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RESEARCH ARTICLE

Analysis and Main Trends of the World and Ukrainian Organic and Natural Cosmetics Market

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ABSTRACT

Organic and natural products are the main modern trend. Organic cosmetics appeared in Europe and the USA about 15–20 years ago. In Ukraine, organic cosmetics began to gain popularity in 2014–2015, in contrast to the market of natural cosmetics, which hit the shelves of Ukrainians in the early 2000s. The main drivers of growth in the use of organic and natural cosmetics: recovery and gradual growth of the cosmetics market (during 2021 – early 2022 under the influence of consumer purchasing power); growing demand for safer and more ecological products; e-commerce sales growth, increasing penetration of the internet etc). In the world and in Ukraine, there are no clear requirements for the terms «organic», «natural» or «eco-cosmetics». All responsibility for the level of quality and naturalness of cosmetics ingredients lies only with the manufacturers and their understanding of «organic», «naturalness». There are 17 companies in the world engaged in the production of organic cosmetics. The leaders are American companies: «Aubrey Organic», «Avon Products Inc», «Esse Organic Skincare» and Japanese companies: «Kao Corporation», «Shiseido». The composition of organic cosmetics does not include dyes, GMOs, ingredients of animal origin. An important criterion for organic cosmetics is certification, which is carried out by one of the certification companies located around the world. If organic cosmetics contain no more than 5% of chemical components, they receive the COSMOS ecocertificate (Weleda, Dr. Hauschka, Melvita, etc.), which confirms their organic origin. Organic and natural cosmetics containing no more than 5% of chemical components must be certified by the COSMOS Eco Certificate (Weleda, Dr. Hauschka, Melvita, etc.).

The global market value for organic and natural cosmetics expected a positive increase from almost 41.38 billion dollars in 2023 to roughly 85.47 billion dollars expected for the year 2032. These data are proof of the growing importance of the natural and organic beauty market. The positive trend seen in past years continued into 2023, growing at a CAGR of 9.49% over the period 2022–2032. In fact, consumer awareness of the types of cosmetics they buy has increased over time.

Introduction

Nowadays, the words «ORGANIC», «BIO» or «100% natural product» are present on many food products, things and cosmetics. For the first time, the terms "organic" and "natural" were used in relation to food products in the USA in the 1960s in agriculture and processing industries[1–5]. The rapid development of the organic movement is evidenced by the «Organic Movement Associations», which exist in different countries of the world:

- NATRUE. The International Natural and Organic Cosmetics (EU)[6];
- BDIH (Germany)[7];
- OTA. The Organic Trade Association (USA)[8];
- The Natural Products Association (USA)[9].

In 2005, the Federation of the Organic Movement of Ukraine was created. The purpose of which was to promote the development of direct production, processing and export of organic products and the formation of the domestic consumer market[10].

Products of agriculture and food industry, which are produced in accordance with official standards, can be called organic. In each country, they are different, in general, these norms are based on the principles (standards) of the International Federation of Organic Agriculture Movement (IFOAM) and provide for 5 categories listed in the Table 1[11–14].

Material and methods

Official Internet pages of organic cosmetics certification bodies (ECOCERT[15], COSMOS[16] , Cosmetique BIO[17]), websites of producers of organic and natural cosmetics, scientific articles, methodical materials, etc. were used in the analysis.

The documentary method in the context of theoretical tasks was used to analyze scientific publications and regulatory documents, which allowed us to identify key trends in the global and Ukrainian market of organic and natural cosmetics. Using the retrospective method of analysis, the development of the cosmetics market in the historical aspect is studied. The systematic approach made it possible to comprehensively consider the problem of regulatory and legal regulation of the circulation of organic and natural cosmetics in different countries of the world. The statistical data was processed using Microsoft Excel, and trends and prospects for the development of the analyzed segment of the cosmetics market were identified. The graphical method of analysis made it possible to visually present the consumption of organic cosmetics by regions of the world, as well as the forecast for the development of the global market for organic and natural products.

Results and Discussion

According to the scope of use of organic raw materials, the term «organic» can be applied to natural components used in the production of cosmetics[18, 19]. As with organic food and household chemicals, more and more consumers are interested in natural cosmetics[20, 21].

Currently, both in the world and in Ukraine, there are no clear requirements for the terms «organic», «natural» or «eco-cosmetics». All responsibility for the level of quality and naturalness of cosmetics

Table 1. Principles (standards) of the IFOAM regarding organic products

Scope of application	Principle (standard)
The land on which the products are grown	it must undergo a transitional period established by the standards, during which the use of chemical fertilizers and pesticides is limited
In crop production	the use of genetically modified organisms is excluded, the use of pesticides, synthetic mineral fertilizers is limited
In organic animal husbandry	there is a requirement to keep animals on a leash, feed them organic feed, and prohibit the use of growth stimulants and hormones
When processing agricultural raw materials	it is forbidden to use synthetic flavors, dyes and preservatives. Acceptable processing technologies should minimally transform raw materials. The hydrogenation, deodorization and refining processes are excluded from the list
The organic supply chain	is controlled to eliminate the possibility of adulteration and to avoid contamination by non-organic products or leaky packaging

ingredients lies only with the manufacturers and their understanding of «organic» and «naturalness». These are marketing tools that do not require confirmation. The terminological definition of «organic» and «natural» cosmetics is shown in Figure 1[22, 23].

Organic cosmetics have advantages over natural cosmetics: The products contain at least 95% of ingredients grown in accordance with the principles of organic farming; only natural ingredients are used in production; they do not contain toxic substances; they are environmentally friendly; they are grown without chemicals, pesticides and herbicides; they are packaged in dark glass bottles, which is due to the fact that oxidation processes in such containers are much slower; paper and glass containers for organic products are recyclable; they are not tested on animals, instead, computer modeling is used, and all necessary studies are conducted in a test tube. The advantages and disadvantages of organic and natural cosmetics are shown in Table 2[18, 22, 24, 25].

The packaging of organic cosmetics must be biodegradable and not pose a threat to the environment. Manufacturers strive to reduce the negative impact on the environment of the packaging of their products using the following methods:

- use of packaging from recycled materials;
- reducing the use of packaging in general;
- use of ecological materials (paper, cardboard, bioplastic, etc.).

So, for example, Nivea was able to launch a new micellar water (Naturally Good Organic Aloe Vera Germany) in an eco-friendly packaging bottle made of recycled plastic 97 % recycled bottle – 98 % natural origin, 2 % additional ingredients[26].

In different regions of the world, organic cosmetics are used differently – in North and Sorth America it is much more – 29 % and 22 %, respectively, in the Asia-Pacific region – 15 %, in Europe – 9 %, and in other regions of the world, it is 25 % (Figure 2)[26].

In the changed post COVID-19 business landscape, the global market for Organic and Natural Products estimated at USD 37.8 billion in the year 2022, is projected to reach a revised size of USD 85.47 billion by 2032, growing at a CAGR of 9.49 % over the period 2022–2032 (Figure 3)[26–28].

The assortment of cosmetics is constantly increasing, and the production of new affordable cosmetics labeled «organic» or «natural» does not lose its rel-

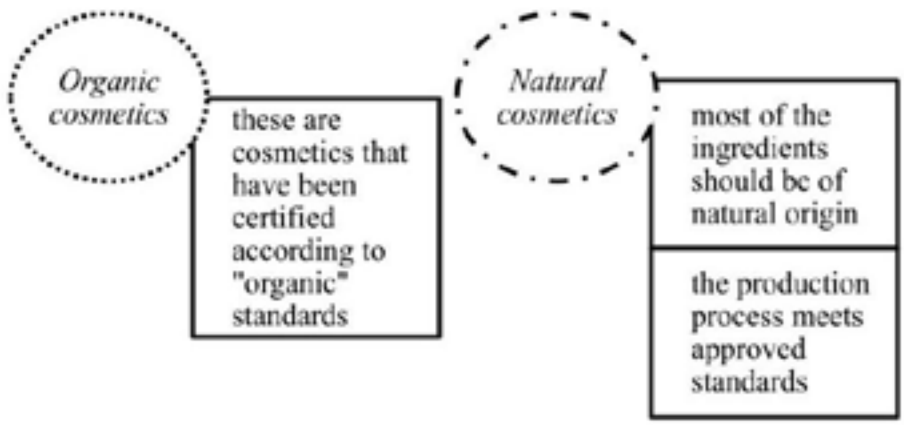

***Figure 1.** Terminological definition of organic and natural cosmetics*

evance at this time. There are 17 leading companies in the world that are engaged in the production of organic cosmetics for facial skin, body, and hair care (Table 3). According to the marketing firm «Occams Business Research and Consulting», the leading world companies that produce organic cosmetics are the American companies: «Aubrey Organic»[29], «Avon Products Inc»[30], «Esse Organic Skincare»[31] and the Japanese companies: «Kao Corporation»[32], «Shiseido»[33].

Unfortunately, the organic segment is small in almost all world markets. Ukraine is no exception[18]. As a rule, the richer the country and the more the state in it seeks to «enculturate» the population in environmental issues, the higher the consumption of organic products there[5]. In Ukraine, this trend is just emerging: the niche is around 0.5–1.0% of the market. In countries such as Germany, the market volume reaches 10%. And for the project to develop in this niche, it must be independent of cataclysms. In Ukraine, this means a rapid increase in the cost of living in conditions of an economic crisis, a decrease in the share of the population due to migration due to the war, etc. Therefore, Ukrainian manufacturers are looking for access to foreign markets, which will significant financial support and confidence in the future:

- TM «Yaka», LLC «Remos», Kyiv – entered the market of the Republic of Poland in 2022[34];
- TM «Aromashka» LLC «Aromat» Kharkiv – entered the market of the Republic of Kazakhstan in 2022[35].

Cosmetics can only be called organic if they have been properly certified and have a certificate attesting to their organic origin. The number of organic standards and certification schemes is constantly growing. In 2008, there were only 5, and in 2021 – up to 30. The most common are Cosmos and Natrue. In Europe, the most common are: Cosmos, Natrue, BDIH, Ecocert, Demeter, Soil Association, Icea, and in America NSF and USDA are used. New organic standards in Europe: Nature & Progress, CCRB, Organic Farmers & Groves, Demeter. The most influential is the organization Ecocert – an independent certification body that was the first in the world to develop standards for «organic and natural» cosmetics. Ecocert certification is accepted in 80 countries, currently covers more than 5,000 enterprises and more than 80,000 names of cosmetic products[15]. The main principle of the standard is that cosmetics marked with the signs «organic cosmetics» and «natural cosmetics» must contain at least 95% of components of natural origin. Inspection according to the Esosert standard is carried out every year. If there is a violation, the certificate will be revoked. Natural and organic cosmetics that contain no more than

Table 2. The advantages and disadvantages of organic and natural cosmetics

Advantages	*Disadvantages*
• has a gentle effect on the skin, removes toxins, saturates the skin with vitamins, and protects against the effects of the external environment	• individual intolerance to the components that are part of this or that tool
• contains only natural plant components and also contains essential oils	• the result of use is observed after some time (compared to synthetic care products)
• safe use due to the absence of toxic components	• sometimes, under the label "organic", there may be products that do not have an organic composition at all
• wide selection: tonics, washing gels, shampoos, hair balms, decorative cosmetics	• compared to synthetic cosmetics, it is not always effective (in the production of organic cosmetics, attention is paid to the selection of raw materials – the final product must meet certification standards, which reduces the effectiveness of the final product)
• effective for the care of young skin, which increases the protective properties of the skin and helps reduce moisture loss	• unable to cope with some skin problems (pigmentation, wrinkles and scars)
• the production process does not harm the environment and is not tested on animals	• has a short shelf life, which is due to the use of preservatives obtained by extraction from plants that are less stable
• the packaging consists of environmentally friendly materials that can decompose naturally	

5% chemical components and must have the Ecocert COSMOS certificate (Weleda, Dr.Hauschka, Melvita, Madara)[15]. Currently, about 1,000 companies participating in the certification program are registered, but there is not a single Ukrainian company among them yet. The only Ukrainian certification body is «Organic Standart» LLC; all others are foreign or their local affiliates. Each of the organic cosmetics certification systems sets its own requirements for organic products. It should be noted that these organizations were founded in different years at the initiative of representatives of the cosmetics business themselves: BIO/ECOCERT, France, founded in 2003 (used by more than 5,000 producers)[15]; COSMEBIO, France, 2004 – 13,000 manufacturers[17]; BDIH, Germany, 1952 – 500 used by producers[7].

You can distinguish real organic or natural cosmetics by the presence of one of the eco-certificate icons on the packaging. Examples of labeling of organic standards are shown in Figure 4. In addition to the certificate, it is worth paying attention to the packaging of cosmetics. If organic products are produced in the EU, then the label must have the «Eurolist» marking, the number of the certification body, and the country of origin of the raw materials.

Currently, individual states are trying to independently determine the details of their own vision of organic production and develop official standards. Such developed countries as the USA, Switzerland, and Japan were the first to formalize the organic sector. Currently, more and more countries that are developing in this direction, including Ukraine, are approving the relevant legislative norms.

As in the case of organic food products and house-

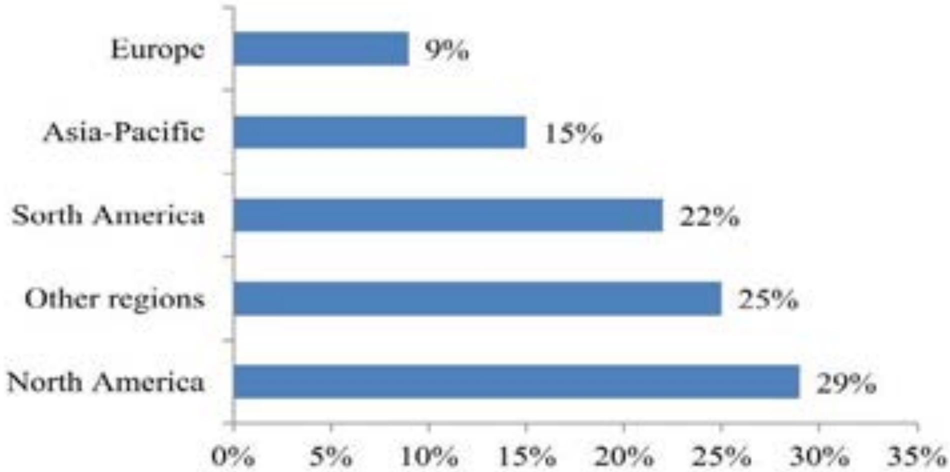

***Figure 2**. Consumption of organic cosmetics by regions of the world*

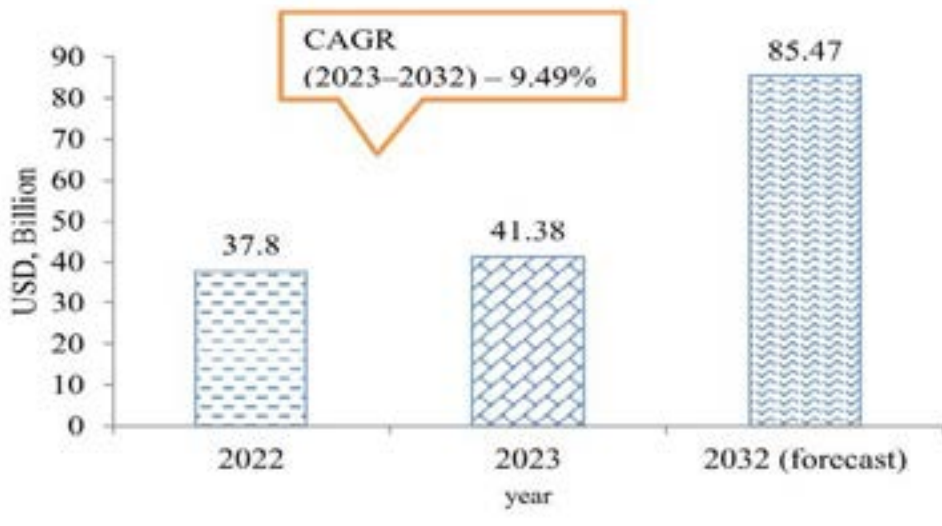

***Figure 3**. The global Organic and Natural Personal*

hold chemicals, Ukrainians are more interested in natural cosmetics. Consumers pay a lot of attention to the composition of the product – they want to understand what they are using for body care[22]. Mobile technologies allow consumers to get complete information about the composition of a cosmetic product and make an informed choice. Figure 5 shows an example of the latest mobile application, EWG's Healthy living App, which allows you to scan the composition of cosmetics and evaluate their naturalness[36].

Manufacturers rely on the visual factor, confirming the organic nature of a cosmetic product through various digital platforms such as Instagram, YouTube, etc., which allow you to see what the packaging of an organic cosmetic product looks like and its benefits[37]. Also, the international cosmetics retailer Sephora launched a separate Clean & Planet Positive category for brands that produce natural cosmetics and have modern ecological production (Figure 5).

There are opportunities for growth in the retail

Table 3. The world's leading companies producing organic cosmetics

№	Company name	Established year	Country	Specialization	World brand
1.	Aveda Corporation	1978	USA	production of hair products, treatment of alopecia	Voluminous Dry Shampoo
2.	Bare Escentuals Beauty, Inc.	1999	USA	products for face, eyes, lips, skincare, cleanse, moisturize, and body	Cream powder for the face
3.	Burt's Bees Products Company	1984	USA	personal care product	Personalized Lip Balm
4.	Colgate-Palmolive Company	1806	USA	Global Household & Consumer Products	Colgate Total toothpaste
5.	Colorganics, Inc.,	2000	USA	Hemp Organics lipsticks	lipstick
6.	Estee Lauder, Inc.	1946	USA	skin care, makeup, fragrance and hair care products	Double Wea
7.	Gabriel Cosmetics, Inc.	1992	USA	homeopathic skincare and cosmetics	Balancing Cleanse
8.	Giovanni Cosmetics Inc.	1979	USA	the gentle, cruelty-free skin care products	Giovanni® tree treat shampoo
9.	Iredale Mineral Cosmetics, Ltd.	1994	USA	mineral makeup products	Beyond matte™ lip fixation
10.	Johnson & Johnson	1886	USA	cosmetic and sanitary-hygienic products	Shower gel Johnson's Vita-Rich, with raspberry extract, restoring, 750 ml
11.	Kiehl's, Laverana GmbH & Co. KG	1851	USA	premium products for skin, hair and body	Luxusproben Kiehl's Calendula Calming Mask & Gesichtsreiger Set 44 ml
12.	L'Occitane	1979	France	cosmetic products	L'Occitane Verveine Agrumes
13.	L'Oreal Group	1909	France	makeup, skin care, hair color, conditioner	L'Oreal Paris Volume Million Lashes So Couture
14.	Natural Solter S.L.	2003	Spain	cosmetic products and natural and organic BIO cosmetics	Solidu Hair Drops Natural Hair Oil For Sensitive Scalp
15.	Oriflame Cosmetics Global SA, Revlon, Inc	1967	Switzerland	products in skincare, sun care and makeup	Laboratoire Professionnel Long Lash Mascara
16.	Shiseido Co. Ltd.	1842	Japan	products in skincare, suncare and makeup	Shiseido Benefiance NutriPerfect Day Cream SPF 15
17.	Weleda AG	1921	Switzerland	Natural and organic cosmetics and pharmaceuticals	Tonic-stimulator Weleda

sector of organic and natural cosmetics:

- creating and allocating space (separate shelves) in supermarkets and cosmetics stores;
- creation of specialized online cosmetics stores.

The main factors restraining the development of organic and natural cosmetics in Ukraine include: the fact that they are practically not available in stores due to a short shelf life; the return to normal life after COVID-19; high inflation caused by the Russian invasion of Ukraine; the energy crisis; problems in the chain supply and disruptions in production; and growing tension in trade[38].

However, organic products are not only a concern for people's health and the environment but also a matter of marketing. Sellers of such products imperceptibly manipulate the consumer. Usually, producers of «organic» products transfer part of the profit to animal protection funds or environmental organizations. This psychological aspect gives the consumer confidence in the advantages of the purchased product and forces him to buy more products. Attention to the environmental and social responsibilities of producers is also growing. Consumers are increasingly paying attention to the composition of products, the environmental friendliness of packaging, and the working conditions of production workers.

The war in Ukraine significantly affected the natural and organic cosmetics market in the country. In the face of economic instability and a decrease in the income of the population, Ukrainians are reducing their spending on personal hygiene products and replacing them with more affordable analogues. Many people have switched to using cheap home care products. The state of war in the country led to a narrowing of the market and a decrease in competition between cosmetics manufacturers. This, in turn, can lead to reduced innovation and the introduction of new products to the market. In addition, the war also affected the logistics and supply of raw materials for the production of organic and natural cosmetics. In some territories of Ukraine, doing business is prohibited or complicated, which may affect the work of companies that have production units in these regions. Given that, after recovering from the shock and effects of war, people are returning to normal life wherever possible, and businesses are returning to work, so we can expect an increase in promotional activity in the organic and natural cosmetics sector in the near future[38].

Production of organic and natural cosmetics is a combination of environmental, legal and human resources. For some, it is a business idea; for some it is a lifestyle, for some it is beauty and health, therefore the development of the market of organic and natural cosmetics is an integral part of our present.

Conclusions

Organic cosmetics production has covered the beauty industry, thanks to which a new line was born: organic cosmetics, which appeared in Europe and the USA about 20 years ago and in Ukraine no more than 10 years ago (White Mandarin, Piel Cosmetics, Nature.Med Vigor, etc.).In the world and in Ukraine, there are no clear requirements for the terms «organic» and «natural» cosmetics. In general, these are marketing tools. All responsibility for the level of quality and naturalness of cosmetics lies only with the manufacturers and their understanding of «naturalness». The main advantages and disadvantages of organic and natural cosmetics compared to traditional ones are considered. Advantages: has a gentle effect on the skin, removes toxins, saturates the skin with vitamins, protects against the effects of the external environment, etc. Disadvantages: individual intolerance of the components, the result is observed after some time (in comparison with synthetic care products), etc. An analysis of the consumption of organic cosmetics by region showed that in South America (29 %), Europe – 25 % and North America (22 %), it is consumed more than in the Asia-Pacific region – 15 %. The largest regional markets: China, USA, EU countries. The organic and natural cosmetics market in the world is estimated at USD 5.1 Billion in 2023. Is forecast to reach a projected market size of USD 85.47 Billion by the year 2032, trailing a CAGR of 9.49 % over the analysis period 2022 to 2032. The main factors restraining the development of organic and natural cosmetics

***Figure 4**. Certificates and marks of organic standards*

***Figure 5.** Marking EWG's Healthy living App and Clean & Planet Positive category for international organic brands*

in Ukraine are analyzed: they are practically not represented in ordinary stores, which negatively affects demand and consumption; most consumers do not understand the difference between organic and conventional cosmetics. Organic cosmetics must undergo certification by special bodies that monitor the origin and quality of raw materials, production methods, packaging, etc. The only guarantee of organic production is certification, which is carried out by almost 30 organic standards. The organic cosmetics certification systems in the world were reviewed, including the most used BIO/ECOCERT (France), BDIH (Germany). The latest devices – the Healthy living App mobile application from EWG – allow you to scan the composition of cosmetics and assess their naturalness. Sephora launched the Clean & Planet Positive category for international organic brands. ☐

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