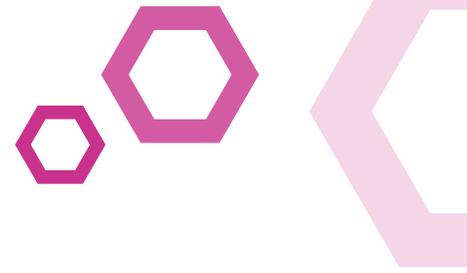


16th Edition



Professional Skin Care Global Series: Market Analysis and Opportunities

U.S. and Europe Published December 2018

China Published February 2019

Base Year: 2018

Regional Coverage: Asia ■ Europe ■ North America

A comprehensive series of reports on the professional skin care market, focusing on market size and growth, new product launches, and key changes in the competitive landscape.

This study is designed to provide business executives with reliable and timely insights that assists them in addressing such questions as:

- Are there shifts occurring between physician types in the medical care providers channel?
- Which skin concerns are the most demanded regionally?
- How will the recent acquisitions of Elta MD, PCA, and Obagi affect the market?
- What role does e-commerce play in the distribution of professional brands?
- What are the opportunities for professional skin care marketers?



Report Contents

Contents of Global Overview

This presentation-style report is available to subscribers of all volumes, as shown in Table 1, and includes:

- Global review of the market report
- Market drivers and trends
- Key lessons learned
- Top-line summaries of key findings for each channel covered
- Top-line summaries of the leading competitors
- Outlook to 2023

Table 1: Volumes Offered

| |
|---------------|
| China |
| Europe |
| United States |

Table 2: Channels Examined

| |
|--|
| Medical care providers-a |
| Spas and salons-b |
| Retail-c |
| a- Includes dermatologists, plastic surgeons, medical spas, and others (where applicable). |
| b- Includes beauty institutes and hair salons. |
| c- Separate view in database. Part of other channels in the Global report. |

Table 3: Select Examples of Brands Profiled

THE UNITED STATES

| | |
|--------------|--------------------|
| Alastin | PCA Skin |
| Colorscience | SkinBetter Science |
| Dermalogica | SkinCeuticals |
| EltaMD | SkinMedica |
| Eminence | ZO Skin Health |
| Obagi | |

CHINA

| | |
|------------|----------------|
| Amitabha | Marubi |
| Angelina | Matis |
| Chlitina | Natural Beauty |
| Csmax | NeoStrata |
| Deynique | Pevonia |
| DMS | SkinCeuticals |
| Eve Charm | Sothys |
| Guinot | Toplink |
| Jourdeness | Winona |
| LaColline | Youya |

EUROPE

| | |
|-----------------------|----------------|
| Babor | Guinot |
| Clarins | Klapp |
| Comfort Zone | Natura Bissé |
| Decléor Paris | Obagi |
| Dermalogica | Phytomer |
| Elemis | SkinCeuticals |
| Environ | Sothys |
| ESPA | Thalgo |
| Germaine de Capuccini | ZO Skin Health |

Contents of Each Volume

Market Overview

This presentation-style chapter provides the following:

- Market size and growth for 2018
- Historical sales for 2013-2018
- Key new product activity and trends
- Sales breakdowns by segment, product category and skin care concern
- Channel snapshots
- Competitive landscape
- Outlook to 2023

Brand Profiles

Brief profiles are provided for 10 key brands of skin care products that are offered in professional channels, as listed in Table 3.

Information includes:

- Company overview
- Sales for 2017 and 2018
- Product offerings
- New product activity
- Distribution and key marketing activities
- Outlook to 2023

Purchase Channels

Profiles are provided for each of the purchase channels listed in Table 2. Information includes:

- Channel developments in 2018
- Number of outlets/doors
- Geographic dispersion (where applicable)
- Product sales by skin care concern
- Sales for key skin care brands for 2017 and 2018
- Outlook to 2023





Database Contents

- Total industry size and growth

Brand sales are provided by country as follows:

- China
- France
- United Kingdom
- Germany
- Russia
- Italy
- Spain
- Poland
- United States

Channel sales (as shown in Table 2) for Europe (region only) and country volumes are provided by:

- Brand
- Product type
- Segment (back-bar vs. take-home)

Database Features

User-friendliness in a simple yet sophisticated system

Data presented by:

- Manufacturers' sales
- Market share
- Growth rates
- Flexible search options
- Export capabilities
- Ability to easily refine and modify search

User Interface of the Database

Kline Database View - Consumer - Professional Skin Care 2013 - Segment View

Home | Data | Fields | Calculation | Layout | Export | Help

Currency: United States Dollar (USD)

Exchange rate type: Current Constant

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Drop Filter Fields Here

Sales, USD million Year

| Region | Channel | Segment | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2018 |
|---------------------|------------------------------|------------------------------------|------|------|------|------|------|------|------|
| Grand Total | | | | | | | | | |
| Europe Total | | | | | | | | | |
| Europe | Beauty institutes and salons | Beauty institutes and salons Total | | | | | | | |
| | | Take-home | | | | | | | |
| | Back-bar | | | | | | | | |
| | Spas | | | | | | | | |
| | Medical care providers | | | | | | | | |
| | Retail stores | | | | | | | | |
| United States Total | | | | | | | | | |
| United States | Medical care providers | | | | | | | | |
| | Spas | | | | | | | | |
| | Retail stores | | | | | | | | |
| Indonesia | | | | | | | | | |
| Thailand | | | | | | | | | |

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Scope

Professional Skin Care Global Series: Market Analysis and Opportunities examines the country-level demand for consumable topical skin care products sold through and used in professional channels of distribution, such as doctors' offices, beauty institutes and hair salons, and spas. This program is multinational in scope and organized according to the following major regions. The regions covered vary from edition to edition:

- Asia: China
- Europe: France, Germany, Italy, Poland, Russia, Spain, and the United Kingdom
- North America: the United States

Key Benefits

This program provides subscribers with an accurate picture of the size, segmentation, and performance of the professional skin care market in key and underdeveloped geographic regions. It enables subscribers to exploit business opportunities by understanding market dynamics, competitive forces, product trends, forecasts, and future trends. Specifically, this study can be used as an aid in:

- Acquisition screening and potential alliance partners
- Competitive intelligence
- Industry/channel/brand assessments
- New business development
- Strategic planning



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
- Retailers
- Spas, beauty institutes, and medical care providers
- 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.

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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