

Natural and Organic Personal Care Consumer: Incl Impact of COVID-19 - Canada - November 2020

Report Price: £3695 | \$4995 | €4400

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 COVID-19 on consumer behaviour and the natural or organic personal care (NOPC) market.
- How an economic slowdown will impact the NOPC product market.
- Market factors impacting the NOPC product market.
- Consumer behaviours and attitudes relating to the NOPC product market.



“COVID-19 has accelerated a shift towards more wellness-focused lifestyles. Natural or organic personal care brands can help support these healthy aspirations and self-care practices by providing clean and safe products, both for the end user and for the planet. Younger shoppers are particularly aligned with natural brands, indicating strength for the category into the future.”

– **Meghan Ross, Senior Home**

Beauty Analyst
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: £3695 | \$4995 | €4400

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
- Key issues covered in this Report
- Definition
- COVID-19: Market context
- Economic and other assumptions

EXECUTIVE SUMMARY

- Top takeaways
- Market overview
- Impact of COVID-19 on natural and organic personal care products
 Figure 1: Short, medium and longer-term impact of COVID-19 on natural and organic personal care, November 2020
- Opportunities and Challenges
- Restricted spending may impact NOPC purchases
- COVID-19 lifestyle disruptions create both challenges and opportunities for NOPC brands
- A focus on wellness will propel natural brands
- Younger Canadians are strong proponents of NOPC brands
- Biotechnology and lab-based solutions offer an alternative to plant-based naturals

THE MARKET – KEY TAKEAWAYS

- COVID-19 has led to a stronger embrace of self-care and wellness
- The economic slowdown will lead to more measured spending
- Apprehension about visiting salons and spas spurs an uptick in DIY approaches
- Biotechnology can offer safe and sustainable alternatives to traditional plant-based products
- Transparency will be key to consumer trust

IMPACT OF COVID-19

- Impact of COVID-19 on natural and organic personal care products
 Figure 2: Short, medium and longer-term impact of COVID-19 on natural and organic personal care products, November 2020
- Lockdown
- Re-emergence

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: £3695 | \$4995 | €4400

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

- Recovery
- COVID-19: Canadian context

MARKET FACTORS

- **COVID-19 has led to a stronger embrace of self-care and wellness**
- **The economic slowdown will lead to more measured spending**

Figure 3: Personal care category spending priority increase motivated by COVID-19, by purchasers of mainstream products only vs purchasers of a mix of mainstream and NOPC products, July 2020

- **Apprehension about visiting salons and spas spurs an uptick in DIY approaches**

Figure 4: Overtone Color Instagram post, July 2020
 Figure 5: Paintbox Nails Instagram post, March 2020

MARKET OPPORTUNITIES

- **Biotechnology can offer safe and sustainable alternatives to traditional plant-based products**
- **Pre-, pro- and post-biotics offer another natural alternative to plants**

Figure 6: Bioeffect Instagram post, May 2019
 Figure 7: Biossance Instagram post, July 2020
 Figure 8: Gallinée Youthful Serum (US), June 2020
 Figure 9: Ouai Body Cleanser (US), October 2019
 Figure 10: Aveeno Kefir Probiotic Blend Shampoo (US), June 2020
 Figure 11: Elina Organics Instagram post, April 2020

- **Transparency will be key to consumer trust**
- **Brands can simplify this process for shoppers by doing the legwork**

Figure 12: Sephora Canada Instagram post, October 2020
 Figure 13: ProvenanceHQ Instagram post, May 2020
 Figure 14: ProvenanceHQ Instagram post, September 2020

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **CBD offers relief to stressed-out shoppers**
- **COVID-19 routine disruptions create new opportunities**

COMPETITIVE STRATEGIES

- **CBD offers relief to stressed-out shoppers**
 Figure 15: The Uplifters' Prima Enlightenment Serum Concentrated Boost (US), April 2020

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: £3695 | \$4995 | €4400

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

- COVID-19 routine disruptions create new opportunities**

Figure 16: Each and Every Instagram post, April 2020

Figure 17: Each and Every Instagram post screenshot, February 2020

THE CONSUMER – KEY TAKEAWAYS

- The majority of personal care shoppers include NOPC brands in their repertoire**
- Personal care shoppers are divided over the importance of natural ingredients**
- Natural shoppers are increasing their NOPC product purchases**
- Health is the biggest purchase driver for NOPC products**
- A small portion of shoppers are willing to sacrifice pricing and performance to get natural ingredients**

PERSONAL CARE PRODUCT PURCHASES

- The majority of personal care shoppers include NOPC brands in their repertoire**

Figure 18: Types of personal care product purchases, July 2020

Figure 19: Types of personal care product purchases, by age, July 2020

- Canadians are purchasing a wide range of personal care products**

Figure 20: Natural and organic personal care product purchases, by users of each format, July 2020

Figure 21: Personal care product repertoire, July 2020

Figure 22: Personal care product repertoire averages, by age, July 2020

IMPORTANCE OF HAVING NATURAL OR ORGANIC PERSONAL CARE PRODUCTS

- Personal care shoppers are divided over the importance of natural ingredients**

Figure 23: Importance of having natural or organic personal care products, July 2020

Figure 24: Importance of having natural or organic personal care products, by gender and age, July 2020

Figure 25: Importance of having natural or organic personal care products, parents vs non-parents, July 2020

Figure 26: Importance of having natural or organic personal care products, South Asians vs overall, July 2020

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: £3695 | \$4995 | €4400

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

IMPORTANCE OF INGREDIENTS

- Canadians are paying attention to product formulations**

Figure 27: Frequency of checking personal care product labels prior to purchase, July 2020

Figure 28: Frequency of checking personal care product labels prior to purchase, 18-44s vs over-45s, July 2020

- BIPOC shoppers review ingredients for functionality**

Figure 29: Mielle Organics Instagram post, October 2020

Figure 30: Shea Moisture Canada Instagram post, March 2020

- NOPC shoppers are very interested in ingredient labels**

Figure 31: Those who always check personal care product labels prior to purchase, by NOPC purchase rates, July 2020

CHANGE IN NATURAL OR ORGANIC PURCHASE BEHAVIOUR

- Natural shoppers are increasing their NOPC product purchases**

Figure 32: Change in natural or organic personal care product purchase rates, July 2020

Figure 33: Change in natural or organic personal care product purchase rates, by age, July 2020

Figure 34: Thirsty Naturals Instagram post, October 2019

NATURAL AND ORGANIC PERSONAL CARE PURCHASE DRIVERS

- Health is the biggest purchase driver for NOPC products**

Figure 35: Natural or organic purchase drivers, July 2020

Figure 36: Laurel Skin Instagram post, September 2020

Figure 37: Take it up to 100 with Patrick Mahomes & Troy Polamalu | Head & Shoulders, September 2020

Figure 38: Natural or organic purchase drivers, men vs women, July 2020

Figure 39: Natural or organic purchase drivers, 18-44s vs over-45s, July 2020

Figure 40: Natural or organic purchase drivers (select), South Asian Canadians vs overall, July 2020

Figure 41: Natural or organic purchase drivers (select), parents vs non-parents, July 2020

Figure 42: Natural or organic purchase drivers, buyers of 1-3 natural product formats vs buyers of 7+ natural product formats, July 2020

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: £3695 | \$4995 | €4400

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

NATURAL AND ORGANIC PRODUCT ATTITUDES

- Personal and environmental safety are key features of NOPC brands**
 Figure 43: Attitude statements (% agree), July 2020
 Figure 44: Thinkspout Instagram post, February 2020
 Figure 45: Attitude statements (% agree), exclusive natural vs exclusive mainstream personal care shoppers, July 2020
- Most Canadians are unwilling to pay a premium for natural brands**
 Figure 46: 'Natural or organic personal care products are worth paying more for' (% agree), by age, July 2020
- Some shoppers are committed enough to natural brands to sacrifice performance**
 Figure 47: 'I am willing to sacrifice some effectiveness if it means a personal care product is more natural' (% agree), by age, July 2020

INTEREST IN FORMAT VARIATIONS

- Canadians are willing to consider a variety of formats**
 Figure 48: Interest in formats, July 2020
 Figure 49: Trial of select formats, by age, July 2020
 Figure 50: Prior use of formats, heavy NOPC buyers vs heavy personal care buyers, July 2020
- Recycled packaging is widely accepted**
 Figure 51: UpCircle Beauty Instagram post, September 2020
 Figure 52: The Body Shop Carrot Cream Nature Rich Daily Moisturiser (Canada), September 2019
- Package-free options will need to address hygiene concerns during the pandemic**
- Younger shoppers already have considerable experience with solid products**
 Figure 53: Ethique: What if you had to go where your rubbish went?, October 2018
 Figure 54: Ethique Concentrates – Rethink refillables with Ethique's new concentrate range (extended), October 2020
- Water-free products have considerable room to grow**
 Figure 55: Rejection of select formats, 18-24s vs over-65s, July 2020
 Figure 56: Cooluli_USA Instagram post, October 2020
- Refillables will need to be convenient for wider uptake**
- Brands using essential oils can benefit from the wellness movement**

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: £3695 | \$4995 | €4400

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
- Abbreviations and terms
- Abbreviations

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)**.