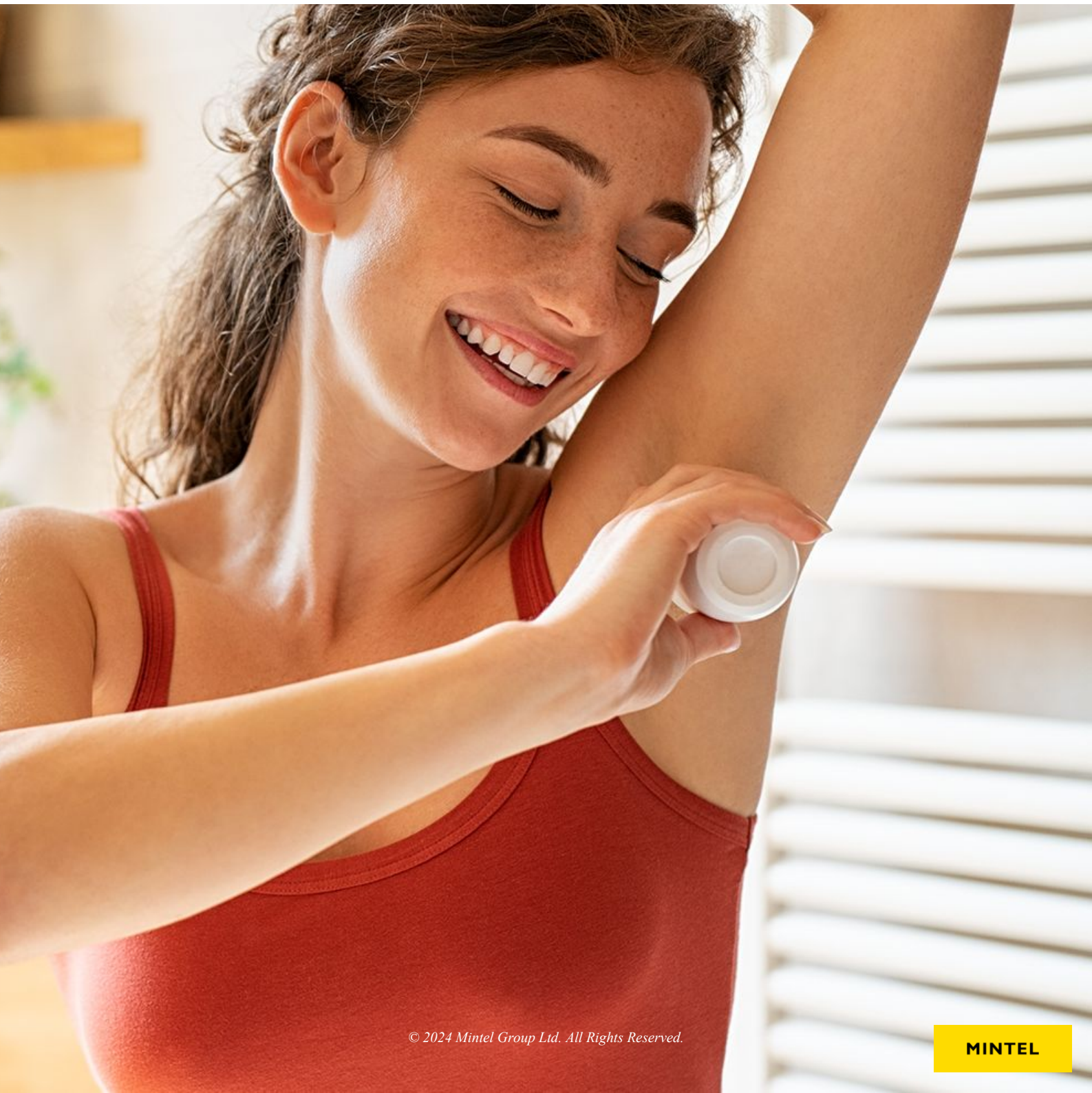


# DEODORANTS – GERMANY – 2023

Deodorants are impacted by savvy shopping behaviours, but the interest in refills and natural deodorants will push the category into a greener direction.



Henrike Philipp, Research Analyst



# Deodorants – Germany – 2023

## This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on deodorants, including changing usage habits and buying intentions
- Deodorant/antiperspirant formats and types used, with aerosol being the most popular format
- Usage of natural deodorants, with a majority of Germans being interested in natural deodorants
- Reasons to use natural deodorants, with perceived health and environmental benefits coming out on top
- Barriers to using natural deodorants, with cost being the main barrier
- Associations with deodorants/antiperspirants
- Behaviours towards deodorants/antiperspirants, centring around daily usage
- Launch activity and innovation



Deodorants are impacted by savvy shopping behaviours, but the interest in refills and natural deodorants will push the category into a greener direction.

## Overview

The cost-of-living crisis is impacting the deodorant category, despite deodorants being a staple in consumers' routines (92% of Germans use deodorant/antiperspirant). Due to the lower price positioning of deodorants, consumers **will tend to trade down rather than drop out of the category**.

Aerosols and roll-ons are the most popular types of deodorants. The biggest deodorant repertoires **are found among 25-34s and parents of children aged 18 and under, who tend**

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**to experience stressful situations, be it through work or parenting** – brands are well advised in reassuring these groups in their day-to-day.

Aerosols are seen as bad for the environment (which brands can tackle), while cream deodorants are perceived as healthy but expensive. Sticks and roll-ons benefit from associations with staying power and ease of application.

Interest in natural deodorants is high: **41% of German deo users** don't use natural deodorants but would be interested in trying. **This shows that there is room to turn more people into users.** Natural deodorants can convince through health and environmental benefits. Still, brands need to overcome barriers like price and availability.

Interest in refills is high (**70% of deodorant users**), but launches are still scarce, providing ample opportunities for brands to offer sustainable options.

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# Report Content

## EXECUTIVE SUMMARY

- The five year outlook for deodorants

### Market context

- Money is a concern but won't make consumers drop out of the category completely
- European Green Deal will impact the category: more sustainable actions are needed

### Mintel predicts

- Market size & forecast
- Mintel predicts steady growth
- From COVID-19 dip to sustainable trends and premiumisation

### Opportunities

- Utilise the universal appeal of roll-ons
- Bridge the gap between interest in refills vs refill launches
- Boost brand loyalty through premiumisation and sophisticated scents
- Tout the benefits of a deodorant wardrobe
  - Graph 1: repertoire of deodorants, 2023
- Clear up aerosol's reputation as being bad for the environment

### The competitive landscape

- Unilever has launched a big ramping-up strategy
- Key players dominate the market
  - Graph 2: company shares of deodorants, 2022

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 3: key economic data, in real terms, 2019-24
- Inflation slows down – but remains at a higher level
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and consumer expenditure
  - Graph 4: financial confidence index, 2022-23
- The impact of the economy on the deodorant category
- Respond to rising temperatures due to climate change

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- Get ahead of the Green Claims Directive
- Working from home/hybrid working is decreasing usage of deodorant

## WHAT CONSUMERS WANT AND WHY

### Deodorant/antiperspirant formats used

- Deodorants/antiperspirants are beauty routine staples
  - Graph 5: usage of deodorants/antiperspirants, 2020 vs 2023
- Usage of antiperspirants by men has increased
  - Graph 6: usage of antiperspirants, by gender and age, 2020 vs 2023

### Types of deodorant used

- Convenience and efficacy are top of mind
  - Graph 7: types of deodorant used, 2023
- Roll-on deodorant shows universal appeal
- Most Germans use one type of deodorant
- Call for products suited for specific occasions
- Seize the opportunity to cater to parents

### Usage of natural deodorants

- Most Germans are interested in natural deodorants but have not used them
- Rethink distribution of natural deodorants to aid product discovery

### Reasons to use natural deodorants

- Natural deodorant users are keen on personal and planetary health
  - Graph 8: use of/interest in trying a natural deodorant, by natural deodorant users and those interested in natural deodorants, 2023
- Natural deodorants convince through health and environmental benefits
- Consumer care about ingredients: the fewer, the better
- The environment is a decisive factor for natural deodorants
- Take inspiration from other categories for eco-friendly options
- Skinification trend has reached the underarm area

### Barriers to using natural deodorants

- Cost is the main barrier to usage
  - Graph 9: barriers to using a natural deodorant, 2023
- Align prices to attract non-users
- Men prioritise convenience when shopping for natural deodorants
- Support consumers in the transition from regular to natural deodorant
- Working with personal scent could be the way forward

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- Get inspiration for natural deodorants from fragrances of regular deodorants
- Preferred format is only a hindrance for some

### Purchase of deodorants/antiperspirants

- Most people shop at health and beauty retailers for deodorants
  - Graph 10: purchase of deodorants/antiperspirants, 2023

### Associations with deodorants/antiperspirants

- Non-spray formats are seen as healthier
- Aerosols are the format most associated with a bad impact on the environment
- Cream deodorant is seen as expensive but good for health
- Stick and roll-on have similar associations

### Behaviours towards deodorants/antiperspirants

- Deodorant behaviours centre around daily usage
  - Graph 11: behaviours towards deodorants/antiperspirants, 2023
- Active consumers and parents reapply most commonly
- Interest in refillables is high, but launches are lacking
- Consider the overlap with the fragrance category...
- ...and focus on the mood-boosting potential of scented deodorants
- Money-saving behaviours take more of a backseat when it comes to deodorants
- Sharing deodorant is an untapped market
- Target parents and natural deodorant users with eco-friendly launches
- Natural deodorants show a trend towards unisex products
  - Graph 12: deodorant launches with gender claims, 2018-23

## LAUNCH ACTIVITY AND INNOVATION

- Launched formats match usage
  - Graph 13: deodorant/antiperspirant usage vs launches, 2018-23
- Draw the line between innovation and gimmick
- Invest in more personalised offers to keep consumers engaged
- Unilever ramps up launches
  - Graph 14: deodorant launches, by ultimate company, 2018-23
- Activity by big players focuses on relaunches
- dm puts spotlight on men's deodorants
- Formulations get increasingly longer-lasting claims
  - Graph 15: deodorant launches with 24h, 48h, 72h and 96h claims, 2018-23
- Brands move to alternatives for aluminium
- Claims for fresh feeling dominate

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- Graph 16: fragrance components in deodorants/antiperspirants, 2018-23
- Ethical & environmental claims are still on the rise
- The focus is on functionality
  - Graph 17: top 10 claims in deodorant launches, 2018-23
- Unique collaboration in UK: Fussy x Brewdog
- Building a deodorant wardrobe: seasonal deodorants
- Accessible deodorants need more attention
- Refills for deodorants are increasing
- nuud deodorant follows a transformative approach

## Advertising and marketing activity

- Dove launches #FreeThePits
- Old Spice x The Witcher
- Save your pits while saving the planet
- Maximum protection in all circumstances

## MARKET SHARE

- The market is led by Unilever and Beiersdorf
- Fragmentation of deodorants market

## MARKET SIZE, SEGMENTATION AND FORECAST

- Deodorants continue to be resilient as growth opportunities start to emerge
- Steady growth predicted for the deodorants market

## Market segmentation

- Growth in all segments
- Interest in natural deodorants is visible

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID Analysis
- CHAID Analysis – consumers who are interested in fragrances
- A note on language

### Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value



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