



Packaged
Facts

The Nail Care Market in the U.S.

June 2012



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The Nail Care Market in the U.S.

June 2012

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Chapter 1 Executive Summary

Background

Introduction

The mass nail care market has grown by leaps and bounds since 2009, dwarfing the relatively sleepy growth rates in other cosmetics categories. The explosive growth in mass-market sales of nail care products continued into 2012, as nail care sales grew 26% for the 52 weeks ending April 15, 2012. This completely new Packaged Facts report probes deeply into the trends driving the growth in nail care product sales. These include a nailcentric fashion culture that has transformed women's nails into fashion accessories, a continuing flood of innovative, fashion-forward nail care products that empower women to imitate nail salon effects in their own home in a cost-effective way and a growing population of women who make frequent use of DIY nail care products. The report also includes a surprising take on how the growing number of women who spend heavily on professional nail care services will help drive the continuing growth in sales of DIY nail care products.

Overview of the Report

The report begins with topline findings about major trends in the mass nail care market, including key factors affecting the growth of the market and a projection of dollar sales through 2016. The next chapter profiles leading marketers in the nail care category, identifies which marketers gained and lost market share for the 52 weeks ending April 15, 2012 and analyzes the reasons why. The report continues with a detailed examination of the sales performance of leading brands and products within the major segments of the nail care market, including nail polish, artificial nails and accessories, nail accessories/implements, nail treatment products, nail polish removers and nail polish accessories. The next chapter provides an in-depth assessment of the nail care consumer that includes an analysis of the characteristics of frequent users of DIY nail care products and profiles of users of major nail care brands. The report concludes with a chapter analyzing the demographic characteristics and consumer attitudes of women using professional nail care services, with an emphasis on "salonistas," women who have had two or more manicures in the past six months.

Scope and Methodology

Scope of the Market

This Packaged Facts report defines the mass nail care market on the basis of data generated by SymphonyIRI InfoScan Reviews, which track sales through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart but excluding Walmart) with annual sales of \$2 million or more.

SymphonyIRI InfoScan divides the nail care category into the following major product types or segments: nail polish, nail accessories/implements, nail treatment products, artificial nails and accessories, nail polish removers and nail polish accessories.

Methodology

There are two principal sources of primary data in this report. The first is SymphonyIRI InfoScan Reviews as described above. The second is the Fall 2011 Simmons Experian National Consumer Study (NCS), which was fielded between October 2010 and November 2011. Experian Simmons conducts telephone and booklet-based surveys of a large and random sample of consumers who in aggregate represent a statistically accurate cross-section of the U.S. population. Each Experian Simmons NCS survey release involves a sample of approximately 25,000 respondents.

The report is also based upon data collected from a wide range of industry sources, including company websites, trade publications, business newspapers and magazines; consumer blogs; and annual reports, 10Ks and other releases from public companies

Topline Trends

Nail Care Dollar Sales Outpace Other Cosmetics Categories

The dollar value of nail care product sales tracked by SymphonyIRI grew 21% during the 52 weeks ending December 2011. The growth in mass market nail care product sales was nearly three times higher than the 8.2% registered by cosmetics categories as a whole, and more than four times the increase experienced in the facial category, which experienced 5.3% growth, eye category (4.4%) and lip category (3.3%). The explosive growth in mass market sales of nail care products continued into 2012, as dollar sales of nail care products grew by 26% for the 52 weeks ending April 15, 2012.

It's All About Nail Polish

Sales of nail polish have grown significantly faster than the sales registered by other product types within the nail care category. As a result, nail polish now has a larger share of the overall nail care market than it had before. During the 52 weeks ending April 15, 2012, the share of nail polish within the nail care category increased from 47% to 53%, while the share attributed to other product types in the category declined. Nail polish accounted for 53% of all dollar sales of nail care products and was responsible for 79% of the growth in dollar sales of nail care products during this period.

Nailcentric Fashion Culture Continues to Flourish during Economic Recovery

Many industry analysts point to the Great Recession as the impetus for the creation of the nailcentric fashion culture now driving the growth of sales of do-it-yourself (DIY) nail care products. The basic premise is that women needing to economize during hard economic times could make up for doing without pricey shoes and bags by indulging themselves with a far less expensive but nonetheless high-impact personal fashion statement on their nails. However, the nail care craze has continued even in post-recession America. According to Experian Simmons National Consumer Study (NCS) data, as the economy has started to show signs of recovery, the number of women using DIY nail care products has continued to increase faster than the growth in the overall population of women.

Never-Ending Flow of New Products Boosts Nail Care Growth

A rapid, continuous flow of a wide range of innovative technologies and products designed to empower women to imitate nail salon effects simply and cost-effectively on their own has been a driving force in the growth of the nail care category. The sheer volume of new, creative, easy-to-use DIY nail care products and techniques has had an impact on the extraordinary growth of the nail care category.

- DIY products mimicking the salon effects of Minx nails—adhesive nail stickers made in a range of wild colors and patterns that are available only in salons—have had a major influence on the expansion of the DIY nail care market.
- Another breakthrough fueling the growth of the nail care category was the introduction of products allowing consumers to apply their own gel manicures at home. A salon gel manicure lasts twice as long as a traditional manicure but can cost \$50 and up at a salon.
- Products enabling DIYers to create textured nails, such as crackle nail polish, have also contributed to the explosive growth of the nail care category. Magnetic nail polish, a newer entry in the field, is increasingly seen as offering stiff competition to crackle nail polish. Glitter nail polish provides another way to make nails stand out.

Frequent DIY Nail Care Product Users Propel Market Growth

Another factor in the explosive growth of sales in the nail care category is an increase in the number of frequent users of DIY nail care products. Between 2010 and 2011, the number of women using nail care products five or more times in the past 30 days increased by 12.1%, while the number of women using nail care products four or fewer times decreased by 0.7%.

“Salonistas” Contribute to Growth in DIY Nail Care Products

Conventional wisdom sees a correlation between the growth in nail care product sales and a decline in the use of nail salon services. In fact, as the DIY nail care category experienced remarkable growth, the market for nail salon services did decline.

However, all signs now point to a return to popularity of nail salon services. The question is whether DIY nail care sales will decline as women return to salons to get professional manicures and pedicures.

A Packaged Facts analysis of Experian Simmons NCS data indicates that the reverse will be true. The reason is that the more women go to salons for manicures, the more they buy and use DIY nail care products. For example, one in four (25%) “salonistas” (defined as women receiving two or more professional manicures in the past six months) used DIY nail care products five times or more in the past 30 days, compared to only 15% of other women. Thus, rather than resulting in a decline in dollar sales of DIY nail care products, the expected post-recession growth in professional manicure and pedicure services is likely to contribute to continuing growth in the mass nail care market.

Many Factors Point to Strong Growth in Nail Care Market

Packaged Facts expects that a number of trends will combine to create conditions favorable to a continuation in the robust growth of the nail care category experienced in the past three years. Trends supporting the long-term growth of nail care product sales include the persistence of the nailcentric fashion culture; a continuing flood of innovative nail care products that will further empower women to imitate nail salon effects in their own home in a cost-effective way; an increase in the number of frequent users of DIY nail care products; the overlap between women who use professional nail care services and women who make frequent use of DIY nail care products; and rapid growth in the population of multicultural women, who are much more likely than non-Hispanic white women to be frequent DIY nail care product users.

Projected Growth in the Nail Care Market

Packaged Facts projects that dollar sales of nail care products in the mass market will continue the high rate of growth experienced in the past two years but will moderate in the final years of the forecast period. This assumption results in a CAGR of 16.7% between 2011 and 2016, which is somewhat lower than the explosive growth experienced between 2009 and 2011 but higher than the growth rate between 2006 and 2011. Dollar sales of nail care products in the mass market are expected to reach \$2 billion for the year ending December 2016.

Leading Nail Care Marketers: Who's Up and Who's Down

Coty Beauty Maintains Top Position but Slips Slightly

The top spot in the rankings of nail care marketers tracked by SymphonyIRI belongs to Coty Beauty, which garnered 36.2% of the total mass nail care market during the 52 weeks ending April 15, 2012. In distant second place is Revlon Inc. (11.1%), followed by Kiss Products Inc. (9.2%), L'Oreal USA (7.2%) and Pacific World (5.8%).

The market share of Coty Beauty fell by 1.8 points from the previous year, as its 19.7% sales growth failed to keep pace with the nail care market as a whole. The biggest move in the rankings of major nail care marketers was made by L'Oreal USA, which experienced a 4.7 point increase in market share as a result of a 353.5% increase in dollar sales coming from its acquisition of the Essie brand.

Other winners were Revlon Inc., which gained 4.4 points in market share due to its acquisition of Mirage Inc. (owner of the Sinful Colors brand) and Pacific World, which gained 3.6 points because of its merger with W.E. Bassett. Other gainers were Markwins International Corp. (+0.6 points) and Kramer Labs and CCA Industries, each of which gained 0.3 points in market share.

Mergers and Acquisitions Re-shape Competitive Landscape in Nail Care Category

Over the past five years major marketers in the cosmetics industry have moved aggressively through mergers and acquisitions to enhance their competitive position and take advantage of growing opportunities in the nail care market.

- In December 2010 Coty Beauty Inc. followed up its 2007 purchase of Del Laboratories (Sally Hansen and New York Color) with the acquisition of OPI Products, a dominant player in professional nail care products distributed through the salon channel. In 2012 Coty Beauty retained its overall leadership in the nail care category with 36.2% of all nail care sales, but its market share slipped by 1.8 points.

- In March 2011 Revlon acquired Mirage Cosmetics, owner of the Sinful Colors brand. Its market share increased 4.4 points between April 2011 and April 2012.
- In November 2011 Pacific World Corp., whose brands include Nailene and Fing'rs, merged with the W.E. Basset Co., marketer of the Trim line of nail clippers and implements. The combination of the brands of Pacific World and W.E. Bassett Co. gave Pacific World a 3.8 point increase in market share.
- The acquisition with the most significant impact on nail care market dollar sales in the 52 weeks ending April 15, 2012 was L'Oreal USA's 2010 acquisition of the Essie brand, which has a significant presence in the salon channel. L'Oreal USA moved quickly to introduce Essie into the mass channel and as a result generated a massive increase in its market share in the nail care category. Between April 2011 and April 2012 L'Oreal USA gained 5 points in market share, growing from 1.8% to 6.8% of the market.

Major Marketers Consolidate Market Share

The string of acquisitions by major marketers has resulted in further consolidation in the market. Major marketers in the nail care category increased their share of the market during the 52 weeks ending April 15, 2012. While the share attributed to the top 11 marketers grew by 1.4 points during this period, the market share of all other marketers, including private labels, declined by 1.4 points.

Top Marketers Focus on Narrow Range of Products

Most leading marketers in the nail care category generate the vast majority of sales from just one or two product types. For example, L'Oreal USA derives 100%, and Coty Beauty 94%, of their nail care revenues from nail polish and nail treatment products. Kiss Products generates 91% of nail care sales from two product types: artificial nails and accessories and nail polish.

Nail Care Products and Brands: What's Hot and What's Not

Nail Polish Market Dominated by a Few Big Players

The top four marketers of nail polish account for 83% of mass market dollar sales of nail polish. Coty Beauty alone is responsible for more than half (53.2%) of nail polish sales. Other marketers with major shares of the nail polish market include L'Oreal USA (12.3%), Revlon Inc. (9.7%) and Mirage Inc. (8.1%).

L'Oreal USA Shakes Up Nail Polish Marketers

As a result of its acquisition of the Essie brand, L'Oreal USA gained 10 points of market share in the nail polish segment during the 52 weeks ending April 15, 2012. Nearly all of its gain came at the expense of Coty Beauty, which lost 7.8 points in market share.

Essie Takes Nail Polish Segment by Storm

The big story in the nail polish segment is Essie. In the 52 weeks ending April 15, 2012, dollar sales of the Essie nail polish brand more than quintupled, catapulting it to second place with a 10.6% market share. Other leading nail polish brands with above average growth include L'Oreal (199.4%), Jordana (163.7%), Kiss (121.5%), Wet 'N' Wild (75.2%) and newcomer Pure Ice, whose sales grew exponentially.

Private Labels Important in Nail Accessories/Implements Market

Sales of nail accessories/implements totaled \$160.1 million during the 52 weeks ending April 15, 2012. Private labels comprise 27.6% of sales of nail accessories/implements, a market share that exceeds the 23.5% share enjoyed by Pacific World as the result of its merger with W.E. Bassett. As a result of a decision by Coty Beauty to combine the Sally Hansen brand with the La Cross brand, SymphonyIRI data show that the dollar sales of Sally Hansen in the segment quadrupled, and its market share grew from 2.5% to 9.8%.

Nail Treatment Segment Sees Significant Movement among Smaller Marketers

Smaller marketers laid siege to Coty Beauty in the nail treatment segment during the 52 weeks ending April 15, 2012. While Coty Beauty continued to dominate in this segment with a 42.6% market share, it experienced a 3.8 point decline in this segment. Foremost among the competitors of Coty Beauty was Kramer Labs, whose sales increased 63% and whose market share grew 3.2 points, due to the success of its Fungi Nail brand.

Kiss Products Inc. Dominates Artificial Nails and Accessories

Kiss Products Inc. controls 77% of the \$93.5 million mass market for artificial nails and accessories. The Kiss brand accounted for 50% of sales in the segment, and Broadway Nails, also marketed by Kiss, generated 26.9% of sales during the 52 weeks ending April 15, 2012.

Private Labels Increase Share in Nail Polish Remover Segment

Private labels account for 78% of dollar sales of nail polish removers. They gained 5.5 points in market share in the 52 weeks ending April 15, 2012. The two largest marketers in this segment—Prestige Brands Holdings Inc. and Coty Beauty—each lost market share. The Cutex brand of Prestige Brands Holdings lost 3.2 points and the Sally Hansen Brand of Coty Beauty declined 3.4 points.

Sally Hansen Keeps Pace with Gains by Salon Professional Brand in Nail Polish Accessories Segment

The Sally Hansen brand, marketed by Coty Beauty, gained 13.3 points of market share in the nail polish accessories segment between 2011 and 2012, even though sales of the brand fell 31.3%. This anomaly was due to the fact that overall sales in the segment fell even more (45.2%). The major gainer in the segment was the Salon Professional brand marketed by CSA Limited Inc., which picked up 11.9 points in market share.

Many Brands Show Dramatic Growth

During the 52 weeks ending April 15, 2012, the Sally Hansen brand, which is marketed by L’Oreal USA, maintained its position as the leading brand in the mass nail care market. In

2012 the Sally Hansen brand had 30.4% of the nail care market and saw its dollar sales increase 28% over the previous 12 months. The Revlon brand finished a distant second, with 9.3% of the market and a 29% dollar sales increase.

The nail care category was roiled by several brands demonstrating relatively greater growth potential than the Sally Hansen and Revlon brands. For example, Essie, a brand acquired in 2010 by L'Oreal USA, registered sales growth of more than 400% and saw its market share increase from 1.5% to 6.2%.

Winning Products/Brands

Sally Hansen's Crackle Overcoat nail polish had the largest impact of any new nail polish product in the mass nail care market. For the 52 weeks ending April 15, 2012 it registered dollar sales of \$24 million. Other new entrants in the nail polish market achieving significant sales included L'Oreal USA's Colour Riche (\$5.2 million), Colorstay by Revlon (\$4.2 million), Nail Dress by Kiss (\$3.3 million) and three new products achieving dollar sales of around \$3 million (Vegas by Sally Hansen, Spoiled by Wet 'N' Wild, and Crackle by Pure Ice).

In the artificial nails and accessories segment, the Broadway Nails ImPress collection generated \$5.4 million in dollar sales within only a few months after it was launched.

New products from Salon Express had a significant impact on the nail accessories/implements segment, generating \$3.1 million in dollar sales and gaining a 1.9% market share. A wide range of products from Sally Hansen also showed substantial growth, with many of them registering dollar sales that quintupled or quadrupled the levels of the previous year.

Several new products achieved significant sales in the nail treatment segment, including two products that had been introduced at the end of the previous period: Dr. Paul's Piggy Paste, which reached 2.7 points in market share in the 52 weeks ending April 15, 2012, and Reclear AF (0.8% market share). Kerasal Nail, Revlon/Colorstay and Sally Hansen/Diamond Manicure also generated enough sales to gain market share.

The Nail Care Consumer

Young, Single Women More Likely to Be Heavy Users of Nail Care Products

Women in the 18- to 24-year-old age group are 28% more likely to have used nail care products five or more times in the last 30 days. Single women also have a much higher likelihood of being high-frequency users of nail care products.

Black and Hispanic Women Do Their Nails More Often

Black women are 46% more likely and Latinas are 30% more likely than women on average to have used nail polish and nail products five or more times in the past 30 days. Non-Hispanic white women are significantly less likely to do their own nails with this degree of frequency.

High Income, Well Educated Women Less Likely to Use Nail Care Products on Frequent Basis

As nail care product use becomes more frequent, the educational level and household income of women decline. While 36% of women using nail care products just once in the last 30 days have a college degree or more, 19% of those using nail care products seven or more times in the past 30 days have a college degree or more. Around 27% of women who use nail care products four or fewer times a month have a household income of \$100,000 or more. In the case of women using nail care products seven or more times per month, only 17% are in this high income bracket.

Brand Popularity Assessed

OPI and Sally Hansen have been successful both in terms of the degree of their popularity—they are the two most popular brands tracked by Experian Simmons NCS—and their ability to show continuous growth in popularity over the past five years.

Experian Simmons NCS data show that several nail care brands remained relatively constant in their degree of popularity or experienced only modest gains. These are Almay, Chanel, Lancôme and Nutra Nail.

Nearly half of the nail care brands tracked by Experian Simmons NCS have drifted downward in popularity over the past five years. Brands in this category include Avon, Cover Girl, Cutex, Estee Lauder, L’Oreal, Max Factor, Maybelline and Revlon.

Essie and OPI Attract College Educated, High Income Women

The Essie nail care brand attracts women under the age of 45, women who have never married and those who are college graduates. Essie aficionados are more than twice as likely as women on average to live in the Northeast and to have a household income of \$150,000 or more. Users of the OPI brand have an equally positive economic profile.

L’Oreal and Revlon Appeal to Middle-Income Women

Compared to women on average, users of L’Oreal brand nail products are 30% more likely and users of Revlon are 20% more likely to live in a household with an income of between \$50,000 and \$75,000. Users of the L’Oreal brand of nail care products also have a higher propensity to be Hispanic and to live in the Pacific region.

Boomers Lean Toward Max Factor, Gen-Xers Like Maybelline

Compared to women on average, users of Max Factor nail care products are much more likely to be in the 55- to 64-year-old age group. They also are more likely to have a household income of less than \$50,000. Maybelline users have a higher likelihood of being in the 35- to 44-year-old age group.

Younger Women Like N.Y.C New York Color

The N.Y.C. New York Color brand has an exceptional appeal to younger women. Compared to women on average, users of N.Y.C. are more than twice as likely to be under the age of 35. They also are much more likely to be single and to live in the Northeast.

Women and Professional Nail Care Services

Manicures and Pedicures Part of Women's World

Nearly 27 million adults went to a salon for a manicure, while 32 million engaged the services of a salon for a pedicure in the last six months. Women are around 10 times more likely than men to get a manicure (21% vs. 2%) or a pedicure (25.1% vs. 2.5%). More than 90% of those receiving manicures and pedicures are women.

Salons Depend on Core of Frequent Users of Manicure and Pedicure Services

Only 8% of women get four or more manicures in a six-month period, but they account for 37% of all women getting manicures. Women going to a salon for a manicure at least twice every six months represent 74% of the population of women buying manicure services from salons. A similar pattern holds for pedicures. Around 17% of women get two or more pedicures every six months. They constitute 70% of all women getting pedicures.

Younger Women Most Important Clients for Salon Services

In absolute terms, 18- to 34-year-old women are the most important part of the client base of salons for manicures and pedicures. They account for around 26% of women getting four or more manicures and 29% of those obtaining four or more pedicures.

Black Women Anchor Market for Manicure and Pedicure Services

Black women are especially likely to be frequent users of professional manicure and pedicure services. As a result, black women exercise a disproportionate influence in the market for salon manicure and pedicure services. They comprise 13% of the population of adult women but account for 21% of the population of women who obtained four or more manicures or pedicures in the past six months.

High-Income Women More Likely to Use Salon Services

There is a high correlation between household income and the use of manicure and pedicure salon services. For example, 33% of women with a household income of \$150,000 or more used a salon for a pedicure in the past six months, compared to only 12% of those with a household income of less than \$50,000. However, women of all income levels find their way to salons to get manicures and pedicures. Women with a household income of less than \$50,000 comprise around one-third of all women getting multiple manicures in the past six months.

Market for Professional Manicure and Pedicure Services Thrives in Urban Areas of Northeast

When controlled by region, women living in large metropolitan areas in the Northeast have the highest propensity to make multiple visits to salons for manicures and pedicures. Women in the Central region are least likely to turn to salons for manicures and pedicures.

“Salonistas” Profiled

Compared to women as a whole, salonistas (women frequenting salons for two or more manicure services in the last six months) are more likely to be black, live in urban areas, have a college degree or more and work on a full-time basis.

Salonistas Stay in Shape

Women who are frequent users of professional manicure and pedicure services are much more likely to work hard at staying fit. For example, women getting two manicures in the past six months are more likely than women on average to claim that they exercise regularly (68% vs. 54%) and to exercise three or more times per week (47% vs. 36%).

Fashion Has High Priority

As part of enhancing their image, salonistas exhibit a strong interest in fashion. For example, compared to women on average, they are much more likely to keep up with the latest fashions and to buy new clothes in order to keep up with the latest fashions.

Chapter 2 Topline Trends

- The dollar value of nail care product sales tracked by SymphonyIRI grew 21% during the 52 weeks ending December 2011.
- The growth in mass market nail care product sales was nearly three times higher than the 8.2% registered by cosmetics categories as a whole, and more than four times the increase experienced in the facial category, which experienced 5.3% growth, eye category (4.4%) and lip category (3.3%).
- During the 52 weeks ending April 15, 2012, the share of nail polish within the nail care category increased from 47% to 53%.
- Many industry analysts point to the Great Recession as the impetus for the creation of the nailcentric fashion culture now driving the growth of sales of do-it-yourself (DIY) nail care products.
- A rapid, continuous flow of a wide range of innovative technologies and products designed to empower women to imitate nail salon effects simply and cost-effectively on their own has been a driving force in the growth of the nail care category.
- Another factor in the explosive growth of sales in the nail care category is an increase in the number of frequent users of DIY nail care products.
- Rather than resulting in a decline in dollar sales of DIY nail care products, the post-recession growth in professional manicures and pedicure services is likely to contribute to continuing growth in the mass nail care market.
- Dollar sales of nail care products in the mass market are expected to reach \$2 billion for the year ending December 2016.

Overview of Market Trends

Nail Care Dollar Sales Outpace Other Cosmetics Categories

The dollar value of nail care product sales tracked by SymphonyIRI grew 21% during the 52 weeks ending December 2011. The growth in mass market nail care product sales was nearly three times higher than the 8.2% registered by cosmetics categories as a whole, and more than four times the increase experienced in the facial category, which experienced 5.3% growth, eye category (4.4%) and lip category (3.3%).

The nail category accounted for 24.6% of total dollar sales in cosmetics categories in 2011 but was responsible for more than half of the total growth in sales of cosmetics products between 2010 and 2011. [Table 2-1 and Figure 2-1]

Table 2-1

**Change in SymphonyIRI-Tracked Dollar Sales of Cosmetics by Category, 2010-2011
(in thousands of dollars)**

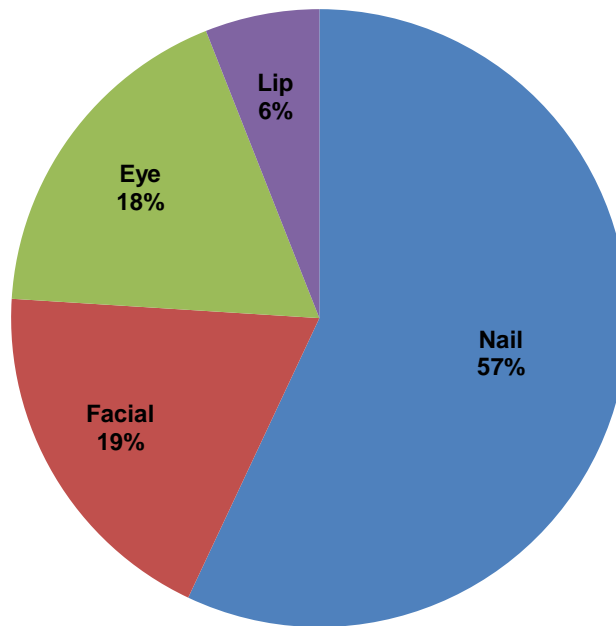
Category	Market Size		Market Growth 2010-2011		
	2011 Dollar Sales	% of Total 2011 Dollar Sales	Dollar Sales Change Year Ago	Dollar Sales % Change Year Ago	% of Dollar Change
Nail.....	\$924,904	24.6%	\$160,764	21.0%	56.7%
Facial	1,055,697	28.1	53,251	5.3%	18.8
Eye.....	1,237,782	32.9	52,241	4.4%	18.4
Lip.....	538,229	14.3	17,120	3.3%	6.0
Total.....	\$3,756,612	100.0%	\$283,376	8.2%	100.0%

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending December 25, 2010 and 2011.

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Figure 2-1

Percent of Growth in SymphonyIRI-Tracked Dollar Sales by Cosmetics Category, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks



Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more.

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Nail Care Products Continue Explosive Sales Growth in 2012

The explosive growth in mass market sales of nail care products continued into 2012, as dollar sales of nail care products grew by 26% for the 52 weeks ending April 15, 2012. Nail care product sales in the mass retailer channel tracked by SymphonyIRI totaled \$989.1 million, an increase of \$201.4 million over the previous year. Volume sales showed an increase of 18.3%. [Tables 2-2 and 2-3]

Table 2-2

**SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Product Type,
52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Product Type	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Artificial nails and accessories ...	\$93,457	\$3,471	3.9%	9.4%	(2.0)
Nail accessories/implements	160,106	8,931	5.9	16.2	(3.0)
Nail polish	528,663	158,897	43.0	53.4	6.5
Nail polish accessories	1,845	(1,525)	(45.2)	0.2	(0.2)
Nail polish removers	68,536	6,807	11.0	6.9	(0.9)
Nail treatment.....	129,917	19,993	18.2	13.1	(0.8)
Other (new products)	6,571	4,838	279.2	0.7	0.4
Total	\$989,094	\$201,413	25.6%	100.0%	0.0

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Table 2-3

**SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Dollar and Volume
Growth, 52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Category	\$ Sales Change	\$ Sales % Change 52 Weeks Ago	Volume Sales Change	% Change
Artificial nails and accessories	\$3,471	3.9%	\$17,610	0.3%
Nail accessories/implements...	8,931	5.9	57,253	0.6
Nail polish	158,897	43.0	144,159	34.1
Nail polish accessories.....	(1,525)	(45.2)	400	(45.8)
Nail polish removers.....	6,807	11.0	36,267	9.2
Nail treatment.....	19,993	18.2	18,491	13.6
Other (new product types).....	4,838	279.2	655	213.4
Total	\$201,413	25.6%	\$274,836	18.3%

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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It's All About Nail Polish

The robust growth in the nail care category as a whole masks significant underlying changes in the way consumers are allocating their nail care expenditures. Sales of nail polish have grown significantly faster than the sales registered by other product types within the nail care category. As a result, nail polish now has a larger share of the overall nail care market than it had before. During the 52 weeks ending April 15, 2012, the dollar share of nail polish within the nail care category increased from 47% to 53%, while the share attributed to other product types in the category declined. Nail polish accounted for 53% of all dollar sales of nail care products and was responsible for 79% of the growth in dollar sales of nail care products during this period. [Table 2-4 and Figures 2-2 and 2-3]

Table 2-4

Share of SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Product Type, 52 Weeks Ending April 15, 2011 vs. Previous 52 Weeks

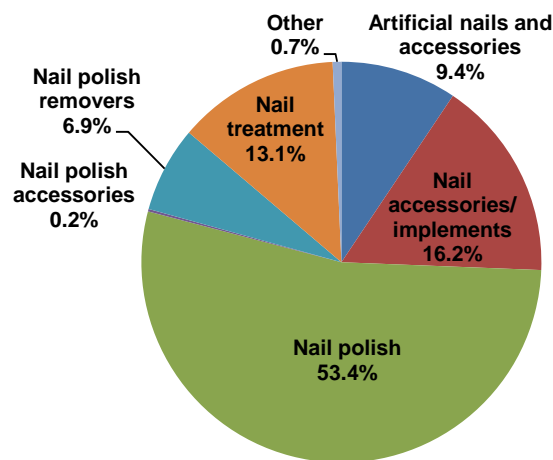
Segment	\$ Share		\$ Sales % Change 52 Weeks Ago
	52 Weeks Ending April 15, 2011	52 Weeks Ending April 15, 2012	
Artificial nails and accessories	11.4%	9.4%	3.9%
Nail accessories/implements	19.2	16.2	5.9
Nail polish	46.9	53.4	43.0
Nail polish accessories	0.4	0.2	(45.2)
Nail polish removers	7.8	6.9	11.0
Nail treatment	13.9	13.1	18.2
Other.....	0.4	0.7	279.2
Total	100.0%	100.0%	25.6%

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Figure 2-2

Nail Care Product Types as Percent of Total SymphonyIRI-Tracked Dollar Sales of Nail Care Category, 52 Weeks Ending April 15, 2012

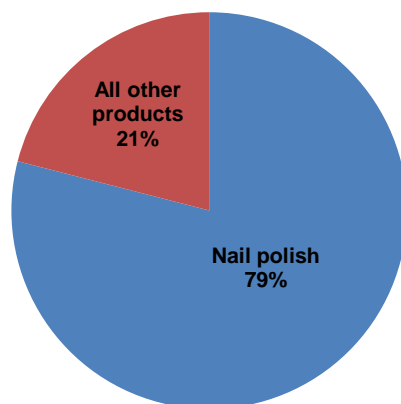


Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Figure 2-3

Percent of Dollar Change in Nail Care Category SymphonyIRI-Tracked Dollar Sales for 52 Weeks Ending April 15, 2012, Nail Polish vs. All Other Product Types



Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending December 25, 2010 and 2011.

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Trends Affecting the Growth of the Market

Nailcentric Fashion Culture Continues to Flourish during Economic Recovery

Many industry analysts point to the Great Recession as the impetus for the creation of the nailcentric fashion culture now driving the growth of sales of do-it-yourself (DIY) nail care products. The basic premise is that women needing to economize during hard economic times could make up for doing without pricey shoes and bags by indulging themselves with a far less expensive but nonetheless high-impact personal fashion statement on their nails. In the view of one industry observer, “Marketers say that what makes nail art so attractive to many women is that it remains an affordable luxury in tough economic times, providing a fashion-forward appearance for a minimal investment” (*Chain Drug Review*, March 26, 2012).

However, the nail care craze has continued even in post-recession America. According to Experian Simmons National Consumer Study (NCS) data, as the economy has started to show signs of recovery, the number of women using DIY nail care products has continued to increase.

In 2011 the number of women taking care of their nails themselves reached approximately 61 million. The percentage increase in the number of women using nail care products was significantly higher than the increase in the population of women as a whole between 2010 and 2011 (3.1% vs. 0.8%). [Table 2-5]

Table 2-5

Number of Women Using Nail Polish/Nail Care Products in Last 30 Days by Number of Times, 2010 vs. 2011 (in thousands)

Women Categorized by No. of Times Using Nail Polish/Nail Care Products in Last 30 Days	Women Using Nail Polish/Nail Care Products in Last 30 Days				
	No.			% of Population of Women	
	2011	2010	% Increase	2011	2010
10+	4,670	4,571	2.2%	4.0%	3.9%
7-9	4,515	4,217	7.1	3.9	3.6
5-6	10,340	8,626	19.9	8.9	7.4
2-4	28,678	28,333	1.2	24.5	24.4
1.....	12,675	13,304	-4.7	10.8	11.5

—continued—

Table 2-5

**Number of Women Using Nail Polish/Nail Care Products in Last 30 Days by Number of Times, 2010 vs. 2011
(in thousands) [Cont.]**

Women Categorized by No. of Times Using Nail Polish/Nail Care Products in Last 30 Days	Women Using Nail Polish/Nail Care Products in Last 30 Days				
	No.			% of Population of Women	
	2011	2010	% Increase	2011	2010
Total using nail polish/ nail care products	60,878	59,052	3.1%	52.1%	50.9%
Total population of women	116,821	115,942	0.8%	—	—

Source: Compiled by Packaged Facts based on data from Experian Simmons National Consumer Study, Fall 2011.
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Never-Ending Flow of New Products Boosts Nail Care Growth

A rapid, continuous flow of a wide range of new technologies and products designed to empower women to imitate nail salon effects simply and cost-effectively on their own has been a driving force in the growth of the nail care category. Nail care marketers have created innovative ways to enable women to use their nails as “miniaturized canvasses for some of the nerviest experiments that fashion permits.”

The sheer volume of creative, easy-to-use DIY nail care products and techniques released has had an impact on the extraordinary growth of the nail care category. According to the president of Coty Beauty, marketer of Sally Hansen and OPI, the rise in nail care sales is due largely to the fact that “these days there is so much more to buy” (*The New York Times*, April 5, 2012).

DIY Press-On Manicures Low-Cost Alternative to Minx Nails

Minx nails—adhesive nail stickers made in a range of wild colors and patterns that are available only in salons—have had a significant impact on the nurturing of today’s nailcentric fashion culture. As one industry observer opines, “Our love affair with nails can be traced to 2008 and the arrival of Minx nails, flexible polymers that are heatcured to nails at a salon and come in custom or ready-made designs. Celebs such as Rihanna, Beyoncé and Lady Gaga soon caught on to the trend, sporting gold and silver foils, fishnet and houndstooth patterns.” In the years following the launch of Minx, “Nails have become an accessory, and the demand

for more accessible alternatives to Minx and expensive salon visits has trickled down to the mass category” (*Cosmetics*, January/February 2012).

Thus, DIY products mimicking the salon effects of Minx nails have had a major influence on the expansion of the DIY nail care market. Sally Hansen’s Salon Effects Real Nail Polish Strips and the ImPress Press-On Manicure of Broadway Nails are just two examples.

DIY Gel Manicures Imitate Expensive Nail Salon Treatments

Another breakthrough fueling the growth of the nail care category was the introduction of products allowing consumers to apply their own gel manicures at home. A salon gel manicure lasts twice as long as a traditional manicure but can cost \$50 and up at a salon. SensatioNail™ gel polish launched in November 2011 by the Nailene brand of Pacific World Corporation provides an example of the basic appeal made by marketers to promote salon-type nail care products now available for DIY use. According to Pacific World: “At the forefront of innovation, SensatioNail is a premium collection of at-home gel polish products that will provide users with up to two weeks of dazzling, damage-proof wear. With the resilient benefits of salon gel services—no chipping, no smudging, no breaking—in a do-it-yourself format, SensatioNail is a high performance, time saving and cost-effective alternative.”

Textured Nails Create Their Own Niche

Products enabling DIYers to create textured nails also contributed to the explosive growth of the nail care category.

- Crackle nail polish is one such product. OPI’s Shatter was first released in 2011 and was an early example of a product bringing crackle effects into the mass market. Another example is Sally Hansen’s Crackle Overcoat, which comes in eight different shades, can be used with any nail polish color, and is designed to create a “unique mosaic design.”
- Magnetic nail polish, a newer entry in the field, is increasingly seen as offering stiff competition to crackle nail polish. Magnetic nail polish contains iron particles. With the help of a magnet, the user can use the nail polish to create wavy shapes on nails. Only Nail Lacquer is one example of this product type.

- Glitter nail polish provides another way to make nails stand out. One example is Pink-a-Boo by Essie, which is described as “sheer pink with glittery sparkle.”

Nail Care Marketers Turn to Celebrity Tie-Ins

Nail care brands often tie new products to celebrities and movie releases. OPI is an example of a brand depending heavily on this marketing strategy. OPI has linked new releases in its Shatter collection to Katy Perry and Serena Williams as well as the latest “Pirates of the Caribbean” film. In early 2011 Nicole by OPI launched eight new shades corresponding to eight songs by pop star Justin Bieber and it has a Kardashian Kolor line of nail polishes. In May 2012 OPI released a series of polishes with themes tied to the “Spider-Man” film.

Frequent DIY Nail Care Product Users Propel Market Growth

Another key factor in the explosive growth of sales in the nail care category is an increase in the number of women who make frequent use of DIY nail care products. Between 2010 and 2011, the number of women using nail care products five or more times in the past 30 days increased by 12.1%, while the number of women using nail care products four or fewer times decreased by 0.7%. The percentage of women categorized as heavy users of nail care products increased from 14.9% to 16.8%, as the proportion of women relying less heavily on DIY nail care fell from 35.9% to 35.3%. [Table 2-6]

Table 2-6

Number of Women Using Nail Polish/Nail Care Products at Home in Last 30 Days by Number of Times, 2010-2011
(in thousands)

Women Categorized by No. of Times Using Nail Polish/Nail Care Products in Last 30 Days	Women Using Nail Polish/Nail Care Products at Home in Last 30 Days				
	No.			% of Population of Women	
	2011	2010	% Increase	2011	2010
5 or more times.....	19,525	17,414	12.1%	16.7%	15.0%
1-4 times.....	41,353	41,637	-0.7	35.4	35.9
Total.....	60,878	59,052	3.1%	52.1%	50.9%

Source: Compiled by Packaged Facts based on data from Experian Simmons National Consumer Study, Fall 2011. This material is reprinted with permission.

“Salonistas” Contribute to Growth in DIY Nail Care Products

Conventional wisdom sees a correlation between the growth in nail care product sales and a decline in the use of nail salon services. In fact, as the DIY nail care category experienced remarkable growth, the market for nail salon services did decline. According to *Nails Magazine* “2011-2012 The Big Book,” the nail salon services market fell nearly 5% in 2009 and was still below its 2008 level in 2010.

However, all signs now point to a return to popularity of nail salon services. According to Experian Simmons NCS data, an improving economic picture in 2011 likely resulted in a sharp uptick in the number of women obtaining manicures and pedicures in salons. In 2011 the number of women having two or more manicures in a six-month period (defined as “salonistas” in this report) increased from 16.3 million to 18.1 million, or 11.3%. The proportion of women going to a salon for two or more pedicures in a six-month period grew by 7%. The number of women paying for two or more salon manicures and pedicures increased by nearly one million and grew by 7.9%. [Table 2-7]

Moreover, *Nails Magazine* “2011-2012 Big Book” estimates that nail salon services grew from \$6.2 billion in 2010 to \$6.6 billion in 2011, an increase of 10.6%. The nail salon market is expected to reach \$7.3 billion in 2012, a year-over-year increase of 10.6%.

One reason for the growth in nail salon services is the creation of a mass market for salon services by Vietnamese-owned nail salons. According to *Nails Magazine*, Vietnamese-owned nail salons now account for 40% of the U.S. professional nail care market by offering their services at prices far below the standard levels of more upscale salons. The result has been the democratization of the professional nail care market. As noted by the editor of *Nails Magazine*, “Getting your nails done used to be a privilege for the upper class or upper middle class. Vietnamese-owned salons have made it more of a service for everyone.” (*Orange County Business Journal*, May 8, 2011).

The question is whether DIY nail care sales will decline as women return to salons to get professional manicures and pedicures. Paradoxically, a Packaged Facts analysis of Experian Simmons NCS data indicates that the reverse will be true. The reason is that the more women go to salons for manicures, the more they buy and use DIY nail care products.

- One in four (25%) salonistas used DIY nail care products five times or more in the past 30 days, compared to only 15% of other women. Salonistas are nearly twice as likely as other women to have used DIY nail care products two to four times during

this period (39% vs. 22%). They are slightly less likely than other women to have used nail care products only once in the past 30 days. [Table 2-8]

- Packaged Facts estimates that in 2011 the number of DIY uses of nail care products in the previous 30 days increased by 13.4 million. Nearly half of this growth (46%) was due to the increase of 6.2 million DIY nail care product uses by salonistas. [Table 2-9]

Thus, the data show that salonistas are at the core of the nailcentric fashion culture helping to drive nail care market growth. Rather than resulting in a decline in dollar sales of DIY nail care products, the expected post-recession growth in professional manicure and pedicure services is likely to contribute to continuing growth in the mass nail care market.

Table 2-7

Use of Manicure and Pedicure Services by Women in Last Six Months, 2010 vs.2011

Category	2011	2010
Women having 2 or more manicures in past six months		
Number (in thousands)	18,126	16,284
% of population of women.....	15.5	14.0
% increase 2010-2011	11.3	—
Women having 2 or more pedicures in past six months		
Number (in thousands)	20,461	19,109
% of population of women.....	17.5	16.5
% increase 2010-2011	7.1	—
Women having 2 or more both manicures and pedicures in past six months		
Number (in thousands)	13,296	12,325
% of population of women.....	11.4	10.6
% increase 2010-2011	7.9	—

Source: Compiled by Packaged Facts based on data from Experian Simmons National Consumer Study, Fall 2011. This material is reprinted with permission.

Table 2-8

Number of Times Using Nail Polish/Nail Care Products in Last 30 Days, Women Having Two or More Manicures in Last Six Months vs. Other Women

No. of Times	Salonistas (Had two or more manicures in last six months)	Other Women (Did not have two or more manicures in last six months)
5 or more	24.9%	15.2%
2-4	38.6	22.0
1.....	9.7	11.1

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Table 2-9

Impact of Women Having Two or More Salon Manicures on Increase of DIY Use of Nail Polish/Nail Care Products, 2010 vs. 2011 (in thousands)

Category	Increase in No. of DIY Uses of Nail Polish/Nail Care Products in Last 30 Days, 2010 vs. 2011	% of Total Growth in DIY Uses	% of Population of Women
Had two or more manicures in last six months	6,155	45.9%	15.5%
Did not have two or more manicures in last six months	7,250	54.1	84.5
Total	13,405	100.0%	100.0%

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Demographics Favorable for Nail Care Growth

As seen in Chapter 5, “The Nail Care Consumer,” black women are 46% more likely and Latinas are 30% more likely than women on average to have used nail polish and nail products five or more times in the past 30 days. Non-Hispanic white women are significantly less likely to do their own nails with this degree of frequency. Moreover, women under the age of 45 are more likely to be frequent DIY nail care product users.

Fundamental demographic trends will result in an increasing number of women fitting the profile of frequent DIY nail care product users. The Census Bureau projects that between

2010 and 2020 the number of Latinas, black and other multicultural women under the age of 45 will increase 18.8%, while the population of non-Hispanic white women in this age group will fall 1.8%. The percentage of multicultural women in the under-45 age group will grow from 39.6% to 44.2%. [Table 2-10]

Table 2-10

Growth in Population of 20- to 44-Year-Old Women by Race and Hispanic Origin, 2010-2020
(in thousands)

Category	Year		Growth 2010-2020	
	2010	2020	No.	%
Non-Hispanic white				
Number	31,388	30,814	-574	-1.8%
% of population	60.4	55.8	—	—
Latina, black and other multicultural....				
Number	20,505	24,360	3,855	18.8
% of population	39.6	44.2	—	—
All	51,893	55,174	3,281	6.3%

Source: Compiled by Packaged Facts based on data from U.S. Census Bureau.

Size and Growth of the Nail Care Market

Many Factors Point to Continuing Strong Growth in Nail Care Market

Packaged Facts expects that the trends highlighted previously in this chapter will combine to create conditions favorable to a continuation in the robust growth of the nail care category experienced in the past three years. Trends supporting the long-term growth of nail care product sales include:

- the persistence of the nailcentric fashion culture that has transformed women's nails into fashion accessories;
- a continuing flood of innovative, fashion-forward nail care products that will further empower women to imitate nail salon effects in their own home in a fun and cost-effective way;
- an increase in the number of women using DIY nail care products on a frequent basis;
- a growing overlap between women who avail themselves of professional nail care services and women who make frequent use of DIY nail care products; and
- fundamental demographic trends favoring a growth in the segment of the women's population most likely to use DIY nail care products.

Projected Growth in the Nail Care Market

Packaged Facts estimates that the nail care market has grown at a compound annual growth rate (CAGR) of 11.4% in the 2006-2011 period. However, use of a CAGR to evaluate nail care market growth masks the fact the last two years have seen growth averaging 26%, while the first three years of the period registered a CAGR of 2.7%.

Against this background, Packaged Facts projects that dollar sales of nail care products in the mass market will continue the high rate of growth experienced in the past two years but will start to moderate in the final years of the forecast period. This projection results in a CAGR of 16.7% between 2011 and 2016, which is somewhat lower than the explosive growth experienced between 2009 and 2011 but substantially higher than the growth rate between 2006 and 2011. Based on these assumptions, dollar sales of nail care products in the mass retail channel are expected to reach \$2 billion for the year ending December 2016. [Table 2-11]

Table 2-11

Projected SymphonyIRI-Tracked Dollar Sales of Nail Care Products, 2011-2016
(in thousands of dollars)

Year	Dollar Sales	% Cumulative Growth
2016	\$1,998,366	116.1%
2015	1,816,696	96.4
2014	1,622,050	75.4
2013	1,410,479	52.5
2012	1,156,130	25.0
2011	924,904	—

Source: Packaged Facts

Chapter 3 Leading Nail Care Marketers: Who's Up and Who's Down

- The top spot in the rankings of nail care marketers tracked by SymphonyIRI belongs to Coty Beauty, which garnered 36.2% of the total mass nail care market during the 52 weeks ending April 15, 2012.
- The market share of Coty Beauty fell by 1.8 points from the previous year, as its 19.7% sales growth failed to keep pace with the nail care market as a whole.
- L'Oreal USA experienced a 4.7 point increase in market share as a result of a 353.5% increase in dollar sales coming from its acquisition of the Essie brand.
- Over the past five years major marketers in the cosmetics industry have moved aggressively through mergers and acquisitions to enhance their competitive position and take advantage of growing opportunities in the nail care market.
- The string of acquisitions by major marketers has resulted in further consolidation in the market. The share attributed to the top 11 marketers grew by 1.4 points during the 52 weeks ending April 15, 2012.

Overview

Coty Beauty Maintains Top Position but Slips Slightly

The top spot in the rankings of nail care marketers tracked by SymphonyIRI belongs to Coty Beauty, which garnered 36.2% of the total mass nail care market during the 52 weeks ending April 15, 2012. In distant second place is Revlon Inc. (11.1%), followed by Kiss Products Inc. (9.2%), L'Oreal USA (7.2%) and Pacific World (5.8%).

The market share of Coty Beauty fell by 1.8 points from the previous year, as its 19.7% sales growth failed to keep pace with the nail care market as a whole. The biggest move in the rankings of major nail care marketers was made by L'Oreal USA, which experienced a 4.7 point increase in market share as a result of a 353.5% increase in dollar sales coming from its acquisition of the Essie brand.

Other winners were Revlon Inc., which gained 4.4 points in market share due to its acquisition of Mirage Inc. (owner of the Sinful Colors brand) and Pacific World, which gained 3.6 points because of its merger with W.E. Bassett. Other gainers were Markwins International Corp. (+0.6 points) and Kramer Labs and CCA Industries, each of which gained 0.3 points in market share.

Those losing market share were Kiss Products Inc. (-1.2 points), Helen of Troy Inc. (-0.9 points), Jordana Cosmetics Corp. (-0.4 points), Prestige Brands Holdings (-0.3 points) and Alva-Amco Pharmacal Companies (-0.1 points).

Smaller marketers and private labels lost out to major marketers and their brands. Private label products lost 0.5 points in market share, while the market share of all other marketers fell 0.5 points. [Table 3-1]

Table 3-1

SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Leading Marketers, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Coty Beauty	\$357,958	\$58,828	19.7%	36.2%	(1.8)
Revlon Inc. (includes Mirage Inc.)	109,482	30,141	38.0	11.1	4.4
Kiss Products Inc... ..	90,727	8,695	10.6	9.2	(1.2)
L'Oreal USA	70,968	50,891	353.5	7.2	4.7
Pacific World (includes W.E. Bassett)	57,174	3,877	7.3	5.8	3.6
Markwins International Corp.	27,031	10,504	63.6	2.7	0.6
Helen of Troy Inc.....	24,208	(1,426)	(5.6)	2.4	(0.9)
Jordana Cosmetics Corp.	15,023	(88)	(0.6)	1.5	(0.4)
Kramer Labs	14,945	5,768	62.9	1.5	0.3
Prestige Brands Holdings.....	8,526	(1,140)	(11.8)	0.9	(0.3)
Orly International.....	8,458	1,375	19.4	0.9	0.0
CCA Industries Inc.	7,859	4,010	104.2	0.8	0.3
Alva-Amco Pharmacal Companies.....	7,016	(894)	(14.6)	0.7	(0.1)
Subtotal top 13 marketers.....	799,375	170,541	27.1	80.8	1.0
Private label	110,855	18,688	20.3	11.2	(0.5)
All others	78,864	12,184	18.3	8.0	(0.5)
Total	\$989,094	\$201,413	25.6%	100.0%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Mergers and Acquisitions Re-shape Competitive Landscape in Nail Care Category

Over the past five years major marketers in the cosmetics industry have moved aggressively through mergers and acquisitions to enhance their competitive position and take advantage of growing opportunities in the nail care market. However, some of the moves were more successful than others.

- In December 2010 Coty Beauty Inc. followed up its 2007 purchase of Del Laboratories (Sally Hansen and New York Color) with the acquisition of OPI Products, a dominant player in professional nail care products distributed through the salon channel. In 2012 Coty Beauty retained its overall leadership in the nail care category with 36.2% of all nail care sales, but its market share slipped by 1.8 points.
- In March 2011 Revlon acquired Mirage Cosmetics, owner of the Sinful Colors brand. Its market share increased 4.4 points between April 2011 and April 2012.
- In November 2011 Pacific World Corp., whose brands include Nailene and Fing'rs, merged with the W.E. Basset Co., marketer of the Trim line of nail clippers and implements. The combination of the brands of Pacific World and W.E. Bassett Co. gave Pacific World a 3.8 point increase in market share.
- The acquisition with the most significant impact on nail care market dollar sales in the 52 weeks ending April 15, 2012 was L'Oreal USA's 2010 acquisition of the Essie brand, which has a significant presence in the salon channel. L'Oreal USA moved quickly to introduce Essie into the mass channel and as a result generated a massive increase in its market share in the nail care category. Between April 2011 and April 2012 L'Oreal USA gained 5 points in market share, growing from 1.8% to 6.8% of the market. [Table 3-2]

Table 3-2

SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Leading Marketers, Changes in Market Share 52 Weeks Ending April 15, 2012 vs. April 15, 2011 (in thousands of dollars)

Marketer	\$ Share	
	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
L'Oreal USA	6.8%	5.0%
Revlon Inc.	11.1	4.4
Pacific World/W.E. Bassett	5.8	3.8
Markwins International Corp.	2.7	0.6
CCA Industries Inc.	0.8	0.3
Kramer Labs	1.5	0.3
Alva-Amco Pharmacal Companies.	0.7	(0.1)
Jordana Cosmetics Corp.....	1.5	(0.4)
Helen of Troy Inc.....	2.4	(0.9)
Kiss Products Inc... ..	9.2	(1.2)
Coty Beauty	36.2	(1.8)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Major Marketers Consolidate Market Share

The string of acquisitions by major marketers has resulted in further consolidation in the market. Major marketers in the nail care category increased their share of the market during the 52 weeks ending April 15, 2012. While the share attributed to the top 11 marketers grew by 1.4 points during this period, the market share of all other marketers, including private labels, declined by 1.4 points. [Table 3-3]

Table 3-3

SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Top 11 Marketers, Changes in Market Share 52 Weeks Ending April 15, 2012 vs. April 15, 2011 (in thousands of dollars)

Marketer	\$ Share	
	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Top 11 marketers	74.3%	1.4
All others (including private labels)	25.7	(1.4)
Total	100.0%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Top Marketers Focus on Narrow Range of Products

Most leading marketers in the nail care category generate the vast majority of sales from just one or two product types. For example:

- L’Oreal USA derives 100%, and Coty Beauty 94%, of their nail care revenues from nail polish and nail treatment products.
- Kiss Products generates 91% of nail care sales from two product types: artificial nails and accessories and nail polish.
- Helen of Troy, Jordana and Kramer Labs depend on one product type for 100% of their sales in the nail care category. [Table 3-4]

Table 3-4

Percent of SymphonyIRI-Tracked Dollar Sales of Leading Marketers of Nail Care Products by Product Type, 2012

Product Type	Coty Beauty	Revlon Inc.	Kiss Products Inc.	L'Oreal USA	Pacific World
Artificial nails and accessories ...	—	1.2%	79.3%	—	23.4%
Nail accessories/implements	4.4	6.1	8.6	—	71.0
Nail polish	78.5	85.7	12.1	91.9	2.4
Nail polish accessories	0.3	—	—	—	—
Nail polish removers	0.9	—	—	—	—
Nail treatment	15.4	7.1	—	8.0	2.2
Other (new products)	3.9	—	—	—	1.3
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Product Type	Markwins International	Helen of Troy Inc.	Jordana Cosmetics Corp.	Kramer Labs	Prestige Brands Holdings
Artificial nails and accessories ...	—	—	—	—	—
Nail accessories/implements	2.8	100.0	—	—	0.1
Nail polish	95.1	—	99.4	—	—
Nail polish accessories	—	—	—	—	—
Nail polish removers	—	—	—	—	99.9
Nail treatment	—	—	0.6	100.0	—
Other (new products)	2.0	—	—	—	—
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Profiles of Leading Nail Care Marketers

Coty Beauty

Coty Beauty in the United States traces its lineage to the founding of Coty Beauty in Paris in 1905. The company has 12,000 employees worldwide and three corporate headquarter offices (in New York, Paris and Geneva) managing a portfolio of brands in fragrance, color cosmetics (including nail) and skin and body care. For the fiscal year ending June 30, 2011, global sales totaled \$4.1 billion.

In recent years Coty Beauty has expanded its presence in the U.S. mass nail care market through an aggressive acquisition program. In 2007 Coty Beauty purchased Del Laboratories (marketer of the Sally Hansen and New York Color brands) and in 2010 it acquired OPI Products, a dominant player in professional nail products distributed through the salon channel. As a result, nearly 9% of the worldwide sales of Coty Beauty (\$358 million) are generated from its the mass nail care market in the United States, where it ranks first among marketers active in the mass channel tracked by SymphonyIRI.

Sally Hansen has become the single most lucrative brand in the mass nail care market. With dollar sales of \$301 million in the 52 weeks ending April 15, 2012, the Sally Hansen brand achieved total nail care market share of 30.4%. Although Sally Hansen lost 4.5 points in market share of nail polish due to the success of the Essie brand of L'Oreal USA, it still controls 43.5% of the nail polish segment. The Sally Hansen brand experienced significant results in its nail accessories/implements business as a result of a decision by Coty Beauty to combine the Sally Hansen brand with the LaCross brand. The dollar sales of Sally Hansen in this segment quadrupled to \$15.7 million, and its market share grew from 2.5% to 9.8%. However, the Sally Hansen brand lost market share in both the nail treatment and nail polish remover segments.

The OPI brand has also performed well for Coty Beauty. The brand kept pace with overall nail care market growth during the year ending April 15, 2012, with dollar sales growing 25.1% to \$28.9 million and 2.9% of the market. Other Coty Beauty brands are Nicole (\$12.6 million in dollar sales), New York Color (\$8 million in dollar sales) and Rimmel (\$5.3 million in dollar sales).

Experian Simmons National Consumer Study (NCS) data show that both Sally Hansen and OPI are extremely popular among women who frequent nail salons. OPI is used by 32% of women who report having two or more manicures in the past six months (defined in this report as “salonistas”), compared to only 8% of all women. Sally Hansen is used by 15% of salonistas, compared to only 8% of women as a whole.

Revlon Inc.

Revlon Inc., based in New York, New York, describes itself as a global color cosmetics, hair color, beauty tools, fragrances, skincare, anti-perspirant/deodorants and beauty care products company. In 2011 Revlon Inc. reported net U.S. sales in of \$757.4 million. On a worldwide basis, 22% of its revenues come from large mass-volume retailers and chain drug stores, including Walmart, Walgreens, CVS and Target in the United States. Packaged Facts estimates that the mass-market nail care category accounts for approximately 15% of the U.S. revenues of Revlon Inc.

In the 52 weeks ending April 15, 2012, the Revlon brand, which is marketed by Helen of Troy Inc. and Pacific World Corp. as well as Revlon Inc., maintained its position as the second-leading brand in the nail care category. During this time period the Revlon brand had 9.3% of the nail care market and saw its sales increase 29% over the previous 52 weeks.

Revlon Inc. significantly enhanced its competitive position in the nail care category with its March 2011 acquisition of Mirage Cosmetics, owner of the Sinful Colors brand, which is widely distributed by mass retailers. As noted by *Women's Wear Daily* (March 25, 2011), “Mirage Cosmetics is best known for its speed to market with the hottest nail polish shades, maintaining 14 promotions per year.” According to comments made by a Revlon spokesperson at the time of the acquisition, “We will continue to utilize the successful Sinful Colors business model, namely, speed to market with on-trend and exciting new product introductions and highly effective in-store promotional programs.”

Revlon Inc. gained immediate results from its acquisition of Mirage Cosmetics. One measure of success came from a 3.9% increase of its U.S. net sales in 2011. According to the company's 2011 annual report, the increase was primarily driven by the inclusion of the net sales of Sinful Colors beginning in March 2011 as well as higher net sales of Almay color cosmetics and Revlon Color silk hair color.

Another success metric was an increase in Revlon Inc.'s market share in the nail care category. In the 52 weeks ending April 15, 2012, Revlon Inc. gained 4.4 points in market share as a result of its acquisition of Sinful Colors. Revlon now holds second place in the rankings of nail care marketers with 11.1% of the mass nail care market in the United States.

Kiss Products Inc.

Based in Port Washington, New York, Kiss Products Inc. had its start in the beauty supply market and subsequently branched out into the mass-market channel. The company bills itself as the “first company to bring quality, professional nail care directly to the consumer, creating easy-to-use, all-in-one kits so she can achieve salon results at home.”

In addition to the Kiss brand, Kiss Products Inc. also markets Broadway Nails. The kits of Broadway Nails include what the company describes as “easy, glue-on, full-cover nails that make getting a salon-like manicure at home easy for any consumer.”

Kiss Products Inc. ranks third in the mass nail care market in the United States with a market share of 9.2% and total dollar sales of \$90.7 million for the 52 weeks ending April 15, 2012. Around 80% of all of the dollar sales of Kiss Products Inc. in the mass nail care market come from artificial nails and accessories.

Kiss Products Inc. dominates the artificial nails and accessories segment of the nail care market. The company controls 77% of this \$93.5 million segment. In the 52 weeks ending April 15, 2012, dollar sales of artificial nails and accessories marketed by Kiss Products totaled \$71.9 million. The Kiss brand accounted for 50% of all sales in the segment, while the Broadway Nails brand generated 26.9% of sales.

Kiss Products Inc. also has a growing presence in the nail polish segment. In the 52 weeks ending April 15, 2012, its market share in the nail polish segment increased 50% from 1.4% to 2.1% and its dollar sales grew 118% to reach \$11 million.

The ImPress Press-On Manicure collection is the latest example of a Broadway Nails product. ImPress covers the entire nail and comes in 36 styles covering 18 colors and 18 patterns. According to a company spokesperson, the benefit of ImPress is that it is a “full-cover nail that doesn’t need glue like traditional artificial nails and has no drying time like enamel. . . .Unlike polish, where you have to wait for it to dry or to find time to remove it,

ImPress provides instant gratification. You press them on and you're done. You're ready to go."

The launch of ImPress was supported by the company's first-ever celebrity endorsement (Nicole Scherzinger of "Dancing with the Stars" and "X-Factor"). It was also backed by a television commercial targeting 18- to 24-year-old women that appeared on shows such as "The Vampire Diaries" and "The Kardashians" (*Chain Drug Review*, January 16, 2012).

SymphonyIRI data displayed in Chapter 4, "Nail Care Products and Brands: What's Hot and What's Not," show that the marketing campaign supporting the launch of the ImPress line of artificial nails paid off. As of April 15, 2012—barely four months after its arrival in the marketplace—ImPress had generated \$5.4 million in dollar sales in the mass market.

L'Oreal USA

L'Oreal USA, based in New York, New York, is a subsidiary of L'Oreal, which is headquartered in Paris. L'Oreal is a worldwide manufacturer and marketer of fragrances and hair care, hair color, skin care and color cosmetics products.

In April 2010 L'Oreal USA set out to remedy the lack of a strong presence in nail care, the fastest growing category in the cosmetics world, by acquiring Essie Cosmetics, a Queens, New York-based nail polish marketer. At the time of the acquisition, according to *Crain's New York Business* (April 21, 2010), Essie produced nail polish in more than 300 different colors and was selling nail polish in more than 250,000 salons in 101 countries.

L'Oreal USA moved quickly to introduce Essie into the mass channel and as a result generated a massive increase in its market share in the nail care category. During the 52 weeks ending April 15, 2012, L'Oreal USA gained 4.7 points in mass-market share, growing from 2.5% to 7.2% of the market. L'Oreal's ability to leverage the acquisition of Essie so quickly was highlighted by *Advertising Age* (November 7, 2011): "Part of L'Oreal's recent success . . . has come from an agility that's rare for big, traditional beauty marketers."

The impact of Essie on SymphonyIRI-tracked dollar sales of L'Oreal USA in the nail polish segment was even more stunning. In the 52 weeks ending April 15, 2012, the dollar sales of the Essie brand grew more than 400% to \$61.2 million, and its share of the mass nail care market increased from 1.5% to 6.2%. As a result, L'Oreal USA picked up 10 points of

market share in the nail polish segment, jumping from 2% to 12.3% of the mass market for nail polish.

L’Oreal USA also had significant success in the nail treatment segment following its acquisition of Essie. Its market share in the segment increased 2.6 points due to an increase of nearly 500% in the dollar sales of Essie brand nail treatment products.

In addition to the Essie brand, the mass-market brands marketed by L’Oreal in the United States and tracked by Symphony IRI are L’Oreal and Maybelline. Experian Simmons NCS data show that each brand appeals to different demographic segments, a finding that suggests L’Oreal USA has wide coverage of the market.

- The Essie brand attracts women under the age of 45, those who have never married and those who are college graduates. Essie aficionados are more than twice as likely as women on average to live in the Northeast and to have a household income of \$150,000 or more.
- The L’Oreal brand of nail care products appeals to middle-income women. Compared to women on average, users of L’Oreal brand nail products are 30% more likely to live in a household with an income of between \$50,000 and \$75,000. Users of the L’Oreal brand of nail care products also have a higher propensity to live in a household with five or more people and in one with three or more children.
- Maybelline users have a higher likelihood of being in the 35- to 44-year-old age group and to attract multicultural women who have a relatively high likelihood of using professional nail salon services on a frequent basis.

Chapter 4 Nail Care Products and Brands: What's Hot and What's Not

- The top four marketers of nail polish account for 83% of mass market dollar sales of nail polish. Coty Beauty alone is responsible for more than half (53.2%) of nail polish sales.
- As a result of its acquisition of the Essie brand, L'Oreal USA gained 10 points of market share in the nail polish segment during the 52 weeks ending April 15, 2012.
- In the 52 weeks ending April 15, 2012 dollar sales of the Essie nail polish brand more than quintupled, catapulting it to second place with a 10.6% market share.
- Private labels comprise 27.6% of sales of nail accessories/implements, a market share that exceeds the 23.5% share enjoyed by Pacific World as the result of its merger with W.E. Bassett.
- Smaller marketers laid siege to Coty Beauty in the nail treatment segment, which experienced a 3.8 point decline in this segment during the 52 weeks ending April 15, 2012.
- Private labels account for 78% of dollar sales of nail polish removers. They gained 5.5 points in market share in the 52 weeks ending April 15, 2012.
- The Sally Hansen brand maintained its position as the leading brand in the mass nail care market with 30.4% of the nail care market.
- Sally Hansen's Crackle Overcoat nail polish had the largest impact of any new nail polish product in the mass nail care market. For the 52 weeks ending April 15, 2012 it registered dollar sales of \$24 million.

Nail Care Product Segments

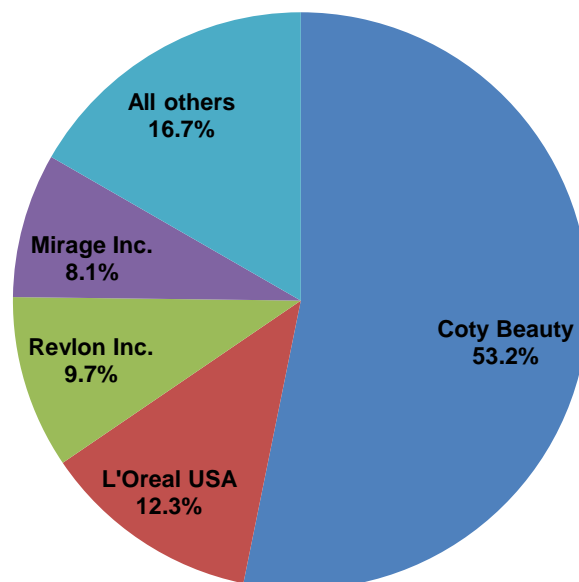
Nail Polish Market Dominated by a Few Big Players

As seen in Figure 4-1, the top four marketers of nail polish account for 83% of mass market dollar sales of nail polish. Coty Beauty alone is responsible for more than half (53.2%) of nail polish sales. Other marketers with major shares of the nail polish market include L'Oreal USA (12.3%), Revlon Inc. (9.7%) and Mirage Inc. (8.1%).

The top 14 marketers of nail polish generate 96.4% of all dollar sales in the mass nail polish segment. However, the market share of the companies now among the leaders in the nail polish segment declined slightly (-0.3%). Private label dollar sales of nail polish more than tripled, resulting in a market share increase of 1.2 points. [Table 4-1]

Figure 4-1

Percent Share of SymphonyIRI-Tracked Dollar Sales of Nail Polish for 52 Weeks Ending April 15, 2012, Top Four Marketers vs. All Others



Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Table 4-1

**SymphonyIRI-Tracked Dollar Sales of Nail Polish by Leading Marketers,
52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Coty Beauty	\$281,030	\$55,580	24.7%	53.2%	(7.8)
L'Oreal USA	65,249	47,153	260.6	12.3	10.0
Revlon Inc.	51,231	18,822	58.1	9.7	0.9
Mirage Inc.	42,591	8,067	23.4	8.1	(1.3)
Markwins International Corp.	25,727	10,513	69.1	4.9	0.8
Jordana Cosmetics Corp.....	14,931	(158)	(1.0)	2.8	(1.3)
Kiss Products Inc.	11,006	5,957	118.0	2.1	0.7
Orly International Inc.	7,120	1,347	23.3	1.3	(0.2)
Bari Cosmetics Ltd.	3,720	3,440	1,231.2	0.7	0.6
Scherer Inc.	1,742	(212)	(10.9)	0.3	(0.2)
Beauty 21 Cosmetics	1,633	839	105.5	0.3	0.1
Brucci Ltd.	1,399	(325)	(18.9)	0.3	(0.2)
Pacific World Corp.	1,384	304	28.1	0.3	(0.0)
Townley Cosmetics	1,054	1,035	5,479.8	0.2	0.2
Subtotal top 14 marketers	509,817	152,362	42.6	96.4	(0.3)
Private label	11,927	8,009	204.4	2.3	1.2
Other marketers	6,919	1,474	27.1	1.4	(0.1)
Total	\$528,663	\$158,897	43.0%	100%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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L'Oreal USA Shakes Up Nail Polish Marketers

As a result of its acquisition of the Essie brand, L'Oreal USA gained 10 points of market share in the nail polish segment during the 52 weeks ending April 15, 2012. Nearly all of its

gain came at the expense of Coty Beauty, which lost 7.8 points in market share during this period. Other winners among the ten largest marketers of nail polish included Revlon Inc. (+0.9 points), Markwins International Corp. (+0.8 points), Kiss Products Inc. (whose market share increased 50% from 1.4% to 2.1%) and Bari Cosmetics Ltd. (+0.6 points). Losers included Mirage Inc. (-1.3 points), Jordana Cosmetics Corp. (-1.3 points), Orly International (-0.2 points) and Scherer Inc. (-0.2 points). [Table 4-2]

Table 4-2

Dollar Share Winners and Losers in SymphonyIRI-Tracked Dollar Sales of Nail Polish by Leading Marketers, 52 Weeks Ending April 15, 2012

Marketer (in Order of 2012 \$ Sales)	\$ Share		Share Change Year Ago (% Point)
	2012	2011	
Coty Beauty.....	53.2%	61.0%	(7.8)
L'Oreal USA	12.3	2.3	10.0
Revlon Inc.	9.7	8.8	0.9
Mirage Inc.	8.1	9.4	(1.3)
Markwins International Corp.....	4.9	4.1	0.8
Jordana Cosmetics Corp.....	2.8	4.1	(1.3)
Kiss Products Inc	2.1	1.4	0.7
Orly International.....	1.3	1.5	(0.2)
Bari Cosmetics Ltd.	0.7	0.1	0.6
Scherer Inc,.....	0.3	0.5	(0.2)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Essie Takes Nail Polish Segment by Storm

The big story in the nail polish segment is Essie. In the 52 weeks ending April 15, 2012 dollar sales of the Essie nail polish brand more than quintupled, catapulting it to second place with a 10.6% market share. Other leading nail polish brands with above average growth include L'Oreal (199.4%), Jordana (163.7%), Kiss (121.5%), Wet 'N' Wild (75.2%) and newcomer Pure Ice, whose sales grew exponentially during the 52 weeks ending April 15, 2012. [Table 4-3]

Table 4-3

**SymphonyIRI-Tracked Dollar Sales of Nail Polish by Leading Brands,
52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Sally Hansen/Coty Beauty	\$229,883	\$52,274	29.4%	43.5%	(4.5)
Essie/L'Oreal USA	55,875	45,107	418.9	10.6	7.7
Revlon/Revlon Inc.	51,231	18,822	58.8	9.7	0.9
Sinful Colors/Mirage Inc.	42,574	8,111	23.5	8.1	(1.3)
OPI/Coty Beauty	25,639	5,185	25.3	4.8	(0.7)
Wet 'N' Wild/Markwins International Corp.	25,137	10,793	75.2	4.8	0.9
Milani/Jordana Cosmetics Corp... ..	13,466	(1,068)	(7.3)	2.5	(1.4)
Nicole/Coty Beauty	11,594	2,960	34.3	2.2	(0.1)
Kiss/Kiss Products Inc.	10,302	5,651	121.5	1.9	0.7
New York Color/Coty Beauty	7,506	(230)	(3.0)	1.4	(0.7)
Orly/Orly International Inc.	7,120	1,347	23.3	1.3	(0.2)
L'Oreal/L'Oreal USA	6,122	4,077	199.4	1.2	0.6
Rimmel/Coty Beauty.	4,730	(261)	(5.2)	0.9	(0.5)
Pure Ice/Bari Cosmetics Ltd.	3,668	3,398	12,573.5	0.7	0.6
Maybelline/L'Oreal USA	3,252	(2,031)	(38.4)	0.6	(0.8)
Del Borghese/Coty Beauty	1,676	(4,346)	(72.2)	0.3	(1.3)
Petites/Scherer Inc.	1,556	(398)	(20.4)	0.3	(0.2)
Jordana/Jordana Cosmetics Corp... ..	1,465	909	163.7	0.3	0.1
Brucci/Brucci Ltd	1,399	(325)	(18.9)	0.3	(0.2)
Hello Kitty/Townley Cosmetics/Added Extras	1,126	1,126	NA	0.2	0.2
Nailene/Pacific World Corp.	1,104	205	22.9	0.2	0.0

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012. "NA" refers to new products or brands not sold in 52 weeks ending April 15, 2011.

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Private Labels Important in Nail Accessories/Implements Market

Sales of nail accessories/implements totaled \$160.1 million during the 52 weeks ending April 15, 2012. Private labels comprise 27.6% of sales of nail accessories/implements, a market share that exceeds the 23.5% share enjoyed by Pacific World as the result of its merger with W.E. Bassett. Other leading marketers include Helen of Troy Inc. (\$24.2 million in sales and a 15.1% market share) and Coty Beauty (\$15.9 million and 9.9% share). [Table 4-4]

Table 4-4

SymphonyIRI-Tracked Dollar Sales of Nail Accessories/Implements by Leading Marketers, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
(Pacific World) W. E. Bassett Co.....	\$37,671	\$1,980	5.5%	23.5%	(0.1)
Helen Of Troy Inc.	24,208	(1,426)	(5.6)	15.1	(1.8)
Coty Beauty.....	15,880	912	6.1	9.9	0.0
Kiss Products Inc.	7,796	134	1.7	4.9	(0.2)
Revlon Inc.	6,659	1,837	38.1	4.2	1.0
Tweezerman	3,411	239	7.5	2.1	0.0
Spark Innovators Inc.	3,057	3,057	NA	1.9	1.9
Pacific World Corp.	2,920	(428)	(12.8)	1.8	(0.4)
Belcam Inc.	2,065	250	13.8	1.3	0.1
Wholesale Merchandisers Inc.....	1,169	98	9.1	0.7	0.0
Subtotal top 10 marketers	\$104,835	\$6,423	6.5	65.5	0.4
Other marketers	11,000	546	5.2	6.9	0.0
Private label	44,227	1,962	4.6	27.6	(0.3)
Total	\$160,106	\$8,931	5.9%	100.0%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012. "NA" refers to new products or brands not sold in 52 weeks ending April 15, 2011.

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Sally Hansen Picks Up Market Share in Nail Accessories/Implements Segment

Although Sally Hansen faltered in the nail polish segment, it experienced significant success in its nail accessories/implements business as a result of a decision by Coty Beauty to combine the Sally Hansen brand with the La Cross brand. SymphonyIRI data show that the dollar sales of Sally Hansen in the segment quadrupled, and its market share grew from 2.5% to 9.8% during the 52 weeks ending April 15, 2012.

The dollar sales of Trim increased enough for the brand to maintain its leadership position in the nail accessories/implements segment, although it lost a modest (-0.1%) amount of market share. Brands experiencing a gain in market share were Kiss (+0.4 points), newcomer Salon Express (+1.9% points), The Color Workshop (+0.4 points) and Hello Kitty (+0.3 points). [Table 4-5]

Table 4-5

SymphonyIRI-Tracked Dollar Sales of Nail Accessories/Implements by Leading Brands, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Trim/W.E. Bassett Co.	\$37,654	\$1,989	5.6%	23.5%	(0.1)
Revlon/Helen Of Troy Inc.....	30,868	412	1.4	19.3	(0.9)
Sally Hansen/Coty Beauty	15,683	11,864	310.7	9.8	7.3
Kiss/Kiss Products Inc.....	6,120	926	17.8	3.8	0.4
Tweezerman/Tweezerman.....	3,411	240	7.6	2.1	0.0
Salon Express/Spark Innovators....	3,057	3,057	NA	1.9	1.9
Denco/Belcam Inc.	1,953	222	12.8	1.2	0.1
Fing'rs/Pacific World Corp (includes Little Fing'rs brand)	1,831	75	4.3	1.1	0.0
Broadway Nails/Kiss Products	1,676	(792)	(32.1)	1.0	(0.6)

—continued—

Table 4-5

SymphonyIRI-Tracked Dollar Sales of Nail Accessories/Implements by Leading Brands, 52 Weeks Ending April 15, 2012
(in thousands of dollars) [Cont.]

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Studio M/Wholesale Merchandisers Inc.'	\$1,170	\$98	9.1%	0.7%	0.0
Nailene/Pacific World Corp.	1,089	(153)	(12.3)	0.7	(0.1)
Hello Kitty/Added Extras/ Townley Cosmetics	930	448	92.9	0.6	0.3
Cover Girl/Procter & Gamble.....	775	117	17.9	0.5	0.0
The Color Workshop/Markwins International Corp.....	743	582	361.5	0.5	0.4

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Nail Treatment Segment Sees Significant Movement among Smaller Marketers

Smaller marketers laid siege to Coty Beauty in the nail treatment segment during the 52 weeks ending April 15, 2012. While Coty Beauty continued to dominate in this segment with a 42.6% market share, it experienced a 3.8 point decline as a result of strong upward movement by several other marketers of nail treatment products and a decline in the sales of Sally Hansen, its leading brand in the segment.

Foremost among the competitors of Coty Beauty was Kramer Labs, whose sales increased 63% and whose market share grew 3.2 points, due to the success of its Fungi Nail brand. L'Oreal USA saw its dollar sales of nail treatment products nearly triple and its market share increase 2.6 points as a result of strong sales of its Essie brand. Dr. Paul's Piggy Paste, a new entrant in the segment, posted sales of \$3.5 million and gained a 2.7% market share. [Tables 4-6 and 4-7]

Table 4-6

**SymphonyIRI-Tracked Dollar Sales of Nail Treatment Products by Leading Marketers,
52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Coty Beauty	\$55,302	\$4,257	8.3%	42.6%	(3.8)
Kramer Labs	14,945	5,768	62.9	11.5	3.2
Alva-Amco Pharmacal Companies, Inc.	7,016	(894)	(11.3)	5.4	(1.8)
Revlon Inc.	6,585	1,564	31.1	5.1	0.5
L'Oreal USA	5,686	3,711	187.8	4.4	2.6
Nailtiques Cosmetic Corp.	5,070	41	0.8	3.9	(0.7)
CCA Industries Inc.	3,747	(35)	(0.9)	2.9	(0.5)
Dr. Paul's Piggy Paste	3,453	3,414	8,661.6	2.7	2.7
Blaine Labs Inc.	3,207	(378)	(10.5)	2.5	(0.8)
Pro Foot Footcare Products	3,197	1,414	79.3	2.5	0.9
Woodward Laboratories Inc.	3,015	340	12.7	2.3	(0.1)
Xenna Corporation	2,986	(303)	(9.2)	2.3	(0.7)
Clorox Company	1,649	20	1.2	1.3	(0.2)
Seche	1,630	215	15.2	1.3	(0.0)
NDC Laboratories	1,345	(182)	(11.9)	1.0	(0.4)
Orly International Inc.	1,338	31	2.4	1.0	(0.2)
Pacific World Corp.	1,094	342	45.5	0.8	0.1
Mirage Inc.	1,081	147	15.8	0.8	(0.0)
Subtotal top 18 marketers	122,346	19,472	18.9	94.2	0.6
Other marketers	7,571	521	7.4	5.8	(0.6)
Total	\$129,917	\$19,993	18.2%	100.0%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Table 4-7

**SymphonyIRI-Tracked Dollar Sales of Nail Treatment Products by Leading Brands,
52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Sally Hansen/Coty Beauty	\$49,862	\$3,214	6.9%	38.4%	(4.1)
Fungi Nail/Kramer Labs	14,945	5,768	62.9	11.5	3.2
Fungi Cure/ Alva-Amco Pharmacal ..	6,963	(898)	(11.4)	5.4	(1.8)
Revlon/ Revlon Inc.	6,585	1,564	31.2	5.1	0.5
Essie/L'Oreal USA	5,281	4,397	497.4	4.1	3.3
Nailtiques/Nailtiques Cosmetic Corp.	5,070	41	0.8	3.9	(0.7)
Nutra Nail/CCA Industries Inc.	3,747	(35)	(0.9)	2.9	(0.6)
Dr. Paul's Piggy Paste/ Dr. Paul's Piggy Paste	3,453	3,414	8,661.6	2.7	2.6
Dr Blaines Tineacide/Blaine Labs Inc.	3,207	(378)	(10.5)	2.5	(0.8)
Pro Clearz/ Pro Foot Footcare Products	3,194	1,412	79.2	2.5	0.8
OPI/Coty Beauty	3,184	575	22.0	2.5	0.1
Mycocide KD/Woodward Laboratories Inc.	2,988	370	14.1	2.3	(0.1)
Xenna Nonyx/ Xenna Corp.	2,986	(303)	(9.2)	2.3	(0.7)
Seche/Seche/American International Industries	1,872	345	22.6	1.4	0.1
Burt's Bees/Clorox Company	1,649	20	1.2	1.3	(0.2)
Orly/ Orly International Inc.	1,338	32	2.4	1.0	0.2
Nailene/Pacific World Corp.	1,094	369	51.1	0.8	0.2
Sinful Colors/Mirage Inc.	1,081	148	15.8	0.8	(0.0)
Reclear AF/NDC Laboratories.....	1,028	1,027	311,217.6	0.8	0.8
Nicole/Coty Beauty.....	976	444	83.4	0.8	0.3

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012.

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Kiss Products Inc. Dominates Artificial Nails and Accessories

Kiss Products Inc. controls 77% of the \$93.5 million mass market for artificial nails and accessories. The Kiss brand accounted for 50% of sales in the segment, and Broadway Nails, also marketed by Kiss, generated 26.9% of sales during the 52 weeks ending April 15, 2012.

With \$13.4 million dollars in sales and 14.3% market share, Pacific World Corp. ranked second in this segment. The sales of artificial nails and accessories by Pacific World Corp. increased 7.8% over the previous year, resulting in a gain of 0.5 points in market share. The three brands marketed by Pacific World Corp. segment—Nailene, Fing'rs and Revlon—ranked third, fourth and fifth respectively in the artificial nails and accessories segment.

The IBD 5-Second brand, which is marketed by International Beauty Designs, experienced the most significant loss of sales (-21.7%). Sales of the Hello Kitty brand of artificial nails and accessories, marketed by Townley Cosmetics and Added Extras, more than doubled. [Tables 4-8 and 4-9]

Table 4-8

SymphonyIRI-Tracked Dollar Sales of Artificial Nails and Accessories by Leading Marketers, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Kiss Products Inc.	\$71,925	\$2,604	3.8%	77.0%	(0.1)
Pacific World Corp.	13,385	973	7.8	14.3	0.5
International Beauty Designs Inc. ..	1,732	(481)	(21.7)	1.9	(0.6)
New Dana Perfumes Corp.	1,661	(87)	(5.0)	1.8	(0.2)
Revlon Inc.	1,333	(294)	(18.1)	1.4	(0.4)
Bonne Bell Inc.	1,187	72	6.4	1.3	0.0
Other marketers	2,234	684	44.1	2.4	0.7
Total	\$93,457	\$3,471	3.9%	100.0%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Table 4-9

SymphonyIRI-Tracked Dollar Sales of Artificial Nails and Accessories by Leading Brands, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Kiss/Kiss Products Inc.....	\$46,769	\$1,280	2.8%	50.0%	0.5
Broadway Nails/Kiss Products	25,156	1,324	5.6	26.9	0.4
Nailene/Pacific World Corp.	6,487	791	13.9	6.9	0.6
Fing'rs/Pacific World Corp (includes Little Fing'rs brand)	5,326	166	3.2	5.7	0.0
Revlon/ Pacific World Corp	2,906	(208)	(6.7)	3.1	(0.4)
IBD 5 Second/International Beauty Designs	1,732	(481)	(21.7)	1.9	(0.6)
Bonne Bell Smackers/Bonne Bell...	1,187	72	6.4	1.3	0.0
Hello Kitty/Townley Cosmetics/Added Extras	1,076	552	105.3	1.2	0.7
Cosmar/New Dana Perfumes Corporation	984	(69)	(6.6)	1.1	(0.1)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Private Labels Increase Share in Nail Polish Remover Segment

Private labels account for 78% of dollar sales of nail polish removers. They gained 5.5 points in market share in the 52 weeks ending April 15, 2012. The two largest marketers in this segment—Prestige Brands Holdings Inc. and Coty Beauty—each lost market share. The Cutex brand of Prestige Brands Holdings lost 3.2 points and the Sally Hansen Brand of Coty Beauty declined 3.4 points. [Table 4-10]

Table 4-10

SymphonyIRI-Tracked Dollar Sales of Nail Polish Removers by Leading Marketers and Brands, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Marketer/Brand	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Marketer					
Private label	\$53,464	\$8,725	19.5%	78.0%	5.5
Prestige Brands Holdings Inc.	8,518	(1,133)	(11.7)	12.4	(3.2)
Coty Beauty.....	3,160	(1,804)	(36.3)	4.6	(3.4)
Scherer Inc.....	1,026	24	2.4	1.5	(0.1)
CCA Industries Inc.	706	642	1,007.0	1.0	0.9
Calico Laboratories Inc.	460	5	1.0	0.7	(0.1)
Wholesale Merchandisers Inc. ...	315	68	27.5	0.5	0.1
Other marketers	887	280	46.1	1.3	0.3
Total	\$68,536	\$6,807	11.0%	100%	—
Brand/Marketer					
Cutex/Prestige Brands Holdings	\$8,518	(\$1,133)	(11.7%)	12.4%	(3.2)
Sally Hansen/Coty Beauty	3,134	(1,817)	(36.7)	4.6	(3.4)
Pretty Nails/Scherer Inc.	1,025	24	2.4	1.5	(0.1)
Nutra Nail/CCA Industries Inc. ...	706	642	1000.7	1.0	0.9
Calico/Calico Laboratories Inc....	460	5	1.0	0.6	0.0%
Studio M/Wholesale Merchandisers Inc.....	315	68	27.4	0.5	0.1

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Sally Hansen Keeps Pace with Gains by Salon Professional Brand in Nail Polish Accessories Segment

The Sally Hansen brand, marketed by Coty Beauty, gained 13.3 points of market share in the nail polish accessories segment between 2011 and 2012, even though sales of the brand fell 31.3%. This anomaly was due to the fact that overall sales in the segment fell even more (45.2%). The major gainer in the segment was the Salon Professional brand marketed by CSA Limited Inc., which picked up 11.9 points in market share. [Table 4-11]

Table 4-11

SymphonyIRI-Tracked Dollar Sales of Nail Polish Accessories by Leading Marketers and Brands, 52 Weeks Ending April 15, 2012
(in thousands of dollars)

Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Coty Beauty/Sally Hansen	\$1,206	(\$550)	(31.3%)	65.3%	13.3
CSA Limited Inc./Salon Professional	419	56	15.6	22.7	11.9
Other marketers	220	(1,031)	(82.4)	11.9	(25.2)
Total	\$1,845	(\$1,525)	(45.2%)	100.0%	—

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Nail Care Brand and Product Trends: Winners and Losers

Many Brands Show Dramatic Growth

During the 52 weeks ending April 15, 2012 the Sally Hansen brand, which is marketed by L’Oreal USA, maintained its position as the leading brand in the mass nail care market. The Sally Hansen brand had 30.4% of the nail care market and saw its dollar sales increase 28% over the previous 12 months. The Revlon brand finished a distant second, with 9.3% of the market and a 29% dollar sales increase.

The nail care category was roiled by several brands demonstrating relatively greater growth potential than the Sally Hansen and Revlon brands.

- Essie, a brand acquired in 2010 by L’Oreal USA, registered sales growth of more than 400% and saw its market share increase from 1.5% to 6.2%.
- The dollar sales of Wet ‘N’ Wild (Markwins International) increased 75% and market share grew from 1.8% to 2.5%.
- Nutra Nail (CCA Industries) more than doubled in dollar sales, and its share grew from 0.5% to 0.8%.
- The L’Oreal brand saw its sales increase 65% and its market share double from 0.3% to 0.6%.
- The sales of Fungi Nail (Kramer Labs) grew 63% and its market share grew from 1.2% to 1.5%.
- The sales of the Hello Kitty brand of nail care products more than tripled in value.

Several newcomers had success in the nail care category. These include Pure Ice, Salon Express and Dr. Paul’s Piggy Paste. [Table 4-12]

Table 4-12

**SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Leading Brands,
52 Weeks Ending April 15, 2012
(in thousands of dollars)**

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Sally Hansen/Coty Beauty	\$301,116	\$65,389	27.7%	30.4%	0.5
Revlon/Helen Of Troy Inc./Pacific World Corp.....	91,590	20,588	29.0	9.3	0.2
Kiss/Kiss Products Inc.....	63,192	7,857	14.2	6.4	(0.6)
Essie/L'Oreal USA	61,189	49,531	424.9	6.2	4.7
Sinful Colors/Mirage Inc.....	43,656	8,259	23.3	4.4	(0.1)
Trim/W.E. Bassett Co.	37,655	1,989	5.6	3.8	(0.7)
OPI/Coty Beauty	28,881	5,800	25.1	2.9	0.0
Broadway Nails/Kiss Products Inc...	27,535	838	3.1	2.8	(0.6)
Wet 'N' Wild/Markwins International..	25,139	10,777	75.0	2.5	0.7
Fungi Nail/Kramer Labs	14,945	5,768	62.9	1.5	0.3
Milani/Jordana Cosmetics Corp	13,533	(1013)	(8.1)	1.4	(0.5)
Nicole/Coty Beauty	12,570	3,404	37.1	1.3	0.1
Nailene/Pacific World Corp.	10,453	1,885	22.0	1.1	0.0
Cutex/Prestige Brands Holdings	8,526	(1,140)	(11.8)	0.9	(0.3)
Orly/Orly International Inc.	8,458	1,376	19.4	0.9	0.0
New York Color/Coty Beauty	8,005	(157)	(1.9)	0.8	(0.2)
Nutra Nail/CCA Industries Inc.	7,859	4,010	104.2	0.8	0.3
Fing'rs/Pacific World Corp (includes Little Fing'rs brand)	7,478	374	5.3	0.8	(0.1)
L'Oreal/L'Oreal USA	6,180	3,737	65.4	0.6	0.3
Fungi Cure/ Alva-Amco Pharmacal Companies.....	6,963	(898)			
Rimmel/Coty Beauty	5,318	(139)	(2.6)	0.5	(0.2)
Nailtiques/Nailtiques Cosmetic Corp.	5,208	116	2.3	0.5	(0.1)

—continued—

Table 4-12

**SymphonyIRI-Tracked Dollar Sales of Nail Care Products by Leading Brands,
52 Weeks Ending April 15, 2012
(in thousands of dollars) [Cont.]**

Brand/Marketer	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Pure Ice/Bari Cosmetics Ltd.....	\$3,690	\$3,418	12,571.2%	0.4%	0.3
Maybelline/L'Oreal USA	3,600	(2,377)	(39.8)	0.4	(0.4)
Dr. Paul's Piggy Paste/ Dr. Paul's Piggy Paste	3,453	3,414	8,661.6	0.3	0.3
Tweezerman/Tweezerman.....	3,411	240	7.6	0.3	(0.1)
Hello Kitty/Townley Cosmetics/Added Extras	3,389	2,385	237.4	0.3	0.2
Dr Blaines Tineacide/Blaine Labs.	3,207	(378)	(10.5)	0.3	(0.1)
Pro Clearz/Pro Foot Footcare Products	3,194	1,412	79.2	0.3	0.1
Salon Express/Spark Innovators	3,057	3,057	NA	0.3	0.3
Mycocide/Woodward Laboratories	2,988	370	14.1	0.3	(0.0)
Xenna Nonyx/Xenna Corporation.....	2,986	(303)	(9.2)	0.3	(0.1)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. 2011 shares are calculated for the 52 weeks ending April 15, 2012.

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Winning and Losing Products and Brands Highlighted

Tables 4-13 through 4-16 display products by product type and brand registering the largest percentage gains and losses in dollar sales during the 52 weeks ending April 15, 2012 in the nail polish, artificial nails, nail accessories/implements and nail treatment segments of the nail care category. New products are denoted "NA" (Not Applicable) and are ranked by dollar sales. Other products are ranked by the percentage change in dollar sales when compared to the previous year.

Some products with extremely high growth rates are new products for all practical purposes since they had only a negligible amount of dollar sales tracked by SymphonyIRI during the previous 52 weeks. Some products with extremely high percentage reductions in dollar sales may have been discontinued by their marketers but still were tracked by SymphonyIRI during the 52 weeks ending April 15, 2012.

Entries in the tables with gains only include products with sales of at least \$500,000 during the 52 weeks ending April 15, 2012. Entries with losses include products with sales of at least \$500,000 combined for the 52 weeks ending April 15, 2012 and the previous 52 weeks.

Winning and Losing Nail Polish Products/Brands

Sally Hansen's Crackle Overcoat nail polish had the largest impact of any new product in the nail polish segment of the mass nail care market. For the 52 weeks ending April 15, 2012 it registered dollar sales of \$24 million. Other new entrants in the nail polish market achieving significant sales included L'Oreal USA's Colour Riche (\$5.2 million), Colorstay by Revlon (\$4.2 million), Nail Dress by Kiss (\$3.3 million) and three new products achieving dollar sales of around \$3 million (Vegas by Sally Hansen, Spoiled by Wet 'N' Wild, and Crackle by Pure Ice).

Established nail polish products achieving unusually high sales growth as well as significant dollar sales in absolute terms include the Essie brand (418.9% growth rate and \$55.9 million sales), Sally Hansen Salon Effects (331.7% and \$44.8 million), Sally Hansen Nail Growth Miracle (235.1% and \$13 million) and Revlon Top Speed (153.4% and \$14.6 million).

The Sally Hansen brand also had products experiencing significant reductions in dollar sales compared to the previous year. These included Hi Definition (-\$2.5 million and -30.2%), Color Quick (-\$4 million and -37.6%) and Maximum Growth (-\$4.4 million and -74.4%).
[Table 4-13]

Table 4-13

Selected Nail Polish Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks
(in thousands of dollars)

Brand/Product	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Biggest Winners					
Sally Hansen/Crackle Overcoat	\$23,951	\$23,951	NA	4.5%	4.5
L'Oreal/Colour Riche	5,249	5,249	NA	1.0	1.0
Kiss/Nail Dress	3,261	3,261	NA	0.6	0.6
Sally Hansen/Vegas	2,952	2,952	NA	0.6	0.6
Wet 'N Wild/Spoiled	2,932	2,932	NA	0.6	0.6
Pure Ice/Crackle	2,875	2,875	NA	0.5	0.5
Sally Hansen/Smooth and Perfect	1,904	1,904	NA	0.4	0.4
Hello Kitty	1,053	1,053	NA	0.2	0.2
Wet 'N Wild/Perfect Couple	1,021	1,021	NA	0.2	0.2
Sally Hansen/Gem Crush	683	683	NA	0.1	0.1
Wet 'N Wild/Color Express	559	559	NA	0.1	0.1
Max Makeup/Cherimoya 2012	410	410	NA	0.1	0.1
Color Theory	358	\$358	NA	0.1	0.1
Revlon/Colorstay	4,173	4,171	239870.0%	0.8	0.8
LA Girl	574	557	3,182.6	0.1	0.1
Milani/Jewel FX	1,131	948	517.3	0.2	0.2
Wet 'N Wild	6,512	5,423	498.0	1.2	0.9
Del Borghese/Rapido	524	427	442.4	0.1	0.1
Essie	55,875	45,107	418.9	10.6	7.7
Sally Hansen/Salon Effects	44,755	34,388	331.7	8.5	5.7
Sally Hansen/Nail Growth Miracle	12,956	9,090	235.1	2.5	1.4
Jesse's Girl/High Intensity	556	389	233.9	0.1	0.1
Sinful Colors/Nail Art	1,446	994	219.9	0.3	0.2
Pure Ice	793	523	193.6	0.2	0.1

—continued—

Table 4-13

Selected Nail Polish Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks
(in thousands of dollars)

Brand/Product	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Jordana	\$1,105	\$719	186.2%	0.2%	0.1
LA Colors/Color Craze	517	335	183.6	0.1	0.0
Revlon/Top Speed	14,636	8,859	153.4	2.8	1.2
Biggest Losers					
Sally Hansen/Hi Definition.....	\$5,766	(\$2,497)	(30.2%)	1.1%	(1.1)
Sally Hansen/French Manicure	822	(360)	(30.5)	0.2	(0.2)
Out The Door	416	(190)	(31.4)	0.1	(0.1)
Milani/Nail Art.....	1,694	(802)	(32.1)	0.3	(0.4)
Petites/Color Fever	388	(189)	(32.8)	0.1	(0.1)
Sally Hansen/Color Quick	6,622	(3,998)	(37.6)	1.3	(1.6)
Maybelline/Express Finish	2,454	(2,231)	(47.6)	0.5	(0.8)
L'Oreal/Pro Manicure	850	(1,158)	(57.7)	0.2	(0.4)
Noteworthy.....	196	(391)	(66.6)	0.0	(0.1)
Sally Hansen/Maximum Growth	1,527	(4,450)	(74.4)	0.3	(1.3)
Del Borghese	1,105	(4,782)	(81.2)	0.2	(1.4)
Wet 'N Wild/Flirt	69	(593)	(89.6)	0.0	(0.2)
Wet 'N Wild/Craze.....	84	(1,319)	(94.0)	0.0	(0.4)
Color Workshop/Professional NI SI	17	(429)	(96.1)	0.0	(0.1)
Cover Girl/Boundless Color.....	69	(3,149)	(97.9)	0.0	(0.9)
Sally Hansen/Lacquer Shine.....	16	(923)	(98.3)	0.0	(0.3)
Sally Hansen/Maximum Growth Plus..	13	(1,044)	(98.8)	0.0	(0.3)
Sally Hansen/Salon French Manicure Kit.....	5	(632)	(99.1)	0.0	(0.2)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012. "NA" denotes new product not sold during 52 weeks ending April 15, 2011.

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Winning and Losing Artificial Nails and Accessories Products/Brands

As noted in Chapter 3, “Leading Nail Care Marketers,” the Broadway Nails ImPress collection generated \$5.4 million in dollar sales within only a few months after it was launched. While Kiss Pink and Kiss Luxury generated robust dollar sales, the sales of Kiss Pink Sweet Tarte and Pink Pop Princess declined. Broadway Nails Fashion Express showed a similar loss in dollar sales (-25.2%). [Table 4-14]

Table 4-14

Selected Artificial Nails and Accessories Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks
(in thousands of dollars)

Brand/Product	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Biggest Winners					
Broadway Nails/ImPress	\$5,382	\$5,382	NA	5.8%	5.8
Broadway Nails/Fast French Deceptions	953	953	NA	1.0	1.0
Kiss/Pink	1,001	581	138.2%	1.1	0.6
Kiss/Luxury.....	1,150	586	104.1	1.2	0.6
Hello Kitty.....	1,076	552	53.4	1.2	0.6
Kiss/Kiss Be Pink	912	250	37.7	1.0	0.2
Fing'rs/Flirt	1,358	363	36.5	1.5	0.3
Nailene/So Natural	1,694	410	31.9	1.8	0.4
Nailene/Ulta Quick	677	144	27.1	0.7	0.1
Nailene/Nail Studio.....	1,592	339	27.0	1.7	0.3
Kiss/Pink Color Change	1,133	197	21.0	1.2	0.2

—continued—

Table 4-14

Selected Artificial Nails and Accessories Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks [Cont.]
(in thousands of dollars)

Biggest Losers					
IBD 5 Second.....	\$1,723	(\$480)	(21.8%)	1.8%	(0.6)
Kiss/Pink Sweet Tarte	793	(251)	(24.1)	0.8	(0.3)
Broadway Nails/Fashion Express	1,834	(619)	(25.2)	2.0	(0.8)
Kiss/Pink Pop Princess	1,090	(391)	(26.4)	1.2	(0.5)
Kiss/Catwalk	1,002	(451)	(31.0)	1.1	(0.5)
Broadway Nails	406	(200)	(33.0)	0.4	(0.2)
Broadway Nails/Fast French	2,026	(1,370)	(40.3)	2.2	(1.6)
Broadway Nails/Natural Deceptions..	1,238	(847)	(40.6)	1.3	(1.0)
Kiss/Artist	440	(345)	(44.0)	0.5	(0.4)
Kiss/Feather Light	233	(553)	(70.3)	0.2	(0.6)
Broadway Nails/Natural Deceptions ND F	115	(539)	(82.4)	0.1	(0.6)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012. "NA" denotes new product not sold during 52 weeks ending April 15, 2011.

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Winning and Losing Nail Accessories/Implements Products/Brands

New products from Salon Express had a significant impact on the nail accessories/implements segment, generating \$3.1 million in dollar sales and gaining a 1.9% market share. A wide range of products from Sally Hansen also showed substantial growth, with many of them registering dollar sales that quintupled or quadrupled the levels of the previous year.

The La Cross brand lost the most in sales due to its combination with the Sally Hansen brand. Other products experiencing a significant downturn in dollar sales include Nailene/Bedazzle, Kiss/Salon Results and Broadway Nails/Fashion Diva. [Table 4-15]

Table 4-15

Selected Nail Accessories/Implements Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks
(in thousands of dollars)

Brand/Product	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Biggest Winners					
Salon Express.....	\$3,057	\$3,057	NA	1.9%	1.9
The Color Workshop	741	741	NA	0.5	0.5
Sally Hansen/Safe Snip	3,723	340	1,050.3%	0.2	0.2
Sally Hansen/Clean Clip	747	639	593.6	0.5	0.4
Sally Hansen/Go Toe To Toe.....	763	643	539.2	0.5	0.4
Sally Hansen/Ingrown Be Gone	1,820	1,516	497.9	1.1	0.9
Sally Hansen/Finest Fingernails.....	837	689	466.1	0.5	0.4
Sally Hansen/Nip 'Em Neat	1,215	999	461.9	0.8	0.6
Sally Hansen/Treat Your Toes	1,241	1,016	451.7	0.8	0.6
Sally Hansen/Clip 'N Catch	699	565	421.6	0.4	0.3
Sally Hansen/Cuticle Tamer.....	909	724	391.7	0.6	0.4
Sally Hansen/Nip' Em On The Go.....	1,475	1,145	346.9	0.9	0.7
Revlon/Crazy Shine	1,389	1,076	344.2	0.9	0.7
Sally Hansen.....	2,447	1,618	195.3	1.5	1.0
Kiss/Nail Artist.....	1,066	658	161.1	0.7	0.4
Hello Kitty.....	930	448	92.9	0.6	0.3
Biggest Losers					
Nailene/Bedazzle	\$660	(\$174)	(20.8%)	0.4%	(0.1)
Kiss/Salon Results	809	(289)	(26.3)	0.5	(0.2)
Broadway Nails/Fashion Diva	1,300	(467)	(26.4)	0.8	(0.4)
Sure Clip	81	(982)	(92.4)	0.1	(0.7)
La Cross.....	192	(10,582)	(98.2)	0.1	(7.0)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012. "NA" denotes new product not sold during 52 weeks ending April 15, 2011. Source: Compiled by Packaged Facts based on data from SymphonyIRI Group. Reproduction, resale or other distribution of this document is expressly prohibited without the written permission of Packaged Facts or SymphonyIRI. This material is reprinted with permission.

Winning and Losing Nail Treatment Products/Brands

Several new products achieved significant sales in the nail treatment segment, including two products that had been introduced at the end of the previous period: Dr. Paul's Piggy Paste, which reached 2.7 points in market share in the 52 weeks ending April 15, 2012, and Reclear AF (0.8% market share). Kerasal Nail, Revlon/Colorstay and Sally Hansen/Diamond Manicure also generated enough sales to gain market share. A number of established products marketed under the Essie brand achieved significant success, including Good to Go, No Chips Ahead, All in One and Grow Stronger. Among the losers in the segment were Sally Hansen Maximum Growth and Quick Care, which declined 38% in dollar sales. [Table 4-16]

Table 4-16

Selected Nail Treatment Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks (in thousands of dollars)

Brand/Product	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Biggest Winners					
Kerasal Nail.....	\$876	\$876	NA	0.7%	0.7
Revlon/Colorstay.....	578	578	NA	0.4	0.4
Sally Hansen/Diamond Manicure.....	719	719	NA	0.6	0.6
Reclear AF.....	1,028	1,027	311217.6%	0.8	0.8
Dr. Paul's Piggy Paste	3,453	3,414	8,661.6	2.7	2.6
Essie/Good To Go	1,203	1,156	2,470.1	0.9	0.9
Essie/No Chips Ahead	1,470	1,335	986.8	1.1	1.0
Essie/All In One	794	719	967.6	0.6	0.5
Essie/Grow Stronger.....	506	441	677.9	0.4	0.3
Sally Hansen/Vita Surge	2,541	1,891	290.9	2.0	1.4
Nailene.....	566	370	188.9	0.4	0.3
Pro Clearz.....	3,194	1,412	79.2	2.5	0.8
Fungi Nail.....	14,945	5,768	62.9	11.5	3.2
Sally Hansen/Advanced Hard As Nails.....	1,580	540	51.8	1.2	0.3

—continued—

Table 4-16

Selected Nail Treatment Products/Brands by Percentage Change in SymphonyIRI-Tracked Dollar Sales, 52 Weeks Ending April 15, 2012 vs. Previous 52 Weeks (in thousands of dollars) [Cont.]

Brand/Product	\$ Sales			\$ Share	
	\$ Sales 52 Weeks Ending April 15, 2012	\$ Sales Change 52 Weeks Ago	\$ Sales % Change 52 Weeks Ago	\$ Share 52 Weeks Ending April 15, 2012	Share Change 52 Weeks Ago (% Point)
Sally Hansen/Ultimate Shield	\$906	\$286	46.1%	0.7%	0.1
Sally Hansen/Dries Instantly	1,736	456	35.6	1.3	0.2
Sally Hansen/Double Duty	3,911	905	30.1	3.0	0.3
Biggest Losers					
Sally Hansen/Maximum Growth	\$754	(\$459)	(37.9%)	0.6%	(0.5)
Sally Hansen/Quick Care	1,314	(816)	(38.3)	1.0	(0.9)
Maybelline/Express Finish	348	(341)	(49.5)	0.3	(0.4)
Reclaim AF.....	317	(1,209)	(79.2)	0.2	(1.1)

Note: Figures are based on SymphonyIRI sales tracking through U.S. supermarkets and grocery stores, drugstores, and mass merchandisers (including Target and Kmart, but excluding Walmart) with annual sales of \$2 million or more. Market shares are calculated for the 52 weeks ending April 15, 2012. "NA" denotes new product not sold during 52 weeks ending April 15, 2011.

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Chapter 5 The Nail Care Consumer

- Women in the 18- to 24-year-old age group are 28% more likely than women on average to have used nail care products five or more times in the last 30 days.
- Black women are 46% more likely and Latinas are 30% more likely than women on average to have used nail polish and nail care products five or more times in the past 30 days.
- 36% of women using nail care products just once in the last 30 days have a college degree or more, but only 19% of those using nail care products seven or more times in the past 30 days have a college degree or more.
- The Essie nail care brand attracts women under the age of 45, women who have never married and those who are college graduates and have a household income of \$150,000 or more.
- Compared to women on average, users of L'Oreal brand nail products are 30% more likely and users of Revlon are 20% more likely to live in a household with an income of between \$50,000 and \$75,000.
- Users of Max Factor nail care products are more likely to be in the 55- to 64-year-old age group and to have a household income of less than \$50,000.

Profile of Nail Care Consumers

Young, Single Women More Likely to Be Heavy Users of Nail Care Products

Women in the 18- to 34-year-old age group are more likely than women on average to use nail care products with any degree of frequency. Women in the 18- to 24-year-old age group are 28% more likely to have used nail care products five or more times in the last 30 days. Single women also have a much higher likelihood of being high-frequency users of nail care products. [Table 5-1]

Table 5-1

Women Using Nail Polish and Nail Care Products by Frequency of Use and Age Group and Marital Status

Category	Use	No. of Times Used in Last 30 Days		
		1	2-4	5+
Age				
18-24.....	110	118	104	128
25-34.....	111	122	109	98
35-44.....	102	106	93	105
45-54.....	96	94	105	84
55-64.....	98	87	99	100
65+.....	88	81	92	96
Marital status				
Never married	104	101	100	119
Presently married.....	100	108	102	86
Not married (any)	100	91	98	116
Parent/guardian of any children	101	105	103	94

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Black and Hispanic Women Do Their Nails More Often

Black women are 46% more likely and Latinas are 30% more likely than women on average to have used nail polish and nail care products five or more times in the past 30 days. Non-Hispanic white women are significantly less likely to do their own nails with this degree of frequency. [Table 5-2]

Table 5-2

Women Using Nail Polish and Nail Care Products by Frequency of Use and Race and Hispanic Origin

Category	Use	No. of Times Used in Last 30 Days		
		1	2-4	5+
White non-Hispanic	97	104	100	87
Hispanic	102	93	104	130
Black	111	85	96	146
Asian	108	122*	97	84*

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic. Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution.

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Nail Care Gets More Attention from Women Living in the Northeast

Experian Simmons National Consumer Study (NCS) data indicate that women living in the Northeast are more likely than women on average to have used nail care products five or more times in the past 30 days. The use of nail care products has a slight correlation with urban living. Compared to women on average, women living in the 25 largest DMAs are 3% more likely and those living in rural areas (outside the top 100 DMAs) are 8% less likely to use nail care products. [Table 5-3]

Table 5-3

Women Using Nail Polish and Nail Care Products by Frequency of Use and Region and Place of Residence

Category	Use	No. of Times Used in Last 30 Days		
		1	2-4	5+
Region				
Northeast	104	97	103	115
Southeast	101	95	103	102
Central	100	105	93	105
Southwest	98	96	104	87
Pacific	96	105	100	84
Place of residence				
Top 25 DMAs	103	101	105	103
Top 26-100 DMAs	99	102	100	96
Not top 100 DMAs	92	90	83	100

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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High Income, Well Educated Women Less Likely to Use Nail Care Products on Frequent Basis

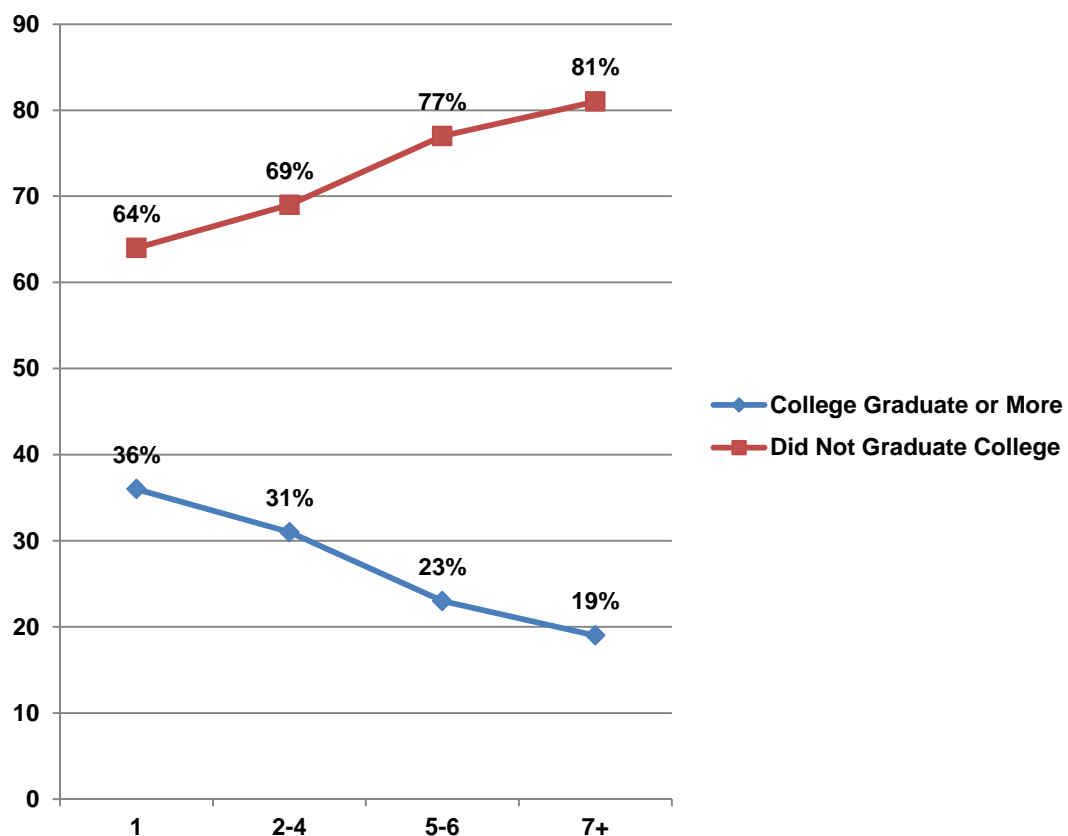
There is a strong correlation between education and frequent use of nail care products. As seen in Figure 5-1, 36% of women using nail care products once in the last 30 days have a college degree or more. However, as nail care use becomes more frequent, the educational level of women declines. Only 19% of those using nail care products seven or more times in the past 30 days have a college degree or more. [Figure 5-1]

A similar pattern holds for household income. Around 27% of women who use nail care products four or fewer times a month have a household income of \$100,000 or more. In the case of women using nail care products seven or more times per month, only 17% have a household income of \$100,000 or more. [Figure 5-2]

Table 5-4 provides further insights into the demographics of nail care product users. Compared to women on average, women with a college degree or higher are 29% more likely to use nail care products only once in the last 30 days and 24% less likely to have used them five or more times. Women with a household income of less than \$25,000 are 16% more likely to have used nail care products five or more times in the past 30 days.

Figure 5-1

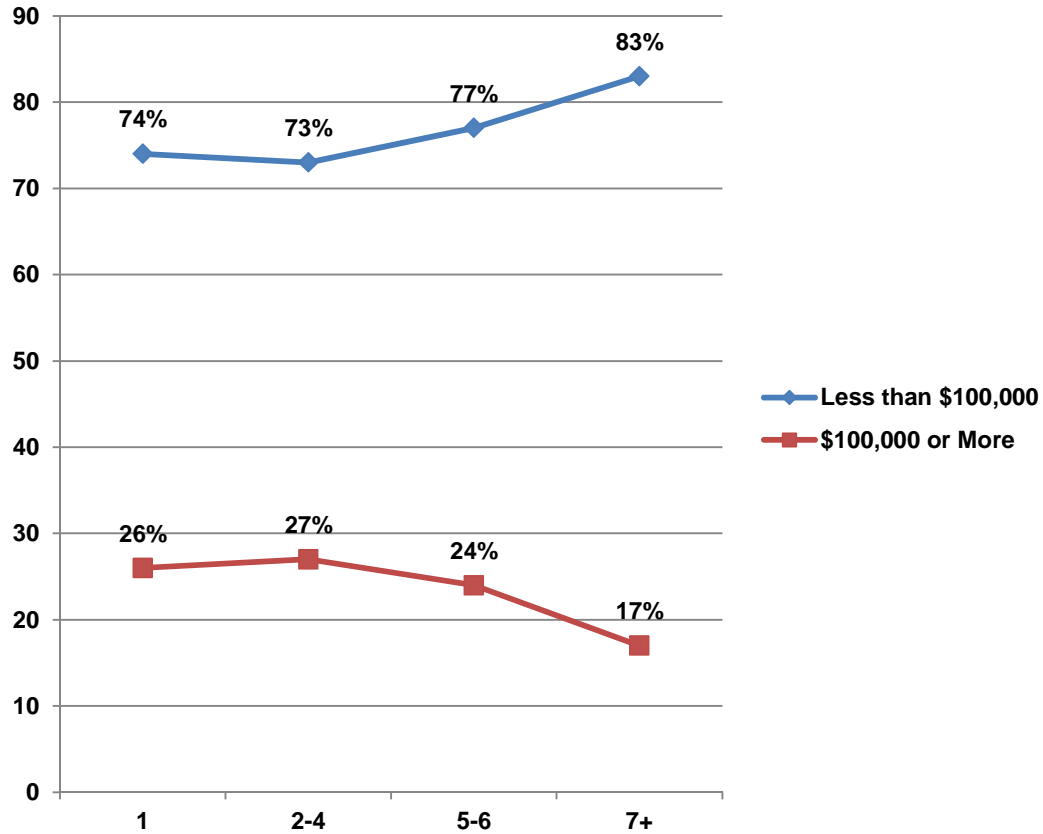
Percent of Women Using Nail Care Products in Last 30 Days by Frequency of Use and Educational Attainment



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Figure 5-2

Percent of Women Using Nail Care Products in Last 30 Days by Frequency of Use and Household Income



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Table 5-4

Economic Profile of Women Using Nail Polish and Nail Care Products by Frequency of Use

Category	Use	No. of Times Used in Last 30 Days		
		1	2-4	5+
Education.....				
Did not graduate high school	86	94	74	106
High school graduate	96	81	97	108
Some college	102	96	102	112
College graduate or more	107	129	112	76
Employment profile				
Employed full-time (30+ hours) ..	101	94	106	97
Employed part-time <30 hours) ..	108	123	98	108
Homemaker	103	117	92	89
Retired	91	79	104	96
Household income				
Less than \$25,000	93	88	81	116
\$25,000 - \$49,999	96	107	96	95
\$50,000 - \$74,999	100	87	102	108
\$75,000 - \$99,999	101	102	102	88
\$100,000 - \$149,999	106	107	119	86
\$150,000+	115	122	121	95
Kind of residence				
Owned house	99	102	104	90
Owned Condo or co-op	109	128	105	112
Rented house	101	97	91	111
Rented apartment	105	93	93	136
Mobile home	82	87*	81	72*

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic. Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution.

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Overview of Brands Used by Nail Care Consumers

Introduction

This assessment of trends in the popularity of nail care brands tracked by Experian Simmons National Consumer Study (NCS) is based upon two-year moving averages of the percentage of women who report using a particular brand of nail polish/nail care products.

Brands on the Upswing

OPI and Sally Hansen have been successful both in terms of the degree of their popularity—they are the two most popular brands tracked by Experian Simmons NCS—and their ability to show continuous growth in popularity over the past five years. The percentage of women using OPI increased steadily from 10.2% in 2006-2007 to 14.3% in 2010-2011. Sally Hansen experienced a similar continuous increase in popularity. Wet ‘N’ Wild showed a less dramatic gain in popularity, while Essie and Sinful Color showed small but noticeable increases in popularity. [Table 5-5]

Table 5-5

Nail Polish/Nail Care Product Brands on the Upswing, 2006-2011
(percent of women using brand)

Brand	2010-2011	2009-2010	2008-2009	2007-2008	2006-2007
Essie.....	1.5%	**	**	**	0.8%
OPI.....	14.3	13.7	12.5	11.1	10.2
Sally Hansen.....	14.5	14.1	13.8	13.3	12.9
Sinful Color	1.5	0.9	**	**	**
Wet ‘N’ Wild	7.4	7.1	6.9	6.4	6.6

Note: Double asterisk indicates data either were not available or were not statistically reliable.

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Brands Holding Steady

Experian Simmons NCS data show that several nail care brands remained relatively constant in their degree of popularity or experienced only modest gains. These are Almay, Chanel, Lancôme and Nutra Nail. [Table 5-6]

Table 5-6

**Nail Polish/Nail Care Product Brands Holding Steady, 2006-2011
(percent of women using brand)**

Brand	2010-2011	2009-2010	2008-2009	2007-2008	2006-2007
Almay.....	1.1%	1.1%	1.0%	1.2%	1.1%
Chanel	0.7	0.6	0.6	0.6	0.6
Lancôme.....	1.0	1.0	0.9	0.8	0.8
Nutra Nail.....	1.6	1.4	1.4	**	**

Note: Double asterisk indicates data either were not available or were not statistically reliable.

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Brands Trending Downward

Nearly half of the nail care brands tracked by Experian Simmons NCS have drifted downward in popularity over the past five years. Brands in this category include Avon, Cover Girl, Cutex, Estee Lauder, L'Oreal, Max Factor, Maybelline and Revlon. [Table 5-7]

Table 5-7

Nail Polish/Nail Care Product Brands Trending Downward, 2006-2011
(percent of women using brand)

Brand	2011-2010	2010-2009	2009-2008	2008-2007	2007-2006
Avon.....	9.0%	8.9%	9.3%	10.1%	9.9%
Cover Girl.....	5.8	5.3	5.5	6.1	6.2
Cutex	4.8	4.6	4.8	5.4	5.2
Estee Lauder	1.2	1.3	1.4	1.6	1.5
L'Oreal	3.4	3.5	4.1	4.3	4.2
Max Factor.....	1.8	1.8	2.0	2.2	2.5
Maybelline.....	4.8	4.5	4.6	5.0	5.3
Revlon.....	8.9	8.7	9.2	9.5	10.7

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Profile of Nail Care Consumers by Major Brand

Overview

This section of the report highlights the most salient demographic features of the women using the nail care brands tracked by Experian Simmons NCS. The index contained in the tables in this section compares the users of each brand to women on average. For example, Table 5-8 shows that users of Essie have an index of 142 in the category of women with a college degree or more. This means that Essie users are 42% more likely than women on average to have an undergraduate degree or higher. The tables only include indexes with a value of 120 or higher.

Essie and OPI Attract Women with College Degrees and High Incomes

The Essie nail care brand attracts women under the age of 45, women who have never married and those who are college graduates. Essie aficionados are more than twice as likely as women on average to live in the Northeast and to have a household income of \$150,000 or more. [Table 5-8]

Users of the OPI brand have an equally positive economic profile. Compared to women on average, women who use OPI products are 51% more likely to have an undergraduate degree or higher. They are nearly twice as likely to have a household income of \$150,000 or more and are 79% more likely to have employment earnings of \$50,000 or more. They also have a much higher likelihood of owning their own condo or co-op, indicating that OPI users are highly urban. [Table 5-9]

Table 5-8

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Essie

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age		College grad or more	142
18-29.....	146	One employed adults in HH	125
30-44.....	125	HH income \$150,000 or more.....	241
Place of residence		Never married	136
Northeast	260	3 or more adults in household	132
Top 25 DMAs.....	130		

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-9

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: OPI

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age 25-34	133	Household income	
Education.....		\$75,000-\$99,000.....	128
Undergraduate degree only	152	\$100,000-\$149,000.....	142
Graduate degree.....	149	\$150,000 or more	197
College grad or more	151	Individual employment income of \$50,000 or more	179
Employment.....		No. of children in HH: 2	131
Employed full-time (30+ hours) ...	121	Live in owned condo or co-op	137
Employed part-time (<30 hours) ..	127		
Employed adults in HH: 2	122		

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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L'Oreal and Revlon Attract Middle-Income Women

Compared to women on average, users of L'Oreal brand nail products are 30% more likely to live in a household with an income of between \$50,000 and \$75,000. Users of the L'Oreal brand of nail care products also have a higher propensity to be Hispanic and to live in the

Pacific region as well as in one of the 25 most populous DMAs. They also are much more likely to live in a household with five or more people and in one with three or more children. [Table 5-10]

Users of Revlon are 20% more likely than women on average to have a household income in the \$50,000-\$74,999 range. Although multiple children are more common in the households of Revlon users, they also have a higher likelihood of being retired. [Table 5-11]

Table 5-10**Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: L'Oreal**

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age 25-34	163	Size/composition of household	
Hispanic	185	5 or more people	161
Place of residence		3 or more adults	124
Pacific	135	1 or more children	122
Top 25 DMAs	123	2 children	140
Did not graduate high school	169	3 or more children	173
Employed part-time (<30 hours)	124	Age of children	
HH income \$50,000-\$74,999	130	Under 6	142
Live in rented apartment	134	6-11	120
		12-17	134

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-11**Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Revlon**

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Retired	121	Size/composition of household	
Homemaker	125	No. of people: 5 or more	124
HH income \$50,000-\$74,999	120	No. of children: 3 or more	142
		Age of children: under 6	128

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Boomers Lean Toward Max Factor, Gen-Xers Like Maybelline

Compared to women on average, users of Max Factor nail care products are much more likely to be in the 55- to 64-year-old age group. They also are more likely to have a household income of less than \$50,000. Maybelline users have a higher likelihood of being in the 35- to 44-year-old age group. [Tables 5-12 and 5-13]

Table 5-12

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Max Factor

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age 55-64	143	Household income	
Hispanic	137	Under \$25,000	122
Employed adults in HH: none	144	\$25,000-\$49,999.....	140
No. of people in HH: 3-4	121		

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-13

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Maybelline

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age 35-44	141	Never married	121
Race/Hispanic origin		Size/composition of household	
Hispanic	149	No. of people: 3-4	123
Black	140	1 or more children	124
Live in Central region	123	Age of children in household	
Did not graduate high school	122	12-17	121
Homemaker	132	Live in rented apartment	135

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Younger Women Like N.Y.C New York Color and Wet 'N' Wild

The N.Y.C. New York Color brand has an exceptional appeal to younger women. Compared to women on average, users of N.Y.C. are more than twice as likely to be under the age of 35. They also are much more likely to be single and to live in the Northeast. [Table 5-14]

The users of Wet 'N' Wild nail care products have a similar profile. Women partial to Wet 'N' Wild skew heavily toward women who are single and under the age of 35. [Table 5-15]

Table 5-14

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: N.Y.C. New York Color

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age		Size/composition of HH	
18-24	220	No. of people	
25-34	219	5 or more	172
Hispanic.....	131	3 or more	136
Place of residence		No. of children	
Northeast	146	1 or more	156
Pacific	122	1	149
Did not graduate high school	138	2	138
Employed part-time (<30 hours)	126	3 or more	197
Employed adults in HH: 1	145	Age of children in household	
HH income \$25,000-\$49,999	133	Under 6.....	192
Never married.....	191	6-11	129
Unmarried parent.....	182	12-17	176
Not married (any).....	138	Kind of residence.....	
		Rented house	144
		Rented apartment.....	136

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-15

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Wet 'N' Wild

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age		Size/composition of HH	
18-24.....	196	No. of people: 5 or more	170
25-34.....	179	No. of adults: 3 or more	138
Black.....	181	No. of children.....	
Did not graduate high school	125	1 or more	139
Homemaker	143	1	128
HH income \$50,000-\$74,999	130	2	123
Marital/family status		3 or more	183
Never married	165	Age of children in household	
Not married	122	Under 6.....	181
Unmarried parent.....	159	6-11	134
Kind of residence		12-17	137
Rented house	159		
Rented apartment	139		

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Many Brands Appeal to Multicultural Women

The demographics of many individual nail care brand users reflect the broad demographic profile of nail care product users shown in the previous section of this chapter. The demographic profiles of many brands skew heavily toward multicultural and lower-income women. Avon, Cover Girl, Cutex and Nutra Nail are included in this category.

Avon

Compared to women on average, Latinas are nearly twice as likely and black women around 50% more likely to use Avon nail care products. Other demographic markers of women using Avon include a higher-than-average likelihood of having less than a high school education, a household income under \$25,000, living in a rented apartment and being an unmarried parent. [Table 5-16]

Cover Girl

Women using the Cover Girl brand of nail care products are 37% more likely to be under the age of 35 and also have a higher likelihood of never having married. Cover Girl users are more likely to be black or Hispanic and to live in a large household. They have a 33% higher likelihood of being a homemaker. [Table 5-17]

Cutex

Women using the Cutex brand of nail care products are more likely to be black and to be 65 years old and over. A household income of less than \$25,000 and a lack of a high school diploma also are more likely. [Table 5-18]

Nutra Nail

Users of Nutra Nail products are more likely to have a household income below \$25,000. They also are more likely to be unmarried and have children in the household. [Table 5-19]

Sally Hansen

Women using Sally Hansen products have a higher likelihood of being black and living in the central region of the country. [Table 5-20]

Table 5-16**Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Avon**

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Race/Hispanic origin.....		HH income under \$25,000.....	141
Hispanic.....	197	Size of household.....	
Black.....	149	5 or more people	136
Place of residence		3 or more adults.....	126
Northeast	121	3 or more children.....	141
Outside top 100 DMAs.....	121	Live in rented apartment.....	140
Education.....		Unmarried parent.....	132
Did not graduate high school	177		
High school graduate only	129		

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-17

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Cover Girl

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age		Size of household	
18-24.....	137	5 or more	141
25-34.....	137	3 or more	180
Race/Hispanic origin		Age of children in household	
Hispanic	128	Under 6.....	141
Black.....	151	6-11	126
Homemaker	133	Live in rented apartment	147
Never married.....	124	Unmarried parent.....	131

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-18

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Cutex

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Age 65+	128	Unmarried parent.....	141
Black (Non-Hispanic)	167	Age of children.....	
Did not graduate high school	130	6-11	130
No employed adults in house.....	130	12-17	126
HH income under \$25,000.....	141	Live in rented apartment	154

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-19

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Nutra Nail

Key Demographic Indicators	Index	Key Demographic Indicators	Index
HH income under \$25,000.....	174	3 or more adults in household	131
Marital/family status		1 or more children in household	147
Not married.....	139		
Parent/guardian of any children...	129		

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Table 5-20

Demographic Highlights of Users of Nail Polish/Nail Care Products by Brand: Sally Hansen

Key Demographic Indicators	Index	Key Demographic Indicators	Index
Black.....	120	Live in Central region.....	123

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Chapter 6 Women and Professional Nail Care Services

- More than 90% of those receiving manicures and pedicures are women.
- Only 8% of women get four or more manicures in a six-month period, but they account for 37% of all women getting manicures.
- 18- to 34-year-old women account for around 26% of women getting four or more manicures and 29% of those obtaining four or more pedicures.
- Black women comprise 13% of the population of adult women but account for 21% of the population of women who obtained four or more manicures or pedicures in the past six months.
- 33% of women with a household income of \$150,000 or more used a salon for a pedicure in the past six months, compared to only 12% of those with a household income of less than \$50,000.
- Women living in large metropolitan areas in the Northeast have the highest propensity to make multiple visits to salons for manicures and pedicures.

Overview

Manicures and Pedicures Part of Women's World

Nearly 27 million adults went to a salon for a manicure, while 32 million engaged the services of a salon for a pedicure in the last six months. Women are around 10 times more likely than men to get a manicure (21% vs. 2%) or a pedicure (25.1% vs. 2.5%). More than 90% of those receiving manicures and pedicures are women. [Table 6-1 and Figures 6-1 and 6-2]

Table 6-1

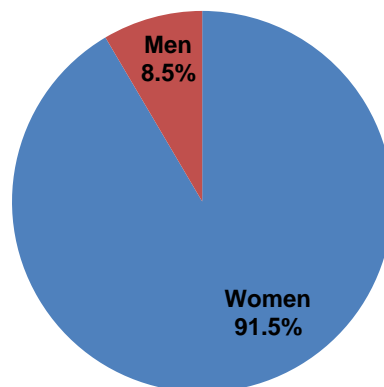
Number of Consumers Having Manicure or Pedicure in Last Six Months by Gender (in thousands)

Salon Service	No.	% of Population	
		Women	Men
Manicure	26,751	20.9%	2.1%
Pedicure.....	32,042	25.1	2.5

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Figure 6-1

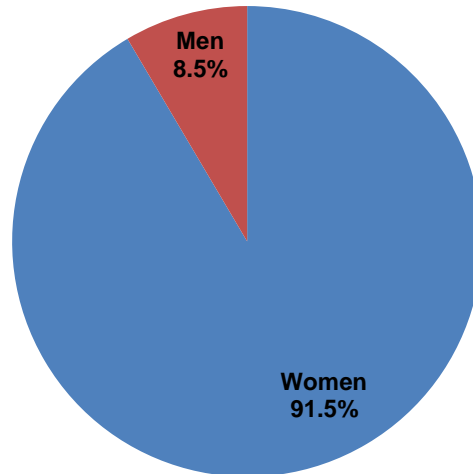
Percent of Consumers Having Manicure in Last Six Months by Gender



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Figure 6-2

Percent of Consumers Having Pedicure in Last Six Months by Gender



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Salons Depend on Core of Frequent Users of Manicure and Pedicure Services

Only 8% of women get four or more manicures in a six-month period, but they account for 37% of all women getting manicures. Women going to a salon for a manicure at least twice every six months represent 74% of the population of women buying manicure services from salons.

A similar pattern holds for pedicures. Around 17% of women get two or more pedicures every six months. They constitute 70% of all women getting pedicures. [Table 6-2]

Table 6-2

Use of Manicure and Pedicure Services by Women in Last Six Months, 2011
(in thousands)

Category	No.	% of Population of Women	% of Category
Manicure.....			
4 or more	8,997	7.7%	36.8%
2-3	9,129	7.8	37.3
1.....	6,349	5.4	25.9
Total.....	24,475	20.9	100.0
Pedicure.....			
4 or more	8,441	7.2	28.8
2-3	12,020	10.3	41.0
1.....	8,868	7.6	30.2
Total.....	29,329	25.1%	100.0%

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Profile of Women Using Professional Nail Care Services

All Women under 65 Drawn to Manicures and Pedicures

Experian Simmons National Consumer Study (NCS) data show that only women in the 65+ age group have a relatively low likelihood of buying manicure and pedicure services. Women in the 35- to 44-year-old age group are most likely to visit salons for these services.

Older boomer women (those in the 55- to 64-year-old age group) are most likely to have obtained four or more manicures in the past six months. Women in the 35- to 44-year-old age group have the highest propensity to get pedicures frequently. [Table 6-3]

Table 6-3

Use of Manicure and Pedicure Services by Women in Last Six Months by Age Group

Category	% of All Women	Index by Age Group				
		18-34	35-44	45-54	55-64	65+
Manicure in last six months	20.9%	109	112	99	108	72
Number of times						
4 or more	7.7	92	103	110	123	81
2-3	7.8	109	136	83	96	73
1.....	5.4	131	93	102	104	59
Pedicure in last six months	25.1	103	119	104	102	73
Number of times						
4 or more	7.2	104	117	103	106	72
2-3	10.3	84	140	100	104	82
1.....	7.6	126	92	111	96	61

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Younger Women Most Important Clients for Salon Services

Women under the age of 45 comprise 46% of the population of women but represent 50% of those obtaining a manicure or pedicure in the past six months. In absolute terms, 18- to 34-year-old women are the most important part of the client base of salons for manicures and pedicures. They account for around 26% of women getting four or more manicures and 29% of those obtaining four or more pedicures. [Table 6-4]

Table 6-4

Use of Manicure and Pedicure Salon Services by Women by Age Group as Percent of Each Service Category

Category	% of Each Category				
	18-34	35-44	45-54	55-64	65+
Total population	28.0%	17.7%	19.1%	16.0%	19.1%
Manicure in last 6 months	30.3	19.8	18.7	17.3	13.8
Number of times in last 6 months					
4 or more	25.7	18.1	21.1	19.8	15.4
2-3	30.6	24.0	16.0	15.4	14.0
1	36.5	16.2	19.3	16.6	11.4
Pedicure in last 6 months	28.8	21.0	19.8	16.4	13.9
Number of times in last 6 months					
4 or more	29.1	20.6	19.6	17.0	13.7
2-3	23.7	24.7	19.1	16.8	15.7
1	35.6	16.4	21.0	15.5	11.5

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Black Women Anchor Market for Manicure and Pedicure Services

In general, black, Hispanic and other multicultural women are more likely than non-Hispanic white women to depend on salons for manicures and pedicures. Black women are especially likely to be frequent users of professional manicure and pedicure services. They are around 70% more likely than women on average to have gotten four or more manicures or pedicures within the past six months. [Table 6-5]

As a result, black women exercise a disproportionate influence in the market for salon manicure and pedicure services. They comprise 13% of the population of adult women but account for 21% of the population of women who obtained four or more manicures or pedicures in the past six months. [Table 6-6]

Table 6-5

Use of Manicure and Pedicure Salon Services by Women by Race and Hispanic Origin

Category	% of All Women	Index by Race and Hispanic Origin			
		Non-Hispanic White	All Multi-cultural	Latina	Black
Manicure in last six months	20.9%	96	110	105	120
Number of times					
4 or more	7.7	90	121	113	169
2-3	7.8	94	114	100	113
1.....	5.4	106	89	102	59*
Pedicure in last six months	25.1	102	96	89	114
Number of times					
4 or more	7.2	89	124	107	171
2-3	10.3	103	94	87	117
1.....	7.6	113	72	74	58*

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic. Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution.

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Table 6-6

Use of Manicure and Pedicure Salon Services by Women by Race and Hispanic Origin as Percent of Each Service Category

Category	% of Each Category			
	Non-Hispanic White	All Multicultural	Latina	Black
Total population	67.5%	32.5%	13.9%	12.5%
Manicure in last 6 months	64.3	35.7	14.5	15.0
4 or more in last 6 months	60.7	39.3	15.7	21.2
Pedicure in last 6 months.....	68.9	31.1	12.3	14.3*
4 or more in last six months ..	63.2	36.8	14.7	21.4

Note: Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution.

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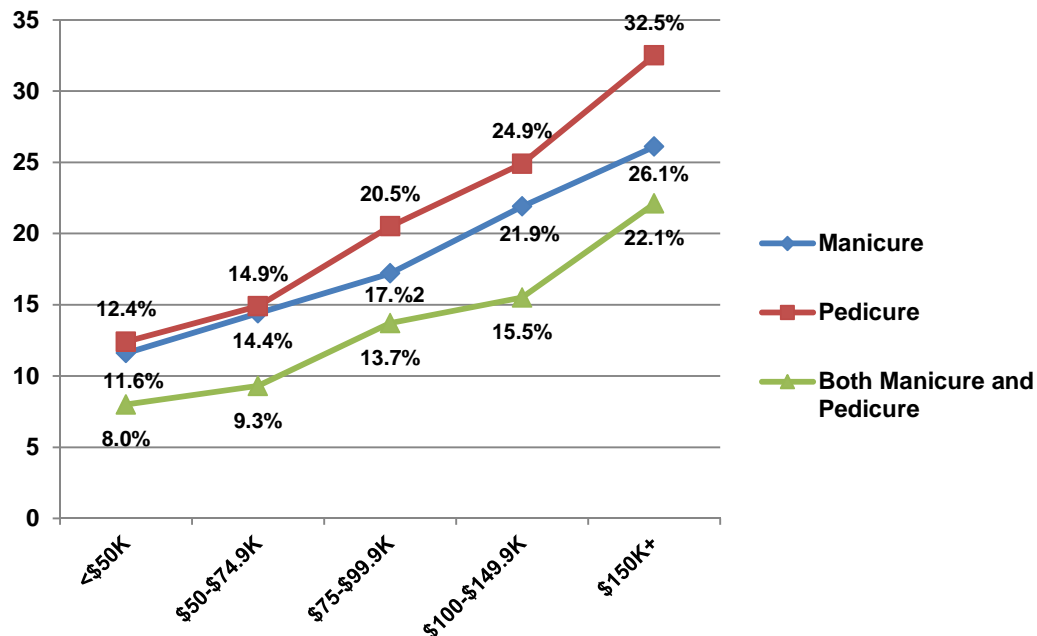
High-Income Women More Likely to Use Salon Services

There is a high correlation between household income and the use of manicure and pedicure salon services. For example, as seen in Figure 6-3, 33% of women with a household income of \$150,000 or more used a salon for a pedicure in the past six months, compared to only 12% of those with a household income of less than \$50,000. A similar pattern holds for manicures (26% vs. 12%).

High-income women also are much more likely to be frequent users of manicure and pedicure services in salons. For example, 14% of women with a household income of \$150,000 or more got four or more manicures in the past six months, compared to only 5% of women with a household income below \$50,000. [Table 6-7]

Figure 6-3

Percent of Women Having Manicure and Pedicure Salon Services in Last Six Months by Household Income, 2011



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Table 6-7

Number of Times Women Had Manicure and Pedicure Salon Services in Last Six Months by Household Income, 2011

No. of Times in Last Six Months	Less than \$50,000	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000-\$149,999	\$150,000 or More
Manicure					
4 or more	4.9%	8.5%	8.6%	10.2%	14.4%
2-3	6.7	5.9	8.6	10.9	11.8
1.....	4.3	4.4	7.4	6.4	8.5
Pedicure					
4 or more	4.6	7.4	8.2	9.2	14.8
2-3	7.7	7.5	12.3	15.7	17.8
1.....	4.9	8.4	9.2	12.3	10.9

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Women of All Income Levels Remain Important to Salons

Although high-income women have a higher propensity to use manicure and pedicure services, women of all income levels find their way to salons to get manicures and pedicures. Women with a household income of less than \$50,000 comprise around one-third of all women getting multiple manicures in the past six months. Women with a household income below \$75,000 account for around half of the population of women getting two or more manicures or pedicures during this period. [Table 6-8]

Table 6-8

Use of Manicure and Pedicure Salon Services by Women by Age Group as Percent of Each Service Category

Category	% of Each Category				
	Less than \$50,000	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000-\$149,999	\$150,000 or More
Total population	46.4%	18.2%	12.6%	12.1%	10.7%
Two or more manicures in last six months	34.8	16.8	13.9	16.4	18.1
Two or more pedicures in last six months	32.8	15.4	14.7	17.1	19.9
Two or more manicures or pedicures in last six months....	32.7	14.9	15.1	16.5	20.8

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Clientele of Salon Services Have Distinctive Profile

The demographic profile of women making frequent use of professional manicure and pedicure services differs from that of women as a whole. For example, women frequenting salons for two or more manicure services in the last six months (referred to in this chapter as “salonistas”) are more likely to be 25- to 44-year-olds and to be in a multicultural population segment. They also are more likely to work on a full-time basis (50% vs. 48%) and to be a college graduate (35% vs. 28%). As seen in Table 5-9 below, they are more likely to live in a rented or owned apartment (22% vs. 17%), indicating that they are more likely to live in urban areas. [Table 6-9]

Table 6-9

Demographic Profile of Women as Percent of Users of Two or More Manicure and Pedicure Services in Past Six Months

Category	All Women	Percent of Users of Two or More Services in Last Six Months		
		Manicure	Pedicure	Manicure and Pedicure
Age.....				
18-24	11.9%	9.6%	7.9%	8.2%
25-34	17.4	18.6	18.0	20.3
35-44	17.9	21.0	23.0	19.9
45-54	19.2	18.5	19.3	19.5
55-64	16.0	17.6	16.8	17.8
65+	17.6	14.7	14.9	14.4
Race and Hispanic origin.....				
White non-Hispanic.....	67.6	61.9	65.5	60.9
Multicultural	32.4	38.1	34.5	39.1
Hispanic.....	14.7	14.7	13.2	14.5
Black.....	11.5	17.2	17.0	19.0
Education				
Did not graduate high school ..	12.3	7.4	5.2	5.6
High school graduate.....	31.9	23.1	23.7	22.1
Some college.....	28.2	34.9	31.3	32.4
College graduate or more	27.6	34.6	39.7	39.9
Employment profile				
Employed full-time (30+ hours)	47.7	50.2	52.0	51.1
Employed part-time <30 hours)	11.8	14.9	13.9	14.2
Homemaker	6.2	6.3	7.0	6.8
Retired	16.7	15.4	14.8	15.0
Marital status				
Never married.....	27.0	24.1	23.2	23.8
Presently married.....	53.9	52.3	54.8	54.3
Not married (any).....	46.1	47.7	45.2	45.7

—continued—

Table 6-9

Demographic Profile of Women as Percent of Users of Two or More Manicure and Pedicure Services in Past Six Months [Cont.]

Category	All Women	Percent of Users of Two or More Services in Last Six Months		
		Manicure	Pedicure	Manicure and Pedicure
Parent/guardian of any children.....	53.9%	56.4%	59.3%	56.5%
Kind of residence.....				
Owned				
House	61.9	63.5	63.6	61.9
Condo or co-op	3.6	5.9	5.6	5.6
Rented				
House	12.5	10.4	11.7	11.5
Condo or co-op	13.4	16.4	15.5	17.3

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Market for Professional Manicure and Pedicure Services Thrives in Urban Areas of Northeast

Women living in the Northeast and in the 25 largest DMAs are most likely to have used professional manicure and pedicure services in the last six months. When controlled by region, women living in large metropolitan areas in the Northeast continue to have the highest propensity to make multiple visits to salons for manicures and pedicures. Women in the Central region of the country are least likely to turn to salons for manicures and pedicures.

[Table 6-10]

Table 6-10

Percent of Women Having Two or More Manicure and/or Pedicure Services in Last Six Months, by Region and Size of Urban Area

Category	Two or More Services in Past Six Months		
	Manicure	Pedicure	Manicures and Pedicures
Region			
Northeast	11.0%	10.9%	8.5%
Southeast	8.2	10.0	6.3
Central	5.2	6.2	3.3
Southwest	8.9	8.8	5.6
Pacific	8.1	10.1	6.4
Size of DMA			
Top 25 DMAs	10.1	11.4	8.1
Top 26-100 DMAs	6.2	6.9	3.7
Not top 100 DMAs	5.1	6.0	3.5*
Top 25 DMAs by region			
Northeast	13.3	13.5	10.8
Southeast	11.5	12.9	9.5
Central	6.5	8.1	4.8
Southwest	11.2	12.3	7.9
Pacific	8.8	11.0	7.4

Note: Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution.

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“Salonistas” Profiled

Table 6-11 displays the characteristics of women who are most likely to have had multiple manicures and pedicures in the past six months. Compared to women as a whole, salonistas are more likely to be black, live in urban areas, have a college degree or more and work on a full-time basis.

The financial profile of salonistas is highly favorable. They are more likely than women on average to have a household income of \$100,000 or more and are more than twice as likely to have an employment income of \$100,000 or more. They also have a much higher likelihood of working in managerial and professional jobs.

Table 6-11

Women Most Likely to Have Two or More Manicures and/or Pedicures in Last Six Months by Demographic Characteristic

Category	Had two or more manicures	Had two or more pedicures	Had two or more manicures and pedicures
Black.....	142	140	156
Northeast.....	136	120	144
Top 25 DMAs.....	126	126	137
Kind of residence: owned condo or co-op.....	164	155	155
College degree or more.....	125	143	144
Employed full-time.....	123	127	125
Household income.....			
\$100,000-\$149,999.....	136	142	136
\$150,000 or more.....	168	186	194
Individual employment income.....			
\$50,000 or more.....	159	186	188
\$75,000 or more.....	195	207	239
\$100,000 or more.....	231	216	287
Occupation.....			
Professional/technical.....	144	136	132
Management/financial/business operations.....	125	143	145

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Salonistas Want to Look Young and Thin

Women who visit salons frequently for manicures and pedicures are much more likely than women on average to agree that they will spend what they have to in order to look younger and to believe that it is important to be attractive to the opposite sex. Dieting is a key component of the lifestyle of salonistas. They are significantly more likely than women on average to be on a diet at the present time and to count calories when they eat. [Table 6-12]

Table 6-12

Attitudes toward Dieting and Looking Attractive, Women Having Two or More Manicures and/or Pedicures in Last Six Months

Statement	Had two or more manicures	Had two or more pedicures	Had two or more manicures and pedicures
Attitudes toward looking young and attractive.....			
I will spend whatever I have to, to make myself look younger.....	135	127	143
It is important to be attractive to the opposite sex.....	128	119	128
Attitudes toward dieting.....			
I'll try any new diet	128	115	135
I normally count the calories in the foods I eat.....	133	134	136
I am currently dieting	133	133	135
Most of the time I am trying to lose weight by dieting	123	123	123

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Salonistas Stay in Shape

Women who are frequent users of professional manicure and pedicure services are much more likely to work hard at staying fit. For example, women getting two manicures in the past six months are more likely than women on average to claim that they exercise regularly (68% vs. 54%) and to exercise three or more times per week (47% vs. 36%).

Salonistas are prime targets for the fitness industry. They are twice as likely to exercise regularly at a private club (20% vs. 10%).

The physical activities routinely undertaken by salonistas reflect their concern for physical fitness. Compared to women on average, they are much more likely to engage in activities such as fitness walking, jogging, aerobics and weight training. [Table 6-13]

Table 6-13

Fitness Profile, Salonistas vs. All Women

Category	All Women	Had two or more manicures in last six months	Had two or more pedicures in last six months	Had two or more manicures and pedicures in last six months
Exercised regularly in last 12 months....	53.7%	67.8%	67.3%	69.8%
Where.....				
Home	32.2	39.2	39.3	41.2
Private club	10.1	19.5	19.6	21.6
YMCA/YWCA.....	3.6	5.6	6.2	6.4
Other facility	11.8	12.7	13.3	12.8
Number of times per week				
3 or more	35.7	46.7	45.7	48.0
2.....	12.4	16.1	16.8	16.3
1.....	4.6	4.4	4.1	4.5
Physical activities in last 12 months.....				
Aerobics.....	17.2	23.4	22.7	25.3
Bicycling-stationary	14.6	17.4	18.1	19.4
Fitness walking/exercise walking	47.5	53.2	55.5	54.7
Jogging/running	19.5	28.4	27.0	30.2
Weight training.....	14.0	21.0	22.0	23.3
Yoga	14.2	19.1	20.0	21.4

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Fashion Has High Priority

As part of enhancing their image, salonistas exhibit a strong interest in fashion. For example, compared to women on average, they are much more likely to keep up with the latest fashions and to make a unique fashion statement. Moreover, salonistas translate their attitudes into action. For example, they are much more likely than women as a whole to buy new clothes in order to keep up with the latest fashions. [Table 6-14]

Table 6-14

Attitudes toward Fashion and Buying Clothes, Women Having Two or More Manicures and/or Pedicures in Last Six Months

Statement	Had two or more manicures	Had two or more pedicures	Had two or more manicures and pedicures
Fashion magazines help me determine what clothes to buy	154	141	168
I like to keep up with the latest fashions	161	154	169
I like to make a unique fashion statement.....	144	135	155
I no longer wear a lot of the clothes I wore a year ago because they have gone out of style	143	128	152
I am usually the first among my friends to try new clothing styles	164	161	190
I like to experiment with new clothing styles	145	141	158
My budget allows for me to buy expensive designer clothes	181	160	201
Often I buy clothes that I don't really need.....	143	136	148
Almost every season I buy new clothes in order to keep up with the latest fashions	169	171	194
I really enjoy clothes shopping.....	137	130	139

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

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Shopping Part of Salonista Lifestyle

Compared to women on average, women who are frequent users of professional manicure and pedicure services are more likely to really enjoy shopping and to say they go shopping frequently. They also are more likely to seek out new stores. [Table 6-15]

Table 6-15

Attitudes toward Shopping, Women Having Two or More Manicures and/or Pedicures in Last Six Months

Statement	Had two or more manicures	Had two or more pedicures	Had two or more manicures and pedicures
I really enjoy any kind of shopping.....	135	132	143
I often go out of my way to find new stores to shop at	148	135	160
I am usually the first among my friends to shop at a new store.....	168	147	178
I go shopping frequently.....	129	133	135
Even when I don't purchase something I enjoy shopping	123	123	125

Note: An index of 100 indicates that respondents are about as likely as all women to exhibit certain characteristics. An index greater than 100 indicates that respondents exhibit an above-average likelihood of having a certain characteristic.

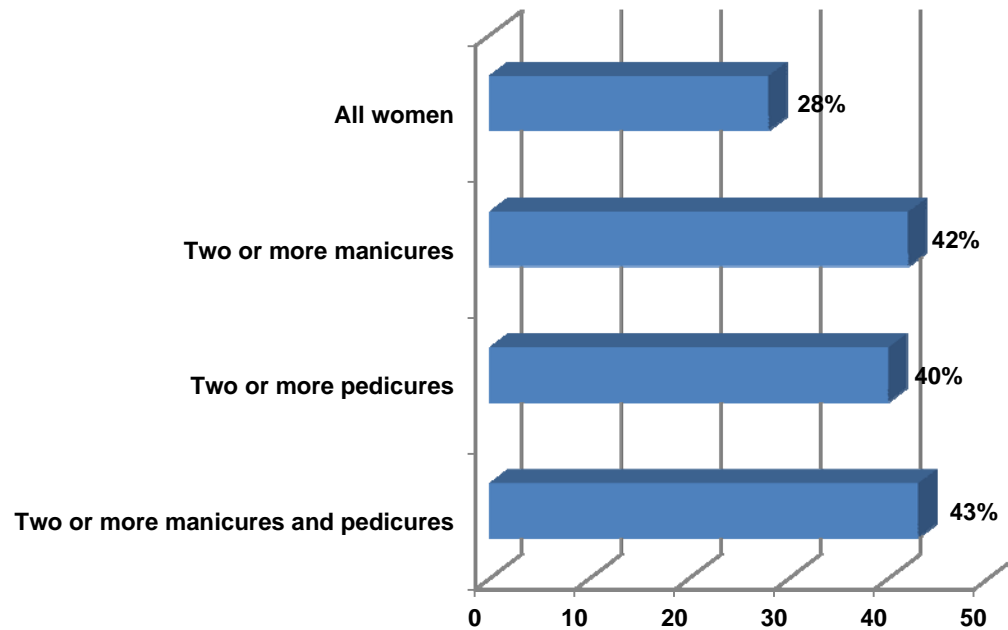
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Salonistas Spend on Toiletries

Women going to a salon for a manicure or pedicure two or more times in the past six months are also drawn to spending money on toiletries. They are much more likely than women on average to report that they spend a lot of money on toiletries. [Figure 6-4]

Figure 6-4

Percent Agreeing “I Spend a Lot of Money on Toiletries,” Women Receiving Two or More Manicures or Pedicures in the Last Six Months vs. All Women



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At-Home Use of Nail Care Products by Frequent Users of Professional Nail Care Services

Salonistas More Likely to Use Nail Care Products at Home

Getting a professional manicure or pedicure and using nail care products at home are not the result of an either-or choice. In fact, salonistas are far more likely than other women to be frequent users of nail care products at home. Compared to women who did not have two or more manicures in the past six months, salonistas are more likely to have used nail care products in the past 30 days 10 or more times (6.5% vs. 3.5%), seven to nine times (5.5% vs. 3.6%), five or six times (12.9% vs. 8.1%) or two to four times (38.6% vs. 22%). [Table 6-16]

Table 6-16

Number of Times Using Nail Polish/Nail Care Products in Last 30 Days, Women Having Two or More Manicures in Last Six Months vs. Other

No. of Times	All Women	Had two or more manicures in last six months	Did not have two or more manicures in last six months
10 or more	4.0%	6.5%	3.5%
7-9	3.9	5.5	3.6
5-6	8.9	12.9	8.1
2-4	24.5	38.6	22.0
1	10.9	9.7	11.1

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OPI and Essie Far More Popular among Salonistas

OPI and Sally Hansen are the top two brands of nail care products among both salonistas and women as a whole. However, because of their nailcentric culture, the percentage of salonistas using most nail care brands is much higher than it is among women on average. Other patterns of brand usage among salonistas include the following:

- OPI's lead among salonistas is far more commanding than is Sally Hansen's among women on average. O.P.I is the choice of 32% of salonistas, while Sally Hansen is

used by 15% of salonistas. Among women as a whole Sally Hansen and O.P.I are essential tied (7.8% vs. 7.6%).

- Essie is far more popular among salonistas than women on average (6.2% vs. 0.9%).
[Table 6-17]

Table 6-17

Nail Polish/Nail Care Product Brands Used in Last Six Months, Women Having Two or More Manicures in Last Six Months vs. All Women

Brand	All Women	Brand	Women Having Two or More Manicures in Last Six Months
Sally Hansen	7.8%	OPI	32.4%
OPI	7.6	Sally Hansen	14.8
Revlon	4.7	Revlon	10.8
Avon	4.6	Avon	8.1
Wet 'N' Wild	3.9	Cover Girl	6.9
Cover Girl	3.0	Essie.....	6.2
Maybelline	2.5	Wet 'N' Wild.....	5.8
Cutex	2.4	Cutex	5.2
N.Y.C. New York Color	1.8	Maybelline	5.1
L'Oreal	1.7	N.Y.C. New York Color.....	4.4
Max Factor.....	0.9	L'Oreal	4.0
Essie.....	0.9	Max Factor.....	2.2
Nutra Nail.....	0.8	Estee Lauder	2.2
Sinful Color	0.8	Lancôme.....	2.2*
Estee Lauder	0.6	Almay	1.8*
Lancôme.....	0.5	Nutra Nail	1.5*
Almay.....	0.5	Sinful Color	**
Chanel	0.3	Chanel	1.3*

Note: Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution. Cells with a double asterisk indicate that the number of cases is too small for reliability.

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Multicultural Salonistas Choose Wider Variety of Nail Care Brands

OPI is the overwhelming choice of non-Hispanic white salonistas, with Sally Hansen a distant second (40% vs. 13%). The only other brands without a statistical note of caution from Experian Simmons NCS are Revlon (7.6%) and Essie (7.4%).

In contrast to the loyalty generated by OPI among non-Hispanic white women who are frequent users of professional manicure and pedicure services, multicultural salonistas are much less tied to a single brand. OPI is used by only 21% of multicultural salonistas. Compared to the brand choices of their non-Hispanic white counterparts, multicultural salonistas are more likely to spread their preferences among a wide range of brands. In addition to Sally Hansen, double-digit percentages of multicultural salonistas use Revlon, Avon, Wet 'N' Wild, Cover Girl and Maybelline. [Table 6-18]

Table 6-18

Leading Nail Polish/Nail Care Product Brands Used by Women Having Two or More Manicures in Last Six Months, Multicultural vs. Non-Hispanic White

Brand	Multicultural Women	Brand	Non-Hispanic White Women
OPI	20.5%	OPI	39.8%
Sally Hansen.....	17.9	Sally Hansen.....	12.9
Revlon.....	16.1	Revlon.....	7.6
Avon	14.8	Essie	7.4
Wet 'N' Wild	12.4	Cover Girl.....	4.3*
Cover Girl.....	11.2	Avon	4.0*
Maybelline.....	10.0	L'Oreal	2.7*
Cutex	9.9	Cutex	2.3*
L'Oreal	6.0		
N.Y.C. New York Color	5.4*		
Essie	4.2*		
Nutra Nail.....	3.9*		
Estee Lauder	3.6*		
Lancôme	3.4*		
Max Factor.....	3.2*		

Note: Cells with a single asterisk indicate a projection that is relatively unstable because of the size of the sample base and is to be used with caution.

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