



11th Edition

Natural Personal Care Global Series: Market Analysis and Opportunities

Published July 2020

Base Year: 2019

Forecasts to 2024

Regional Coverage: ■ Asia ■ Europe ■ Latin America ■ North America

This report series contains an in-depth analysis of the dynamic market for naturally positioned, clean, and organic beauty and personal care products. Focusing on market size and growth, newsmaking imports, key new launches and product trends, and alternate channels, this comprehensive analysis features natural ingredient ratings using Kline's proprietary rating scale.

This study addresses such questions as:

- What is clean beauty, and how does it differ from natural?
- 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 what are their drivers?
- What are the fastest-growing natural personal care brands in each market, and what is their distribution model?
- Are there new brands on the radar? What are their offerings?
- What certifications and labeling do consumers look for?

NEW AND IMPROVED:

- Interactive Brand Database with filters including product category and degree of naturalness
- Updates to our Proprietary Naturalness Rating System



Report Contents

Introduction

- Scope
- Sources and methods

Contents of Global Overview

This report is available to subscribers of the full series and includes:

- Global review of the market
- Market drivers and trends
- Key takeaways
- Top-line summaries of each region
- Snapshots of the leading and up-and-coming competitors
- Outlook to 2024

Contents of Regional Volume (see Table 1)

Market Overview

- Total industry size and growth, 2018 to 2019
- Key takeaways
- Rating of brands according to their degree of naturalness
- Market drivers and trends
- Product category sales breakdowns (see Table 2)
- Product and ingredient trends
- Competitive landscape
- Channels of distribution
- Digital influencer strategies by the naturally positioned brands
- Outlook to 2024

Contents of Database

Interactive Database broken down by company, brand, product class, category, and degree of naturalness.

Brand Profiles for the U.S. Edition

Brief profiles for approximately 10 brands/companies per region will be provided as listed in Table 3. Information provided includes company overview, sales estimates, natural rating, primary distribution channel, and outlook.

Table 1: Regions Offered

Brazil
China
Europe
United States

Table 2: Product Categories Covered

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- Includes 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 3: Illustrative List of Brands to be Profiled in the United States

Arbonne
Burt's Bees
Farmacy
Kopari Beauty
Lush
Natura Brasil
Schmidt's Naturals
Tarte
Tatcha



Scope

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

- This edition focuses on the key markets of Brazil, China, Europe, and the United States.
- 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, makeup, oral care, products, skin care, and other toiletries.
- This report uniquely separates the market into two distinct segments: truly natural products and those that are simply inspired by nature. This report considers brands to be truly natural if they are formulated with a high proportion of ingredients that comply with our definition of natural, or if they receive a score of 5 or above based on our proprietary rating scale.

Key Benefits

This report will provide subscribers with an accurate picture of the size, segmentation, and performance of the natural personal care market in key geographies. It will enable subscribers to exploit business opportunities by understanding market dynamics, competitive forces, product trends, and distribution models. Specifically, this study can be used for:

- Identifying potential strategic alliances, acquisition candidates, and/or customers
- Augmenting business plans with reliable insights and data
- Competitive intelligence
- New business development

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 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

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 more than 60 years.

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