



Organic Beauty and Wellbeing Market 2020



Introduction

With sustainability moving from a 'nice to have' to a 'necessity', we, as consumers, are quickly demanding more from brands. Conscious consumerism is now an urgency, which leaves no surprise that 2019 has seen the certified organic and natural sector lead the way in this shift from a mindset to a lifestyle. **The growth of certified organic and natural products has risen a significant 23% over the past year***. This is not only the 9th year of consecutive double-digit growth, but the 3rd biggest percentage growth since 2010.

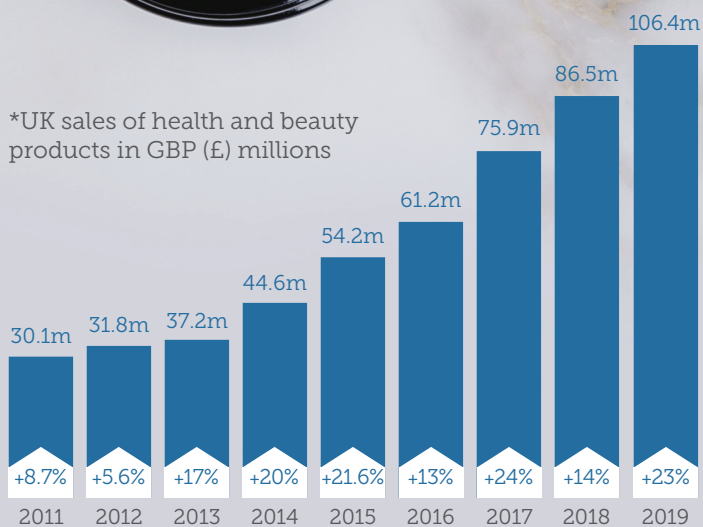
Wellbeing remains the all-encompassing driver that transcends the whole organic sector. With wellness now a lifestyle choice, people are expecting brands to follow them on a journey on what it means to holistically 'look and feel healthy'. Beauty and wellbeing brands are responding by offering real solutions to modern-life areas of struggle – everything from sleep, to anxiety and mental health. **Brands and consumers are now connecting on a deeper level.**

In 2019's Organic Beauty and Wellbeing Market Report, we predicted a turning tide on sustainable beauty and wellbeing – and we were not wrong. 2019 saw an explosion of the environmental movement, that is now in full swing. With Greta Thunberg leading the way, we have seen an emerging generation of passionate and informed consumers demanding more. Global Web Index asked over 2,300 UK and USA based web users why they buy eco-friendly products, and 80% did so because they care about the environment¹. Our consumer research² supports this by highlighting **64% of consumers are now looking for products with recyclable packaging**, and 55% want more refill points in stores.

Garnier Organic's widescale TV advertising and out of home campaign saw the Soil Association COSMOS Logo reach the screens of **millions of primetime viewers** this year. Accessibility and availability has made huge progress, with more and more retailers stocking their shelves with certified organic.

Unlike organic food and drink businesses, beauty brands are not legally obligated to be certified – any brand can claim to be organic and may **contain just 1% of organic ingredients**. Soil Association will continue to push for transparency in the market, by engaging in conversation at events, and driving awareness of certified brands who truly have sustainability baked into their DNA.

2020 promises to be an exciting year of cutting through the noise, to drive real, heartfelt solutions to sustainability.



01 The year in numbers

+23%

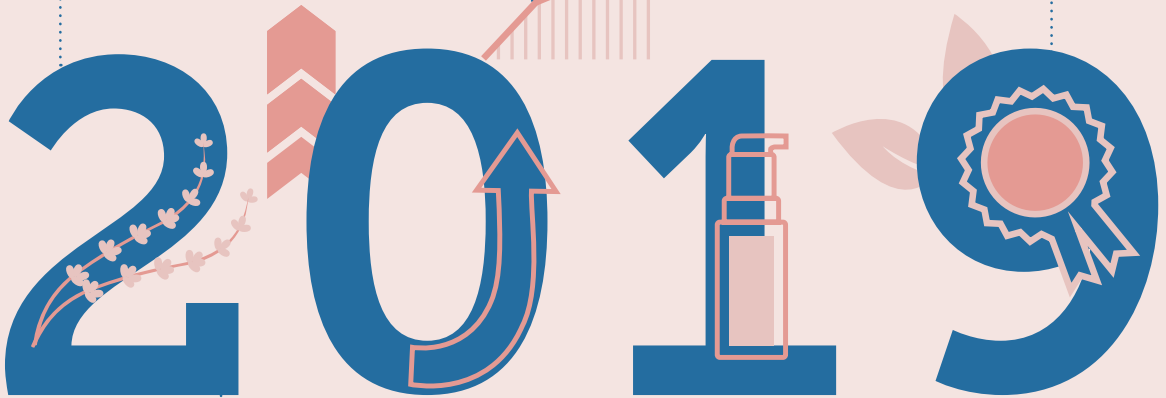
year on year growth of certified organic and natural beauty and wellbeing products

9th

year of consecutive growth

15,000

certified organic and natural products on COSMOS database



14,000

certified organic and natural ingredients on COSMOS database



£106.4m

total sales of certified organic and natural beauty products

*Figures are Soil Association Certification certified sales declarations plus a percentage of other COSMOS certified products

02 Trends driving growth

Wellbeing

With reports of the wellness industry being worth \$4.5 trillion in 2019³, wellbeing has transformed from a “trend” into a lifestyle. Brands are continuing to find innovative ways of meeting consumer demands, breaking down barriers of ‘one size fits all’ by using the power of nature and cutting-edge green chemistry⁴.

There is no doubt that we are living in a frazzled time: three out of four of us are reportedly feeling ‘overwhelmed’ or ‘unable to cope’ due

to stress⁵ - but the desire to feel better is there. Holistic wellbeing is a lifestyle set to grow⁶, with the connection between mind and body never being more prominent.

Consumers are now searching for solutions to all modern-life areas of struggle – everything from sleep, to anxiety and mental health, initiating deeper and more meaningful connections with brands.

In our research

83%

of people felt it was better for their health if a beauty or wellbeing product was organic⁷



Image: Skin & Tonic London

Efficacy

It is vital that beauty products are effective, and as the organic beauty industry continues to grow, brands are now able to evidence their products to be as effective as their non-organic counterparts.

96%

of brands we asked believed their customers are looking for quality

83%

of brands we asked said efficacy was a key driver for their customers loyalty⁸.

Innovation in the sector has led to more effective ingredients becoming available, and even better organic beauty and wellbeing products.



Image: Neal's Yard Remedies



We've proven that organic products can deliver high performance, our COSMOS organic certified Sensitive Replenish + Balance Moisturiser is clinically proven to hydrate for up to 12 hours.

Lou Green – Head of Organic,
Neal's Yard Remedies



Image: VOYA Skincare

Spotlight: VOYA Skincare

Anti-oxidant protection*: All **VOYA Skincare** seaweeds increase the skins ability to fight against free radicals which can help to:

- Protect against premature aging
- Prevent pollution damage
- Decrease sensitivity

One strand of VOYA Skincare seaweed contains 5 of the most important antioxidants for skin protection!

*in-Vitro testing the Shannon Biotechnology Research Centre, Institute of Technology, Tralee



'The Queen of Herbs', Tulsi is the most sacred herb of India, known to reduce stress, enhance stamina, relieve inflammation, eliminate toxins, improve digestion and provide a rich supply of antioxidants and nutrients.

Fushi's Organic Tulsi Supplement



Image: VOYA Skincare

Mindful ingredients

Brands are using naturally occurring active ingredients to drive their product ranges, from mushrooms in supplements, to ground coffee in skin scrubs and seaweed in skincare. Brands using traditional herbal medicinal practices remain popular, such as **Odylique** who rely on age old knowledge to create their products.



Seaweed has been used for over 300 years as therapy for a variety of skin and rheumatic conditions in Ireland, with over 80% of seaweed plant made up of minerals, vitamins and other bioactive compounds.

Mark Walton, Co-founder,
VOYA Skincare



Image: Greenscents

Holistic home

Organic cleaning products continue to be more sought after as consumers look to reduce their toxic load, and even candles are joining the certified organic market.

45%

of people have used an eco-friendly household product in the last 6 months⁹

33%

increased their purchases of eco-friendly household care products⁹

51%

of global BPC launches made either natural or environmental/ethical claims⁹

43%

were unsure what brands mean by eco-friendly⁹

Air pollution

Global pollution levels are on the rise – **9/10 of us worldwide now breathe polluted air¹⁰**. Pollution is a big aggressor for the skin and has been linked to the rise in people with skin sensitivity.

It's also to blame for many signs of premature ageing due to oxidative stress, damaging free radicals which reduces the skin's ability to repair itself properly.

Food by-products

More brands are leaning on circular economy principles to create effective, environmentally conscious products. The latest crop of exfoliators, for example, opt for gentle fruit acids and botanicals to slough away dead skin cells, instead of harsher ingredients or micro-plastics. **UpCircle Beauty's** 'Fruit Stone Collection' products are all made with the powder of a different discarded fruit stone (olive stones, apricot stones, argan shells).



Botanicals certified organic products contain high levels of natural antioxidants, which help protect the skin against free radical damage – including air pollution, as well as UV light, stress related conditions and stuffy offices.

Wendy Stirling, Botanicals



We've rescued 100 tonnes of coffee from cafés and coffee shops across London, transforming them into our coffee-based skincare range.

Anna Brightman, UpCircle Beauty



Spotlight: True Skincare

All of their products are waterless in formulation, but 2020 will see the introduction of a new ingredient which mimics the texture that water provides, in addition to holding skin-beneficial properties. It's also entirely waterless in its extraction process!

Image: True Skincare

Waterless beauty

With brands looking to mitigate the potential downsides of including water in products, from removing the need for preservatives altogether, the carbon impact of shipping water and improving efficacy, we will see more waterless beauty products hit the market. This is already growing, with innovative certified organic brands such as **Inlight Beauty** (who are 100% certified organic) and **True Skincare** pioneering the market.



According to the World Wildlife Fund, by 2025 two-thirds of the world's population may face water shortage¹¹.

Sleep and anti-anxiety

8.2m people in the UK suffered with anxiety in 2013¹³, and an estimated 1 in 4 people in the UK will experience a mental health issue¹⁴. This, together with an estimated 90% of people with depression complaining about sleep quality¹⁵ – certified brands like **Herbapharmacy**, **Bamford** and **Hamo** are stepping up with ways to soothe the body and mind.

Essential oils such as lavender and bergamot have been used as far back as ancient Egyptian communities, and there have been some studies confirming the positive effect of essential oils on sleep¹⁶, and the sedative and pain-relieving qualities of lavender¹⁷.



Spotlight: Bamford

Their b-silent night-time temple balm contains poppy seed oil, known for its relaxing properties. Combined with a blend of roman camomile, lavender flower and vetiver root essential oils. Sleep peacefully and wake restored.

Image: Bamford



03 Environmental Concerns

There is no denying that conscious consumerism is now an urgency. In the midst of a climate emergency, 2019 has seen an explosion of the environmental movement and consumers are demanding more from brands.

Expected to be a \$12 trillion dollar industry by 2030¹⁸, sustainability is now a key focus for consumers, businesses, brands and politicians alike. Concerned about our impact on the

planet and future generations, certified organic standards are leading the way to building **deeper levels of trust with educated and informed consumers** who want brands to live and breathe **honest** sustainability.

We commissioned consumer research in December 2019, and over 500 people told us what sustainability really means to them >

Figures from Soil Association Certification's consumer research survey "Why Organic Beauty and Wellbeing? December 2019.

People say:

79%

are more likely to buy a beauty product if it says **ORGANIC**

64%

look for products with recyclable packaging

41%

choose organic beauty because it is more sustainable

Brands say:

91%

Soil Association Certification boosts their sustainability credentials

87%

feel passionately about supporting environmental initiatives

SUSTAINABLE

was the key word people associated with Organic (over 52%)

Statistics

Figures from Soil Association Certification's consumer research survey "Why Organic Beauty and Wellbeing?" December 2019.



56%

said they looked for logos because it allowed them to support the causes they care about



47%

said they chose organic beauty products because they knew there was no animal testing



92%

of people said that choosing organic beauty would make them feel like they were doing the right thing, or making a positive choice



81%

said they would feel they were doing the right thing for the environment



55%

said they would be encouraged to buy more organic products if there were refill stations available

Ethics plays a big role in conscious consumerism. The COSMOS and leaping bunny logo were joint 1st in the logos consumers look for when buying beauty products.

Social Responsibility remains high on certified organic brands agendas, as a key pillar of what drives the ethics of a business. Soil Association Certified brands are leading the way:

Spotlight: Organic Blooms

Growing cut flowers is therapeutic. Organic Blooms has evolved from twenty years of running Horticulture Projects using plants as a therapeutic medium for people with learning difficulties and mental health support needs.

Spotlight: Amina’s Natural Skincare

A family owned Jordanian manufactured brand, Amina’s Natural Skincare champions the empowerment of Jordanian women by means of providing them with employment where they are valued and where their growth development opportunities are paramount to their philosophy and work ethics.

Photo: Organic Blooms

Transparency

Digital innovation continues to support transparency with the development of blockchain, but consumers still need clarity to be sure the products they are buying match their ethics. **65% of consumers want to buy from purpose driven brands who advocate sustainability, but in reality, only 26% currently do**¹⁹ – clarity and accessibility is key in driving the organic movement forward.

Almost

50%

of people didn't realise that the beauty industry isn't regulated in the same way that it is in the food industry!

52%

of people said they looked for logos such as COSMOS because it gave them peace of mind that the product has passed independent rigorous testing²⁰



Plastic

Plastic remains under the spotlight after an intense year of scrutiny in 2019.



Over 80 billion plastic bottles are disposed of a year from just shampoo and conditioner alone²¹

COSMOS Standards have strict packaging requirements for all their certified brands, but an industry wide approach is needed to ensure swift and effective improvements.



There is a lack of clarity concerning standards that define the biodegradability of biodegradable or compostable plastics in any environment.²²



Photo: Feat. Greenscents

Some brands are forgoing packaging altogether, like **Haoma** whose soap bars are shipped without any consumer packaging at all, whilst others like **Inlight Beauty** are opting for recycled, and recyclable MIRON violet glass.

Retailers are quickly switching onto the demand for refill stations too. Planet Organic were the first to offer organic haircare in refill format this year with **Tabitha James Kraan**. This was closely followed by **La-Eva** in Anthropologie and Petersham Nurseries and **Fushi** in As Nature Intended.

64%

of consumers we asked in our survey said they look for products with recyclable packaging

40%

of our total plastic use is from packaging alone²³



A key trend will be increased pressure to better define terms such as 'clean' and 'non-toxic'. They are creating mass customer confusion and concerns over product safety and, generally, are leading to an unfortunate industry regression to greenwashing. This is predominating in the US but having a global impact. Organic certification standards will lead the way in rectifying this issue - bringing much needed clarity, due diligence and impartiality to the natural and sustainability claims brands are pushing out. This will drive the organic category to new levels of growth in 2020/21 as customers continue to lose trust and demand evidence."

Sarah Brown, Pai Skincare

04

Certify with us

Organic certification is the gold standard for health and beauty products. A product is defined as organic if it is a product of organic farming. Some products may meet the principles of organic but don't qualify for certification because they are naturally

occurring (for example clay or salt). We offer COSMOS natural certification to ensure consumers have clear signposts to products that align with the principles of organic products. Both schemes share the same principles with only three differences. See the table below.

Guarantee	COSMOS Organic	COSMOS Natural	Soil Association Certification H&B (non-cosmetic)
All ingredients used are checked	✓	✓	✓
GM Free	✓	✓	✓
Protection for vulnerable plants	✓	✓	x
No animal testing	✓	✓	✓
Only natural derived colours and fragrances are used	✓	✓	✓
Restrictions over the use of petrochemicals	✓	✓	✓
Prevents greenwashing	✓	✓	✓
May include organic ingredients	✓	✓	✓
Must include a minimum % of organic ingredients	✓	x	✓
Calculations for the number of organic ingredients in the product required	✓	x	✓
Manufacturers are inspected at least annually	✓	✓	✓
Environmental management systems are in place to minimise waste	✓	✓	✓
Packaging standards	✓	✓	✓
Applicable to non-cosmetics such as home cleaning products and candles	✓	✓	✓
Logo may be printed in green	✓	x	✓

To certify, or find out more, please email beautywellbeingsupport@soilassociation.org

05 The year ahead



Photo: Myrtle & Maude

The challenge

2019 has positioned sustainably conscious brands firmly in the mainstream, leaving 2020 to benefit from the results of this awareness. The year ahead will see new product listings, continued interest and input from retailers. However, in a cluttered beauty and wellbeing market, the challenges of transparency, differentiation and honesty will arise.

Mainstream beauty brands will need to seriously, and honestly review their impact on the world around them, and there will need to be true collaboration across the industry on issues, such as plastic, to instigate effective changes as quickly as is needed.

Kantar has measured the 'organic beauty sales' for the first time, reporting a huge sales increase from £343k to £2.5m in 2019. But despite the size of the market growing significantly, there still isn't a differentiation between certified and non-certified organic - which opens the risk for further confusion in the industry.

The market which we report on includes certified organic and natural products (80% organic, Vs. 20% natural), because while we strive for all brands to choose organic, we recognise that the natural sector is here to stay and therefore needs defining to provide consumers transparency across all the products available.

The wider beauty and wellbeing industry is under scrutiny with unsubstantiated claims of "clean, eco and green" and faces mounting pressure from consumers calling for full transparency and an end to the greenwashing epidemic.

The opportunity

The continued demand for transparency, and the need for brands to build authentic relationships with their consumers will see brands making clear, traceable claims - winning loyal supporters. Certified organic and natural brands play a pivotal role in this movement, as they are the clearest way for consumers to be confident that what they are purchasing meets their ethical requirements.

More businesses will need to turn to globally recognised standards to qualify their claims, which will create improved access to brands for people looking to support the organic movement across their decision making. The certified organic movement is in full swing, as opportunity arises from consumers wanting a balanced, reflective and convenient form of wellness, throughout every aspect of life.

This forward thinking is creating space for brands to narrow the intention/action gap, seeing lifestyle wellness brands such as **The YES YES Company** (who offer a range of certified organic intimate care products), and **Myrtle & Maude** (who offer a range of certified organic pregnancy journey solutions) thrive.

Retailers will be choosing to stock more certified brands, improving accessibility (both with availability and price point variety) – although consumers will still need to look for the logo to be confident of the impact of their purchase.

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About this report

This report is compiled using data from a number of sources, including COSMOS data, Soil Association Certification report, consumer research, licensees, and contributions from key partners within the industry. We are grateful to all those who have contributed in any way.

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