

2019 Clean Beauty Update: Defining Big Dollars



A learning revolution that began in grocery aisles has transitioned into the beauty space. Powered in part by the overall consumer trend of paying attention to ingredients—and then choosing a minimalist approach to products—clean beauty is now a big market. Driven by Millennials and Gen Z, brands big and small are responding to the demand, though often by using different definitions of “clean.” Despite vague interpretations, the business of less is not only growing but also evolving to include new categories.

WHAT “CLEAN BEAUTY” MEANS TO WOMEN

58%

feel that it means that a product is “**natural**”

32%

think that clean beauty products contain “**less harsh chemicals**”

28%

define that term as “**cruelty free**”

WHY IS THE DEFINITION HAZY?

While the EU bans over 1,300 ingredients from cosmetics, the U.S. prohibits around 30

The only U.S. government legislation regulating the personal care industry was signed into law in 1938 and has not been updated 🙄



DETERMINING DOLLARS

In 2018, the global **natural cosmetics** market was estimated to be \$34.5B

By 2025, the global **organic personal care** industry is anticipated to reach nearly \$25B

GEN Z IS ALL IN FAVOR



These tendencies deepen with age

- **88%** of older Gen Z women express interest in trying clean beauty products
- **30%** would not purchase products tested on animals, a practice Gen Zers largely disdain
- **28%** of the 18-24 group opt to pay more for natural products

CLEAN, PLEASE: WHY AND HOW MILLENNIALS DRIVE THIS TREND

80%

Believe that their skincare products **affect their health**

Feel it's important to understand the **ingredients** in their skincare products

68%



of Millennials prefer shopping at **mass merchandisers** for natural beauty products, followed by drug stores (36%), Amazon (34%) and specialty beauty (23%)

CBD: A TREND WITHIN A MEGA-TREND

The beauty segment of the CBD market is expected to hit **\$1.6B** by 2020

What do they want to try most?
48% of Millennials are interested in testing products with CBD



2019'S BUZZWORD: VEGAN

VEGAN

product launches rose **175%** from 2013 to 2018

