

# Natural Personal Care 2010:

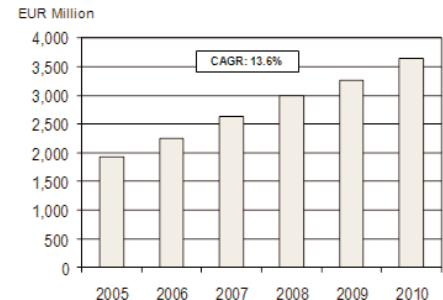
## Global Market Analysis and Competitive Brand Assessment

### Europe Fact Sheet

#### The Market

The market for natural personal care products in Europe grew by 11.7% from 2009 to 2010. Growing awareness of natural products and a new market approach of players are keeping the European market for natural personal in an upward direction.

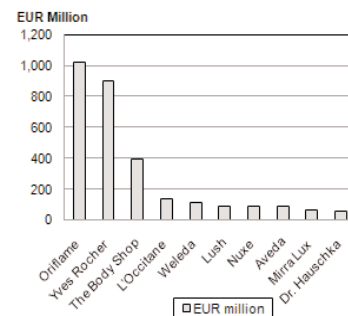
Natural Personal Care Sales in Europe, 2005 to 2010



#### Competitive Landscape

Oriflame ranks first in total sales in the European natural personal care market in 2009, followed by Yves Rocher and The Body Shop (L'Oréal). The European natural personal care products market is highly consolidated, with the top 10 companies controlling 81% of the market, totaling sales of EUR 2,943 million.

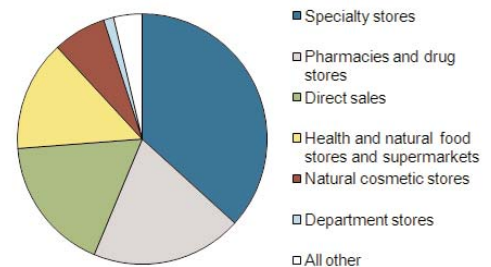
Natural Personal Care Sales of Leading Marketers, 2010



#### Channels of Distribution

Specialty stores represents the largest retail channel in the natural personal care products market. Pharmacies and drug stores have the second biggest share of the market and represent the fastest growing retail channel in 2010.

Natural Personal Care Sales by Channel of Distribution 2010



#### Future Outlook

The natural personal care market will continue to enjoy double-digit growth to reach EUR 6.0 billion in 2015. Consumer behavior and market approach of participants are changing in favor of the market, but the process is long. Although stable around 10%, market growth is limited.

Forecast Manufacturers' Sales of Natural Personal Care Products in Europe, 2010 to 2015

