

MarketLine

Suncare

Global Industry Guide

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About MarketLine

MarketLine is a leading business information company specializing in industry analysis.

Through its proprietary databases and wealth of expertise, MarketLine provides clients with unbiased expert analysis and in depth forecasts for six industry sectors: Healthcare, Technology, Automotive, Energy, Consumer Markets, and Financial Services.

Our series of company, industry and country profiles complements our premium products, providing top-level information on over 50,000 companies, over 2,000 industries and 215 countries. While they do not contain the highly detailed breakdowns found in premium reports, profiles give you the most important qualitative and quantitative summary information you need - including predictions and forecasts.

MarketLine Methodology

MarketLine Industry Profiles draw on extensive primary and secondary research, all aggregated, analyzed, cross-checked and presented in a consistent and accessible style.

Review of in-house databases

Created using 250,000+ industry interviews and consumer surveys and supported by analysis from industry experts using highly complex modelling & forecasting tools, MarketLine's in-house databases provide the foundation for all related industry profiles

Preparatory research

We also maintain extensive in-house databases of news, analyst commentary, company profiles and macroeconomic & demographic information, which enable our researchers to build an accurate market overview

Modelling & forecasting tools

MarketLine has developed powerful tools that allow quantitative and qualitative data to be combined with related macroeconomic and demographic drivers to create market models and forecasts, which can then be refined according to specific competitive, regulatory and demand-related factors. Continuous quality control ensures that our processes and profiles remain focused, accurate and up-to-date.

Market Definitions

Are standardized to allow comparison from country to country. The parameters of each definition are carefully reviewed at the start of the research process to ensure they match the requirements of both the market and our clients. Extensive secondary research activities ensure we are always fully up-to-date with the latest industry events and trends

MarketLine aggregates and analyzes a number of secondary information sources, including:

- National/Governmental statistics
- International data (official international sources)
- National and International trade associations
- Broker and analyst reports
- Company Annual Reports
- Business information libraries and databases

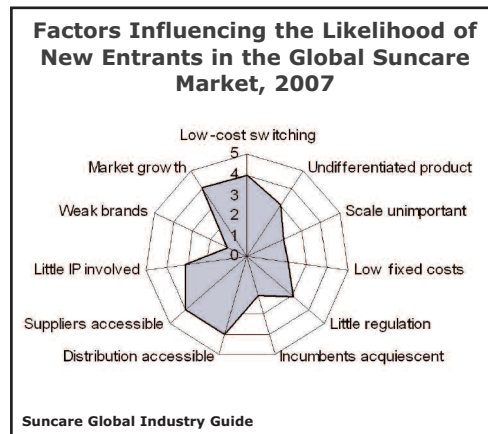
Suncare: Global Industry Guide

This 2008 executive report contains easily comparable data on market value and segmentation for the suncare market.

It provides full five-year forecasts and examines the competitive landscape, analyzing potential threats, future innovations and opportunities for growth.

Suncare: Global Industry Guide will enable you to:

- **Save time and money on research** with this report's easily comparable data and succinct market analysis.
- **Evaluate the competitive landscape** and benchmark performance against key competitors and the market.
- **Assess the key macro-economic trends** in each market from population, inflation and GDP to exchange rates.
- **Identify new and emerging investment opportunities** by product, country and region.
- **Quantify the size and growth of the market** with this report's five years of historic data and forecasts to 2012.



“Entry to the market can be gained as an existing company with similar operations, such as a cosmetics firm, diversifying into the market (for example Rimmel has established its own self tan product range). The market can also be entered as an entirely new company...”

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Each company profile provides:

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What is this report about and who will it interest?

Who is the target reader?

This report should make essential reading for anyone involved in the Suncare market globally - plus anyone considering expansion into Suncare market, or targeting customers or suppliers in the market.

This report should be read by competitive analysts, distribution managers, marketing managers, strategic planners and senior executives

How is the Suncare market defined?

The suncare market consists of after-sun, self-tan and sun protection products. The market is valued according to retail selling price (RSP) and includes any applicable taxes. Any currency conversions used in the creation of this report have been calculated using constant 2006 annual average exchange rates.

For the purpose of this report the Americas comprises Brazil, Canada, Mexico and the US. Europe comprises Belgium, the Czech Republic, Denmark, France, Germany, Hungary, Italy, Netherlands, Norway, Poland, Russia, Spain, Sweden and the UK. Asia-Pacific comprises Australia, China, Japan, India, Singapore, South Korea and Taiwan. The global figure comprises the Americas, Asia-Pacific and Europe.

Some key findings in this report...

Market Value

The global suncare market grew by 4.1% in 2007 to reach a value of \$4,741.5 million. The compound annual growth rate of the market in the period 2003-2007 was 4.2%.

Market Volume

The global suncare market grew by 2.8% in 2007 to reach a volume of 519.4 million units. The compound annual growth rate of the market volume in the period 2003-2007 was 2.7%.

Product Market Segmentation

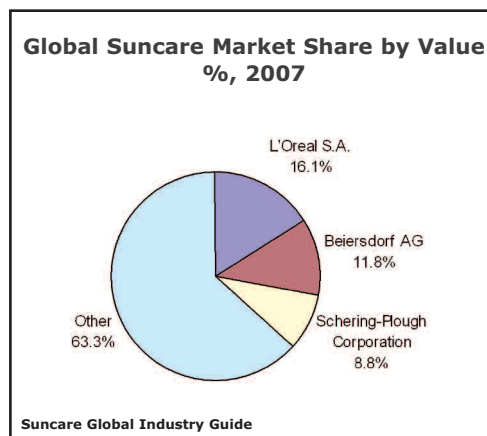
Sun protection segment generates 65.4% of the global suncare market's revenues. Self-tan segment is accountable for an additional 22.6% of the revenues.

Geographical Market Segmentation

53.6% of the suncare market revenues are generated in Europe. Americas region is responsible for additional 29.2% share of the market value.

Distribution

Distribution of suncare products through supermarkets / hypermarkets generates 45.4% of the market value. Sales through specialist retailers account for 23.9% of the market value.



"L'Oreal is the market leader, holding 16.1% share of the global suncare market. Beiersdorf AG holds a further 11.8% of the market..."

CHAPTER 9: SUNCARE IN JAPAN

Research Highlights

The Japanese suncare market generated total revenues of \$123.2 million in 2007.

Market consumption volumes increased with a CAGR of 2.1% between 2003 and 2007, to reach a total of 10.1 million units in 2007.

Sun protection sales proved the most lucrative for the Japanese suncare market in 2007, generating total revenues of \$85.6 million, equivalent to 69.5% of the market's overall value.

Market Analysis

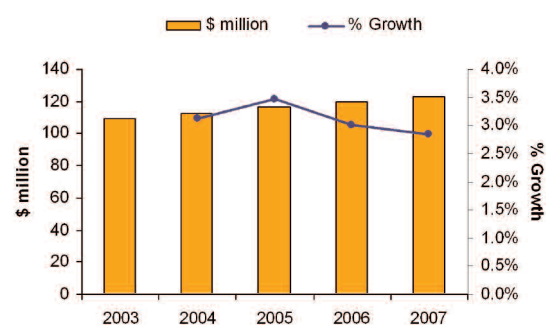
The Japanese suncare market posted steady rates of growth throughout the 2003-2007 period. This trend is expected to continue over the forthcoming five years.

The Japanese suncare market generated total revenues of \$123.2 million in 2007, this representing a compound annual growth rate (CAGR) of 3.1% for the period spanning 2003-2007. In comparison, the UK and French markets grew with CAGRs of 2.9% and 3.3% over the same period, to reach respective values of \$322.1 million and \$480.6 million in 2007. Market consumption volumes increased with a CAGR of 2.1% between 2003 and 2007, to reach a total of 10.1 million units in 2007. The market's volume is expected to rise to 11.1 million units by the end of 2012, this representing a CAGR of 2% for the 2007-2012 period.

Sun protection sales proved the most lucrative for the Japanese suncare market in 2007, generating total revenues of \$85.6 million, equivalent to 69.5% of the market's overall value. In comparison, sales of self-tan products generated revenues of \$28.9 million in 2007, equating to 23.5% of the market's aggregate revenues.

The performance of the market is forecast to decelerate, with an anticipated CAGR of 2.1% for the five-year period 2007-2012 expected to drive the market to a value of \$137 million by the end of 2012. Comparatively, the UK and French markets will grow with CAGRs of 2.6% and 3% over the same period, to reach respective values of \$366.3 million and \$558.5 million in 2012.

Japan Suncare Market Value: \$ million, 2003-2007



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Japan Suncare Market Volume: Units million, 2003-2007

Table 1: Japan Suncare Market Volume: Units million, 2003-2007		
Year	Units million	% Growth
2003	9.3	
2004	9.5	2.20%
2005	9.7	2.10%
2006	9.9	2.10%
2007 (e)	10.1	2.00%
CAGR, 2003-2007:		2.1%

Source: MarketLine

DATA MONITOR

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