



Diagonal Reports

**THE PROFESSIONAL BEAUTY
MARKET FRANCE 2006
(BEAUTY – AESTHETIC – SALON –
SPA – DAY SPA – INSTITUTE)**

SAMPLE PAGES

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INDEX OF COMPANIES, BRANDS, SELECTED PUBLICATIONS, AND ORGANIZATIONS (REGULATORY, TRADE, PROFESSIONAL)

SECTION REPORT STRUCTURE

This section describes the contents of the different sections of the report. The different country reports follow the same structure, to allow for cross country comparisons. Where possible, data is presented in table format.

SECTION 1 - REPORT SUMMARY

SECTION 2 - BEAUTY SALON MARKET (SIZE / STRUCTURE / INCOME / SERVICES)

- MARKET SIZE and TRENDS - that is, the estimated number of units, employees, and turnover a year in the beauty services (salon) channel. All data is the latest available over a three year period.
- The STRUCTURE of the beauty services market - that is, the different types of outlets whose main business is the sale of beauty services and products to consumers. Changes in market structure are reviewed.
- Breakout of sector TURNOVER, (in %) from the sale of services and the sale of products over the counter (OTC).
- The top salon SERVICES are identified, and ranked.

SECTION 3 - BEAUTY SALON PRODUCTS MARKET

- The value of the BEAUTY SALON PRODUCTS MARKET - that is, the sale of products to the beauty salon channel. Typically values are at manufacturers' sales prices.
- The breakout of products (in %) in terms of use in the salon, and retail over the counter.
- The top product categories are ranked.

SECTION 4 – BEAUTY SALON PRODUCTS, MARKET SHARES

- The estimated number of suppliers in the beauty services channel.
- The number of top suppliers, their names, rankings, and market share, where available.
- Sales strategies common to the top suppliers.

SECTION 5 – PROFILES OF PRODUCT SUPPLIERS, SALONS

- The suppliers identified are listed, (alphabetical order).
- Profiles of the leading suppliers.
- Profiles of selected salons, typically these are the top franchises, the largest supplier linked salons, and award winning salons.

SECTION 6 - PROFILES (AGENCIES, ASSOCIATIONS)

This section identifies and profiles of the most important of the following:

Statistics agencies, government agencies, regulatory agencies, training agencies, trade associations, professional associations, trade magazines, internet sites, trade shows, trade awards.

SECTION 7 – APPENDICES

This section includes other data, presented in the same order as in the body the report.

INDEX OF COMPANIES, BRANDS, SELECTED PUBLICATIONS, AND ORGANIZATIONS (REGULATORY, TRADE, PROFESSIONAL)

FRANCE SECTION 1 - SUMMARY

Number of beauty salons*: x.

Employees: x.

Turnover: €x million.

Turnover: x% services, x% product retail.

Trends: x.

+x% change on previous year.

Product sales to salons: €x million, at the manufacturer level.

Product sales: x% used in salon, x% product retail.

(All data refers to the year 2005 unless stated otherwise.)

The top 5 suppliers (ranked):

1 – x

2 – x

3 – x

4 – x

5 – x

Market experts identify some x suppliers as among the top x in France. The top x could have a combined share of at least x%.

The market experts consulted include suppliers who represent more than 20% of total product sales to salons in France.

Average salon turnover is €x,000 a year. The average number of employees is x per salon. Some x% of the salons have fewer than x employees:

*This report only covers beauty salons, that is, outlets whose main business is the sale of beauty services. It does not cover providers of other personal care services, such as hair salons, or at home (mobile) beauticians.

Date of publication: February 2006.

GRAPH with Table 2, France beauty services sector – distribution of x units by type

GRAPH with Table 2, France beauty services sector – distribution of €x million turnover

Table 2 France beauty services sector – distribution by type and turnover

(As % of total sector units or turnover. Figures rounded.)

| Salon type | % units | % turnover |
|------------|---------|-------------|
| X | X% | X% |
| X | X% | X% |
| x | X% | X% |
| TOTAL | X | € x million |

(Source: DR Professional Beauty France 2006) (Source: INSEE 2002.)

SECTION 4 – BEAUTY SALON PRODUCTS, MARKET SHARES

Market size and number of product suppliers

The beauty salon products market in France is estimated at €x million (2004) based on manufacturers' prices.

There are very large numbers of suppliers to the salon channel, but very few have any significant market share. In France, the suppliers are a mixture of some of the largest international brands and small brands whose sales are almost all domestic.

Experts find it difficult to rank suppliers, because the salon market is fragmented. Further, even for the brands identified as leaders, they are often a leader only in one market segment, such as upmarket salons, or in one geographical region, or in one or two product categories.

Table 11 France suppliers to salons – “the top x” (x names)

(Ranking by value of sales/ number of salon clients.)

| Rank | Supplier |
|------|----------|
| 1 | X |
| 2= | X |
| 2= | X |
| 3= | X |
| 3= | X |
| 3= | X |

(Source: DR Professional Beauty France 2006)

(Market experts sample France.)

Leading suppliers

The largest suppliers to the salon market suggest that, of the many dozens of companies in the salon channel in France, fewer than x or x qualify to be described as “top suppliers,” that is, with a market share of over x% each.

Some six companies vie for “the top three” places. They include x, and its x, whose combined sales could reach about x% of salons in France. x and x are followed by x, x, x, x and x.

After the leaders

The “top” companies in sales are trailed by another six suppliers (in approximate order of importance):

- x
- x
- x
- x
- x
- x

Table 12 France suppliers to salons - face care “top 5” (8 names)

(Ranking by number of salons clients.)

| Rank | Supplier |
|------|----------|
| 1 | X |
| 2 | X |
| 3 | X |
| 4 | X |
| 5= | X |

Source: DR Professional Beauty France 2006)
(Market experts sample France.)

Table 13 France suppliers to salons - body care “top 5” (7 names)

(Ranking by number of salons clients.)

| Rank | Supplier |
|------|----------|
| 1 | X |
| 2 | X |
| 3 | X |
| 4 | X |
| 5= | X |

(Source: DR Professional Beauty France 2006)
(Market experts sample France.)

Makeup, sun care, hand care

The best known brands in salons in the following products categories are (in order of importance)

- In makeup: x, x, x, and x.

The many “smaller” brands named include x, x, x, and x , and (but sales are mostly in the provinces), x.

- In sun care: x, x, x, x, and x.
- In hand care: x, x, x, x, and x.
(Source: DR Professional Beauty France 2006)

APPENDIX - COSMETICS INDUSTRY

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