



Beauty Devices:

Global Market Analysis and Opportunities

Base Year: 2018

United States: Published March 2019

China: Published June 2019

Europe and South Korea: Published August 2019

Japan: Published September 2019

Regional Coverage: Asia ■ Europe ■ United States

A comprehensive assessment of the vibrant global market for at-home beauty devices, focusing on market size and growth, importance of skin care concerns, product trends and notable new launches, key changes in distribution, and the competitive landscape. As technology redefines the beauty landscape with personalized experiences, this study will explore the increasing importance of customization in at-home beauty devices.

This Report Answers Questions Including:

- What technology is growing the fastest by device type and region?
- What is new in body care devices?
- Can Clarisonic gain back share with the launch of its new devices?
- Who are the new players on the market?
- Is Neutrogena able to kick-start the acne market for devices with its products?

Includes Special Bonus Snapshot on Facial Rollers



Tentative Report Contents*

Global Market Overview

This presentation style report provides a comprehensive overview of the markets examined in terms of key lessons learned, sales, competition, regional differences, and opportunities. It is available only to subscribers of all five market reports.

A personalized presentation is provided with each full subscription to this report series

Contents for each market report

Each presentation style report provides the following:

- Total industry size and growth for each country as listed in Table 1
- Market drivers
- Competitive landscape with brand snapshots of leading and/or notable marketers
- Sales breakdown for 2017 and 2018 by:
 - Skin concern
 - Leading technology by product type and price point analysis
 - Country (Europe only)
 - Distribution channel
- Innovation and technological advancements
- NEW Facial rollers snapshot: sales and growth, competitive landscape, marketing activity
- Market outlook through 2023

Database Contents

Kline’s interactive database provides:

- Total industry size and growth
- Sales by market as listed in Table 1
- Breakdowns for 2013 through 2018 by:
 - Market
 - Company
 - Brand
 - Distribution channel
 - Skin care concern
 - Technology
- Forecast sales through 2023

Database Features

- User-friendliness in a simple yet sophisticated system
- Data presented by:
 - Manufacturers’ sales
 - Market share
 - Growth rates
- Flexible search options
- Export capabilities
- Ability to easily refine and modify search

* Subject to charter subscriber input

Table 1: List of Markets Covered

China
Europe
Japan
South Korea
United States





Scope

The report examines the non-invasive forms of at-home skin care that mimic results that were once only achieved in doctors' offices and spas. All devices analyzed in the report are power-operated. The analysis covers beauty devices sold to consumers through all channels of distribution, including direct sales, mass, prestige, and professional outlets. Devices that offer the following benefits will be covered:

- Acne elimination
- Anti-aging
- Cellulite reduction and body firming/toning
- Cleansing
- Hair regrowth
- Hair removal

The analysis is global in nature and focuses heavily on the key markets for beauty devices: China, Europe, Japan, South Korea, and the United States. The report does not contain in-depth details on Europe on a country level; however, estimated sales breakdowns are provided by leading country, as well as brand leaders and directional distribution information. This report does not include epilators, implements, hair appliances, or waxing equipment. Devices and appliances used by physicians and aestheticians in professional outlets are excluded.

Key Benefits

This comprehensive report enables subscribers to identify business opportunities by analyzing the dynamics in one of the most dynamic markets in the beauty industry. Specifically, this report assists subscribers by:

- Two key deliverables: an interactive online database and a comprehensive-presentation style report
- Identifying opportunities that may be appropriate for product marketers
- Explaining key skin care concerns that devices address in a clear and consistent fashion
- Identifying the opportunities stemming from the evolution of distribution channels
- Quantifying the key areas that devices treat, such as cellulite, facial hair removal, hair regrowth, cleansing, acne, and wrinkles
- Providing perspective on the leading players, as well as the smaller, up-and-coming ones
- Stimulating ideas for future partnerships/alliances and product ideation



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:

- Marketers/manufacturers
- Distributors
- Government agencies
- 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, 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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