

The State of Natural Beauty: Unmasking Future Trends & Opportunities

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**Natural
Products**
EXPO WEST®

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The State of Natural Beauty: Unmasking Future Trends & Opportunities



Jessica Rubino

*VP of Content
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The State of Natural Beauty: Unmasking Future Trends & Opportunities



Alice Mintz

*Director of Integrated Solutions
SPINS*



State of Natural Beauty

Alice Mintz

SPINS- Director of Solution Architecture



Consumer Mentality Shifts accelerating Natural Beauty



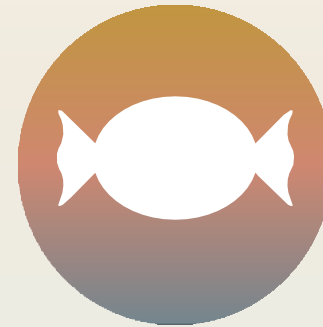
**Lifespan to
Healthspan**



**New Global
Notions**



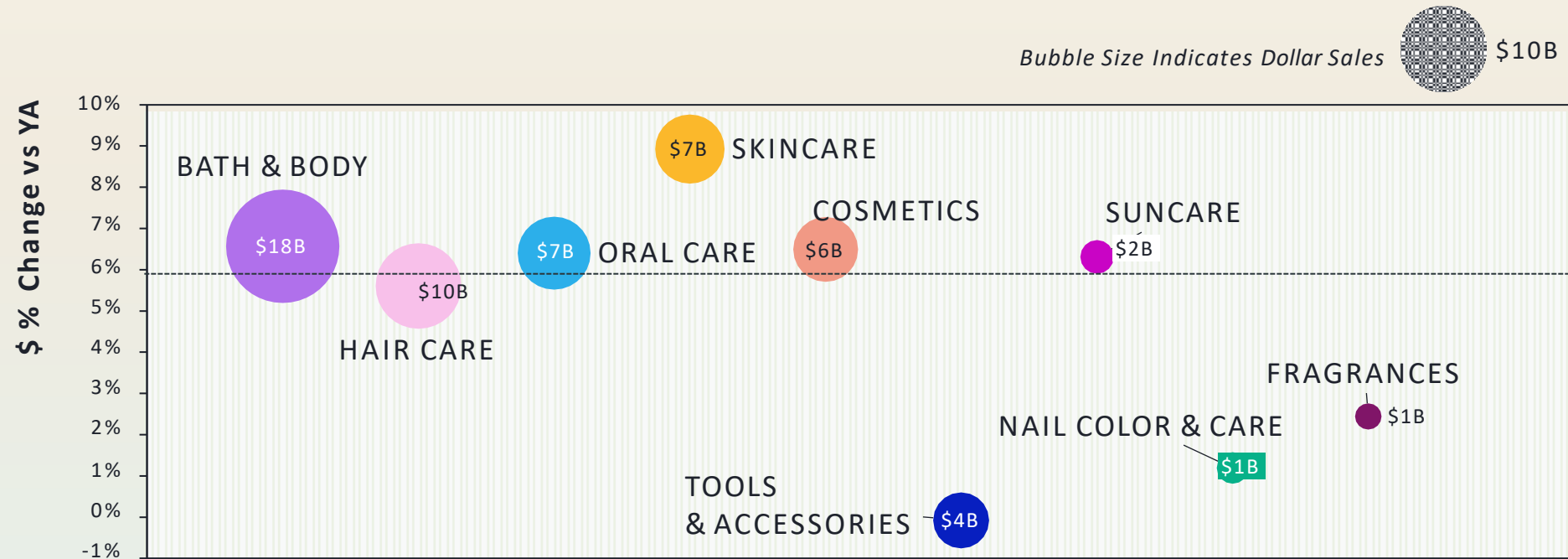
**Protecting
the Planet**



**Intentional
Indulgence**




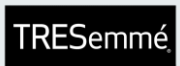

Beauty is a \$55B Industry with growth of +5.9%





Beauty can be segmented by how products are **positioned in the market**

CONVENTIONAL

SPECIALTY

NATURAL



Natural Beauty outpaced Conventional products by **+16 pts.**

Positioning Group \$ % Change



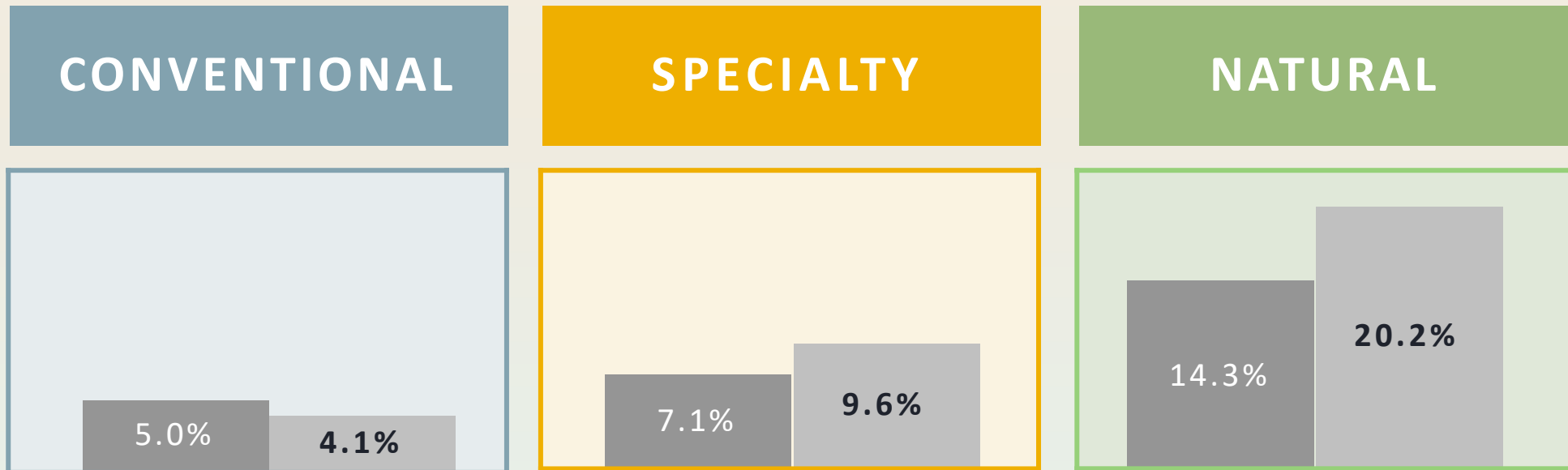
Source: SPINS Satori. Beauty Landscape \$ % Change vs. YA by Positioning Group. Excludes Private Label. Positioning Groups defined by SPINS Product Intelligence. 52 weeks ending 1.28.2024. Total US- Natural Channel and MULO powered by IRI.



Natural Beauty accelerated growth by +6 pts.

Positioning Group \$ % Change

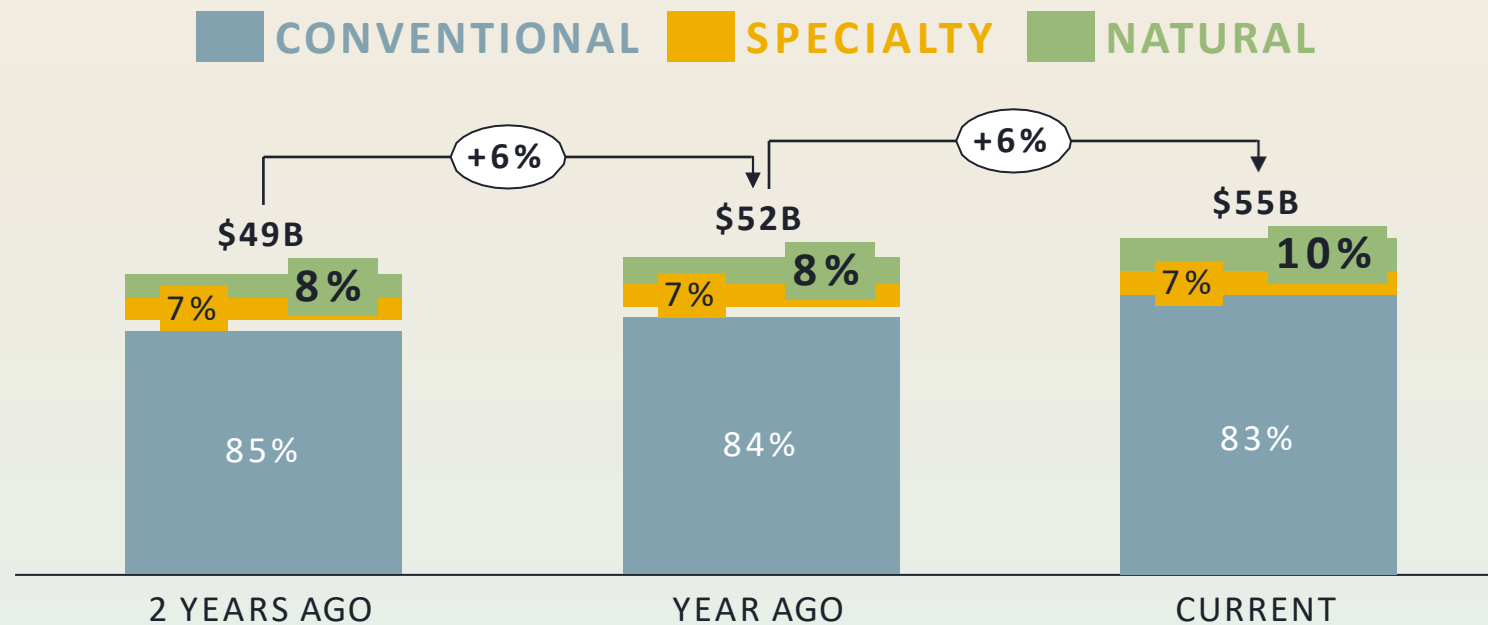
■ YEAR AGO ■ CURRENT YEAR



Source: SPINS Satori. Beauty Industry \$ % Change Current Year and Year Ago by Positioning Group. Positioning Groups defined by SPINS Product Intelligence. Excludes Private Label. 52 weeks ending 1.28.2024. Total US- Natural Channel and MULO powered by IRI.



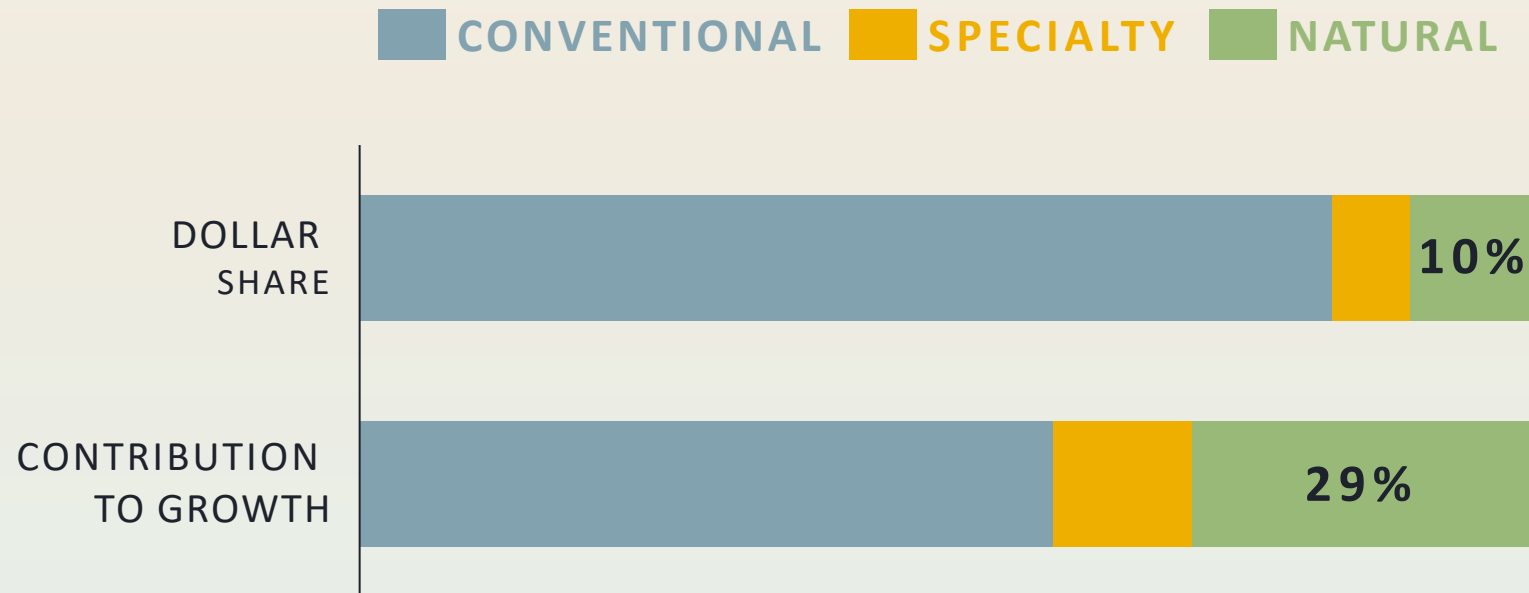
Natural grew to \$5.5B and holds 10% Share of Beauty



Source: SPINS Satori. Beauty Industry 3-Year Dollar Sales by Positioning Group. Positioning Groups defined by SPINS Product Intelligence. Excludes Private Label. 52 weeks ending 1.28.2024 vs. Latest 2 Years. Total US- Natural Channel and MULO powered by IRI.



Natural is contributing to 29% of Beauty Growth



Source: SPINS Satori. Beauty Industry Dollar Sales Share and Contribution to Growth by Positioning Group. Positioning Groups defined by SPINS Product Intelligence. Excludes Private Label. 52 weeks ending 1.28.2024 vs. Latest 2 Years. Total US- Natural Channel and MULO powered by IRI.



Natural Beauty addressing mentality shifts in the Industry



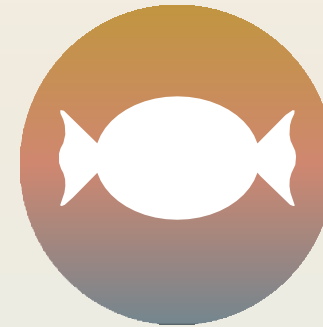
**Lifespan to
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**New Global
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MENTALITY SHIFTS



Lifespan to Healthspan

What to Watch For:

- Protecting the Body's Biome
- Addressing Root Problems
- Activating Mother Earth
- Continued Acid Incorporation



+28%

growth rate of
Body Moisturizers
with Bee Propolis



Scalp Treatments
#3 Growth Driver
products in Hair Care



3X Faster
Growth of
Oral Care
with Xylitol



>\$100MM revenue
of Natural Beauty
products with
Retinol

MENTALITY SHIFTS



New Global Notions

What to Watch For:

- American Ingredient Unrest to Uproar
- French Pharmacy & Ancient Beauty
- Sustained Desire for Suncare

Oc1ccc(cc1)C(=O)OR

+19% Growth of Natural Beauty Products Labeled Paraben Free

LaRoche Posay #7th growth driving brand across Beauty

Source: SPINS Satori. Absolute Brand \$ Growth across Beauty Industry. Labeled Paraben Free growth \$ % Change across Naturally Positioned Beauty Products. 52 weeks ending 1.28.2024. Total US- Natural Channel and MUO powered by IRI.

MENTALITY SHIFTS



Protecting the Planet

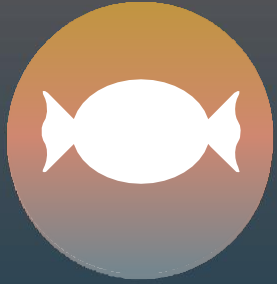
What to Watch For:

- Mitigating Microplastics
- Certification Seeking
- Minimal Earth Impact



Source: SPINS Satori, Labeled Coral Reef Safe across Suncare Products., 52 weeks ending 1.28.2024. \$ % Change CY vs. YA across Labeled Or 70%-100%. Dollar Sales of Natural Beauty with Certified B Corp Certification Total US- Natural Channel and MULO powered b

MENTALITY SHIFTS



Intentional Indulgence

What to Watch For:

- Gen-A Ascension
- Technological Treats
- Escapism for Everyone



>200% growth of
Natural Skin Care Tools
& Accessories



Bubble and Byoma #2
and #3 growth brands
within Skincare*



Natural Deodorant:
+56% and largest growth
subcategory with sales
>\$626MM in L52



PACHA
SOAP CO.



Natural is driving the **future**
of the **Beauty Industry**.



Let's ideate together.

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Natural Beauty Trends to Watch in 2024

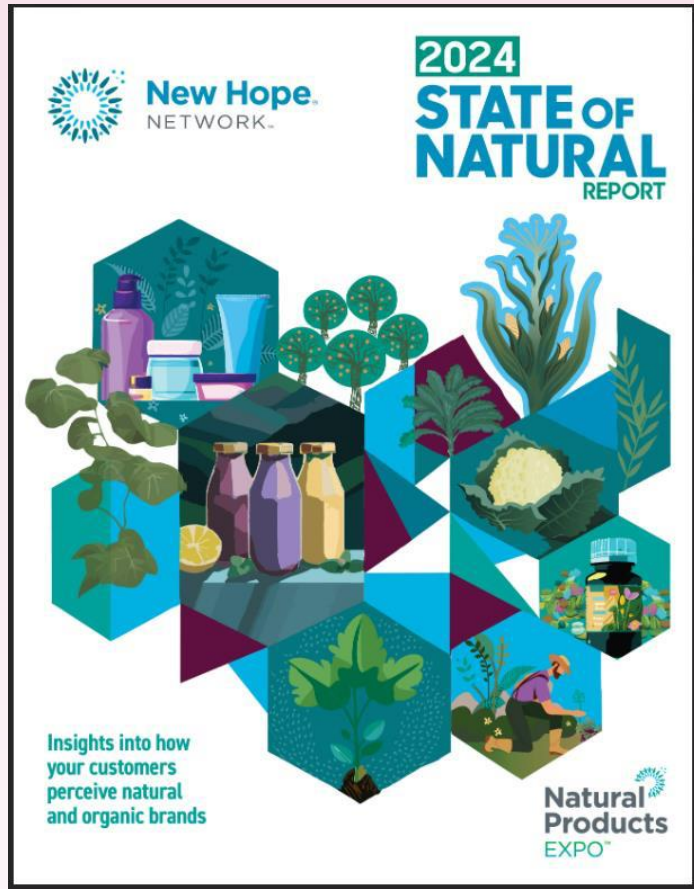
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Natural and Organic Products Industry Size

4.7% growth in 2023,
reaching **\$301.8 billion**



Natural Beauty Industry Size

5.5% growth in 2023,
reaching **\$28.7 billion**

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By the numbers: A Retail Snapshot

- Mass market is the dominant channel, accounting for 41.6 % of natural and organic beauty sales (nearly \$12 billion).
- 30% of sales occurred in Natural and Specialty in 2023. This number has dropped to below 30% this year.
- Growth of sales in Natural and Specialty have been declining since 2019.
- Growth is falling below 2%, with projections below 1.5% in 2024.


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Cross-Category Trends Driving CPG Innovation


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- **Back-To Back-To Basics**
- **Flexitarian Living**
- **Health Span Over Life Span**
- **Multicultural CPG**
- **Making Climate Changes**

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5 Top Beauty Trends to Watch

Formatting for Sustainability



- Waterless and plastic free. Innovative formats.
- Educating on product use and managing consumer expectations.
- Innovation spotted across skin care, hair care, cleaning and lifestyle products.



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5 Top Beauty Trends to Watch

Beauty Meets Wellness

- The lines between beauty, health and wellness are disappearing.
- Beyond clean: function, purpose, health and mindfulness.
- Microbiome, sleep, stress, hormones and more.

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Energy • Focus • Clarity • Beauty⁺

Think outside the pillbox.



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5 Top Beauty Trends to Watch

Waste-Not Beauty

- According to the Upcycled Food Association, 60% of consumers want to buy upcycled food and 95% want to reduce waste.
- Interest has moved beyond food and beverage.
- Tomato skins, citrus, cacao, coffee, dried fruit seeds and more.




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5 Top Beauty Trends to Watch

It's a Beautiful, Biodiverse World

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- Soil- and skin-nurturing ingredients from across the globe showing up in beauty products.
- Sustainable supply chains are key to positive impact.
- Unique global ingredients can address a range of diverse needs for consumers.



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5 Top Beauty Trends to Watch

Climate Action Looks Good on You

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- Agricultural ingredients are used in beauty products.
- More climate-friendly practices, including regenerative agriculture and sustainable packaging.
- Regenerative certified products showing up beyond the food category.



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Thank you!

Education & Events March 12-16, 2024

Trade Show

ACC North Halls March 13-15, 2024

ACC North Halls March 14-16, 2024

Anaheim Convention Center | Anaheim, CA USA

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**Alisa Williams
Carmichael**
Partner
VMG Partners



Isabel Collins
Category Manager
Fresh Thyme



Andrew Vrbas
Co-Founder & CEO
Pacha Soap



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Q&A

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