

Natural and Organic Toiletries - UK - 2022

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- The impact of cost-of-living crisis on the natural and organic BPC market.
- Retail channels used to purchase natural and organic BPC products.
- Innovation in natural and organic BPC.
- Reasons for purchasing and interest in innovation in natural and organic BPC products.
- Consumer understanding of natural and organic definition in BPC.
- How ingredient concerns will impact the natural and organic BPC market.

Although the natural and organic BPC sector is growing, 65% of adults find it difficult to know how natural/organic a product really is, showing a lack of understanding and confusion in this sector that could deter consumers away to more familiar and trusted regular products.

Due to the cost of living crisis, price sensitivities when buying BPC are expected to heighten, with a more selective approach towards essentials-only purchasing expected. This means that NPD in budget and mass market products that does not compromise on quality is needed to provide value for a wider audience, while more premium brands will need to justify their price points accordingly.

A threat to the natural and organic BPC sector is unclear identification, both on-pack and in-store, which will subdue sales as discovery can be challenging and consumers are looking for shortcuts to aid their decision making.

As research behaviours in the purchase journey become more commonplace, consumers are looking for products that are both effective and sustainable, meaning the biggest opportunity in the natural and organic BPC sector lies in marrying science and nature to strengthen NPD. For example, brands can look to biotech to enhance eco credentials, while science-backed claims will appeal to those looking for efficacy.



“While value sales of organic health and beauty products have continued to rise, inflation and the growing importance of sustainability could threaten demand for natural/organic BPC going forward.”

– **Shiyan Zering, BPC & OTC Research Analyst, July 2022**

Buy this report now

Visit store.mintel.com

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

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Market context
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for natural and organic toiletries**
Figure 1: Category outlook for natural and organic BPC, 2022-27
- **The market**
- **Sales of organic health and beauty products continue to rise**
Figure 2: UK sales of organic and natural health and beauty products, 2011-21
- **Selective consumer spending could hit sector**
Figure 3: discretionary spending, 2022
- **Companies and brands**
- **Clearer claims for all-natural and organic products needed**
Figure 4: New product launches in the UK BPC category, by select natural and organic claims, 2019-22
- **The consumer**
- **More availability and affordability will improve categories**
Figure 5: Types of BPC products typically purchased, by category, 2022
- **Lower-income households drive in-store purchasing**
Figure 6: Channels used to purchase natural and organic BPC products, 2022
- **Gentler ingredients drive demand for natural and organic BPC**
Figure 7: Reasons for buying natural and organic BPC products, 2022
- **Better ingredient education is integral**
Figure 8: Interest in natural and organic BPC innovations, 2022
- **Brand transparency concerns impacts consumer choices**
Figure 9: Attitudes toward natural and organic BPC Products, 2022

ISSUES AND INSIGHTS

- **Offset inflation concerns by highlighting value and accessibility**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

- **Ingredient education could help the sustainability movement progress**
- **Respond to consumer demand for science-backed claims**

MARKET DRIVERS

- **Inflation is the key concern for consumers and brands... and will weigh down the post-COVID recovery**
- **Consumer spending power will be curbed**
- **The conflict in Ukraine is hurting the UK economy in a number of ways**
- **Soil Association reports consistent growth**

Figure 10: UK sales of organic health and beauty products, 2011-21

- **Consumers are selectively spending**
Figure 11: discretionary spending, 2022
- **Streamlined ingredients can drive brand loyalty**
Figure 12: Top ranking of brands in the BPC sector, by agreement with "Natural", 2019-21
- **Consumers are researching product naturalness**
Figure 13: Reasons for researching ingredients in facial skincare products, 2022
- **Sustainability is a big purchase factor in natural and organic BPC**
Figure 14: Attitudes towards sustainability in BPC, 2021
- **Natural brands have an opportunity to engage older consumers**
Figure 15: Trends in the age structure of the UK population, 2016-26

LAUNCH ACTIVITY AND INNOVATION

- **Botanical/herbal claims are the largest portion of NPD**
Figure 16: New product launches in the UK BPC category, by select natural and organic claims, 2019-22
- **Prickly pear cactus oil is a trending ingredient**
Figure 17: Examples of all-natural and/or organic launches formulated with cactus and/or prickly pear seed oil ingredients, 2022
- **Major brands lead NPD**
Figure 18: New product launches carrying all-natural and/or organic claims in the UK BPC category, by top 10 ultimate companies, 2021
- **Clarins promote themselves as powered by plants**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

Figure 19: Examples of Clarins launches carrying organic claims, 2021-22

- **Skincare continuously leads natural/organic innovation**

Figure 20: New product launches carrying all-natural and/or organic claims in the UK BPC, by category, 2020-22

- **Biggest dip in shaving & depilatories NPD**

Figure 21: Proportion of new product launches carrying all natural and/or organic claims in the UK BPC category, by sub-category, 2019-22

- **Colour cosmetics sector expanding**

Figure 22: Examples of NakedCo. launches carrying all-natural claims, 2022

- **Haircare has room for improvement**

Figure 23: Examples of scalp treatment launches carrying all-natural and/or organic claims, 2022

- **Fragrance limited NPD**

Figure 24: Examples of fragrance launches carrying all-natural and/or organic claims, 2022

- **Deodorants innovations**

Figure 25: Examples of deodorant launches carrying all-natural and/or organic claims, 2021-22

- **Ethical/sustainable concerns are on the rise**

Figure 26: New product launches carrying all-natural and/or organic claims in the UK BPC category, by top 10 claims in 2021, 2020-22

Figure 27: Example of a refillable Neom organics launch carrying all natural and/or organic claims, 2022

- **Top growth in beauty-enhancing categories**

Figure 28: Examples of moisturising/hydrating skincare launches carrying all natural and/or organic claims, 2021

Figure 29: Examples of brightening/illuminating colour cosmetics launches carrying all natural and/or organic claims, 2022

TYPES OF BPC PRODUCTS PURCHASED

- **Most consumers are still choosing regular products**

Figure 30: Types of BPC products typically purchased, 2022

- **Increased spend amongst existing users**

- **Shampoos/conditioners gain popularity**

Figure 31: Net purchase of natural/organic BPC products, by category, 2020-22

- **Facial skincare users stay loyal**

- **Emphasise product benefits for lower purchase categories**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £2195 | \$2995 | €2600

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

Figure 32: Type of BPC products typically purchased, by category, 2022

THE NATURAL AND ORGANIC BPC CONSUMER

- Opportunity to target men persists**
 Figure 33: Types of BPC products typically purchased, by gender, 2022
- Social media and innovative marketing boosts engagement amongst young consumers**
 Figure 34: Types of BPC products typically purchased, by age, 2022
- Dupes will appeal to value-conscious consumers**
 Figure 35: type of BPC products typically purchased, by household income, 2022
- Penetration highest in baby care**
 Figure 36: Type of BPC products purchased, by parental status, 2022

DEFINING NATURAL AND ORGANIC IN BPC

- Educate consumers on 'natural' definition**
 Figure 37: Defining natural BPC, 2022
- Biotech and lab-grown ingredients need de-stigmatisation**
 Figure 38: Examples of new product launches with all-natural/organic claims containing bio-tech ingredients, 2022
- Organic ingredient definition has little room for shift**
 Figure 39: defining organic BPC, 2022

CHANNELS USED TO PURCHASE NATURAL AND ORGANIC BPC PRODUCTS

- Online purchasing is on the rise**
 Figure 40: Channels used to purchase natural and organic BPC products, 2022
- In-store experience is still a main source of purchase**
- Young consumers are driving the online shift**
 Figure 41: Channels used to purchase natural and organic BPC products, by age, 2022

REASONS FOR BUYING NATURAL AND ORGANIC BPC PRODUCTS

- Gentler products and skin sensitivities are a focus**
 Figure 42: Reasons for buying natural and organic BPC products, 2022
- Natural ingredients are believed to be better for environment**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £2195 | \$2995 | €2600

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

- **Young consumers are cautious about their future health**
Figure 43: Reasons for buying natural and organic BPC products, by age, April 2022
- **Create a familial experience for parents**
Figure 44: Examples of My Little Coco Baby Mama launches carrying organic, sensitive skin and maternal claims, 2022

INTEREST IN NATURAL AND ORGANIC BPC INNOVATIONS

- **Utilise playful education to engage consumers**
Figure 45: Interest in natural and organic BPC innovations, 2022
- **Refillable beauty is a top convenience interest**
Figure 46: Interest in natural and organic BPC innovations, by age, 2022
Figure 47: Examples of new product launches carrying all-natural/organic, environmentally friendly packaging, and refill/refillable claims 2021-22
- **Upcycled ingredients could be the answer**
Figure 48: Examples of new all natural and/or organic BPC product launches carrying upcycled blueberry claims, 2021-22
- **Locally-sourced ingredients could better the economy**
- **Natural fragrances are in demand**

ATTITUDES TOWARD NATURAL AND ORGANIC BPC PRODUCTS

- **Use blockchain services to improve brand transparency**
Figure 49: Attitudes toward natural and organic BPC Products, 2022
Figure 50: Cult Beauty and Provenance, 2022
- **Sustainability is on natural and organic consumers' minds**
Figure 51: Clarins Domaine Clarins virtual tour, 2022
- **Science-backed innovations will comfort consumers**
Figure 52: New product launches carrying all-natural and/or organic claims in the UK BPC, by select claims, 2020-22
- **Women are looking towards natural and organics to enrich their wellbeing**
Figure 53: Attitudes toward natural and organic BPC Products, by gender, 2022
Figure 54: Weleda Aroma showers bathing rituals product page, 2022
- **Identifying natural and organic products in retail space needs to be improved**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

Figure 55: Attitudes toward natural and organic BPC products, by types of products purchased, 2022

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.