



Beauty's 100 Favorite Brands:

Analysis of Booming Independent Brands in the United States

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Regional Coverage: North America

Beauty indies are the most sought-after brands by cosmetics marketers and retailers alike. Recording high double-digit to triple-digit growth for the past several years, these privately-owned gems outpace the total market growth, by offering unique product and ingredient stories combined with compelling digital marketing that resonates with today's beauty consumer. Our report identifies these disruptors and assess the factors that make them resonate with consumers.

This Report Helps Subscribers to Answer:

- Where are the freshest beauty product trends coming from?
- What innovations are brought forward by the indies?
- What marketing strategies do the indies use to differentiate themselves?
- Which product categories are the indies dominant in and where do the opportunities lie?
- Who are the most influential bloggers in the Indie space and what roles do they play in making these brands a success?
- What is the brand's potential for growth?



Report Contents

- Brand profiles of approximately 100 select brands (see Table 1) that include the following:
 - Brand equity and positioning
 - Company overview and profile of the founders
 - Description of product portfolio
 - Best-selling products and pricing strategy
 - Marketing activity – focus on digital influencer strategy
 - Go-to market strategy
 - Retail distribution and expansion strategies
 - Brand sales for 2018 and 2019 estimates
 - Outlook for the brand and its growth potential for the next 5 years

Table 1: List of Indie Brands Profiled

■ #myidentity	■ eSalon	■ Juvia’s Place	■ Rosebud Woman
■ Alaffia	■ Eufora	■ Keune Kevin Murphy	■ Routine Saint Jane
■ Amika	■ Farmacy	■ KKW Beauty	■ Sara Happ
■ Anese	■ Farsáli	■ Knours	■ Skyn Iceland
■ Arctic Fox	■ Fenty Beauty	■ Kopari	■ Suavecito
■ Bali Body	■ Frank Body	■ L’Anza	■ Summer Fridays
■ Barefoot Scientist	■ Function of Beauty	■ Layrite	■ Supergoop
■ Bawdy Beauty	■ Girilactik	■ LOLI Beauty	■ Surface Hair
■ Beauty Bakerie	■ Glossier	■ Love Wellness	■ Tata Harper
■ Beautycounter	■ Glow Recipe	■ Madison Reed	■ The Honey Pot
■ BH Cosmetics	■ Hairstory	■ Makeup Geek	■ The Ordinary
■ Briogeo	■ Hand in Hand	■ Megababe	■ Thrive Causemetics
■ Cannuka	■ Hello Products	■ Moon Juice	■ Too Cool for School
■ Colorscience	■ Herb Essentials	■ Morphe	■ True Botanicals
■ Colourpop	■ Herbivore Botanicals	■ Myro	■ Tula
■ Curie	■ Hero Cosmetics	■ Onyx Bathhouse	■ Unite
■ Da Bomb	■ Huda Beauty	■ Ouai	■ Wander Beauty
■ Davines	■ IGK	■ Pat McGrath	■ Winky Lux
■ DevaCurl	■ Ilia Beauty	■ Patchology	■ Youth to the People
■ Dose of Colors	■ Image Skincare	■ Pixi Beauty	■ Yuni
■ Elcie Cosmetics	■ Ipsy	■ Queen V	■ Zatik Naturals
■ Éminence Organic Skin Care	■ Jeffree Star Cosmetics	■ R+Co	
■ Enjoy	■ Josie Maran	■ Revolution Beauty	
■ Era Organics	■ Juice Beauty	■ Rodan + Fields	

NOTE: Indies acquired in 2019 are excluded; however, profiles are available.



Scope

Beauty's 100 Favorite Brands identifies and profiles 100 brands that we consider to be industry disruptors.

- Geographically, our research focuses on the United States.
- The category scope encompasses all beauty and personal care products, with a focus on fragrances, makeup, skin care, and other toiletries.
- The channel scope encompasses all consumer outlets where beauty products are sold, including direct sales.

Key Benefits

This report provides pertinent information on the most compelling indie brands that are helping to shape today's beauty industry in the United States. While these brands may be small in terms of sales value today, they have potential to become tomorrow's billion dollar buy-outs. This report provides:

- A view of the independent brands that are outpacing the beauty industry growth in the categories that they compete in.
- Understanding of which products and concepts resonate with today's consumers.
- Identify concepts that may have traction in other parts of the world.
- Screening for potential acquisition candidates and/or local partners.



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.

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 more than 60 years.

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