

becomes the main reason of low sales. In winter one can find sun protection products mainly in pharmacies. Even in spring, when the sun is already warm, the assortment of sun care products in specialized perfumery chains is poor. Massmarket products are absent, while limited range of premium trademarks is merchandised at Ile de Beaute, L'Etoile and Arbat Prestige. Sisley has the widest distribution. Its products are offered in the majority of perfumeries at 1700–5525 ruble. Thalgo can be found in Arbat Prestige and L'Etoile at price starting from 730 ruble. Clarins is sold in L'Etoile and Ile de Beaute and is positioned in 849–1399 ruble price range. Besides that L'Etoile offers Lancaster at 449–1179 ruble, while Arbat Prestige sells Biotherm (960–1120 ruble) and Clinique (545–870 ruble). Ile de Beaute supposed to have the best sun care assortment comprising Biotherm (1100 ruble), Comfort zone (770–1190 ruble), Estee lauder (845–870 ruble), Lancome (1113 ruble), Payot (700–1115 ruble), Matis (945–1190 ruble).

In summer distributors of massmarket products become more active, especially at popular resorts like Black Sea coast. Beiersdorf, Linda, Garnier, Floresan, Kolastyna, Kora company, Johnson & Johnson, Mesoplast, Yves Rocher, Londa, Serebryannaya Rosa, Green Mama, Magrav and several other companies compete for consumer attention in low and middle mass market.

Sole Mio by ASD, a Russian manufacturer, is among massmarket novelties. The series comprises three types of sun care oil with three different aromas. Product formula comprises vitamin E claimed to be a natural UV filter. Sole Mio provides basic SPF2. Light plastic flacon is designed to provide convenient usage in a trip.

Some Russian companies have already moved to premium segments. For example, Green Mama, besides its inexpensive Solnechny Krug line, launched Sun Body-Guard retailed at 1200 rubles (about \$46).

Additional value, created by moisturizing, anti-ageing and anti-cellulite features of a product, serves as a tangible advantage in competition. For example, Oriflame, one of cosmetic leaders in the Russian market, offers anti-ageing sun protecting creams. Techkon Cosmetic widened Voyage Solange series with anti-cellulite SPF 10 cream, while Ishi collection has moisturizing mousse White Chocolate.

#### Brand data, Russia, 2006, %

Source: Euromonitor

Garnier Ambre Solaire	16
Nivea Sun	12.1
Bronze by Avon	6.2
Oriflame	5.5
Vichy Capital Soleil	3.3

#### Company data, Russia, 2006, %

Source: Euromonitor

L'Oreal	26.3
Beiersdorf	12.1
Avon	8.4
Oriflame	5.5
Yves Rocher	3.2

According to the poll conducted at [www.intercharm.net](http://www.intercharm.net), the majority of beauty professionals (33%) believe that substantial investments into educational campaigns about the damage that sun can arouse will increase sun care sales in Russia. 15% of correspondents consider high launching activity is the best way to stimulate sales. 44% of market players prefer to even season consumption curve out: 24% of them stand up for positioning in cosmeceuticals segment, while 20% offer cooperation with solariums.

Only 7% of women in Russia use sun care all year round, as compared to 33% of women in USA, 41% in Japan and 44% in Korea (Clinique). Manufacturers regard self-tanning products as a good instrument to boost consumption in sun care market. Advertorials do their best to promote fashion for tanned body and self-tanning cosmetic is in demand all the year round. Almost all the companies dealing in the Russian market offer self-tanning products in their sun care lines. These products have especially strong positions in premium segment. In the period 2007 – 2009 experts forecast the most active growth of self-tanning cosmetics sales, while in 2011 the growth rate is expected to reach 14% annually.

After-sun products are evidently not the primer necessity of Russian people. The

segment reported a negligible \$10.2m in 2006. Foreign companies make attempts to attract mad about everything new Russians with strikingly exotic ingredients. For example, Ambre Solaire enriched its after-sun balm with cactus extract. However, these products are still treated as extravagant excess.

On the contrary, cosmetic production targeting baby's and sensitive skin become more popular. Some companies widen their sun protecting lines for babies with new products, other market players have just entered this segment. Thus, Rassvet, a local cosmetics manufacturer, launched sun protecting SPF 24 cream for babies within its sun care line. The cream is based on physical filters, which provide maximum safety for its small users, as the company claims.

Sun care products are the most demanding by young women at the age 20–24 years old. 11.8% of them claim to buy products for skin protection and aftersun treatment (Comcon Pharma). Remarkably, this is the largest share of sun care users among various age groups, that highlights generally low consumption of sun care products in Russia and high potential of the segment. Women are more active sun care consumers than men. Only 2.3% of men at the age 20–24 years old (the most purchase prone group) use sun care. Women after 35 years old claim they buy sun care rarely. These groups of consumers may provide further growth of sun care segment in Russia. While sun care adopt caring treats of skin care, the segment borders dissolve and sun protection factors are included in skin care creams, make-up products and hair care. Lancaster, Sisley, Lancome develop the direction of mini-packs, thermostable cosmetic bags, while Shiseido and Estee Lauder provide Russian people with high SPF colour cosmetics, including compact powder and lipstick.

Though Russian perfumery and cosmetics market is already a quite developed one, sun care still remains relatively new to Russia and is brought predominantly by foreign companies. People, preferring to spend their vacations at dachas, are the most alluring and still undeveloped group of consumers. Undoubtedly, sun care has a high potential to develop, if promoters manage to break the ice in sun care distribution.

More data is on [www.cosmeticsinrussia.com](http://www.cosmeticsinrussia.com).

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