

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The body care and deodorant industry continues to see slow yet steady sales growth in 2018. Deodorant brands that focus on scent, natural ingredients, and practical claims will continue to see success. Body care brands that pique consumer interest with secondary benefits such as dermatologist-recommended or derriere care will continue to drive engagement."

- Alison Gaither, Beauty & Personal Care Analyst

This report looks at the following areas:

- Sales of deodorant and body care remain on a slow trajectory
- Body care and deodorant are viewed as functional, which poses challenges
- Body care is impacted by consumers trading body lotion for kitchen essentials
- Natural deodorants perform well, despite skepticism
- Usage of specialty body care is niche
- Emphasizing benefits could help bolster engagement in specialty

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

_{АРАС} +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview What you need to know Definition **Executive Summary** The issues Sales of deodorant and body care remain on a slow trajectory Figure 1: Total US sales and fan chart forecast of body care and APDO market, at current prices, 2013-23 Body care and deodorant are viewed as functional, which poses challenges Figure 2: Role of scent and brand as body care and APDO purchase influencers, May 2018 Body care is impacted by consumers trading body lotion for kitchen essentials The opportunities Natural deodorants perform well, despite skepticism Figure 3: MULO sales of select natural deodorants, current 52-week period ending May 20, 2018 Usage of specialty body care is niche Figure 4: Select body care routines - Ever use (net)*, May 2018 Emphasizing benefits could help bolster engagement in specialty Figure 5: Select interest in convenient formats, any interest - (Net)*, May 2018 What it means The Market - What You Need to Know Growth of body care and deodorant remains slow and steady Deodorant sales leading the market Health and wellness trends affect both categories Free-from claims and multiple benefits blur category lines **Market Size and Forecast** Body care and deodorant to maintain steady growth through 2023 Figure 6: Total US sales and fan chart forecast of body care and APDO market, at current prices, 2013-23 Figure 7: Total US sales and forecast of body care and APDO market, at current prices, 2013-23

Market Breakdown

APDO experiences a slight sales bump

Figure 8: Share of body care and APDO sales, by segment, 2018 (est)

Figure 9: Total US retail sales and forecast of body care products and deodorant, by segment, at current prices, 2013-23

Market Perspective

Ingredient replacements are still affecting growth in body care

Actively focusing on health management impacts APDO usage

Figure 10: Deodorant usage on a weekly basis, 2016-18

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Market Factors

Category blurring has potential to affect both markets

Aluminum-free deodorants on the rise

Figure 11: Share of US deodorant launches with an aluminum-free claim, Jan. 1, 2013-Dec. 31, 2017

Key Players – What You Need to Know

Larger players are still on top, but growth comes from small players

Body care gets complicated while deodorant keeps it natural

Secondary benefits will lead the way in product innovation

Company and Brand Sales of Body Care and Deodorant

Unilever remains the top player; highest growth from Sanofi-Aventis

Sales of body care and deodorant by company

Figure 12: Multi-outlet sales of body care and deodorant, by leading companies, rolling 52 weeks 2017 and 2018

What's Happening?

Basic body care loses share to derma brands

Figure 13: Multi-outlet sales of select body care brands, rolling 52 weeks 2017 and 2018

Body care goes bottoms up with booty beauty

Natural deodorants growing in sales despite doubts

Figure 14: MULO sales of select natural deodorants, current 52-week period ending May 20, 2018

What's Next?

Hair-inhibiting personal care is just the tip of the iceberg

Innovations in self-tanner will save skin and time

Will anti-pollution body care be affordable to the masses?

The Consumer – What You Need to Know

Specialized formats have lower usage compared to basic body care

Body care benefits sought depend on consumer engagement

Consumers take functional approach to body care

APDO are highly functional; innovation comes from format

Scent is a purchase driver for APDO; Black consumers value brands

Consumers are concerned over ingredients, yet skeptical of natural

Travel-friendly formats driving interest in both categories

Body Care Routines

Usage is dependent on product type and occasion Figure 15: Select body care routines, May 2018

Specialty products are typically reserved for engaged users

Figure 16: Body care routines – Ever use (net)*, May 2018

Younger consumers drive usage of new formats

Figure 17: Body care routines – Ever use (net)*, by age, May 2018

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Hispanic consumers consider body care supplementary Figure 18: Body care routines – Ever use (net)*, by Hispanic origin, May 2018

Body Care Purchase Influencers

Body care consumers are less brand loyal

Figure 19: Body care purchase influencers, May 2018

Scent – or lack of – can widen reach

Figure 20: TURF analysis – Body care purchase influencers, May 2018

Methodology

Women seek more body care benefits; men value scent Figure 21: Select body care purchase influencers, by gender, May 2018

Older consumers value hydration claims; younger lose interest in scent

Figure 22: Body care purchase influencers, by age, May 2018

Hispanic consumers drawn to natural body care with a pleasant scent Figure 23: Body care purchase influencers, by Hispanic origin, May 2018

Attitudes toward Body Care

Boosting engagement in a functional category poses a challenge

Figure 24: Attitudes toward body care, May 2018

Consumer attitudes are reflective of lifestage

Figure 25: Attitudes toward body care, by age, May 2018

Male attitudes support their low-maintenance routines

Figure 26: Attitudes toward body care, by gender, May 2018

Hispanics have a body care repertoire; Black consumers value hydration

Figure 27: Attitudes toward body care, by race and Hispanic origin, May 2018

APDO Routines

Deodorants are highly functional, an essential part of routines Figure 28: APDO routines, May 2018

Men drive usage of spray formats, women stick to sticks Figure 29: APDO usage – Ever use (net)*, by gender, May 2018

APDO Purchase Influencers

Scent remains a key purchase influencer Figure 30: APDO purchase influencers, May 2018

Brand can widen reach over other benefits Figure 31: Dove Invisible Dry – Confidence In Any Color Figure 32: TURF analysis – APDO purchase influencers, May 2018

Methodology

Men are more brand loyal; women value aesthetics Figure 33: APDO purchase influencers, by gender, May 2018

Secondary claims are key points of difference for APDO

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 34: APDO purchase influencers, by age, May 2018

Black consumers are driven by brand loyalty

Figure 35: APDO purchase influencers, by race and Hispanic origin, May 2018

Attitudes toward APDO

Consumers are not as engaged in APDO as other categories Figure 36: Attitudes toward APDO, May 2018

18-44-year-olds are concerned with ingredient efficacy and safety Figure 37: Attitudes toward APDO, by age, May 2018

Women skeptical of natural deodorants, but worry about ingredients

Figure 38: Attitudes toward APDO, by gender, May 2018

Black consumers believe in naturals

Figure 39: Attitudes toward APDO, by race and Hispanic origin, May 2018

Interest in Formats

Convenient formats are a priority in functional categories

Masking detoxes more than the face

Figure 40: Interest in formats, May 2018

Convenience is valued, but for different reasons

Figure 41: Select interest in convenient formats – Any interest (net)*, May 2018

Hispanics are willing to try new formats

Figure 42: Select interest in formats – Any interest (net)*, by race and Hispanic origin, May 2018

Appendix – Data Sources and Abbreviations

Data sources Sales data Fan chart forecast Consumer survey data Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 43: Total US sales and forecast of body care and APDO market, at inflation-adjusted prices, 2013-23

Figure 44: Total US retail sales of body care products and deodorant, by segment, at current prices, 2016 and 2018

Figure 45: Total US retail sales and forecast of body care products, at inflation-adjusted prices, 2013-18

Figure 46: Total US retail sales and forecast of body care products, at current prices, 2013-18

Figure 47: Total US retail sales of body care products and deodorant, by channel, at current prices, 2013-18

Appendix – Key Players

Figure 48: Multi-outlet sales of body care, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 49: Multi-outlet sales of deodorant/antiperspirant, by leading companies and brands, rolling 52 weeks 2017 and 2018

BUY THIS REPORT NOW