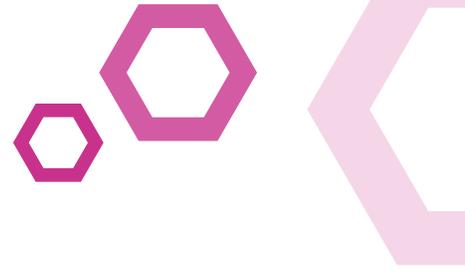


10th Edition



Natural Personal Care: U.S. Market Analysis and Opportunities

To Be Published 1st Quarter 2019

Base Year: 2018

Forecasts to 2023

Regional Coverage: United States

This report series contains in-depth analysis of the dynamic market for naturally positioned, clean, and organic beauty and personal care products. Focusing on market size and growth, news-making imports, key new launches and product trends, and alternate channels, this comprehensive analysis features natural ingredient ratings using Kline's proprietary rating scale. The consumer survey takes a deep dive into the various triggers and influencers of purchase decisions and identifies unmet needs of consumers.

This Report Answers Such Questions as:

- What are the key differences between “truly natural” and “nature-inspired” products?
- Which brands receive the highest rating in our proprietary ingredient analysis?
- What are the fastest-growing natural personal care brands in each category, and why?
- What are the key consumer trends and behaviors in terms of preference for degree of naturalness of a product and channels to shop for products?
- What certifications and labeling do consumers look for?
- For consumers not currently using natural products, what would help them convert?



Tentative Report Contents*

Introduction

- Scope
- Sources and methods

Market Overview

- Total industry size and growth
- Key takeaways
- Breakdowns of sales for natural-inspired vs. truly natural products
- Market drivers and trends
- Product class sales breakdowns
- Sales growth of natural personal care products vs. general market by product class
- Product category breakdowns
- Product and ingredient trends
- Competitive landscape
- Channels of distribution
- Digital influencer strategies by the naturally positioned brands
- Outlook to 2023

Brand Profiles

Brief snapshots will be provided for approximately 15 brands/companies marketing natural personal care products, as listed in Table 2. Information provided includes company overview, sales estimates, natural rating, primary distribution channel, and outlook.



Consumer Insights*

A detailed consumer survey that will provide a thorough understanding of the following:

- Demographics
 - Demographics of natural personal care purchasers and users
 - Demographics of users who mostly use conventional brands
- Market factors
 - Key factors driving natural personal care usage
 - Levels of satisfaction with naturally derived products
 - Unmet needs of the consumers
 - Influencers of purchasing decisions
 - Factors that would make the conventional brand users convert to naturally positioned brands
 - Views of safety of natural personal care products compared to conventional products
 - Views on efficacy of natural personal care products compared to conventional brands
- Brands
 - Most popular and trusted brands
 - Importance of certification and labeling
- Purchase decisions
 - Favorite purchase channels of naturals
 - Most trusted retailers of naturally-derived product users
 - Sources of information to help make purchasing decisions
 - Frequency of purchase of products

* Subject to charter subscriber input



Table 1: Product Category Breakdown

| |
|--------------------------------|
| Deodorants and antiperspirants |
| Facial skin care |
| Fragrances |
| Hair care products-a |
| Hand and body lotions |
| Makeup |
| Oral care products-b |
| Personal cleansing products |
| All other skin care-c |
| All other-d |

a- Includes shampoos, conditioners, hair coloring products, and hair styling products and sprays.

b- Comprises all oral care products, as well as lip balms, jellies and treatment products.

c- Includes sun care, baby skin care products, and skin care for men.

d- Includes shaving products and miscellaneous products.

Table 2: Illustrative List of Brand Snapshots to be Provided-a

| | |
|------------------|---------------------|
| Ahava | Indie Lee |
| Andalou | M-61 |
| Biossance | Naturally Serious |
| Boscia | Ole Henriksen |
| Coola | One love Organics |
| Desert Essence | Summer Friday |
| Era Organics | True Botanicals |
| First Aid Beauty | Vita Liberata |
| Goop | Volition Beauty |
| Lilyana Naturals | Youth to the People |

a- Subject to subscriber input.



Scope

This report provides subscribers with an analysis of trends and development, market size and growth, product trends, brand synopses, and competitive forces within the natural personal care market in the United States.

- The report will provide the subscribers with in-depth analysis of trends and developments in the consumer purchasing patterns of natural personal care products.
- For this report, natural is defined as all brands in which naturals is a core element of its positioning.
- The following product classes will be covered: fragrances, hair care products, makeup, skin care products, and other toiletries.
- The report will focus on consumers in the United States, those who purchase mostly naturally positioned products and those who mostly purchase conventional brands.
- The market is defined as take-home (consumer use) beauty and personal care products that are positioned as natural. It excludes back-bar products used in salons, spas, etc.

This analysis will cover consumer purchases in the United States through all channels:

- Direct sales (social selling, home shopping, info-mercials, and the Internet)
- Department stores
- Mass outlets (mass merchandisers, drug stores, food stores, and warehouse clubs)
- Specialty (vertically integrated stores and cosmetics specialty retailers)
- Professional (salons and spas, doctors' offices)

Key Benefits

This report enables subscribers to exploit business opportunities by understanding market growth factors, the competitive landscape, consumer behavior, and future trends.

- Assess the natural personal care market and understand its unique market drivers.
- Inform decisions on business opportunities and marketing/sales plans.
- Learn which categories hold the most opportunity, which channels of distribution are important, and what brands are getting ahead of the pack.
- Identify potential strategic alliances, acquisition candidates, and/or customers.
- Augment business plans with reliable insights and data.
- Subscribers also receive one day of consultation time with members of the research team. This time can be used for strategic planning assistance or to explore specific or related industry information not covered in the report.



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

A structured online survey of 1,000 men and women will be completed with a nationally representative sample of consumers in the United States. Of the total sample, 65% will consist of men and women who shop for beauty natural and personal care products for themselves and others. The remainder of the respondents will be those who primarily purchase conventional (i.e. non-natural) products.

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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