



# Clean Up with Organic Personal Care Products

By April MacIntyre

Natural Food Network Contributor

ATTITUDES TOWARDS BEAUTY HAVE CHANGED WITH CONSUMERS INCREASING EXPENDITURES ON ANTI-AGEING PRODUCTS.

“What I want is one store where I can get most of my items. I am tired of running to Trader Joe’s for this, Whole Food’s for that and having to hit Ralphs and Vons and even Costco. I use natural shampoo and skincare products and I eat a lot of organic foods but I like an occasional soda and a crappy hot dog, and I want to find the best of all of it at good prices under one roof – that is what I would say to your readers who buy for supermarkets...”

— Mary D. [outside Ralphs in the Calabasas Commons – Calabasas, Calif.]

**V**ariations of this comment were repeated often by consumers asked where they buy their personal care items.

Those queried want not only to save gasoline and multiple market trips - they want the deep discounts of a Costco, the rolling price deals and in-and-out ease of a Target with the organic/natural product selections of Whole Foods at Trader Joe’s low prices.

## A hard bill to fill

The explosive growth and interest in organic/natural skincare is fueled by the aging baby boomer population and “NPRents” – a term coined in jest by *Radar*

*Magazine* to describe the newest variation of the Yuppie: Educated, affluent progressive young parents with a generalized fear of toxic ingredients who genuinely care about sustainability and fair trade.

The other market driver, according to market researcher Datamonitor, is older women who believe that misconceptions about them still exist in society as reflected in the media. These misconceptions result in women aged 50-64 being significantly less likely to agree with the statement “I like being the age I am”.

The most common concern about physical attractiveness cited by women of all ages is body shape, as reported by 73 percent of respondents to Datamonitor’s consumer survey. Results are contained in their latest report, *Anti-Aging & Beauty Attitudes and Behaviors*.

Although physical appearance has become more important, around 60 percent of all Americans still feel that inner beauty is more important than physical appearance, reports Datamonitor.

Sales of all beauty industry products were \$42 billion, as estimated by The NPD Group which places the natural/organic segment at 15 percent.

A large slice of Americans, crossing age and gender, use beauty products. In 2007, three out of four men ages 18-64 told The NPD Group they wear fragrance and nine out of 10 women ages 18 and older say they use



skincare, makeup or fragrance. That’s a force of over 170 million beauty users in the U.S. alone, according to The NPD Group, a leading consumer and retail information provider.

Researchers at Packaged Facts estimate that the U.S. natural/organic personal care market shot to almost \$6.1 billion at retail in 2006. That year’s 11 percent increase continued a string of low-double-digit increases that date back to 2003. For a sales base that was already huge at \$3.9 billion in 2002, sales growth through 2006 was outstanding.

The total increase for the 2002–2006 span neared 57 percent, or \$2.2 billion, and the compound annual growth rate (CAGR) was a robust 12 percent during the same period.

“Based on our estimates of retail dollar sales, skincare was the mightiest natural/organic personal care category in 2006, with a 60 percent share,” according to Packaged Facts.

Research reveals organic and natural skincare sales parallel consumer desires for organic food. Projected sales for the natural/organic personal care market are estimated to reach \$8.7 billion by 2010. Certified organic products represent 5.8 percent of HBC.

## Mass Market Potential

Holistic lifestyle-savvy boomers who turned 50 in the mid-1990’s commonly switch to natural skincare products to preserve their looks and health but Americans of every demographic now demand non-synthetic chemical toothpastes, deodorants, skincare, shampoo and makeup.





While most sales remain in the natural food/HBC channel, health concerns and ecological conscientiousness is so broad-based that sales growth has exploded in club stores, chain drugstores, and mass merchandisers.

Mass market sales of natural personal care products "is still tiny" according to Packaged Facts. The category rose to only 1.5 percent of

all HBC sales, beginning at \$177 million in 2002 reaching \$241 million in 2006, according to Information Resources, Inc., a market research firm analyzing POS data. Sales data excludes Wal-Mart.

In March Target Corp. supercharged the category by stocking eight feet of "Natural Beauty Care" items against a forest backdrop in all 1,591 of its stores. The set features nine product lines including Dr. Bronner's, Burt's Bees, Kiss My Face, Juice Organics, Alba, Avalon Organics, Jason Naturals, Weleda and Giovanni. Wal-Mart promptly rolled out a new 4-foot natural care set with Hain Celestial

brands including Zia and Noah's Naturals. Prices in these sets range from \$2.99 to \$29.99.

Target introduced its own ErbaOrganics organic skin care products in 2007 and Wal-Mart has placed Natural & Organic Bodycare Oasis sets in 366 superstores. Be Fine Food Skin care, a paraben-free line of skin care products started by Florence Sender, launched in CVS and Rite Aid drugstores.

The potential for behemoths like Clorox to expand the category can be seen in the acquisition of Burt's Bees, the earth-friendly maker of lip balms, hand soaps, shampoos and body lotions based in Durham, N.C. Founded in 1984, Burt's products netted \$170 million in 2006.

When announced, analysts questioned the \$925 million purchase. "Clorox has virtually zero presence in personal care categories in the U.S," wrote Lehman Bros. analyst Linda Bolton Weiser. "We wonder how much Clorox can really do to enhance the distribution of Burt's Bees."

The answer came shortly with an agreement for Wal-Mart to carry Clorox's Green Works line of cleaners. Clorox grabbed market share in what it calls two major consumer trends: "green" products made to do less harm to the environment, and products made with natural ingredients that are better for consumers.

Clorox Chairman and CEO Donald R. Knauss said "With this transaction, we're entering into a new strategic phase for our company, enabling us to expand further into the natural/sustainable business platform. tailwinds."

There is huge, untapped growth for these items in the aisles of average supermarkets in the U.S. according to research firm Organic Monitor which reports that "apart from new product launches, a major driver of market growth is 'mainstreaming' of natural & organic products."

## The Natural Potential

Sherwood Badger Smith, research director of *Natural Grocery Buyer's* second annual consumer research study, reports that 71 percent of shoppers buy their natural soap, shampoo, toothpaste, lotion and other personal care products in natural foods stores, compared with 54 percent who buy these products in mass merchandise outlets, conventional supermarkets and club stores.

Smith says that "body care products are the final frontier where naturals retailers can hold the advantage in product assortment."

The market is divided into four categories: skin care, hair care, oral care, and cosmetics. Natural cosmetics are discussed in the accompanying article on page 13.

The top ten products in order of sales are: Body Lotions & Creams; Facial Lotions & Creams; Shampoo; Oral Care; Bar Soap; Essential Oils; Liquid Soap; Facial Cleansers & Exfoliants; Body Wash & Bath Gels and Conditioners.

"The Big Blur has already begun," says Don Montuori, Acquisitions Editor of Packaged Facts as quoted in *Soapwire*. "Although relatively few natural brands are significant enough to show up in mass-market data tracking, natural brands' collective presence is a growing force. And in the natural channel's leading retail outlets, such as Whole Foods, both natural and non-natural brands are stocked center-store if not in the personal care department."

## Safety: The argument for organic

People are more aware of the number of toxins applied on our largest organ – our skin – in the name of comfort and/or beauty. Up to 60 percent of these products are absorbed into the bloodstream.

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A study conducted by Mount Sinai School of Medicine in New York to measure the amounts of environmental contaminants in humans, found an average of 91 industrial compounds, pollutants and other chemicals in the blood and urine of volunteers. According to the Environmental Working Group, one way to reduce your exposure to chemicals is to use organic natural products.

The American Cancer Society lists 216 chemicals that caused breast cancer in animal tests. Ninety-seven of the carcinogens are breathed in by humans or used in our consumer products, which included personal care products, as reported in *The Baltimore Sun* (May 14, 2007).

"We made a conscientious decision as a natural skincare line to appeal and pursue the mass market buyer and the customer," said Joshua Scherz, Natural Markets Coordinator and head of sales at Be Fine Food Skin a one-year old company in Newton, Mass. "What you put on your body is as important as what you put in your body, you have to feed the skin the best foods - just as you would your stomach. All 181 ingredients that we use are food based," he said.

To date 774 personal care manufacturers have pledged to remove potentially harmful ingredients. A complete list can be found at The Campaign for Safe Cosmetics [www.safecosmetics.com](http://www.safecosmetics.com).

### Cost considerations

Consumers are willing to pay more for organics because of the perception that it is better quality. Organic products are more expensive because organic ingredients are more expensive; it is more labor intensive to make and has to conform to more stringent regulations.

In *Macleans*, Jeff Binder, co-founder of [www.saffronrouge.ca](http://www.saffronrouge.ca), a Canadian online organic cosmetics store, praises organics: "They're better for the environment, and they'll leave less chemical residue on your skin. But they're also quite a bit more expensive than your average skin care product."

Organic personal care products are not just for women and babies; manufacturers of organic/natural skincare now cater to men. Changing attitudes have opened up the market for men's beauty and anti-ageing products. Lines like JASON, Zia and Aubrey Organics in the U.S. have extended their lines.

### Merchandising organic

Knowledgeable salespersons greatly impact sales. Whole Foods does this well with a large center store selection and a well organized personal care department with informational signage.

Group by category and learn the lingo. Understand the terminology so salespersons don't caught off-guard. Assure customers that you share their concerns about parabens, phthalates and animal testing. **nfn**



## Pay Attention To These Trends

1. Organic Monitor predicts a shake-up as 2008 becomes the "defining year in which the adoption of private standards leads to a clear demarcation between pure natural/organic products and pseudo products."
2. Masstige, prestige products with high efficacy or scientifically-backed claims will gain mass market appeal. Sales of lines such as Weleda, Dr. Hauschka, ShiKai, Rachel Perry, Pangea, have been on the rise for some years, 2008 is likely to be the year with many new product launches in this category, according to Mintel International
3. Interest in eco-friendly, ethical personal care products is a worldwide trend in 2008 according to Mintel. Fair trade will become a significant differentiator.
4. Greener products and greater accountability: Under increasing pressure from savvy consumers as well as government measures to reduce pollution, manufacturers are expected to make significant changes to their carbon footprint in the coming year.
5. Food-based ingredients in personal care lines are nothing new, but this trend is likely to take off as ingredients such as super fruits with high antioxidant content add functionality in personal care products.
6. Mintel's analysts predict that the way personal care consumers shop is likely to change, with rewards to retailers willing to make big changes in selection and display to improve appearances as well as greater emphasis on organization.

Consumers are eager to buy organic/natural skincare and personal care products in traditional supermarkets. The ball is in your court. Expand your organic body care aisle, and you will soon clean up at the cash register.

## The Natural Beauty Summit America

The Natural Beauty Summit, an international series of conferences focused on the natural cosmetics industry, makes its New York debut in May.

The Paris summit last year brought together 250 delegates from 24 countries.

The New York summit, scheduled for May 15-17 at the Hilton in NYC, includes speakers from Aveda, Aubrey Organics, Burt's Bees, Weleda and Whole Foods Market. Naturals and organics are the fastest growing segments of the cosmetics industry in the U.S., with sales increasing by about 20 percent a year according to Organic Monitor, the event co-organizer along with Beyond Beauty Paris.

"North American consumers are more discerning as they become more educated on the differences between natural and conventional products. They are increasingly scrutinizing the ingredient composition when buying personal care products. These high market growth rates have attracted many new entrants, however how pure are existing natural and organic products," according to organizers.

Organic Monitor predicts the development of formal organic personal care standards will cause "an industry shake-up as clear lines are drawn between pure naturals, organics and competing products."

The first two days of the conference will tackle green marketing, standards, regulatory, formulation and technical issues as well as cover major market and product developments in this emerging industry. The last day will have two half-day interactive workshops.

To learn more visit [www.naturalbeautysummit.com](http://www.naturalbeautysummit.com), phone Tina Gill at +44 20 8567 0788 or email [om@naturalbeautysummit.com](mailto:om@naturalbeautysummit.com)

# Retailers Say Natural is Suddenly Beautiful

By Sharon Soboil

Natural Food Network Contributor

SEVEN HUNDRED AND SEVENTY FIVE COSMETIC AND BODY CARE MANUFACTURERS WORLDWIDE HAVE PROMISED TO ELIMINATE TOXIC INGREDIENTS FROM THEIR PRODUCTS.



**W**omen are markedly more curious and involved in their own health, and with the internet at their fingertips they easily uncover details about carcinogens and chemicals found in personal care products.

Their concern about what goes inside cosmetics has supercharged sales of natural and organic brands. The Organic Consumers Association estimates sales of natural and or-

ganic cosmetics hit \$7 billion in 2007.

Packaged Facts, a market research firm, forecasts personal care products will hit a retail value of \$10.2 billion, with natural/organic cosmetics reaching \$658 million, by 2012.

Makeup reigns supreme in the prestige beauty industry with 38 percent market share, up from 36 percent in 2003. Two out of every five of these dollars go to makeup. Dollars rose to \$3.4 billion or 17 percent in the last five years according to The NPD Group. The eye segment was the second biggest leader of growth making up 29 percent of the dollars and growing 5 percent since the prior year.

"During challenging economic times in 2007 the prestige beauty industry managed to rise above the negatives" said Karen Grant, NPD's Group senior beauty industry analyst. "Women and men are still willing to spend money on products that make them look and feel better.

"We see opportunities with organic/natural products which are resonating with beauty consumers of all ages. We have seen as-

tronomical growth with more natural brands and products hitting the marketplace and we expect to see this continue," said Grant.

This extraordinarily lucrative trend has enticed larger corporations to acquire smaller natural/organic cosmetic companies. These lines generate new revenue by enticing health conscious consumers shopping for their paraben-free cosmetics in the aisles of health food stores.

L'Oreal's website notes that "...acquisitions of The Body Shop, Sanoflore, Beauty Alliance, PureOlogy and Maly's West added 3.6 percent growth in 2006."

The Body Shop alone earned £787 million (\$1.2 billion) for L'Oreal. In 2003 Hain Celestial's total sales were \$466 million (with 20 percent from tea) but by 2007 following a series of acquisitions, including Jason and Zia Natural, only 10-11 percent of the firm's \$900 million in sales was from tea.

Concerns about carcinogens and a growing awareness of harmful chemicals lead shoppers to look for products labeled "mineral based"; "certified organic"; "aryurvedic"; "all natural" or "vegan". Shea butter is a popular ingredient and makeup formulations of pure minerals (usually consisting of mica, zinc and/or iron oxide, and titanium di-



*continued on page 14*



## Natural Skincare Pioneer Foresaw Mass-market Growth

**R**achel Perry is a pioneer natural skincare brand and one of the first lines to occupy shelf space in traditional grocery stores.

"It started about 10 years ago in 1997, when some of our health food distributors contacted us with news that Safeway and Ralph's were interested in carrying our natural skincare line," said CEO and Founder Rachel Perry.

"We found that some of our loyal health food customers had been asking store managers at these two grocery chains why they weren't carrying Rachel Perry products for years. This eventually led to our being introduced to a mainstream audience for the first time through traditional grocers," she said.

Perry said she found marketing solely through health food stores confining.

"I wanted as many people as possible to experience my skincare and make up products, which I consider to be the best natural line ever created," she recalled.

"Sales in the mass grocery markets exploded by more than 285 percent in 2007 and we see no reason why these numbers will not continue to grow even more in the near future," said Kathi Danaher, director of sales and business development.

Perry, who learned the trade at Coty, first introduced her products in 1971. She said that consumer awareness of the connection between health and beauty "was inevitable." The firm, which she began with a \$1,200 investment, was the first skincare and make up line to use vitamins, herbs and other botanicals.

Edward Kim, president of Rachel Perry, explained what retailers who choose the line "are going with a powerful and innovative brand that already enjoys a huge base of consumers who recognize that quality." Sales of Perry hold their own alongside traditional mass-market skincare titans like Olay, he said.

The entire line consists of only 18 SKUs, he explained. This core set represents a total skincare system broken into four distinct categories: cleansers, scrubs, moisturizers and specialty products.

"It's a win-win for mass market retailers when you combine the performance of our products with its suggested retail prices (ranging from \$4 to \$35)," adds Kim. "Performance and value is a powerful combination that no mass retail marketers can afford to ignore, es-



pecially in today's recessionary environment."

Danaher said that rather than relying solely on market data from researchers, the firm seeks to communicate at a grassroots level, "keeping in close touch with our current mass grocery accounts as well as potential new ones."

"We take all their comments seriously and spend time thinking and digesting the data that we collect. But, ultimately, the most helpful comments are from our own loyal base of devoted customers who we hear from daily," she added.

"As more and more of our customers contact us seeking our products in their local grocery or drug chain, we come to understand that we're still in the early stages of an organic/natural market breaking out in the mainstream," said Danaher.

### Perry's top mass-market sellers:

- Tangerine Dream, a pH balanced foaming facial cleanser.
- The Elastin-Collagen Immediately Visible Face Lift.
- Bee Pollen-Jobaba Maximum Moisture Cream with SPF 15.
- Rachel's Lip Lover's Conditioning Lip Balms with SPF 15 in seven flavors.

"Year after year, we have been seeing a dramatic sales increase within this group of products," said sales director Kathi Danaher. "It's not difficult to see why these products continue to find space on mass retail shelves."

—April MacIntyre



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oxide) promise to maintain healthy skin with the addition of essential vitamins, antioxidants and ingredients, as well as having a natural SPF 15.

According to Safecosmetics.org more than 775 cosmetic and body care product companies have promised to eliminate toxic ingredients from their products worldwide. That list and other product safety information can be found on their website.

The organization provides a form letter and asks visitors to contact their local retailer.

"There are no limits imposed by the FDA for chemicals in cosmetics and no regulation of their health effects. In fact, 89 percent of ingredients used in products we use every day have not been tested for safety," reads the letter.

"According to recent studies by the U.S. Centers for Disease Control and Prevention, hazardous chemicals are building up in all of our bodies, and diseases linked to chemicals - including breast cancer, testicular cancer and reproductive problems - are on the rise," the letter concludes.

Retailers are given two weeks to contact cosmetic firms that have not pledged.

Websites like Natural Skincare Authority



www.natural-skincare-authority.com review and rank products on a toxicity scale that includes notations for parabens, phthalates, whether the product is animal tested and contains penetration agents. Scores are also noted for safety violations in the manufacturing process and misleading advertising.

Skincare Authority founder Adam Waters asserts that "74 percent of all commercial and some so-called natural skin care product brands" contain mixtures of teratogens, mutagens, allergenic toxicants and carcinogens and other potentially harmful components.

Bella Pierre, now in their third year, offers a 100 percent mineral line. "Our mineral foundation is our biggest seller. It acts as a concealer, foundation, finishing powder, and a setting

powder," said David Oren, Bella Pierre CEO.

No enforceable standard exists for products that claim they are natural. In March the Organic Consumers Association circulated a laboratory study that found numerous "Natural" and "Organic" brands tested positive for 1,4 Dioxane, a cancer causing contaminant resulting from the petrochemical Ethylene Oxide being attached to one or more ingredients.

OCA National Director Ronnie Cummins and Dr. Bronner's President David Bronner announced a "Coming Clean" campaign for products that tested positive in the study, threatening to sue unless by Earth Day they pledged to reformulate or remove all organic claims.

ONE Group (Australia) and Terressentials, the Organic Make-Up Company and Aubrey Organics are USDA certified.

"Although there are many mineral cosmetics, consumers need to make sure it really is 100 percent natural...If mineral products have an expiration date it probably has preservatives in it," said Oren.

Organic Apoteke uses certified organic botanicals in its cosmeceutical line which



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has its roots in aryuvedic medicine. "We focus on the health of the skin and improving skin function, because healthier skin is more beautiful," said Apoteke founder Dr. Nitasha Buldeo. The firm will add a line of certified color cosmetics later this year.

Better Botanicals is another product line that includes an array of flavored aryuvedic lip balms.

Ann Marie Borlind produces all natural line of color make up, which can be found at Erewhon in Los Angeles. Also popular at Erewhon is Nvey's colors, a vegan line of cosmetics, and Zuzu Luxe, also a vegan product. Erewhon sales associate Shonie Gonong describes many of Erewhon's customers as vegetarians seeking vegan skin care and makeup products.

At Fit O'Life, a natural foods supermarket, owner and buyer Katherine Matheson tries all the beauty products herself in stocking her store. Her big sellers are Reviva, Aubrey,

Burt's Bees, Rachel Perry, and Noni. She said that after Noni sent a sales representative to the store to demonstrate the products and hand out samples "their products do very well." "My favorites are the Reviva translucent powder, and Ecco Bella lipstick and eye shadow," said Matheson. Cosmetic sales contribute 10 percent of the store's \$3 million gross.

Even perfume is nudging toward natural/organic. "We believe we are the first to market a 100 percent certified organic premium cream perfume," said Mary Johnston, owner of The Cream Perfume Company which launched its 'Nuts' line in 2005. She adds, "It wasn't until we entered the natural products market that we really took off. Now that market accounts for 75 percent of sales." The custom blended fragrance is imported from Grasse, France and mixed with scent-free sweet almond oil and beeswax. **nfn**

## Stocking Suggestions

Natural Food Network reporter and professional makeup artist April MacIntyre walked the personal care aisles at seven southern California stores in early January including: Gelson's Markets, Whole Foods Market, Ralphs, Vons, Albertsons, Bristol Farms and Trader Joe's. Here's what she found\*:

<b>Alba Organics</b> <a href="http://www.albabotanica.com">www.albabotanica.com</a>	<b>Kopali Organics</b> <a href="http://www.kopaliorganics.com">www.kopaliorganics.com</a>
<b>Alaffia</b> <a href="http://www.alaffia.com">www.alaffia.com</a>	<b>Lily of the Desert</b> <a href="http://www.lilyofthedesert.com">www.lilyofthedesert.com</a>
<b>Anna Marie Borlind</b> <a href="http://www.borlind.com">www.borlind.com</a>	<b>Magick</b> <a href="http://www.magickbotanicals.com">www.magickbotanicals.com</a>
<b>Aubrey Organics</b> <a href="http://www.aubrey-organics.com">www.aubrey-organics.com</a>	<b>Masada</b> <a href="http://www.masada-spa.com">www.masada-spa.com</a>
<b>Aura Cacia</b> <a href="http://www.auracacia.com">www.auracacia.com</a>	<b>Monoi Tiare Tahiti</b> <a href="http://www.monoi.com">www.monoi.com</a>
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<b>Aveda</b> <a href="http://www.aveda.com">www.aveda.com</a>	<b>MyChelle</b> <a href="http://www.mychelleusa.com">www.mychelleusa.com</a>
<b>Better Botanicals</b> <a href="http://www.betterbotanicals.com">www.betterbotanicals.com</a>	<b>Nature's Gate</b> <a href="http://www.natures-gate.com">www.natures-gate.com</a>
<b>Burt's Bees</b> <a href="http://www.burtsbees.com">www.burtsbees.com</a>	<b>Natracare</b> <a href="http://www.natracare.com">www.natracare.com</a>
<b>California Baby</b> <a href="http://www.californiababy.com">www.californiababy.com</a>	<b>NutriBiotic</b> <a href="http://www.nutribiotic.com">www.nutribiotic.com</a>
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<b>Devita</b> <a href="http://www.devita.net">www.devita.net</a>	<b>Rachel Perry</b> <a href="http://www.rachelperry.net">www.rachelperry.net</a>
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<b>Home Health</b> <a href="http://www.homehealthUS.com">www.homehealthUS.com</a>	<b>Queen Helene</b> <a href="http://www.queenhelene.com">www.queenhelene.com</a>
<b>Hugo</b> <a href="http://www.hugonaturals.com">www.hugonaturals.com</a>	<b>Weleda</b> <a href="http://www.usa.weleda.com">www.usa.weleda.com</a>
<b>Jason Natural</b> <a href="http://www.jasoncosmetics.com">www.jasoncosmetics.com</a>	<b>Zia Natural Skincare</b> <a href="http://www.zianatural.com">www.zianatural.com</a>
<b>Kiss My Face</b> <a href="http://www.kissmyface.com">www.kissmyface.com</a>	

\*These brands were stocked in Los Angeles area supermarket shelves during the week of Jan. 2-7, 2008:



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