Beauty Retailing:
U.S. Channel Analysis and Opportunities

Base Year: 2020

Published: June 2021

15th edition

A comprehensive analysis of the beauty retailing landscape, this report covers all channels across key beauty categories and pays special attention to growing channels such as e-commerce. The edition will examine how retailing is evolving during the COVID-19 pandemic, with a special focus on how retailers are diversifying for the new normal.

Regional Coverage: United States

SCOPE

- Base year is 2020: historical sales are for 2018-2019
- Retail sales for five beauty product classes consisting of 19 product categories
- Retail sales for seven channels and sub-channels
- Noteworthy retailer profiles
- Forecasts by category and sub-channel for 2021-2025

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

Introduction

Executive Summary

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

Purchase Channel Snapshots

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-channel
- Role of cosmetics and toiletries
- Retail sales, share and growth by product class for 2019 and 2020
- Marketing activity
- Outlook to 2025

Retailer Snapshots

Snapshots of select retailers, each containing:

- Key facts
- Sales and door count
- Beauty initiatives
- Marketing and loyalty programs
- Outlook and opportunities

Contents of Database

Fields in database

- Channel and sub-channel
- Product category

Values in database

- Retail sales by year for 2018-2020
- Growth rates
- Shares
- Forecast retail sales by year for 2021-2025

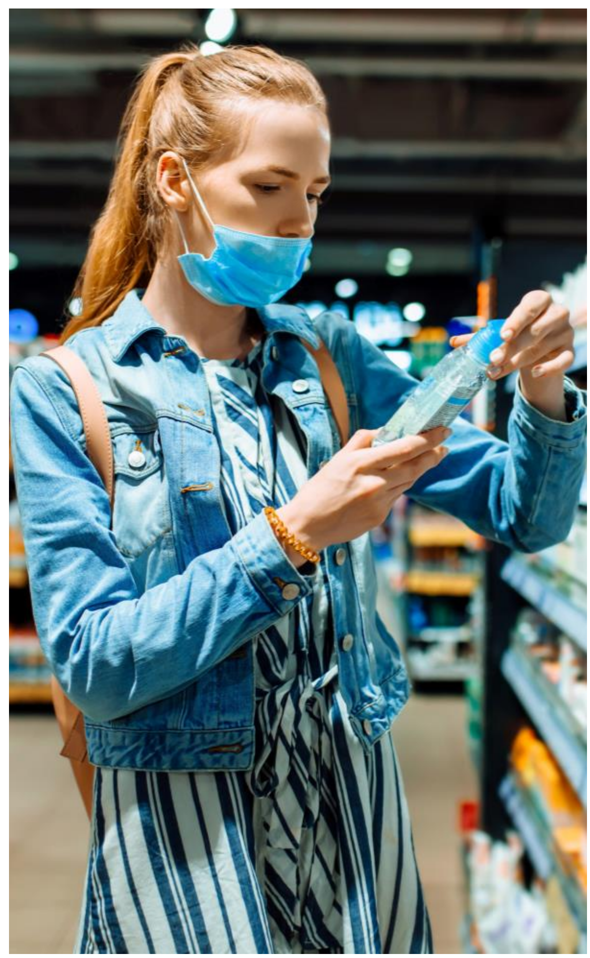

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TABLE 1. CHANNELS AND SUB-CHANNELS COVERED

Department stores	• Low-end • Traditional • Specialty
Direct sales	• E-commerce • Home shopping networks • Infomercials • Social selling
Drug outlets	• Chain and independent drugstores
Food outlets	• Health/natural food stores • Supermarkets
Mass merchandisers	• Big-box retailers • Dollar stores • Warehouse clubs
Professional outlets	• Beauty/hair salons • Physicians' offices • Spas
Specialty stores	• Apparel • Beauty supply • Cosmetics specialty • Vertically integrated

TABLE 2. CATEGORIES COVERED

Fragrances	• Fragrances for men • Fragrances for women
Hair care	• Shampoos and conditioners • Multicultural hair care • Hair coloring • Hair styling
Makeup	• Eye makeup • Face makeup • Lipsticks and lip glosses • Nail polishes
Skin care	• Baby care • Facial skin care • Hand and body lotions • Lip treatments • Skin care for men • Sun care
Toiletries	• Deodorants and antiperspirants • Personal cleansing • Shaving

REPORT BENEFITS

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

- Identify and explain key purchase channels for cosmetics and toiletries in a clear and consistent fashion
- Quantify industry sales by purchase channel, focusing on hard-to-track, non-traditional channels
- Acquire information and insights necessary to capitalize on changes on retail

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-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.

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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 60 years.

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