

DEODORANTS – THAI CONSUMER – 2020

Re-establish category fundamentals and respond to the changing climate and lifestyles in Thailand.



A Mintel Analyst, Global
Analyst



Report Content

- What you need to know

EXECUTIVE SUMMARY

- The future of deodorants in the Thai market
- The category is at risk of letting consumers down
- Join up with the active force
- Leverage cross-category skincare success

KEY TRENDS

- What you need to know

KEY DRIVERS

- It's a mixed-up world in deodorants

Deodorants: on a cusp of stagnancy

- The Thai deodorant market is growing but at a slower rate
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 - Graph 1: Deodorant market size (in USD million)
- Claims remain static; long-lasting dominates
 - Graph 2: Top 10 claims in deodorants, 2015-19

Performance is undervalued

- Deodorant shifted its focus to fragrance
- Meanwhile, Thais' lifestyles are changing towards the active
 - Graph 3: Percentage of exercising participation by demographics, 2015
- Consumers feel inspired and pressured to be active
 - Graph 4: Newly registered fitness businesses, 2016-May 2019
- Exercise is strongly endorsed
- Thais have expanded their fitness options too

Environmental pressures

- The weather is changing
- Thailand faces a new level of heat

Follow the leader: Skincare

- Skincare, leader of beauty, is evolving to needs
- Facial care has an edge on skin treatment
- And it starts to spill over to deodorant

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Respond to changing consumer needs and demands
- Category dynamics have changed
- Prove that you have reacted to the change

CONSUMER INSIGHT

- What you need to know
- Deodorant's main role hasn't changed
- Deodorant's main role hasn't changed
 - Graph 5: Benefits sought in deodorants
- But consumers' expectations revolve around its downsides
 - Graph 6: Benefits sought in deodorants

Return to basic functions

- Basics are not delivered to consumers
- High performance is in demand but do not get stuck in the numbers game

Uncovering men's needs

- Men were built to sweat and exude smell...
- ... but not all men have taken action to combat the issues
 - Graph 7: Deodorant usage, by gender
- Young men are unaware of the problems
 - Graph 8: Male deodorant usage, by age, 2020
- Male users are heavy users with reapplication
 - Graph 9: Percentage of deodorant reapplication during the day
 - Graph 10: Percentage that only use deodorant after exercising
- There are also more situations to sweat
 - Graph 11: Benefits sought in deodorants, by gender

Uncovering women's needs

- Women are pressurised to have smooth and hairless underarms
- New understanding on underarms: it's skin too
- Women seek out solutions to improve underarm skin quality

- Graph 12: Benefits seeking in deodorant, by gender
- Treat underarm skin just like facial or body skin
- The hairy situation bothers women
- Graph 13: Benefits seeking in deodorant, by gender
- Consumer insights in summary

MARKET APPLICATION

- Opportunities: Key focus area

Opportunities for total category

- Top priority: Work on the fundamentals
- Monitor changing factors
- Prove efficacy under daily life situations to assert deodorant's relevance
- To assert superiority, prove it in extreme situations

Opportunities for men

- Find the right touchpoints to recruit young targets
- Education can help establish deodorant usage
- Introduce Athbeauty products
- Example: Athbeauty for runners
- Do not stop the sweat but do help on the odour control
- Sweat or regret
- Stress and Sweat: Not yet a proposition
- In-shower format for deodorants has potential
 - Graph 14: "In-shower" beauty & personal care launches, 2016-19
- Go strong for in-shower solutions for men
- Enable reapplication with the right packaging

Opportunities for women

- Protect the underarm territory within the deodorants category
- Serum deodorant is just the beginning
- Explore new textures and formats beyond serum
- Put skincare ingredients into deodorants
- Introduce additional underarm care steps...
- ... and ultimately, build an underarm routine
- Mark the territory with the armpit hair claim
- Market applications in summary

Who's innovating?

- Off Sweat – the local high performance wipe
- Sweat and odour control on-the-go

Global innovations

- Dandi Patch to stop sweat and odour
- Athbeauty in Japan – Athletia by Kanebo
- Deodorant for the young
- High-performance deodorants
- How different categories made it to in-shower

BOARDROOM CHECKLIST

- Boardroom checklist

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