

Natural and Organic Personal Care Consumer - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Natural brands continue to experience growth, albeit in a new direction. Clean beauty is the new green, with consumers looking for beauty products free from specific synthetic ingredients rather than synthetic-free."

Alison Gaither, Beauty & Personal Care Analyst

This report looks at the following areas:

- Majority of consumers buy mainstream BPC
- The natural industry lacks regulation
- Clean is the new natural – but what does it mean?

To expand consumer penetration of these products and advance sales growth, brands are going beyond formulations and making efforts to boost sustainability initiatives and reduce waste.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Natural and Organic Personal Care Consumer - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Majority of consumers buy mainstream BPC

Figure 1: Product purchases – Any personal care product (net)*, October 2018

The natural industry lacks regulation

Figure 2: Select attitudes toward NOPC, October 2018

Clean is the new natural – but what does it mean?

Figure 3: Select natural indicators – Clean product, by age, October 2018

The opportunities

Incentivize NOPC purchases as a way to reduce waste

In lieu of government regulations, retailers can hold brands accountable

Figure 4: It's Time for Better Beauty

Black consumers are a key driver of NOPC

Figure 5: Select purchasing behaviors, by race, October 2018

What it means

The Market – What You Need to Know

The NOPC market is still growing

Lifestyles of the health conscious – can it last?

Specialty retailers look to food and step up

Market Trends

Innovative formats, men's care lead MULO natural market

Figure 6: Multi-outlet sales of select natural and organic personal care brands, by brand, rolling 52-weeks 2017 and 2018

NOPC shows positive growth in major categories

Figure 7: Multi-outlet sales of select natural and organic personal care brands, by segment, rolling 52-weeks 2017 and 2018

Market Perspective: Lifestyles of the Health Conscious

Consumers are focusing on overall wellbeing

Figure 8: Frequency of health management, October 2017

Different resources are used for different aspects of health

Figure 9: Correspondence analysis – Sources of information, October 2017

Methodology

Make consumers feel good about choosing NOPC

Figure 10: Attitudes toward self-perceptions, August 2017

Market Factors

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Natural and Organic Personal Care Consumer - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Specialty retailers create 'clean' beauty standards . . .

Figure 11: It's Time for Better Beauty

...but the standard started with food and drink

Key Players – What You Need to Know

Brands are looking beyond natural ingredients

Environmentally conscious and plastic free is the future

What's Happening?

Brands are taking steps to support sustainable and ethical practices

Waste reduction gets creative

Vegan beauty products are a natural extension of cruelty free

Figure 12: Share of US BPC product launches making vegan/no animal ingredients claims, January 2015-November 2018

What's Next?

The problem with plastic

Figure 13: Norwegian BPC products bearing the Nordic Ecolabel

Figure 14: Beauty and personal care products created with 100% recycled materials

Social awareness – brand as a by-product

The Consumer – What You Need to Know

Functional segments suffer from lack of options, engagement

Mass merchandisers lead for NOPC purchases, Amazon isn't far behind

To many consumers, natural means clean

Consumers want to make the right choice, as long as it's easy

Engagement determines how much consumers will pay for NOPC

Lack of regulation leads to consumer confusion

Product Purchases

Specialty beauty products benefit from more natural options

Figure 15: Product purchases, October 2018

Function vs benefits continues to impact the types of products purchased

Figure 16: Product purchases – any personal care product (net)*, October 2018

Younger consumers are more engaged, but mature consumers are still a key market

Figure 17: Product purchases – Any natural/organic product purchase (net)*, by age, October 2018

Men use NOPC products as an extension of a healthy lifestyle

Figure 18: Select product purchases – any natural/organic product purchase (net)*, by gender, October 2018

Hispanics demonstrate heightened interest in natural categories

Figure 19: Product purchases – any natural/organic product purchase (net)*, by race and Hispanic origin, October 2018

Retailers Shopped

Mass merchandisers still lead, but the gap is closing

Figure 20: Retailers shopped, October 2018

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Natural and Organic Personal Care Consumer - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mass merchandisers are leading among younger consumers – but keep a close eye on Amazon

Figure 21: Retailers shopped, by age, October 2018

Men and women approach shopping for natural differently

Figure 22: Retailers shopped, by gender, October 2018

Hispanics may forgo convenience for the right product

Figure 23: Retailers shopped, by race and Hispanic origin, October 2018

Natural Indicators

Prove it on product packaging

Figure 24: Natural indicators, October 2018

Clean means natural to younger consumers

Figure 25: Natural indicators, by age, October 2018

Black consumers choose natural brands they trust

Figure 26: Natural indicators, by race and Hispanic origin, October 2018

Purchasing Behaviors

Willingness to pay more for NOPC determined by engagement

Figure 27: Purchasing behaviors, October 2018

Age plays a role in price-related purchase barriers

Figure 28: Purchasing behaviors, by age, October 2018

Price can be a purchase barrier to both genders

Figure 29: Purchasing behaviors, by gender, October 2018

Black consumers are key drivers of NOPC purchases

Figure 30: Purchasing behaviors, by race and Hispanic origin, October 2018

Attitudes toward NOPC

Clean beauty drives consumer interest – but what does it mean?

Figure 31: Attitudes toward NOPC, October 2018

Younger consumers choose “clean” over “green”

Figure 32: Attitudes toward NOPC, by age, October 2018

Multicultural consumers believe in natural

Figure 33: Attitudes toward NOPC, by race and Hispanic origin, October 2018

Interest in Innovations

Interest in environmental innovations is strong

Figure 34: Interest in innovations, October 2018

Make sustainable formats effortless

Figure 35: Interest in innovations – Any use or interest (net)*, October 2018

Purchase drivers change with lifestage

Figure 36: Interest in innovations – Any use or interest (net)*, by age, October 2018

Hispanics key innovation drivers

Figure 37: Interest in innovations – Any use or interest (net)*, by race and Hispanic origin, October 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Natural and Organic Personal Care Consumer - US - December 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com