

NielsenIQ

# The evolution of clean and sustainable beauty

July 2022



# Clean beauty continues to evolve



## Clean beauty 1.0

- Ingredient focused
- Clean beauty
- Paraben free, sulfate free, phthalate free



## Clean beauty 2.0

- Sustainability focused
- Vegan, biodegradable, refillable packages
- Plastic free beauty



## Clean beauty 3.0

- Ethics focused
- Fair trade
- Ethical treatment, fair wages

# Growth among all levels of 'clean'



## NielsenIQ Clean is defined as:

Free from parabens, sulfates, phthalates, artificial colors and fragrances, +600 other ingredients

# Growth trends cluster around sustainability attributes



## Sustained trends

Paraben Free  
**60.8%** of BPC, +5.1%

Sulfate Free  
**46.8%** of BPC, +4.7%

Phthalate Free  
**24.2%** of BPC, + 8.7%



## Growth trends

Humane  
**18.7%** of BPC, +11.8%

Vegan  
**18.9%** of BPC, +6.3%

Artificial fragrance free  
**8.3%** of BPC, +11.8%



## Emerging trends

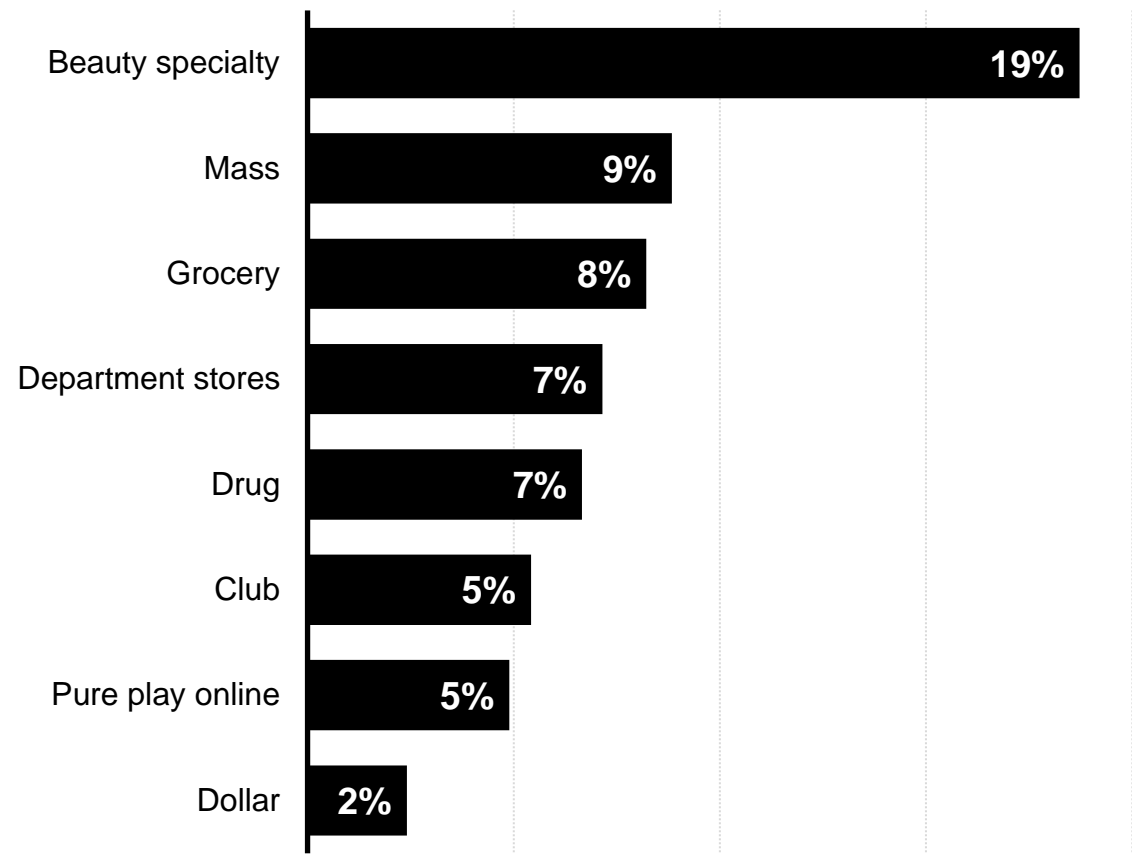
Reef safe  
**0.2%** of BPC, + 16.6%

Plastic free  
**0.03%** of BPC, +34.9%

Clean  
**1.2%** of BPC, +18%

# Retailer success in clean beauty correlated with labeling programs

% of clean beauty sales by channel



### The Grove Standard

Everything available at Grove has met our standards for non-toxicity, efficacy, and sustainability, and is cruelty-free.

[Get Started](#)

**clean**

### CLEAN AT SEPHORA

This seal means formulated without sulfates SLS and SLES, parabens, formaldehyde, phthalates, mineral oils, and other ingredients you might not want.

### CLEAN+ PLANET POSITIVE

This seal means clean brands focused on climate commitments, sustainable sourcing, responsible packaging, and environmental giving.

**conscious beauty** at ulta beauty™

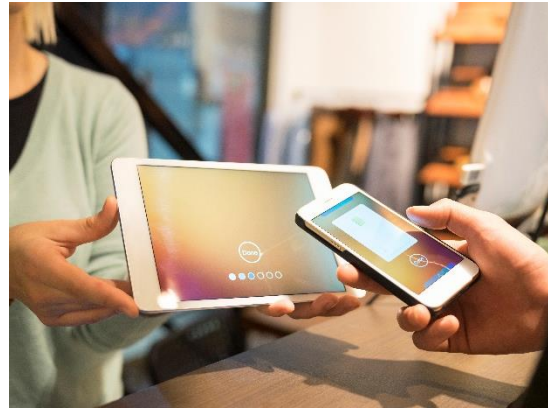
CHOICES FOR YOU & FOR YOUR WORLD™



# Clean drives purchasing



**13%** of beauty & personal care shoppers are actively looking for products that are environmentally friendly



**23%** of online beauty & personal care shoppers say detailed product information drives them to shop online



**860,000+** personal care shoppers searched for a clean label product on Amazon in Q1 of 2021.



Wellness food products grew **+26.7%** in conventional grocery stores vs **8.6%** in natural/specialty retailers

**NielsenIQ**

**Thank You!**

For more information, visit our Beauty Hub at:

**[niq.com/beauty](https://niq.com/beauty)**

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