

Natural Personal Care 2008:

Competitive Brand Assessment and Ingredient Analysis

2nd Edition Featuring New Brand Profiles

Published 4th Quarter 2008

Base Year: 2008

Regional Coverage

Europe

United States

A comprehensive analysis of the global market for natural personal care products, focusing on key trends, developments, challenges, business opportunities, and ingredient analyses, and addressing such issues as:

- What is the definition of "natural"?
- Who are the key players and how do their brand profiles differ?
- Which brands are truly "natural" in terms of the ingredients they use?
- What has been the effect of various distribution outlets for natural care products?
- What regulations, if any, are affecting the market?
- Where are the opportunities for marketers of natural care products?

Features new profiles for 50 brands not covered in the previous edition

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Report Scope

Natural Personal Care 2008: Competitive Brand Assessment and Ingredient Analysis provides detailed profiles of the key players in the natural and organic personal care products market, as well as the ingredients they use.

The report focuses on brands that are formulated mostly with naturally derived and renewable sources. This report considers brands to be natural if they are formulated with a high proportion of ingredients that comply with our definition of natural. We devised a 10-point scale that grades each of the brands analyzed in this report on its degree of "naturalness."

It provides subscribers with competitive intelligence on the key players in the natural and organic personal care products market. It gives information and insights that enables subscribers to exploit business opportunities by understanding product developments, competitive forces, raw material formulation platforms, and future trends.

This report is presented in two regional volumes: Europe and the United States.

Due to the fragmented nature of the natural personal care market, there are hundreds of players in this dynamic market. Kline profiled completely different brands in each edition so that we can examine as many players as possible. Therefore, many of the key brands and market leaders that were previously profiled are not be profiled in this edition. These brands, however, are taken into account for the market totals. This edition features 50 new brand profiles across the two regions.

Key Benefits

To identify the opportunities in this booming but hard-to-track sector, marketers should fully understand the companies that participate in it. For many traditional personal care marketers, there are acquisition opportunities to examine. For raw materials suppliers, this report provides an understanding of their customers and the formulations they use.

Kline is unique in its ability to leverage the skills and synergies of its global Specialty Chemicals and Consumer Products practices. Our firm is the only consultancy that covers the whole personal care value chain, from raw materials to finished goods. Professionals from both practices conducted research and analysis for this study to deliver a report that is insightful from both a raw material and finished goods perspective.

The report enables subscribers to:

- Assess the natural personal care market in four regions
- Determine what makes a brand's products more natural than another brand
- Identify potential alliances, acquisition candidates, and/or customers
- Augment business plans with reliable insights and data

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Report Contents of Each Volume

1. INTRODUCTION

2. EXECUTIVE SUMMARY

The chapter provides an overview of key industry statistics and trends, including:

- Definition of natural
- Total industry size and growth
- Market drivers and trends
- Category and country breakdowns
- Product and ingredient trends
- Channels of distribution
- Competitive landscape
- Regulatory issues
- Key lessons learned
- Outlook to 2013

3. BRAND PROFILES

Detailed profiles are provided for approximately 25 key brands/companies marketing natural personal care products in each region, as listed in Table 1. These profiles address the questions addressed in Table 2. The following information is provided:

- Company overview
- Sales and growth for 2008
- Product offerings
- Critique of raw material formulations
- Assessment of ingredients used
- Distribution
- Outlook to 2013

Table 1

Brands Profiled in Each Region

United States

- Bare Escentuals
- Best On Earth
- Biotene
- Burt's Bees
- California Baby
- Canus Goats Milk
- Carol's Daughter
- Derma E
- Dessert Essence
- Dr. Bronner's
- EO
- Erbavia
- Every Man Jack
- Farmaesthetics
- Giovanni
- Green By Nature
- Juice Beauty
- Nature's Gate
- Noah's Naturals
- Nvey
- Pure & Basic
- Pure & Natural
- Suki
- Tom's of Maine
- Verikira
- Watkins
- Yes to Carrots

Europe

- Anika Aroma
- Bnatural (Tesco private label)
- Balm Balm
- Barefoot Botanicals
- Botanics (Boots private label)
- Caudalie
- CMD Naturakosmetik
- Doux Me
- Essential Care
- Farfalla
- Groupe Léa Nature
- Herbline
- Ilike
- Jo Wood Organics
- Just Pure
- Kibio
- Lavera
- Living Nature
- Logona
- Martina Gebhardt
- Neal's Yard Remedies
- Santaverde
- Schupp
- Suzanne Aux Bains
- Yves Rocher

Table 2

Questions Answered in Each Profile

- Is this brand truly natural in terms of ingredients and sourcing, or is it all marketing?
- How fast is this player growing?
- Which channels of distribution are utilized?
- What is this company's approach to the marketplace?
- Which products are offered?
- What raw materials are used?
- How attractive is this company as a potential acquisition candidate?
- How attractive is this company as a potential customer?
- How is this player expected to perform in the coming years?

NOTE: Profiled brands vary from edition to edition so that more brands can be examined.

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts will conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including manufacturers and marketers, distributors and suppliers, and industry associations that cater to the natural and organic personal care products market.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research will represent the bulk of our research efforts, supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; and Internet sources.

Members of Kline's Specialty Chemicals practice will perform the ingredient assessment and critique of the raw material formulations. An ingredient analysis will be performed using a representative sample of products from each brand. We will assess the degree to which each brand contains natural ingredients and established benchmarks as to what constitutes a truly natural product versus one made with synthetic ingredients. Sustainability is not a part of this assessment.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. 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 nearly 50 years.

Kline's research and consulting services extend across the entire consumer industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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- Specialty Actives and Active Delivery Systems for Cosmetics & Toiletries
- Professional Skin Care
- Beauty Retailing
- Salon Hair Care
- Male Grooming Products
- Nutricosmetics: Nurturing Beauty through Nutrition - A Kline FlashPoint Report
- Green Cleaning: A Significant Element of Environmentally Sustainable Solutions - A Kline Flashpoint Report

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