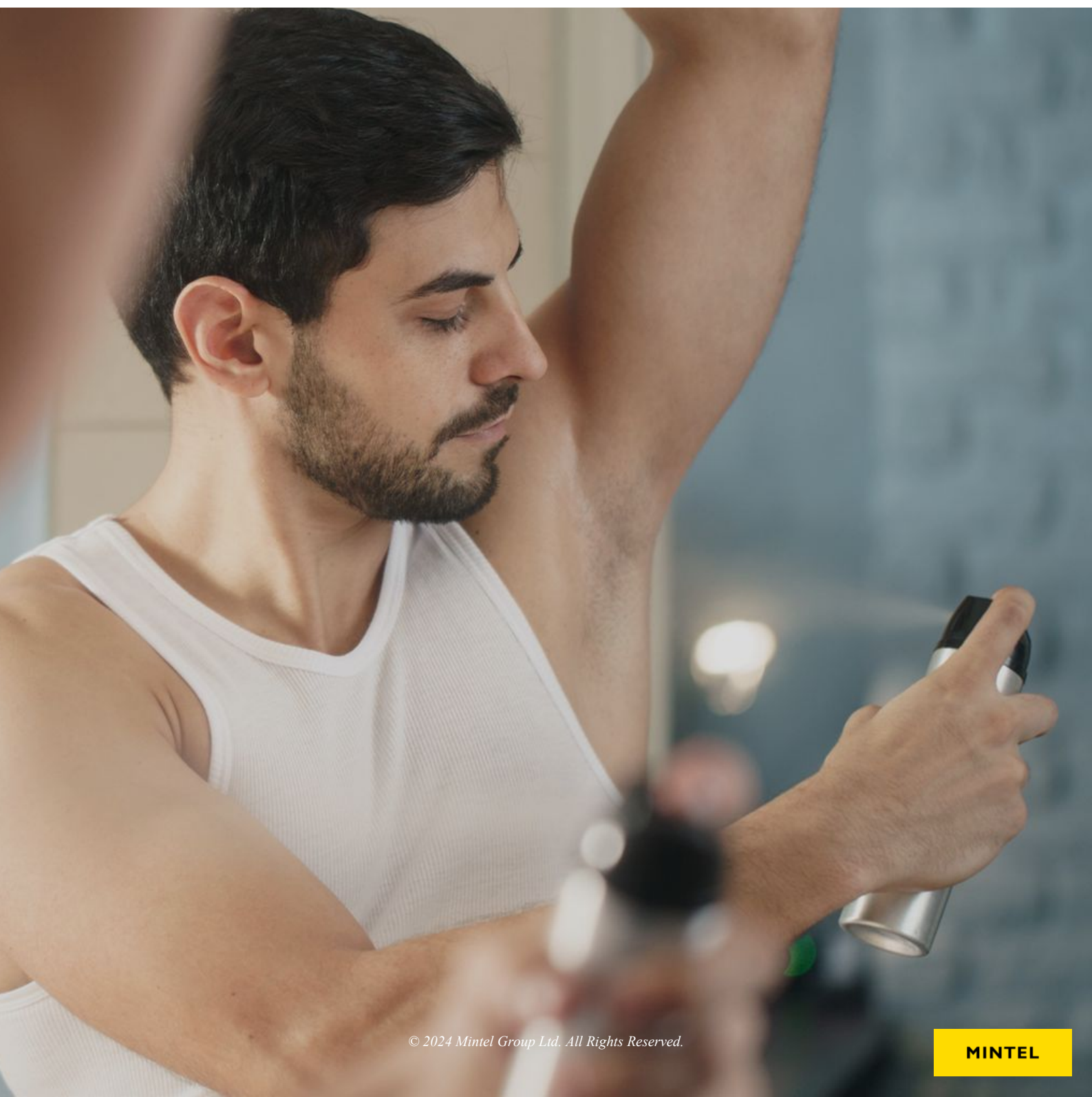


DEODORANTS & FRAGRANCES – INDIA CONSUMER – 2019

Young Indians spending on grooming products, manufacturers launching fragrances with natural ingredients and intense competition is driving the market.



Rimpie Tulsiani, Sr. Beauty & Personal Care Analyst, India



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Drive growth by innovation and premiumisation
- APAC retail market overview: deodorants, 2018
- APAC retail market overview: fragrances 2018
- Now is an opportune time to woo women, especially those aged 18-24
- Explore Tier 1 cities with small pack sizes
- Perfumes and deodorants with functional benefits will perform better
- Chemical-free deodorants will do well in the South
- Launching products based on seasonality will push sales
- A long-lasting smell is attractive

KEY TRENDS

What you need to know

- Increasing grooming consciousness driving the market
- Millennial spending on grooming and appearance
- Rising temperatures in India fuel sales of Deodorants
- Rising urban populations and disposable incomes propel sales
- Intense competition among brands to gain market share
- Young consumers are the primary driver for boosting sales
- More than 50% of the population is aged 15-45

GLOBAL TRENDS PLAYING OUT IN INDIA

- Use of alternative packaging options making inroads
- Help people transition to natural deodorant

CONSUMER INSIGHTS

Perfume users vs deodorant users

- Spray remains the most popular format in deodorants and perfumes
 - Graph 1: Usage of deodorants & perfumes, by format, May 2019
- Deodorant sprays with value additions like 'no gas' are increasing
- The 18-24 and 25-34 age groups buy 68% of deodorant sprays

Deodorants & Fragrances – India Consumer – 2019

- Roll-on deodorants marginally more popular among women
 - Graph 2: Usage of select deodorant types, by gender, May 2019
- Target women aged 18-34
- Draw inspiration from global launches of deodorants that use natural ingredients
- East India uses deodorant sprays more than other parts of India
 - Graph 3: Deodorant spray users, by region, May 2019
- Metros demand deodorant sprays
 - Graph 4: Usage of select deodorants, by city tier, May 2019
- 18-24 year old men seek value for money products
- Unmarried men & unmarried women top the charts in users
 - Graph 5: Top users of deodorant & perfume sprays, by marital status, May 2019
- Advertising targeting unmarried men

What you need to know

- Large number of consumers still use deodorant spray on clothes
 - Graph 6: Typical application of deodorant sprays, May 2019
- South Indians prefer to use deodorants on clothes, unlike other Indians
- Nivea advertisements promoting the use of deodorant sprays on underarms
- Intense competition stirs as premium brands make forays into this space
- Advertisement showing the premiumisation in perfumes
- Women use as much perfume as men
- Advertisements targeting women for perfumes
- New launches in 2019
- Draw inspiration from global trends
- Target audience for perfumes – 18-24 year old men and women
- West India tops the charts in usage of perfume spray
 - Graph 7: Usage of perfume spray, by region, May 2019
- Tier 1 consumers demand perfumes more than metros
 - Graph 8: Usage of deodorants & fragrances, by city tier, May 2019
- Deodorants are more popular among men and perfumes are equally popular among men and women
 - Graph 9: Top users of perfume and deodorant spray, by gender, May 2019
- Usage of perfumes highest on clothes
 - Graph 10: Usage of perfumes, by usage, May 2019
- Long-lasting fragrance is the attribute Indians look for in perfumes
 - Graph 11: Attributes associated with perfumes, May 2019
- Advertisements showing manufacturers tapping into the long-lasting fragrance attribute
- Advertisements showing manufacturers tapping into the long-lasting fragrance attribute
- Penetration of fragrances still low

- Graph 12: Types of fragrances used, May 2019
- Body odour tops as the key purchase driver
 - Graph 13: Key purchase drivers of deodorants and fragrances, May 2019

MARKET APPLICATIONS

- Opportunities
- Draw cues from these perfumes which were launched with different claims
- Global opportunities
- Stick deodorants are offering greener alternatives to plastic packaging
- Trending natural hero ingredients are being showcased front of pack to attract attention
- Multi-functional deodorants gaining momentum
- Deodorants with skincare claims

WHO'S INNOVATING

- Axe Ticket
- He Advanced Grooming Magic Duo Yin and Yang
- Shahnaz Husain Herbal Deodorant
- Avon Intense No Gas Deoperfume

GLOBAL INNOVATIONS

- Procoal Activated Charcoal
- Degree Men Cool Rush Deodorant Wipes
- Aluminium-free deodorants
- Deoco roll-on Deodorant
- Claims that align with purchase reasons
 - Graph 14: Top 10 APDO claims*, 2018 vs 2019

APPENDIX

- Consumer survey methodology

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✓ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✓ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✓ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

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01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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