

# 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
  - 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
  - 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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