



TRENDS & INSIGHTS

DEODORANT MARKET OVERVIEW



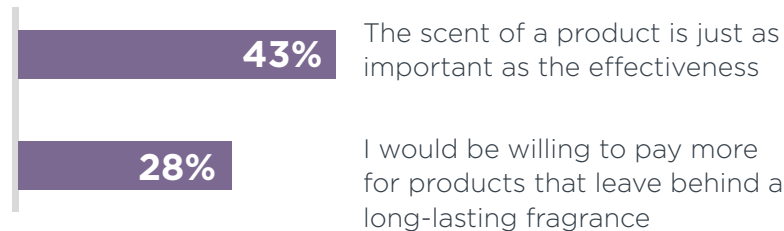
According to Mintel, the U.S. deodorant industry is projected to grow to \$4.2 billion by 2024.

Market expected to see a short-term hit

While COVID-19 is expected to cause slowed sales growth from 2020-21, the bodycare and deodorant markets are expected to maintain positive sales through 2025, thanks to the hygiene staple status of most products.

Don't underestimate the power of scent

Although consumers ultimately choose a product based on efficacy, they still place a high level of importance on scent. Some consumers rely on personal care products, such as APDO, to smell nice, creating challenges for the fine fragrance market.



Base: 1,760 internet users aged 18+ who use deodorant/antiperspirant
Source: Lightspeed/Mintel

Take notes from facial skincare

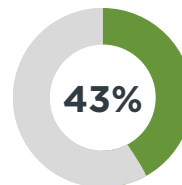
Incorporating unique formats or ingredients that are typically found in facial skincare products can persuade consumers to look beyond the functional nature of bodycare and APDO categories, creating opportunities to sustain longer-term growth.

Natural, from the lab

Increasing demand for sustainability, transparency, ethical sourcing and efficacy in beauty products will lead more brands to rely on synthetic and engineered ingredients as a way to harvest natural in a sustainable manner.

Oh, nice package

In our increasingly visual world, Instagram-worthy packaging has more clout than ever. Successful brands have thought outside the box and borrowed ideas from the world of luxury beauty and interior design, instead of traditional personal care products.



of BPC/Health/Hygiene introductions globally in 2020 included an on-pack claim about environmentally friendly packaging.





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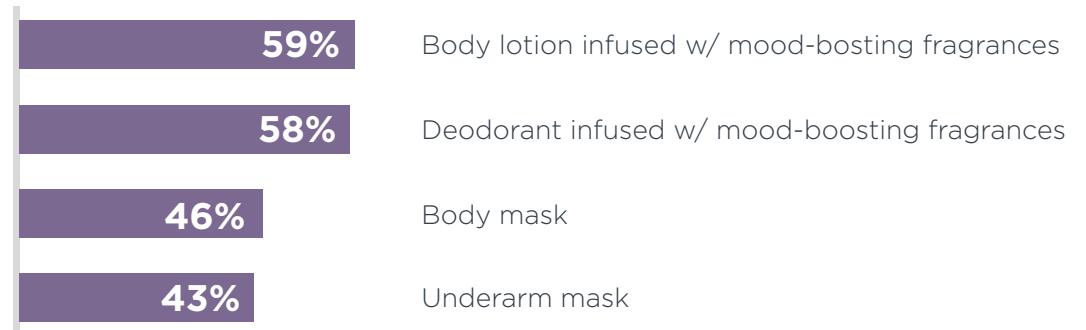
Tap into wellness

Holistic wellness is becoming a widespread trend across BPC categories as consumers seek products that complement their health and wellness, both physically and mentally. While functional categories, such as deodorant, aren't typically associated with self-care, there are opportunities for brands to tap into holistic wellness trends. For instance, mood-boosting fragrances and mask formats could find acceptance, especially in today's COVID-19 environment.

Antiperspirant/deodorant (APDO) continues to benefit from the natural movement

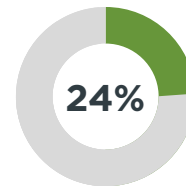
The natural movement continues to shape the APDO category due to perceptions of increased safety, contributing to sales growth of natural deodorant brands. Additionally, the 2019 Report showed that 17% of adults believe that natural deodorant does not work as well as regular formula, while this year's report shows that nearly 24% agree that products made with natural ingredients work just as well as products made with mainstream ingredients, indicating that consumers are becoming more confident in the efficacy of natural formulas.

Trial and interest in select product innovations, any future interest:



Any future interest (net) = have used and would use again or have not used, but interested in trying
Base: 1,948 internet users aged 18+ who use bodycare or deodorant/antiperspirant

Select attitudes and behaviors toward natural APDO



24% say products made with natural ingredients work just as well as products made with mainstream ingredients.



20% use natural deodorant because they are concerned antiperspirants can lead to health issues.



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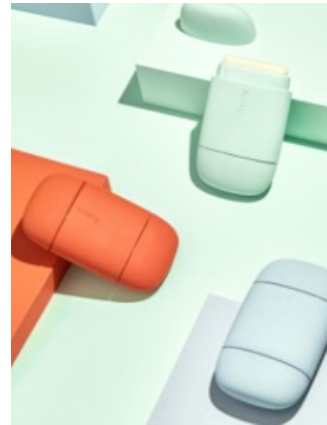
DEODORANT PRODUCT SPOTLIGHT

PERFECT PACKAGE

Sustainability is inherent in the packaging concepts as beauty brands aim to reduce wastefulness. The deodorant category is one of the largest single-use plastic offenders in beauty, so it's without question that refillable and recycling initiatives are the path forward.



Peach's mission is to remove plastic from personal care. They launched the industry's first-ever 100% plastic-free deodorant and body care refill system. It is clean, vegan, and 100% natural fragrance & 100% plastic-free. Cucumber sage aluminum-free formula is made with arrowroot powder and magnesium to help absorb wetness while providing long-lasting odor protection for up to 48 hours. Infused with nourishing coconut oil and microbiome-protecting probiotics, it's non-irritating and kind to sensitive skin.



Fussy's pro-planet & plant-powered refillable deodorants are made from plant-based plastic, with refillable deodorants made from waste sugarcane pulp. They utilize probiotics to neutralize the bacteria that cause odor while leaving you smelling fresh with natural aromas like tropical, citrus, woody, and mint.



Wild's approach to sustainable beauty is reducing waste with its aluminum packaging that will last forever. The sleek tins are biodegradable, compostable and the refill packs are housed in cardboard are easily inserted and removed. They offer 5 aromatic fragrance blends to keep you wildly fresh, naturally. You can think of it as the outdoor water bottle of beauty packaging.



Bôstick Deodorant partnered with French artisans to create a plastic-free container that is made using beech timber wood from sustainable forests in the region of Ain, eastern France. It uses an easy mechanism with a cork base that does not require screwing, or a setting wheel, and is guaranteed to last for life and infinitely refilled.



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RISE IN NEW FORMATS

Mirroring the 'skinification' of bodycare, underarm care is being marketed much like skincare, with multi-step routines and innovation borrowed from across the beauty landscape. The growing popularity of improved formula, formats, and applications may be more caring formulas over water-based ones but can often take longer to dry.



The Natural Deodorant Co has three 'active' deodorant products designed 'go the extra mile'. Active Deodorant Balm contains clay to absorb wetness and antibacterial sodium bicarbonate to ensure complete underarm freshness with coconut oil and shea butter to nourish delicate underarm skin.



New Singaporean brand Soul Good Project's natural deodorant balms and sprays feature sophisticated scents such as Himalayan Wilderness, a woody and citrus scent. They utilize natural ingredients such as coconut, magnesium, arrowroot, and essential oils to naturally combat fungi and bacteria while promoting a sense of wellbeing



Akt, London-based premium deodorant brand, created a gua sha-inspired applicator that helps promote microcirculation of the skin and lymph nodes. Pair the applicator with one of their natural high-performance deodorant balms that are plastic-free, aluminum-free, and cruelty-free come in a variety of natural gender-neutral aromas.





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PRE/PROBIOTIC PERSONAL CARE

As the microbiome concept grows in visibility, a new crop of personal care formulas are being reworked or created to include bacteria-balancing ingredients.



US natural personal care company Tom's of Maine introduced a prebiotic line in early 2020 that includes a deodorant. Not all bacteria is bad, use prebiotic ingredient xylitol that helps supports the good bacteria and crowd out the bad. It helps keep skin in healthy balance by promoting the growth of good bacteria to help reduce odor.



Honestly pHresh offers magnesium-enriched, 100% natural Prebiotic Deodorant Sticks with an exclusive formula that uses a combination of prebiotics, minerals, essential oils, and organic ingredients to effectively keep the user free of odor and wetness while maintaining skin's natural pH for up to 24 hours.



Bulldog Skincare launched a new deodorant formulated with a prebiotic extracted from chicory root to neutralize odor-forming bacteria, companied with invigorating natural fragrances that leave you smelling fresh for up to 24 hours.



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NEW-WAVE NATURALS

With the growing demand for chemical-free deodorants, natural formulations have hit the mainstream. Brands are tapping into this market with more than just aluminum-free options, they are creating high-performance products that seek to prove natural deodorants can be just as effective as classic, chemical-based formulas.



Biossance's is one of the clean beauty brands promoting the environmental benefits of synthetic ingredients used in their products, such as squalene. It's Squalane + Bamboo Deodorant comes from 100% plant-based, renewable sugarcane, which is then bio-fermented to create a sustainable version of squalene and is backed by science. It neutralizes odor with grapefruit, geranium and clary sage, while using with bamboo powder to absorb moisture without blocking pores.



Drunken Elephant uses a powerful blend of mandelic acid and absorbent arrowroot, Sweet Pitti™ Deodorant Cream eliminates even stubborn odor-causing bacteria while absorbing excess moisture from skin. With its mix of calming, barrier-supportive ingredients and a replenishing mix of plant oils (marula, baobab, and mongongo seed), as well as marula and shea butters, Sweet Pitti™ replenishes dry, dull and irritable skin, too.



Grown Alchemist Icelandic Moss Extract, Sage Complex Roll-On Deodorant features an advanced natural anti-bacterial aluminum-free formulation. It contains bioactive ingredients such as: Icelandic moss extract polysaccharides, an innovative Sage-Complex is said to eliminate unwanted body odor through powerful anti-microbial properties; glycyrrhizinic acid, a potent compound found in licorice extract, along with coumarins and triglycerides from tamanu seed oil, to provide noticeable anti-inflammatory benefits and potent anti-bacterial properties ensuring optimum microbial skin balance.

Sources: Stylus, Mintel GNPD.

Image credits: Toms of Maine, Peach not plastic, Akt, Soul Good Project, Drunk Elephant

The Lebermuth Company
South Bend, Indiana USA
800.648.1123
lebermuth.com