

Natural Personal Care 2010:

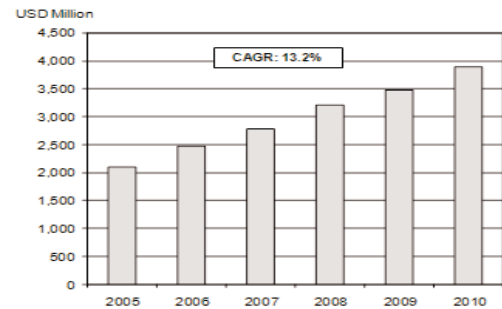
Global Market Analysis and Competitive Brand Assessment

United States Fact Sheet

The Market

The natural personal care market, after witnessing a significant slowdown in 2009, has recovered well in 2010 to post a healthy sales growth of 11.9%. A double-digit growth is an upright indication of the natural personal care market reviving from the economic recession.

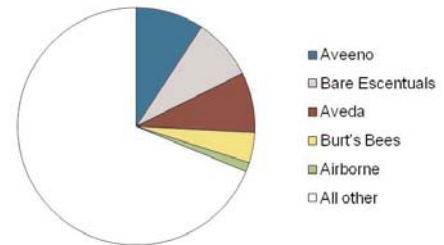
Natural Personal Care Sales in the United States, 2005 to 2010



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 top 10 marketers of natural personal care products represent nearly 50% of the total market sales in 2010.

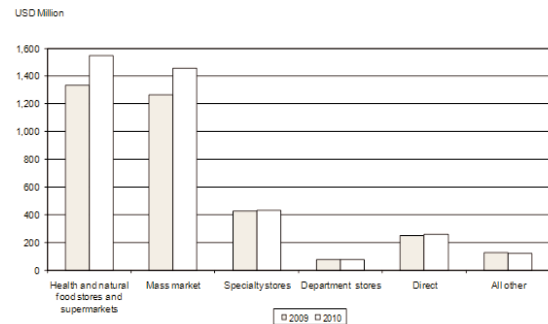
Natural Personal Care Sales of Leading Marketers, 2010



Channels of Distribution

Health and natural food stores and supermarkets remain the largest retail channel in the natural segment followed closely by mass merchandisers. Mass retailers continue to outpace all other retail channels, bridging the gap with the largest channel, health and natural food stores.

Natural Personal Care Sales by Channel of Distribution, 2009 and 2010



Future Outlook

The natural personal care market in the United States will continue to witness double-digit growth to reach USD 6.7 billion in 2015. 2010 and 2011 are expected to be slightly slower years for the industry with low double-digit growth, but the industry will enjoy higher growth rates in 2012 and beyond.

Forecast Manufacturers' Sales of Natural Personal Care Products in the United States, 2010 to 2015

