
- Marketers/manufacturers
- Distributors
- Government agencies
- 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 physical stores, retailer websites, 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, 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 60 years.

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