



45th Edition

# Cosmetics & Toiletries USA

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Base Year: 2019

Regional Coverage: United States

Kline's 45th edition of analysis of the ever-evolving U.S. beauty and personal care market encompasses five product classes and 20 product categories. In addition to providing a close look at the key drivers, trends, and relevant product launches, this report assesses the changing competitive playing field. Developments tracked include merger and acquisition activity, rising independent brands, changes in retail landscape and distribution channels by product category, and forward-looking analysis through 2024.

## This Report Will Answer Questions Such as:

- What changes have taken place in the beauty and personal care space in the past year?
- Are there any shifts in consumer preferences, and how are marketers responding to them?
- Who are the key market movers in the industry?
- Which brands are innovating and setting trends in their respective categories?
- How is the beauty retailing landscape changing in each of the categories, and who are the key retailers?
- What strategies are marketers using to gain and retain market share?
- How are marketing activities evolving to communicate with consumers and increase presence?
- Which categories will outperform the market in the next several years, and why?

**ADDED BONUS: Coming in January — Top Ten Trends and Highlights in Beauty 2019**



# Tentative Report Contents\*

## Introduction

### Executive Summary

This chapter will provide 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 by category. It will also provide commentary on key mergers and acquisitions and their impact on the market at large.

### Products

This chapter examines the 20 product categories and analyzes trends and product launches, historical and 2019 manufacturers’ and retail sales, sales and market shares for leading brands, snapshots of up-and-coming market movers, sales by retail outlet, marketing activity through traditional platforms and social media, and outlook to 2024. The product categories to be covered are shown in Table 1.

\* Subject to subscriber input.

**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
■ Multicultural hair care	■ Lip balms, jellies, and treatments
■ Hair coloring products	■ Skin care products for men
■ Hair styling products and sprays	■ Sun care products
■ Shampoos and conditioners	Other Toiletries
Makeup	■ Deodorants and antiperspirants
■ Eye makeup	■ Personal cleansing products
■ Face makeup	■ Shaving products
■ Lipsticks and lip glosses	





## Scope

The **Cosmetics & Toiletries USA** report covers all cosmetics, toiletry, and fragrance products sold through all domestic consumer outlets in the United States, including those marketed via direct sales from companies such as Rodan + Fields and Glossier, in addition to non-traditional outlets such as the Internet and television home shopping. Our report consists of:

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

## Key Benefits

Kline & Company has been serving the personal care products industry for 60 years. **Cosmetics & Toiletries USA** is a detailed assessment of the beauty and personal care products industry and the players who compete in this market. The report will:

- Assess category and product trends
- Identify acquisition and alliance partners
- Develop market-entry strategies
- Develop competitive strategies for increased market share
- Assess industry dynamics, including the role of independent brands
- Assess 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 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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