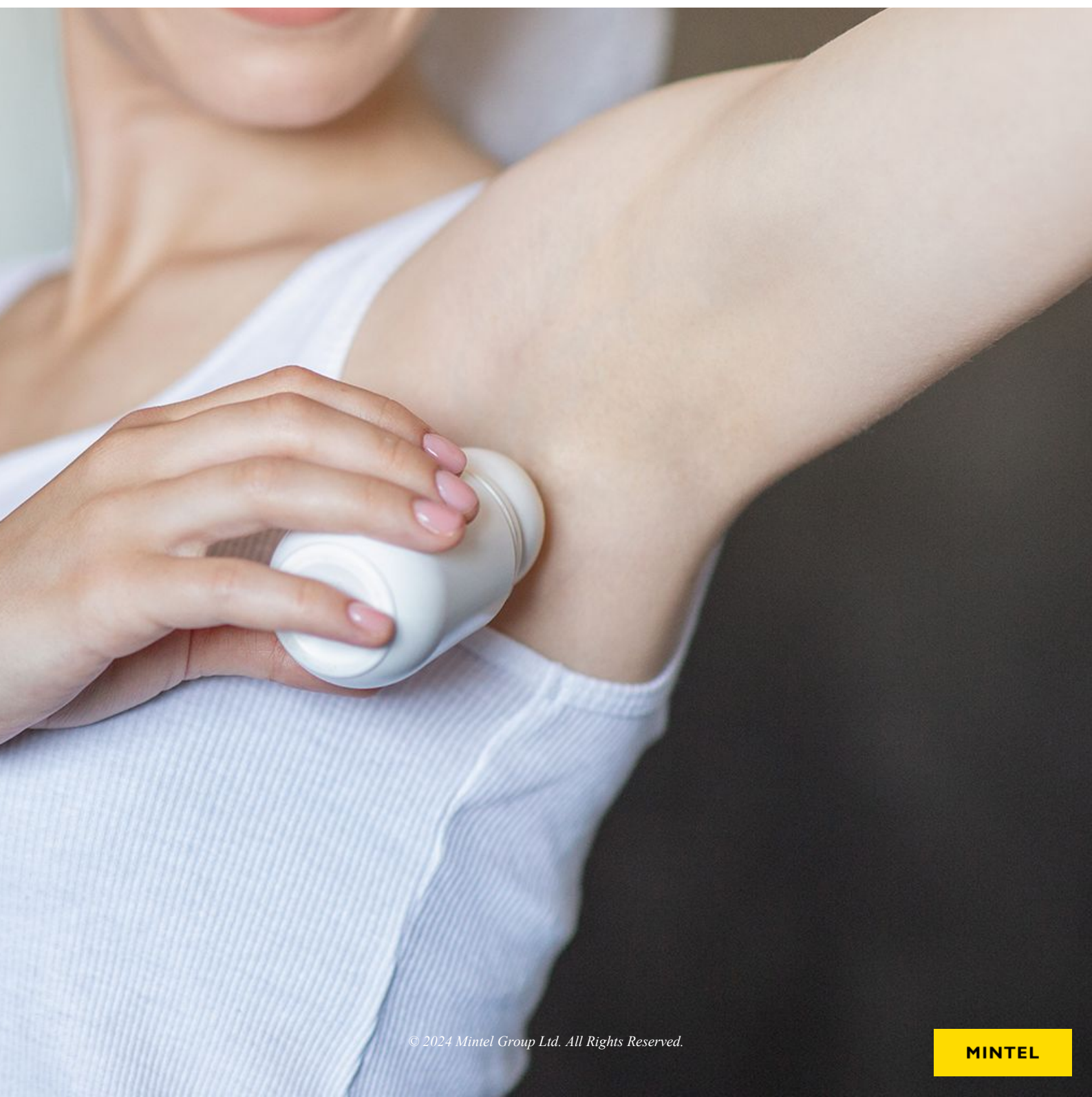


DEODORANTS – THAI CONSUMER – 2021

Challenged by bodycare, it is time for deodorant to examine best practices across other beauty categories and incorporate them to ensure its success.



A Mintel Analyst, Global Analyst



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on deodorant
- The competition against bodycare is getting heated
 - Graph 1: % whitening claims in bodycare and deodorant, 2018-21

What consumers want and why

- Female consumers want: underarm skin solutions
 - Graph 2: body issues by gender, 2021
- Consumers want: exciting scents
 - Graph 3: daily usage of roll-on deodorant and perfumed body lotion by gender and age, 2021
- Young consumers want: fun and convenience
 - Graph 4: roll-on deodorant and alum usage by age group, 2021

Opportunities

- Extend deodorant's lead in underarm care with skinification
- Regain scent competitiveness with more dimensions
- Hone in on the convenience and excitement provided by colour cosmetics

Competitive landscape

- Market activities

Mintel predicts

- The outlook for the deodorant category in Thailand
- The marketing mix
- Transformation is needed for deodorant to have a bright future

KEY TRENDS

- What you need to know
- Deodorant launch activities decline
 - Graph 5: top 10 sub-category product launches in beauty and personal care, 2018-21
 - Graph 6: deodorant launches, 2018-21
- Deodorant claims are dynamic beyond the common long-lasting claim

Deodorants – Thai Consumer – 2021

- Graph 7: top 10 claims in deodorant launches, 2018-21
- Alum-like gender-neutral deodorant launches are becoming active
 - Graph 8: deodorant launches, by gender, 2018-21
- The whitening claim shines in deodorant
 - Graph 9: top three beauty-enhancing claims in deodorant launches, 2018-21
 - Graph 10: share of whitening claims in bodycare and deodorant, 2018-21
- Bodycare is the winner of the fragrance war
 - Graph 11: beauty and personal care launches with perfume feature*, by sub-category, 2018-21
- Local brands are introducing new underarm care steps

Key drivers

- Appearance outshines hygiene
- Outdoor activities and sports are still trending despite the pandemic
- Body lotion highlights the affordable luxury perfume
- Gender stereotypes broken by male ambassadors in beauty

Global trends and how they are playing out in Thailand

- Falling back to the basics
- The battle for scent is on

CONSUMER INSIGHT

- What you need to know
- Unpleasant body odour and sweat are the top concerns
 - Graph 12: concern about body issues, 2021
- Performance as the foundation; sensory as the differentiator
 - Graph 13: deodorant purchasing factors, 2021

Women need dedicated underarm skin solutions

- Women place more concern on underarm skin
 - Graph 14: concern about body issues, by gender, 2021
- Underarm hair is a barrier to achieving flawless underarms
 - Graph 15: more hair removal product usage, by age groups, 2021
- Interest in underarm skincare peaks among women
 - Graph 16: interest in deodorant innovations by gender, 2021

Fragrance attention shifted to bodycare among women aged 25+

- Scent appreciation in deodorant is challenged by bodycare
 - Graph 17: deodorant and scented bodycare usage, 2021
- Women aged 25+ embrace perfumed body lotion

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- Graph 18: daily usage of roll-on deodorant and perfumed body lotion by gender and age, 2021
- Demand for refreshing floral and fruity scents
 - Graph 19: scents currently used in bodycare and deodorant among women aged 25+, 2021

Consumers aged 18-24 are conflicted between alum and deodorant

- Younger consumers under the age of 25 favour alum
 - Graph 20: roll-on deodorant and alum usage by age group, 2021
- Meet the reapplication needs of younger consumers with on-the-go formats
- Fun, food-related fragrances spark interest among younger consumers
 - Graph 21: food-related flavour fragrance currently used in deodorant by age group, 2021

MARKET APPLICATIONS

- Opportunities: key focus areas

Take a further leap into beauty with skincare

- Mimic the facial skincare routine to expand underarm care steps
- Deep cleanse for completely smooth and even underarms
- Spotlight skincare ingredients to add credibility
- Introduce effective, non-sticky serum and essence formats

Reenter the scent competition with more dimensions

- Highlight fine fragrance/perfume scent in deodorant
- Offer light floral scents
- Elevate scent with fragrance complexity
- Captivate younger audiences with scent novelty

Learn from colour cosmetics to leverage convenience and excitement

- Make a fashion statement with packaging inspired by colour cosmetics
- Borrow formats from colour cosmetics for convenient reapplication
- Offer small, on-the-go products for reapplication
- Provide instant beautification with makeup properties

Who's innovating

- Erb Underarm Spa
- Modernising to stay afloat

Global innovation

- Highlight skin benefits with popular skincare ingredients
- Explore textures and formats popularised in skincare

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