



1st Edition

Private-Label Beauty Products: U.S. Market Assessment

To Be Published 2nd Quarter 2020

Base Year: 2019

Forecasts to 2024

Regional Coverage: United States

Private label has been advancing rapidly over the years, as an increasing number of retailers enters the lucrative beauty and personal care space through the introduction of their own private-label lines. In 2018, private label climbs to the top 10 position in Cosmetics & Toiletries in terms of annual sales, competing with giants such as Procter & Gamble and Johnson & Johnson. This report explores the dynamically growing private-label market, taking a deep dive into trends and developments, key product categories, main retailers and their private-label offerings, and forecasts for the next five years.

This Report Will Help Subscribers Answer the Following Questions:

- How big is the market for private-label products, and how has it advanced over the years?
- What product categories constitute the largest proportion of private-label products?
- In which retailers is private label most prominent?
- What are the margins on private-label products, and how do they differ from branded products?
- Where are the opportunities in private label?
- What threats do brands face because of private label's rapid growth?



Tentative Report Contents*

Introduction

- Scope
- Sources and methods

Market Overview

- Key learnings
- Trends and developments
- Market size and growth
- Category highlights
- Role in industry
- Competitive landscape
- Outlook to 2024

Products

Profiles for the private-label segments of all product classes listed in Table 1 will include the following:

- Product class developments
- Sales and growth
- Role in product class
- New product trends
- Sales by company and brand for 2018 and 2019
- Margins and pricing strategy
- Marketing activity
- Outlook to 2024

Private-Label Retailer Profiles

- Brief profiles of 5-10 select private-label brands by retailer (Table 2).
- Manufacturer overview
 - Sales for 2018 and 2019
 - Product offerings
 - New product activity
 - Marketing activity
 - Price strategy
 - Forecasts





Table 1: Product classes and categories to be examined

Hair Care Products	Skin Care Products
■ Conditioners	■ Baby care products
■ Multicultural hair care products	■ Facial skin care
■ Hair coloring products	■ Hand and body lotions
■ Hair styling products and sprays	■ Skin care products for men
■ Shampoos	■ Sun care products
Makeup	Oral Care Products
■ Eye makeup	■ Lip balms, jellies, and treatments
■ Face makeup	■ Mouthwashes
■ Lipsticks and lip glosses	■ Toothpaste
■ Nail polishes	■ Toothbrushes
Other Toiletries	
■ Deodorants and antiperspirants	
■ Personal cleansing products	
■ Shaving products	

Table 2: Private-label beauty and personal care brands*

Retailer	Brand
Amazon	Belei
Dollar General	Believe Beauty
CVS	Beauty 360, Essence, Makeup Academy, etc.
QVC	Carmindy
Saks Off 5th	Fifth City
Sephora	Sephora
Target	Kristin Ess Hair
Ulta	Ulta Beauty
Walgreens/Boots Alliance	Your Good Skin
Walmart and Ulta	Flower Beauty
Whole Foods	365 Whole

* Subject to subscriber input.



Scope

Private-Label Beauty Products: U.S. Market Assessment will analyze the market for private labels. Private label refers to products marketed by retailers under their own brand. These include products that are no-name or carry the retailer's name. The product class and categories covered in this report are as follows:

- Hair care product class (conditioners, multicultural hair care products, hair coloring products, hair coloring products, hair styling products and sprays, shampoos)
- Makeup product class (face makeup, eye makeup, lipsticks and lip glosses, nail polishes)
- Skin care products (baby care products, facial skin care, hand and body lotions, skin care products for men)
- Oral care products (lip balms, jellies and treatments, mouthwashes, toothpaste, toothbrushes)
- Other toiletries (deodorants and antiperspirants, personal cleansing products, shaving products)

This analysis will cover consumer purchases in the United States through the following retail channels:

- Direct sales (home shopping, infomercials, and the Internet)
- Department stores
- Mass outlets (mass merchandisers, drug stores, food stores, and warehouse clubs)
- Specialty (cosmetics specialty retailers)

For the purposes of this report, brands from vertically integrated retailers such as Lush and Bath & Body Works are not considered private label, nor are social selling brands like Rodan+Fields or Mary Kay.

Key Benefits

This report will enable subscribers to identify business opportunities by analyzing the dynamics in this hard-to-track industry; it will also help subscribers understand market growth factors, the competitive landscape, and future trends. The report will provide:

- An understanding of the dynamics behind the success of private-label brands
- A perspective on leading players, as well as the smaller, up-and-coming ones
- A resource to augment business plans with reliable insights and data
- The identification of potential threats
- An understanding of market growth and future trends



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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