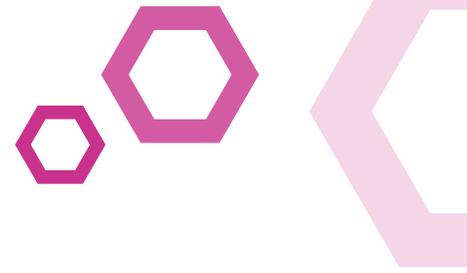


10th Edition



# Natural Personal Care: Market Analysis and Opportunities

Published January 2019

Canada Volume To Be Published July 2019

Base Year: 2018

Forecasts to 2023

Regional Coverage: Canada ■ 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. Canada volume includes a consumer survey.

## 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?

## Report Contents

### Introduction

- Scope
- Sources and methods

### Market Overview

- Total industry size and growth
- Key takeaways
- Breakdowns of sales for nature-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 of 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.

## ★ Bonus ★

### Consumer Survey for Canada!

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

- Demographics of natural personal care purchasers and users
- Influences of purchase of natural personal care products
- Product claims and labeling
- Most trusted natural personal care brands
- Willingness to pay premium for natural personal care products
- Purchase channels





**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: List of Brand Snapshots Provided**

Captain Blankenship	L'Occitane
Caudalie	Ole Henriksen
Era Organics	Schmidt's Naturals
Honest Beauty	SheaMoisture
ILIA	The Body Shop
Innisfree	TruSkin Naturals
Lawless Beauty	Youth To The People
LilyAna Naturals	



## 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 and Canada.

- The report provides subscribers with an in-depth analysis of trends and developments in the consumer purchasing patterns of natural personal care products.
- The consumer survey in Canada focuses on the consumers who purchase naturally positioned brands in the past six months.
- 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.
- For this report, natural is defined as all brands where being natural is a core element of its positioning.
- The following product classes are covered: fragrances, hair care products, makeup, skin care products, oral care, and other toiletries.

This analysis covers consumer purchases in the United States and Canada through all channels:

- Direct sales (social selling, home shopping, infomercials, 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. It also helps to:

- 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.



## 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 60-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 survey of 300 men and women with a nationally representative sample of consumers in Canada.

### 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.

#### A FULL SPECTRUM OF SERVICES



**North America**  
+1-973-435-3407

**Latin America**  
+55-11-3079-0792

**Europe**  
+32-2-770-4740

**China**  
+86-21-6012-6500

**India**  
+91-124-4546-100

**Japan**  
+81-3-3242-6277