What’s Hot & What’s Not
2013-2014 U.S. Trends in the
Aromatherapy Essential Oil Sector

Presented by
Dorene Petersen
B.A., Dip.NT, Dip.Acu, RH (AHG)
ACHS President
Hot Topics

- What is Aromatherapy?
- Sources and Quality of Essential Oils
- Diluents and Extended Oils
- Environmental and Sustainability Concerns
- Essential Oil Labeling
- 2013 Aromatherapy Trends Survey and SPINS Retail Data
- Top Essential Oils Used By Professional Aromatherapists
- Factors That Influence Purchasing
- Notable Biological Activity
- 2013-2014 Market Trends and Growth of the Sector
- Conclusion
What is Aromatherapy?

“All in an NP Day...”

Joseph Farris

“I think I’m in love with him, but it might be my aromatherapy.”
Aromatherapy Terms

Aromatherapy… the controlled use of essential oils to promote the health and vitality of the body, mind and spirit by inhalation, baths, compresses, topical application, and full-body massage. (Price, 2000)

Aromatology… [above and] selected area massage, plus external intensive use of undiluted oils and internal use via rectum, os, and vagina. (Price, 2000)

Aromachology… only olfactory effects that have been scientifically demonstrated to affect mood, physiology and behavior. (Herz, 2009)
How does it work?

"I prefer the term 'aromatherapy.'"
How does it work?
Do you need to be able to smell?

Aromatherapy does not depend on aromatic perception; psychological changes occur despite perception. (Hongratanaworakit, 2004)

Anosmics can benefit from aromatherapy. (Nasel et al., 1994)
How does it work?

There are many measurements that can be used to quantify the physiological and psychological effects of essential oils on the body.

- contingent negative variation
- cerebral blood flow
- brain waves
- dialation or constriction of pupils
- heart rate
- and eye blink
- peripheral blood pressure
- electrodermal activity
- skin temperature
How does it work?
What are the health claims?

- Improve memory and increase alertness (Jellenik, 1997)
- Affect mood: sedate or stimulate (Kikuchi et al, 1991)
- Affect overall performance ability, such as memory tasks, sustained attention, and problem solving (Moss et al., 2003)
- Affect cognitive performance and attention speed (Moss et al., 2003)
How does it work?
How does it work?

Contemporary Aromatherapy Research

– Prior experiences and expectations associated with aroma affect the final outcome (Fox, 2009; Herz, 2009)

– Culture and learned social behavior affect the perception and effects of aromas (Herz, 2009)

– There is some evidence of gender-related differences; little evidence of age-related differences; but much evidence to suggest individual variance (Choudhury, 2004; Larsson et al., 2000)
Does Aromatherapy really work?

Aromatherapy is unique as a healing modality because it can produce physiological and psychological effects simultaneously. There are four methods of aroma action (Jellinek, 1997):

- Quasi-pharmacological
- Semantic
- Hedonic valence
- Placebo
Sources and Quality of Essential Oils
What does an Aromatherapist look for?

Just like a fine wine, a number of factors affect the quality of an essential oil:

- Origin of the plant
- Part of the plant used
- Growing techniques employed
- Climate where the plant was produced
- Harvest methodologies
- Time of harvest [Basil EO extracted in spring had the highest antioxidant levels (Al-Maskri et al., 2011)]
- Method of production
- Method of and length of storage after production
Why is Latin important?
Lavandula vs. Lavandin
## Sources and Quality of Essential Oils

### Lavandula vs. Lavandin

<table>
<thead>
<tr>
<th>Source</th>
<th>Lavender</th>
<th>Lavandin</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lavandula angustifolia</strong> (otherwise known as <strong>Lavandula officinalis</strong>)</td>
<td><strong>Lavandula intermedia</strong> Hybrid: <strong>L. latifolia</strong> x <strong>L. angustifolia</strong></td>
<td></td>
</tr>
<tr>
<td>Constituents</td>
<td>Linalool (25-28%), linalyl acetate (25-45%), 1,8 cineole (0%), and camphor (0%)</td>
<td>Linalyl acetate (28-28%), 1,8 cineole (6-20%), and camphor (7-40%)</td>
</tr>
<tr>
<td>Oil Characteristics (color and scent)</td>
<td>Colorless to pale yellow; sweet, floral herbaceous</td>
<td>Colorless to pale yellow, yellow-green; similar but with camphor tones and rose-like note due to &quot;rhodinol&quot;</td>
</tr>
<tr>
<td>Therapeutic Action</td>
<td>More sedating</td>
<td>Less sedating</td>
</tr>
</tbody>
</table>
Sources and Quality of Essential Oils

Chemotypes that provide a specific constituent profile are also important for clinical aromatherapy.
Diluents and Extended Oils

Diluents…substances that are usually odorless and are added to the products for commercial reasons.
Diluents and Extended Oils

Extenders… inexpensive aroma materials that may or may not have an identical fragrance and are usually synthetic.
Nature identical... usually refers to a chemically synthesized version of an essential oil.
Diluents and Extended Oils

Synergy… the whole is better than the sum of its parts, and it exists within each oil and within blends of specific oils.
Wildcrafted Plant… has been gathered in the wild, in its natural habitat, for manufacturing or personal use. (organic.org, 2013)

- Convention on International Trade in Endangered Species (CITES) of Wild Flora and Fauna
- United Plant Savers (UpS) At-Risk and To-Watch
- International Union for Conservation of Nature Natural Resources (IUCN) Red List of Threatened Species
Environmental & Sustainability Concerns

Sandalwood *Santalum album* is now virtually extinct in India with no evidence of any real sustainability programs for regeneration.
Environmental & Sustainability Concerns

At the Manoko experimental and research garden managed by the Indonesian Medicinal and Aromatic Crops Research Institute, they feed dairy cows spent material left from distilling Citronella Cymbopogon nardus, which produces raw milk with less bacteria.
Aromatherapy Essential Oil Labeling
Aromatherapy Essential Oil Labeling
Federal Drug Administration (FDA)

Essential oil labeling for retail sales generally falls under the jurisdiction of dietary supplement labeling requirements, which are defined and regulated in the U.S. by the Food and Drug Administration (FDA).
Aromatherapy Essential Oil Labeling
American Herbal Products Association

American Herbal Products Association (AHPA):

- Keep out of reach of children or significantly similar cautionary language
- External Use Only, Not for Internal Use, Not for Ingestion or significantly similar cautionary language
- Keep away from eyes and mucous membranes or significantly similar cautionary language
- The Latin name of the plant from which the essential oil is derived
- Identification of the plant part from which the essential oil is derived
Aromatherapy Essential Oil Labeling
Regulated Terms

The Agricultural Marketing Service of the U.S. Department of Agriculture (USDA) oversees the National Organic Program (NOP) and defines the term and certifies organic.

- Organic
- Certified organic
Aromatherapy Essential Oil Labeling

Unregulated Terms

These are just a sampling of the many unregulated terms. Consumers should be especially cautious of these products as they may contain pesticides, synthetic adulterants, or diluents.

- All natural
- Spray free
- Therapeutic grade
- CPTG Certified Pure Therapeutic Grade®
- Pure and natural
- Genuine
- Certified naturally grown
2013 Aromatherapy Trends Survey
Who did we survey? (APA’s)

– Registered Aromatherapists: Aromatherapy Registration Council (ARC)
– National Association for Holistic Aromatherapists (NAHA)
– Alliance of International Aromatherapists (AIA)
– International Journal of Professional Holistic Aromatherapy
2013 Aromatherapy Research Methods of Administration

Tell us how you use essential oils (Select all that apply):

- External: 120
- Oral: 20
- Prepare products for resale: 80
- Prepare products for clinical use: 60

© 2014 American College of Healthcare Sciences All duplication prohibited. achs.edu
2013 Aromatherapy Trends Survey
Distribution of APAs Practice Settings
2013 Aromatherapy Trends Survey
Professional Backgrounds

What is your professional background? (Select all that apply)

- Holistic Health Practitioner
- Master Aromatherapist
- Massage Therapist
- Other
- Complementary Medicine
- Registered Nurse
- Master Herbalist
- Wellness Coach
- Life Coach
- Esthetician
- All Other Responses
# Six Hot Essential Oils

APA’s Use vs. Retail Sales

<table>
<thead>
<tr>
<th>Rank</th>
<th>Essential Oil Common and Latin Name</th>
<th>Rank</th>
<th>Scent</th>
<th>$ Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LAVENDER <em>Lavandula angustifolia</em></td>
<td>1</td>
<td>LAVENDER</td>
<td>$3,574,157</td>
</tr>
<tr>
<td>2</td>
<td>BERGAMOT <em>Citrus aurantium var. bergamia</em></td>
<td>2</td>
<td>PEPPERMINT</td>
<td>$1,631,238</td>
</tr>
<tr>
<td>3</td>
<td>IMMORTELLE <em>Helichrysum italicum</em></td>
<td>3</td>
<td>EUCALYPTUS</td>
<td>$1,492,073</td>
</tr>
<tr>
<td>4</td>
<td>CHAMOMILE <em>Chamaemelum nobile</em></td>
<td>4</td>
<td>TEA TREE</td>
<td>$1,291,079</td>
</tr>
<tr>
<td>5</td>
<td>EUCALYPTUS <em>Eucalyptus globulus</em></td>
<td>5</td>
<td>ROSEMARY</td>
<td>$490,129</td>
</tr>
<tr>
<td>6</td>
<td>FRANKINCENSE <em>Boswellia carterii</em></td>
<td>6</td>
<td>PATCHOULI</td>
<td>$447,150</td>
</tr>
<tr>
<td>7</td>
<td>TEA TREE AUSTRALIA <em>Melaleuca alternifolia</em></td>
<td>7</td>
<td>BLENDS — OTHER</td>
<td>$385,959</td>
</tr>
<tr>
<td>8</td>
<td>BLACK PEPPER <em>Piper nigrum</em></td>
<td>8</td>
<td>LEMON</td>
<td>$380,038</td>
</tr>
<tr>
<td>9</td>
<td>PEPPERMINT <em>Metha piperita var. vulgaris</em></td>
<td>9</td>
<td>ROSE</td>
<td>$372,131</td>
</tr>
<tr>
<td>10</td>
<td>FRANKINCENSE</td>
<td>10</td>
<td>$371,444</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>BLENDS — CALMING</td>
<td>11</td>
<td>$332,382</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>CLOVE</td>
<td>12</td>
<td>$331,972</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>ORANGE</td>
<td>13</td>
<td>$321,681</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>SANDALWOOD</td>
<td>14</td>
<td>$310,142</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>GERANIUM</td>
<td>15</td>
<td>$265,400</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>GRAPEFRUIT</td>
<td>16</td>
<td>$261,068</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>YLANG YLANG</td>
<td>17</td>
<td>$255,223</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>BERGAMOT</td>
<td>18</td>
<td>$237,048</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>BLENDS — MEDICINAL</td>
<td>19</td>
<td>$231,590</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>LEMONGRASS</td>
<td>20</td>
<td>$231,586</td>
<td></td>
</tr>
</tbody>
</table>
Hot Stand Out!

Cinnamon *Cinnamomum zeylanicum* grew at a 19.8% rate in 2012, well out-pacing the retail aromatherapy category growth rate of 14.9%.

Research confirms that it can lower blood sugar and LDL cholesterol with no harmful side effects. (Sharma et al, 2012)
Volume of Essential Oils Used By APAs

On an annual basis, which of the following best describes the total volume of all essential oil you purchase for professional use?

- Between 0 and 1 pound (16 oz or approx 480 mls)
- More than 1 pound and up to 1 liter (1 kilo or approx 1000 mls)
- Between 1-3 liters (1-3 kilos or up to 3000 mls)
- More than 3 liters
Aromatherapy Research Review

Three of the most popular oils identified in both retails sales and clinical aromatherapy:

- **Lavender** *L. angustifolia*
- **Peppermint** *M. piperita* var. *vulgaris*
- **Eucalyptus** *E. globulus*
Notable Biological Activity
Lavender *L. angustifolia*

19 human studies, from January 1, 2012 until the beginning of September 2013, demonstrate significant biological activity:

- **Antifungal** (Zuzarte et al., 2011)
- **Reduce perineal discomfort** (Sheikhan et al., 2012)
- **Reduce pain for primary dysmenorrhea** (Ou, 2012)
Notable Biological Activity
Lavender *L. angustifolia*

- Reduce symptoms of colic in infants (Cetinkaya & Basbakkal, 2012)
- Reduce anxiety and depression in high-risk post partum women (Conrad & Adams, 2012)
- Provide support for post traumatic stress disorder and anxiety (Uehleke et al, 2012)
- Alleviate agitated behavior in patients with dementia (Holmes et al., 2002)
Lavender *L. angustifolia*
Antimicrobial Blend

In a 2013 *in vitro* study, *Cinnamomum zeylanicum* and *Citrus sinesis* show the highest synergist antimicrobial effect at 1:1 ratios with lavender (de Rapper et al., 2013)
Lavender *L. angustifolia*  
Antibacterial and Anti-Fungal Blend

In another study, lavender *L. angustifolia* oil, clary sage *Salvia sclarea* oil, and ylang ylang *Cananga odorata* var. *geniune* oil (volume ratio 3:4:3) showed significant antibacterial and anti-fungal activity *in vitro* against Gram-positive bacteria *Staphylococcus aureus* and *S. epidermidis*, and the Gram-negative bacterium *Escherichia coli* and *Candida albicans*. (Tadtong et al., 2010).
Lavender *L. angustifolia*  
Hypertension & Prehypertension

A 2013 clinical trial on blood pressure levels and salivary cortisol concentration in patients with hypertension and prehypertension showed lavender *L. angustifolia* had both an immediate (within 10 minutes) and long-term hypotensive effect. (Kim et al., 2012)
Notable Biological Activity
Peppermint *Mentha piperita*

44 human studies (during the same time period) demonstrate significant biological activity:

- **Anticarcinogenic** (Jain et al., 2011)
- **Antiemetic** (Heimes et al., 2011)
- **Reduce the perceived level of mental fatigue and burnout** (Varney & Buckle, 2013)
Notable Biological Activity
Peppermint *Mentha piperita*

- Manage fungal infection (dEnfert et al., 2007)
- Extend the shelf life of food products (Saharkhiz et al., 2010)
- Reduce the intensity and number of chemotherapy-induced nausea and vomiting events (Tayarani-Najaran et al., 2013)
Notable Biological Activity
Eucalyptus *Eucalyptus globulus*

6 human studies (during the same time period) demonstrate significant biological activity:

- Analgesic
- Antibacterial
- Antiseptic
- Pediculicide (Toloza et al., 2010; Choi et al., 2010)
- Anti-dandruff agent (Selvakumar et al., 2012)
Notable Biological Activity

Eucalyptus *Eucalyptus globulus*

- Anthelmintic with potential support for parasitic infection (Taur et al., 2010; Macedo et al., 2010; Macedo et al., 2009)
- Absorption enhancer (Williams & Barry, 1989)
- Penetration enhancer to aid topical drug delivery (Williams & Barry, 1989)
Factors That Influence Purchasing Professional Aromatherapy Users

These results identify a consumer who is savvy about the scientific testing of essential oils to determine quality and therapeutic viability, as well as the impact of environmental concerns and the continued importance of organic.

<table>
<thead>
<tr>
<th>Purchasing Influences</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Factor #1</td>
<td>GC/MS Available</td>
</tr>
<tr>
<td>Factor #2</td>
<td>Certified Organic</td>
</tr>
<tr>
<td>Factor #3</td>
<td>Sustainably grown and harvested</td>
</tr>
<tr>
<td>Factor #4</td>
<td>Organic</td>
</tr>
<tr>
<td>Factor #5</td>
<td>Price</td>
</tr>
<tr>
<td>Factor #6</td>
<td>Country of Origin</td>
</tr>
<tr>
<td>Factor #7</td>
<td>At-Risk Status (Endangered Status)</td>
</tr>
<tr>
<td>Factor #8</td>
<td>Age of the oil</td>
</tr>
<tr>
<td>Factor #9</td>
<td>How was the oil stored</td>
</tr>
<tr>
<td>Factor #10</td>
<td>Wildcrafted</td>
</tr>
<tr>
<td>Factor #11</td>
<td>Fair Trade</td>
</tr>
<tr>
<td>Factor #12</td>
<td>Spray-free cultivated</td>
</tr>
<tr>
<td>Factor #13</td>
<td>Conventionally grown</td>
</tr>
</tbody>
</table>
Factors That Influence Purchasing Organic Performance

- Organic Oils are outpacing their non-organic counterparts, posting in excess of 40% growth in both units and $ in the last 52 weeks, compared to 13% $ growth for conventional oils.
- Aura Cacia, the top Organic Oil brand, top selling Patchouli Organic oil up 73% vs. last year.
Certificate of Analysis
Does “organic” really make a difference?

<table>
<thead>
<tr>
<th>Sample &amp; lot: neroli</th>
<th>Organic Neroli</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date: 8/19/13</td>
<td>Date: 8/19/13</td>
</tr>
<tr>
<td><strong>Component</strong></td>
<td><strong>Component</strong></td>
</tr>
<tr>
<td><strong>Area %</strong></td>
<td><strong>Area %</strong></td>
</tr>
<tr>
<td>12.60</td>
<td>12.60</td>
</tr>
<tr>
<td>13.07</td>
<td>13.07</td>
</tr>
<tr>
<td>14.07</td>
<td>14.07</td>
</tr>
<tr>
<td>15.07</td>
<td>15.07</td>
</tr>
<tr>
<td>16.07</td>
<td>16.07</td>
</tr>
<tr>
<td>17.07</td>
<td>17.07</td>
</tr>
<tr>
<td>18.07</td>
<td>18.07</td>
</tr>
<tr>
<td>19.07</td>
<td>19.07</td>
</tr>
<tr>
<td>20.07</td>
<td>20.07</td>
</tr>
<tr>
<td>21.07</td>
<td>21.07</td>
</tr>
<tr>
<td>22.07</td>
<td>22.07</td>
</tr>
<tr>
<td>23.07</td>
<td>23.07</td>
</tr>
<tr>
<td>24.07</td>
<td>24.07</td>
</tr>
<tr>
<td>25.07</td>
<td>25.07</td>
</tr>
<tr>
<td>26.07</td>
<td>26.07</td>
</tr>
<tr>
<td>27.07</td>
<td>27.07</td>
</tr>
<tr>
<td>28.07</td>
<td>28.07</td>
</tr>
<tr>
<td>29.07</td>
<td>29.07</td>
</tr>
<tr>
<td>30.07</td>
<td>30.07</td>
</tr>
<tr>
<td>31.07</td>
<td>31.07</td>
</tr>
<tr>
<td>32.07</td>
<td>32.07</td>
</tr>
<tr>
<td>33.07</td>
<td>33.07</td>
</tr>
<tr>
<td>34.07</td>
<td>34.07</td>
</tr>
<tr>
<td>35.07</td>
<td>35.07</td>
</tr>
<tr>
<td>36.07</td>
<td>36.07</td>
</tr>
<tr>
<td>37.07</td>
<td>37.07</td>
</tr>
<tr>
<td>38.07</td>
<td>38.07</td>
</tr>
<tr>
<td>39.07</td>
<td>39.07</td>
</tr>
<tr>
<td>40.07</td>
<td>40.07</td>
</tr>
<tr>
<td>41.07</td>
<td>41.07</td>
</tr>
<tr>
<td>42.07</td>
<td>42.07</td>
</tr>
<tr>
<td>43.07</td>
<td>43.07</td>
</tr>
<tr>
<td>44.07</td>
<td>44.07</td>
</tr>
<tr>
<td>45.07</td>
<td>45.07</td>
</tr>
<tr>
<td>46.07</td>
<td>46.07</td>
</tr>
<tr>
<td>47.07</td>
<td>47.07</td>
</tr>
<tr>
<td>48.07</td>
<td>48.07</td>
</tr>
<tr>
<td>49.07</td>
<td>49.07</td>
</tr>
<tr>
<td>50.07</td>
<td>50.07</td>
</tr>
<tr>
<td>51.07</td>
<td>51.07</td>
</tr>
<tr>
<td>52.07</td>
<td>52.07</td>
</tr>
<tr>
<td>53.07</td>
<td>53.07</td>
</tr>
<tr>
<td>54.07</td>
<td>54.07</td>
</tr>
<tr>
<td>55.07</td>
<td>55.07</td>
</tr>
<tr>
<td>56.07</td>
<td>56.07</td>
</tr>
<tr>
<td>57.07</td>
<td>57.07</td>
</tr>
<tr>
<td>58.07</td>
<td>58.07</td>
</tr>
<tr>
<td>59.07</td>
<td>59.07</td>
</tr>
<tr>
<td>60.07</td>
<td>60.07</td>
</tr>
<tr>
<td>61.07</td>
<td>61.07</td>
</tr>
<tr>
<td>62.07</td>
<td>62.07</td>
</tr>
<tr>
<td>63.07</td>
<td>63.07</td>
</tr>
<tr>
<td>64.07</td>
<td>64.07</td>
</tr>
<tr>
<td>65.07</td>
<td>65.07</td>
</tr>
<tr>
<td>66.07</td>
<td>66.07</td>
</tr>
<tr>
<td>67.07</td>
<td>67.07</td>
</tr>
<tr>
<td>68.07</td>
<td>68.07</td>
</tr>
<tr>
<td>69.07</td>
<td>69.07</td>
</tr>
<tr>
<td>70.07</td>
<td>70.07</td>
</tr>
<tr>
<td>71.07</td>
<td>71.07</td>
</tr>
<tr>
<td>72.07</td>
<td>72.07</td>
</tr>
<tr>
<td>73.07</td>
<td>73.07</td>
</tr>
<tr>
<td>74.07</td>
<td>74.07</td>
</tr>
<tr>
<td>75.07</td>
<td>75.07</td>
</tr>
<tr>
<td>76.07</td>
<td>76.07</td>
</tr>
<tr>
<td>77.07</td>
<td>77.07</td>
</tr>
<tr>
<td>78.07</td>
<td>78.07</td>
</tr>
<tr>
<td>79.07</td>
<td>79.07</td>
</tr>
<tr>
<td>80.07</td>
<td>80.07</td>
</tr>
<tr>
<td>81.07</td>
<td>81.07</td>
</tr>
<tr>
<td>82.07</td>
<td>82.07</td>
</tr>
<tr>
<td>83.07</td>
<td>83.07</td>
</tr>
<tr>
<td>84.07</td>
<td>84.07</td>
</tr>
<tr>
<td>85.07</td>
<td>85.07</td>
</tr>
<tr>
<td>86.07</td>
<td>86.07</td>
</tr>
<tr>
<td>87.07</td>
<td>87.07</td>
</tr>
<tr>
<td>88.07</td>
<td>88.07</td>
</tr>
<tr>
<td>89.07</td>
<td>89.07</td>
</tr>
<tr>
<td>90.07</td>
<td>90.07</td>
</tr>
<tr>
<td>91.07</td>
<td>91.07</td>
</tr>
<tr>
<td>92.07</td>
<td>92.07</td>
</tr>
<tr>
<td>93.07</td>
<td>93.07</td>
</tr>
<tr>
<td>94.07</td>
<td>94.07</td>
</tr>
<tr>
<td>95.07</td>
<td>95.07</td>
</tr>
<tr>
<td>96.07</td>
<td>96.07</td>
</tr>
<tr>
<td>97.07</td>
<td>97.07</td>
</tr>
<tr>
<td>98.07</td>
<td>98.07</td>
</tr>
<tr>
<td>99.07</td>
<td>99.07</td>
</tr>
<tr>
<td>100.07</td>
<td>100.07</td>
</tr>
</tbody>
</table>

Comments: Published papers on the neroli, Citrus xanthocarpa flowers, have reported 0.1%-15% beta-pinene, 0.2%-22% limonene, and 3%-31% linalool. This oil falls within the expected ranges considering biological and seasonal variations, although the linalool is slightly higher than expected. No adulterants were detected.

© 2014 American College of Healthcare Sciences All duplication prohibited. achs.edu
Growth of Retail Aromatherapy
Retail Sales 3-Years’ Performance

- The Aromatherapy & Body Oils category grew in Natural Supermarkets by +17.7% in the 52 weeks ending February 2012.
- The category posted growth of +12.5% in the prior year - 2011.

SPINS PROPRIETARY AND CONFIDENTIAL
Growth of Retail Aromatherapy Category Makeup

- All four of the subcategories grew by double digit rates.
- However, the largest of them, Essential Oils, under-performed with growth of +14.9%.

© 2014 American College of Healthcare Sciences All duplication prohibited. achs.edu
Growth of Retail Aromatherapy
Brand Performance

<table>
<thead>
<tr>
<th>Brand Dollar Rank</th>
<th>Total US - Natural Channel</th>
<th>Unit % Change (Vs Year Ago)</th>
<th>% Units Sold On Promo % Units Sold On Promo % Change</th>
<th>Average Discount</th>
<th>Average Lift</th>
<th>Promo Elasticity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AURA CACIA</td>
<td>12,568,846</td>
<td>10.5%</td>
<td>34%</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>2</td>
<td>NOW</td>
<td>843,670</td>
<td>26.2%</td>
<td>13%</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>3</td>
<td>HERITAGE PRODUCTS</td>
<td>174,811</td>
<td>3.9%</td>
<td>13%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>4</td>
<td>SIMPLERS</td>
<td>91,369</td>
<td>11.2%</td>
<td>19%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>5</td>
<td>WYNDMERE</td>
<td>121,810</td>
<td>5.8%</td>
<td>14%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>6</td>
<td>WELEDA</td>
<td>54,464</td>
<td>0.9%</td>
<td>19%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>7</td>
<td>PACIFICA</td>
<td>57,107</td>
<td>74.9%</td>
<td>32%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>8</td>
<td>DESERT ESSENCE</td>
<td>70,535</td>
<td>11.6%</td>
<td>32%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>9</td>
<td>VERIDITAS BOTANICALS</td>
<td>59,221</td>
<td>48.5%</td>
<td>33%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>10</td>
<td>KUJUMBA MADE</td>
<td>78,881</td>
<td>12.7%</td>
<td>33%</td>
<td>23%</td>
<td>13%</td>
</tr>
</tbody>
</table>

- The category sells 23% of its total units with a promotional price discount. This is a -0.3% decrease over the prior year.
- The average discount for the category is 20% resulting in a 21% item lift over baseline expectations. This is a 1.0% lift on average for every 1% of discount – low compared to other Body Care categories.
- Veriditas Botanicals, which claims the fastest growth and sales velocity rates among the Top 10 brands, also had the most units sold on promo over the period.

Source:
SPINS Proprietary. Natural & IFR
MIDAS* Supermarkets =24mm
52 wks Ending 05/17/2012 unless otherwise noted

SPINS PROPRIETARY AND CONFIDENTIAL

© 2014 American College of Healthcare Sciences All duplication prohibited. achs.edu
Growth of Retail Aromatherapy Brand Performance

Consumers need to be educated on how to use essential oils.

This will also provide an opportunity to develop the accessories subcategory.
Growth of Retail Aromatherapy Sector
Regional Trend

- All of the SPINSscan Natural regions saw dollar increases compared to year ago, although growth was minimal in the Northeast
- The Northwest was the fastest growing region for the category
Conclusion

The essential oil industry can have an impact on the growing professional clinical and retail aromatherapy markets in the U.S. by producing raw materials with a commitment to...
Conclusion

- Certified organic, or organic cultivated, or sustainably wildcrafted

- GC/MS analyses to show constituent profile

- Pesticide-free, evidenced by a pesticide analysis

- Aromatherapy accessories

- Continued growth

- Increased education based on research

And, the story of the raw materials needs shared .......
Essential oils produced with care and concern for those who grow and gather...
...will be sought after, as key factors in a product’s desirability.
An abiding love for the raw materials can unite us...

...as one industry where sustaining our resources is achieved with equal parts heart and head.

Thank you,

Questions or comments: dorene.petersen@achs.edu
References

A.F.N.O.R. Association Francaise de Normalisation  Tour Europe Cedex 7  92049 Paris  La Defense


Altaei, D.T. (n.d.). Topical lavender oil for the treatment of recurrent aphthous ulceration. Department of Pharmacology and Toxicology, College of Pharmacy, Hawler Medical University.


References


References


References


International Standards Organization (ISO)

International Union for Conservation of Nature Natural Resources (IUCN)
  http://www.youtube.com/watch?v=k2LnoLD2ss0
  http://www.iucnredlist.org


References


References


References


References


United Plant Savers http://www.unitedplantsavers.org/content.php/121-species-at-risk


References


Farris, J. (n.d.) All in an NP Day… [Cartoon].


Los Angeles Times (2010) PTSD [Photograph]. http://latimesblogs.latimes.com/.a/6a00d8341c630a53ef0133f040ea61970b-300wi
Visuals


