



43rd Edition

# Cosmetics & Toiletries USA

Data Released March 2018  
Report Published June 2018  
Base Year: 2017

**Regional Coverage:** United States

Kline's comprehensive analysis of the dynamically evolving U.S. beauty and personal care market, encompassing five product classes and 18 product categories. This report provides a close look at the key drivers, trends, and relevant product launches, assessment of the changing competitive playing field due to mergers and acquisitions, focus on the up-and-coming independent brands, changes in retail landscape and distribution channels by product category, and forward-looking analysis through 2022.

## This Report Answers Questions Such as:

- How is the beauty and personal care market advancing, and what trends are witnessed within the categories?
- How are marketers responding to the changing needs of consumers?
- How are marketers strategizing to gain and retain market share, and what marketing activities do they implement to increase their presence?
- How are indie brands utilizing social media to connect with consumers?
- Who are the newcomers in each category that are making a dent in the market?
- Who are the key retailers in the respective categories, and how is the retail landscape changing?
- Which categories will outperform the market in the next several years and why?



# Tentative Report Contents

## Introduction

### Executive Summary

This chapter provides an assessment of the overall market performance, highlights from the five product classes examined in terms of performance, growth drivers, competition, distribution channels and opportunities, and outlook for the product classes. This chapter also provides commentary on the key mergers and acquisitions and the impact on the market at large.

### Products

Pertinent information and insightful analysis of 18 important product categories, including trends and product launches, manufacturers' 2017 sales, sales and market shares for the leading brands including independent market-movers, sales by retail outlet, marketing activity through traditional platforms and social media, and an outlook to 2022. The product categories covered are shown in Table 1.

### Major Companies

Profiles for the 10 leading beauty marketers including company activities, performance by product category and brand, key new launches, recent developments including mergers, acquisitions, and divestitures, new product launches, marketing activity by channel, and an outlook to 2022. The major companies covered are shown in Table 2.

Table 1: Product Categories Covered

Fragrances	Skin Care Products
■ Fragrances for men	■ Baby care products
■ Fragrances for women	■ Facial skin care
Hair Care Products	■ Hand and body lotions
■ Ethnic hair care	■ Skin care products for men
■ Hair coloring products	■ Sun care products
■ Hair styling products and sprays	Other Toiletries
■ Shampoos and conditioners	■ Deodorants and antiperspirants
Makeup	■ Personal cleansing products
■ Eye makeup	■ Shaving products
■ Face makeup	
■ Lipsticks and lip glosses	
■ Nail polishes	

Table 2: Leading Companies Covered

■ Coty	■ L'Oréal
■ Estée Lauder	■ Mary Kay
■ Guthy-Renker	■ Procter & Gamble
■ Johnson & Johnson	■ Revlon
■ L Brands	■ Unilever





## Scope

Cosmetics & Toiletries USA covers all cosmetic, toiletry, and fragrance products sold through all domestic consumer outlets in the United States, including those marketed via direct sales from companies such as Beautycounter and Guthy-Renker, in addition to non-traditional outlets, such as the Internet and television home shopping. Our report will consist of:

- Two key deliverables: an interactive online database and a comprehensive written report
- Product class summaries and insightful analysis of the covered product categories (see Table 1)
- Manufacturer's, unit, and retail sales
- Professional use (back-bar) products are excluded from our analysis
- Analysis of sales by distribution channel for each product category, including traditional and alternate channels. Distribution channels include department stores, direct sales (person-to-person, the Internet, and television shopping), drug stores, food stores, mass merchandisers, professional outlets (salons, spas, and doctor offices), and specialty stores

## Key Benefits

Kline & Company has been serving the personal care products industry for over 50 years. Cosmetics & Toiletries USA is a detailed assessment of the beauty and personal care products industry and the players who compete in this market.

- Assess category and product trends
- Identify acquisition and alliance partners
- Develop competitive strategies for increased market share
- Develop market-entry strategies
- Understand industry dynamics, including the role of independent brands
- Understand channels of distribution and shifts that are occurring



## 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:

- 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 over 50 years.

#### A FULL SPECTRUM OF SERVICES

CUSTOM RESEARCH

MARKET RESEARCH REPORTS

MANAGEMENT CONSULTING

**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