



# Professional Nail Care: U.S. Value Market Analysis

To Be Published 3rd Quarter 2019  
Base Year: 2018

Regional Coverage: United States

This study will look at the so-called “value market” for distribution of professional nail care products such as nail polishes, gels, long wear nail polishes, care products, and nail enhancements. This study will assess the size of the market of products sold through independent distributors in the U.S. mostly held by Vietnamese and South Korean independent distributors. It will take a deeper look at distribution structure, brands carried, trends and sales by category, but also gives an opportunity to understand such important topics like decision-making process of value market distributors.

## This Report Will Answer Such Questions As:

- Which territory distributors operate in, and how many salons do they service?
- How many and which brands distributors do work with?
- What is important in brand selection by distributors?
- How many nail salons are serviced by value distributors in the United States?
- Which product categories prevail in this distribution?
- Which promotional tools should be used while working with value distributors?

**Based on an extensive survey with distributors and salons nationwide!**

## Tentative Report Contents\*

### Introduction

- Market size and growth (2017 and 2018)
- Market split by ethnicity of distributors (Vietnamese, Korean)
- Category performance (see Table 1)
- Category sales and growth (2017 and 2018)
- Category sales split by product type (See Table 1)
- Key trends and drivers
- Key product launches
- Key brands' sales
- Distribution structure (number of value distributors, number of salons purchasing from value distributors)
- Marketing overview (promotional tools used by value distributors and marketers that sell to value distributors)
- Competitive landscape (key brands sold through value distributors)
- Outlook (sales forecast from 2018-2023)

\* Subject to charter subscriber input

Table 1	
Product Categories	Product Types
Care Products	Nail and Cuticle Treatments Washes, Scrubs, and Lotions
Gels	Soak-off Gels Gel-polishes
Nail Enhancements	Acrylics Dipping Powders Other Enhancements Traditional Hard Gels
Nail Polishes	Traditional Nail Polishes Long-wear Nail Polishes





## Scope

Professional Nail Care U.S.: Value Market Analysis will provide subscribers not only a comprehensive overview of size and structure of value market distribution of professional nail care products, but also a truly in-depth view into key characteristics of value distributors and their decision-making process in brand selection as well as promotional tools used.

- Based on in-depth face-to-face interviews with independent “value” distributors located in three key areas for professional nail care distribution: California, Texas, and Illinois.
- Distribution channel analysis of products used to perform standard manicures and pedicures in professional channels such as salons and spas.

## Key Benefits

This report will complement Kline’s Professional Nail Care: Global Market Brief program by adding depth to the analysis of important decision-makers and clients of professional nail care brands — value market distributors.

- An unbiased and comprehensive examination of the value distribution channels in the U.S. professional nail care market.
- Information to exploit business opportunities by understanding the structure of the market and key needs of professional nail care brands’ business partners—-independent distributors from two key ethnic groups: Vietnamese and South Korean.
- A resource to augment business plans with reliable insights and data.
- A perspective on the key criteria used by distributors while choosing the brands they work with to better leverage the market presence and penetration using the right communication and tools.
- One day of consultation with members of the research team, which may be used for strategic planning assistance or to explore specific information, which might not be covered in this report.

## 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.

On top of in-depth discussions done by our consultants, structured surveys with nail salons will assure comparative data and interesting results in this real look inside the nail salon.

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



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