

# Natural and Organic Personal Care Consumer - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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



"Natural and organic personal care brands offer a variety of options that are largely appealing, though consumers express some confusion due to the prevalence of natural claims, limited regulations, and a less than clear category definition. However, consumers are concerned about green issues, and aspire to live a healthier lifestyle. Natural and organic personal care brands that are accessible and offer transparent benefits will stand to see the most success."

## This report looks at the following areas:

- Limited regulation and saturated natural market creates blurry product lines
- Few adults are loyal to natural and organic personal care products
- Older adults most green focused; yet for the most part don't purchase NOPC products

### Definition

This report focuses on consumers' attitudes toward green living, as well as usage, perception of claims, and attitudes toward NOPC (natural and organic personal care products).

For the purposes of this report, Mintel has used the following definitions:

- Haircare (includes shampoo, conditioner, hairstyling products, hair color)
- Skincare (includes skincare products for the face and body such as soap, shower gel, body lotion, facial skincare, sun protection, deodorant)
- Oral care (toothpaste and mouthwash).

The following categories are excluded from the scope of this report:

- Color cosmetics (including facial, lip, and eye)
- Fragrance
- Nail products
- Shaving products
- Children's and baby personal care products.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://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](mailto: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 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Limited regulation and saturated natural market creates blurry product lines

Figure 1: Difficulty identifying and stricter regulations of natural and organic personal care products, July 2015

Few adults are loyal to natural and organic personal care products

Figure 2: Personal care product use, by brand type, July 2015

Older adults most green focused; yet for the most part don't purchase NOPC products

Figure 3: Only use natural and organic personal care brands, by generation, July 2015

The opportunities

Parents are purchasing NOPC products; offer online subscription

Figure 4: Only use select natural and organic personal care brands, by presence of children in household, July 2015

Promote the health benefits of NOPC products, particularly to older adults

Figure 5: Health reasons for purchasing natural and organic personal care products, by age and gender, July 2015

Create an experience in natural food stores

Figure 6: Shopped natural food stores most often for any personal care products, by various demographics, July 2015

What it means

### The Market – What You Need to Know

NOPC sales grew in natural supermarkets

Sales of organic and non-GMO increase

Number of natural products and lack of regulation weaken natural claims

Parents lead the way in NOPC purchasing; opportunity to grow

### Market Performance

NOPC product sales in natural channels continue to increase

Figure 7: Natural supermarket sales of select personal care products, at current prices, rolling 52 weeks September 2013-September 2015

### Market Breakdown – Natural Channels

Skincare brings in the most revenue; oral care growing rapidly

Figure 8: Natural supermarket sales of select personal care products, by segment, at current prices, rolling 52-weeks ending Sept. 8, 2013 and Sept. 6, 2015

### Market Perspective

Increasing sales of organic and products with organic ingredients

Figure 9: Natural supermarket sales of select natural personal care products, by organic ingredient content, at current prices, rolling 52-weeks ending Sept. 8, 2013 and Sept. 6, 2015

Sales increase of products verified as non-GMO

Figure 10: Share of natural supermarket sales of select natural personal care products, by presence of GMO ingredients, at current prices, rolling 52-weeks ending Sept. 8, 2013 and Sept. 6, 2015

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Natural and Organic Personal Care Consumer - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

## Market Factors

Majority of personal care launches claim to be natural

Figure 11: Share of personal care product launches with natural claim, November 2014-November 2015

Certification and standardized is still unregulated

Many new NOPC products are launched online

Figure 12: Percentage of personal care product launches (with a natural claim) and change of share, by store type, 2010-14

Parents lead the way in NOPC purchasing; opportunity to grow

Figure 13: Parental status, presence and number of children, by personal care user type, July 2015

Figure 14: Uses mix of mainstream and natural and organic personal care brands, by parental status, July 2015

## Key Players – What You Need to Know

Segment sales of select natural and organic brands increasing

Value options and ability to measure up to mainstream products struggle

Unique formats and formulas could boost NOPC sales

## Manufacturer Sales of Select Natural and Organic Personal Care Products

MULO performance of select NOPC brands

Segment sales of select natural and organic personal care products

Figure 15: Manufacturer sales of select natural and organic personal care brands, by segment, 2014 and 2015

## What's Working?

Aveeno leads sales of select skincare, lotion, and sun protectant brands

Figure 16: MULO sales of skincare products, at current prices, rolling 52 weeks September 2013-September 2015

Ogx leader in hair care sales

Figure 17: MULO sales of haircare products, at current prices, rolling 52 weeks September 2013-September 2015

Suave Naturals loses sales as newer NOPC soap brands have big gains

Figure 18: MULO sales of soap products, at current prices, rolling 52 weeks September 2013-September 2015

Natural and organic oral care sales boost the total oral care market

Figure 19: MULO sales of oral care products, at current prices, rolling 52 weeks September 2013-September 2015

## What's Struggling?

A lack of value-focused natural and organic introductions

Figure 20: Share of natural and organic product launches, by private label, November 2014-November 2015

Natural and organic deodorants may not stand up to mainstream

Figure 21: MULO sales of deodorant products, at current prices, rolling 52 weeks September 2013-September 2015

Natural or organic hair coloring options are limited

Figure 22: MULO sales of hair coloring products, at current prices, rolling 52 weeks September 2013-September 2015

Consumers are critical of The Honest Company sun protectant

## What's Next?

Stricter regulations in the personal care industry proposed

Powder face cleansers emerging among natural brands

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Natural and Organic Personal Care Consumer - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Activated charcoal gaining popularity in NOPC products  
 Natural brands have a wipe for everything

## The Consumer – What You Need to Know

Overall green attitudes remain similar to 2013  
 A small few exclusively use natural and organic  
 NOPC users shop many locations; mainly mass merchandisers  
 Product claims help identify products that align with consumer needs  
 Consumers have conflicting perceptions of NOPC products  
 Personal benefits are the top reason for purchasing NOPC products

## Attitudes toward Green Living

Attitudes toward green living remain largely unchanged  
 Figure 23: Attitudes toward green living, September 2013 and July 2015

Natural and organic personal care users have greener attitudes  
 Figure 24: NOPC Users' attitudes toward green living, by user type, July 2015

Older generations more concerned with environment and health  
 Figure 25: Select attitudes toward green living, by generation, July 2015  
 Figure 26: Attitudes toward price and research, by generation, July 2015

Children in household impact green action and attitudes  
 Figure 27: Attitudes toward green living, by children in household, July 2015

Green attitudes are similar across race and origin  
 Figure 28: Attitudes toward green living, by Hispanic origin and race, July 2015

## Natural and Organic Personal Care Product Use

A small number exclusively purchase natural and organic brands  
 Figure 29: Personal care product use, by brand type, July 2015

Age and income factor into natural and organic personal care use  
 Figure 30: Select personal care product use, only use natural and organic brands, by age and income, July 2015

Parents of young children are a key target for natural and organic brands  
 Figure 31: Select personal care product use, only use natural and organic brands, by presence of children in household, July 2015

Asian adults most likely to solely use natural and organic products  
 Figure 32: Select personal care product use, only use natural and organic brands, by race and Hispanic origin, July 2015

## Retailers Shopped

Mass merchandiser the lead location for personal care products  
 Figure 33: Retailer shopped most often for any personal care products, by user type, July 2015

Profile of NOPC users who shop natural food stores  
 Figure 34: Shopped natural food stores shopped most often for any personal care products, by various demographics, July 2015

Profile of NOPC users who shop online  
 Figure 35: Shopped online most often for any personal care products, by various demographics, July 2015

## Importance of Personal Care Product Claims

**BUY THIS  
 REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Natural and Organic Personal Care Consumer - US - December 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

## Most product claims are important to NOPC product users

Figure 36: Importance of claims, top two box, by user type, July 2015

## Millennials and Seniors differ on claims' importance

Figure 37: Importance of select product claims, top two box, by generation, July 2015

Figure 38: Importance of free-from claims, top two box, by generation, July 2015

## Added vitamins and safe ingredient claims important to parents

Figure 39: Importance of personal care claims, top two box, by parental status, July 2015

## Hispanics lean on claims most; Black and Asian adults look to some

Figure 40: Importance of select claims, top two box, by Hispanic origin and race, July 2015

## Perceptions of Natural and Organic Personal Care Products

### Availability and transparency could be barriers to purchasing

Figure 41: Availability, transparency, and health perceptions of natural and organic personal care products, by age, July 2015

### Health impact and the need for natural and organic line extensions

Figure 42: Health, product line extension, and skepticism perceptions of natural and organic personal care products, by user type, July 2015

Figure 43: Health, product line extension, and skepticism perceptions of natural and organic personal care products, by Hispanic origin and race, July 2015

### Uncertainty surrounds the impact on the environment

Figure 44: Environmental perceptions of natural and organic personal care products, by age, July 2015

## Reasons for Purchasing Natural and Organic Personal Care Products

### Adults purchasing NOPC do so primarily for the personal benefits

Figure 45: Personal benefit reasons for purchasing natural and organic personal care products, by age and gender, July 2015

### Supporting the environment is secondary

Figure 46: Environmental reasons for purchasing natural and organic personal care products, by age and gender, July 2015

### To feel good about oneself does drive purchasing, particularly for dads

Figure 47: Aspirational reasons for purchasing natural and organic personal care products, by parental status, July 2015

### Performance compared to mainstream products is not a motive

Figure 48: Performance reasons for purchasing natural and organic personal care products, by age and gender, July 2015

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

## Appendix – Market

Figure 49: Natural supermarket sales of select personal care products\*\*, by presence of GMO ingredients, at current prices, rolling 52-weeks ending Sept. 8, 2013 and Sept. 6, 2015

Figure 50: Natural supermarket sales of select personal care products, by organic ingredients and naturally positioned, at current prices, rolling 52-weeks ending Sept. 8, 2013 and Sept. 6, 2015

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)