

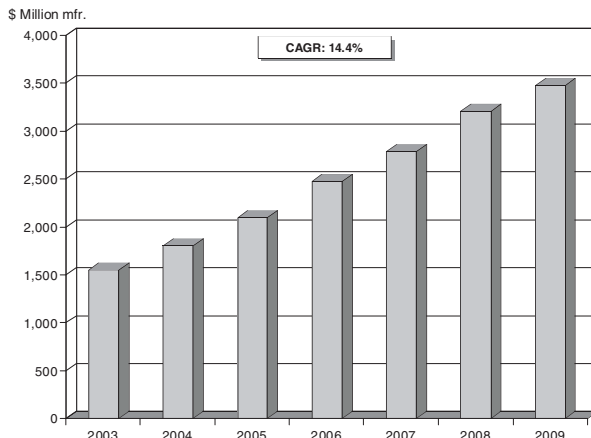
# Natural Personal Care 2009:

## Global Market Analysis and Competitive Brand Assessment

### United States Fact Sheet

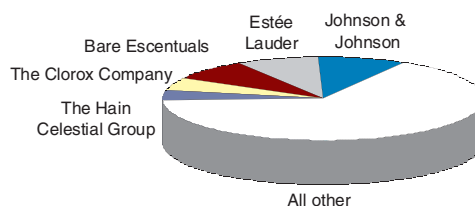
#### The Market

The U.S. market for natural personal care products has been less affected by the protracted economic recession than the cosmetics and toiletries market as a whole. The market for natural personal care products registers a healthy 8% sales gain in 2009. However, the recession has lowered the growth significantly from about 15% in 2008.



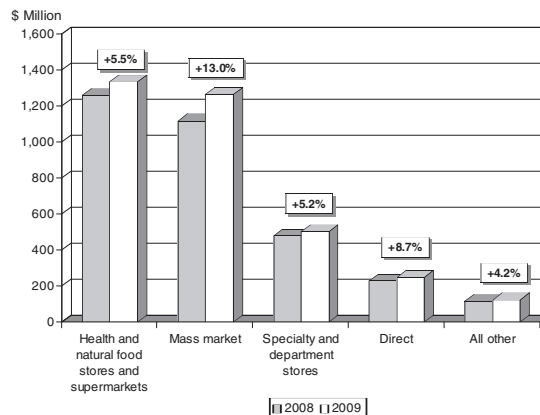
#### Competitive Landscape

Aveeno (Johnson & Johnson) is the leading brand in the market, followed by Bare Escentuals (Bare Escentuals), Aveda (Estée Lauder), and Burt's Bees (The Clorox Company). The leading 10 marketers in the naturals market account for nearly half of the total market sales in 2009.



#### Channels of Distribution

Health and natural food stores and supermarkets comprise the largest retail channel in the natural personal care products market; mass retailers are rapidly catching up. Mass market outlets represent the fastest growing retail channel, while health and natural food stores and supermarkets have the highest sales.



NOTE: All other includes retail channels such as spas, vitamin and supplement stores, hotel/resorts, and gift/boutiques. Mass market includes sales from food, drug, and mass merchandising stores. Whole Foods is part of the health and natural food stores and supermarkets channel.

#### Future Outlook

The natural personal care market will continue to enjoy double-digit growth to reach \$5.8 billion at the manufacturers' level in 2014. 2010 to 2012 are expected to be slightly tougher years for the industry with single digit growth, but the industry will enjoy phenomenal growth in 2013 and 2014.

