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DEODORANTS
Propelling innovations

cosmetics business MARKETS

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Cosmetics Business Markets
HPCi Media Limited
The Tanneries Natraj Building
55 Bermondsey Street
London SE1 3XG
www.cosmeticsbusiness.com
tel +44 20 7193 6862
fax +44 20 3318 5305
email cbm@hpcimedia.com

Editor

Jo Allen

Reporter

Rachel Lawler

German Correspondent

Annemarie Kruse

Italian Correspondent

Kathleen Armstrong

Spanish Correspondent

Simeon Goldstein

Sub-Editor

Austyn King

Art Editor

Sibylla Duffy

Sales Director

Adrian Goldfinch

Subscriptions

Julie Wilson

Editorial Director

Erika Hatva

Managing Director

Colin Bailey-Wood

Editorial

+44 1992 303 259

joa@hpcimedia.com

Advertising

+44 20 7193 6862

adriang@hpcimedia.com

Subscriptions

+44 20 7193 1279

juliew@hpcimedia.com

Subscriptions

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The world's first smart electric deodorant is about to be launched. Could it revolutionise the category?



Each year *Cosmetics Business Markets* publishes a market report on the following product categories:

January	Bathroom products
February	Facial skin care
March	Men's lines
April	Sun care
May	Women's fragrances
June	Body care
July	Deodorants
August	Hair care
September	Aesthetics
October	Spa products
November	Colour cosmetics
December	Hands & nails

Famously fickle, it's rare for teenage consumers to stick to one brand for long. Rarer still for any generation to embrace a product previously favoured by their elders. Yet So...? Fragrances has just introduced its fifth generation to the world of fragrance via body sprays.

Countless girls have started their journey into fragrance with a can of the brand's iconic scents So...? Kiss Me and So...? Sinful. Versatility is key in this market, and So...? is well-placed, with its constantly updating range. But the brand isn't just about new consumers. After more than 20 years, So...? also has a loyal following of older fans. But how does it manage to balance the needs of these two very different consumers?

In 1994, So...? launched with a view to capture a younger audience for its parent brand, Yardley. Packaged in simple red, the original scent So...? was created. Yardley was very much focussed on older consumers and decided to invest in this promising sector. Five years later, Yardley went into receivership and So...? was bought by Incos Limited.

Since its launch, the brand has faced several challenges. A surprising but notable problem arose from the decline of the print industry. Karim Gangj, Financial Director, explains: "Cosmo Girl, Sugar, Bliss... these magazines were once part of teenagers' lifestyle. In the late 1990s and early 2000s we focused our advertising on these weekly teen titles but that's really changed now." Since then, many of the magazines once adored by teen consumers folded as the audience moved online.

So...? continues to soar in the UK, with a retail value of £18m and y-o-y growth of 9%



SO...? FRAGRANCES FOREVER YOUNG

Teen trends tend to come and go, but So...? Fragrances have been keeping adolescents smelling good across the world for more than 20 years. Rachel Lawler speaks to the brand about its success

"Some of these titles still exist, particularly the music titles, but their circulation is now very small," Patrick Spillmann, Creative Director, adds. Instead, the brand focuses its marketing efforts online. "Social media is the best way to connect with teenagers now," Gangj says. The brand has around 65,000 likes and follows across social media overall, including an impressive 50,000 likes on Facebook. The brand also works with fashion and beauty bloggers to further tap in to the growing online audience.

In late 2003, the brand launched So...? VIP – an online club for the brand's consumers, giving them access to offers, competitions and brand events in reward for their loyalty. Members are offered samples of new products and attend press days, adding to the online buzz. Gangj says: "It allows us to connect with our biggest fans." Moving online will also help the brand as it conquers its next challenge – cracking other markets worldwide.

Blooming in Indonesia

Worldwide, license holders distribute the brand to 38 countries across the globe. Today, its biggest market is still the UK but it is rapidly growing its market share in Indonesia – which is now its second biggest market. In third and fourth place are Australia and Canada respectively.

Gangj says: "If the Indonesian market continues in the same way it will overtake the UK in about five years time." He says this is due to a number of factors, including the country's larger population and younger demographic. Interestingly, the brand chose to market one of its most popular fragrances, So...? Sinful, under a different name in this region. "We went with So...? Sensual – our market researchers told us that the sinful name would not work in Indonesia at all," Gangj says.

The brand also has plans to break into the Indian market, using its progress in Indonesia as

Fact File: So...? Fragrances

Founded 1994

Owner Incos Limited

Address Ambassador House, Cavendish Avenue, Harrow, Middlesex, HA1 3RW, UK

Contact telephone +44 20 8869 4444

Website www.sofragrances.com

a model. "I know another of our license holders is interested in taking the brand into Brazil," Gangj adds. Taking what they have learnt about digital marketing and product selection from Indonesia, the brand hopes to see similar success in these markets.

Back home, the UK market is still hugely successful for So...?. The brand now has around 20 employees in its UK base in Middlesex, manufacturing some of its products in the country too. Last year alone the company sold 10 million items in the UK with a total retail value of around £18m. For the financial year ending March 2014, the brand reported an impressive 9% growth in sales. "For an established brand that's quite a lot and our best result to date," says Gangj.

Tempting teens

As with any brand targeting a teen audience, new products are as important as new markets. Since its launch So...? has introduced around 28 different scents. At least 18 of these are still available in one form or another. Gangj explains: "We try to launch one new fragrance every new year and a flagship range every three years."

The brand's current flagship range is the So...? Couture set of products, which include four fragrances named after popular travel and fashion destinations: London, New York, Paris and Rio. The brand's previous collection was So...? Rock 'n' Roll, which used tattoo imagery, tapping into a current trend with teens.

"Newness is generally what drives growth," Gangj says. But the brand's classic products are still of huge importance. "It's our old tried and tested fragrances that actually sell the most. Like Chanel No5 has always been their number one seller, our So...? Kiss Me range has always been our top seller." It is these favourite products that keep So...?'s loyal fans returning to the range. So...? Kiss Me is the brand's biggest seller in the UK, Australia and Canada, with So...? Sinful a close second.

"We've worked up a very loyal customer base of adults. Many years ago we were the number one repeat buy fragrance in Boots," Gangj says. He believes their success in this area stems from the brand's origins in fragrance. "We come from fragrance heritage: our Eau de Toilette was introduced before our body spray. Fragrance is a very emotional thing, but less so with body sprays. Consumers are looking for a long lasting, nice scent that they know will last all day." However, while its loyal adult following is important to So...?, Gangj says the brand will always be driven by teenagers. "That's the challenge – we need to keep our loyal customers happy but we need newness to maintain interest in the brand," he comments.

The most successful of the brand's recent launches is So...? Sexy. This product demonstrates the balances between old and new customers well, with a new fragrance and new packaging, but still heavily inspired by the bestselling So...? Kiss Me. "We always knew that we would release So...? Sexy, as soon as we created So...? Kiss Me," Gangj says. "It was just waiting for the right time."

Gangj doesn't believe multifunctional products will be of any importance to this sector now, or even in the future. "I think body spray is a simplistic product at a set price. People have trusted brands in body fragrance and trusted brands in body care and it's difficult to try and merge the two," he says. Instead, Gangj sees a real opportunity for the So...? brand to expand into bath and body. The company has already added a scented dry shampoo to its range.

So...? Versatile

"We're looking at expanding out of the fragrance area and creating a whole lifestyle for teenagers," Gangj says. So...? has already had considerable success with other products as part of gift and promotional sets. "I can't even tell you the number of t-shirts we have sold with the So...? Kiss Me logo on," Gangj says. "We think the potential for us to engage a teenage consumer in other products is huge. It's really about looking at the success we've had with fragrance and emulating it in lifestyle," he adds.

How that lifestyle will evolve depends entirely on So...?'s fans. "This brand is really owned by the consumers," Gangj says. The brand emulates the aspirations of each new generation of teenagers, using their ideals to take the products forward. "When celebrities were the big thing we bought out So...? Superstar. The So...? Couture range we just launched is targeting the fashion and travel aspirations of teenagers," Gangj explains. The expansion into lifestyle products is a fairly natural progression.

The key to the brand's success in all areas is its versatility. Gangj says: "It's the beauty of the name So...? You can put any word next to it." With each new launch, the brand attempts to identify the aspirations of each new generation of teenagers and morph them into a fragrance concept. With the flexibility this brings, the possibilities for future scents is almost limitless.

Unusually for a fragrance brand, So...? did not celebrate its recent 20 year anniversary with any new launches or advertising campaigns. Thanks to its teenage audience, these milestones will always been celebrated privately. But if the brand is able to continue its current success, there should be many more of these silent markers of success to come.

“We need to keep our loyal customers happy but we need newness to maintain interest in the brand”

Karim Gangj, Financial Director, So...? Fragrances



New launches are an important growth driver for the brand. However, its classic ranges remain top sellers

A.S. WATSON

LIVING LARGE

With a recent history that reads as a catalogue of acquisitions, A.S. Watson today operates over 11, 600 retail stores worldwide and is the largest health and beauty retailer in Asia and Europe. Annemarie Kruse reports

A.S. Watson is the biggest health & beauty retailer in Asia and Europe. The origins of the chain go back to the mid-19th century, when Scottish emigré Thomas Boswell Watson opened a medical dispensary in Hong Kong. In 1871, the Watson family leased their business to merchant John Humphreys. From then on, the chain was known as A.S. Watson. In the 1880s, Humphreys turned A.S. Watson in a public company.

In 1963, Chinese tycoon Li Ka Shing and his Hutchison Whampoa group acquired the majority of A.S. Watson's shares and in 1981 A.S. Watson became a fully owned subsidiary of Hutchison Whampoa Limited. The company then merged with the Cheung Kong Group on 3 June 2015 in a reorganisation of the group's businesses and renamed CK Hutchison Holdings. The multinational conglomerate has five core businesses – ports and related services, retail (A.S. Watson), infrastructure, energy and telecommunications in over 50 countries.

A.S. Watson operates 13 retail brands worldwide, including Dutch group Kruidvat. Its Watson stores carry a wide range of own brand C&T products



Booming in Asia

The A.S. Watson division operates 13 retail brands, and 11,600 stores in total, in 24 markets worldwide and in 2014 it generated a total revenue of HK\$157bn. The division has over 110,000 employees. Although the store portfolio also includes several Asian food and electronics brands, the majority of A.S. Watson's retail chains are from the C&T sector. And this business is doing very well: in 2014, A.S. Watson's total health and beauty turnover grew 9% to HK\$120,104m.

A.S. Watson operates its flagship Watsons stores chain in 12 worldwide markets. In Asia, these markets include mainland China, Hong Kong, Taiwan and Macau, plus Korea and the southeast Asian countries Singapore, Thailand, Indonesia, Malaysia and the Philippines. In 2014, there were a total of 4,018 Watsons stores in Asia, an increase of 13%. In mainland China alone, the number of



Watsons stores reached 2,000 in November 2014. In addition, there are Watsons outlets in the Ukraine and Turkey. In the majority of its Asian markets, Watsons is the drugstore market leader.

The Chinese market (mainland China) did particularly well last year, growing 14% to HK\$20,408m in 2014. The other Asian markets increased 8% to HK\$20,843m. In total, Watson's health and beauty retail business in China and Asia reached HK\$41,251m, an increase of 11%.

Stepping up in Europe

Over the past decade, A.S. Watson has stepped up its expansion pace in Europe, quietly acquiring scores of European beauty chains. Today, A.S. Watson is the biggest beauty retailer in Europe. The group has a particularly strong position in Germany, France, Benelux and the UK, thanks to a number of strategic purchases.

The first of these was the acquisition of Dutch retail group Kruidvat in 2002 for €1.3bn. The Kruidvat portfolio included not just the Kruidvat drugstore chain with currently 900 stores, but also fellow Dutch chain Trekpleister, Belgian perfumery chain ICI Paris XL and UK drugstore retailers Superdrug and Savers Health & Beauty. Superdrug, as the second-biggest health and beauty chain in the UK, currently operates over 900 stores and in 2014 generated a turnover of £1.058bn, up 4.75%. Discount chain Savers has some 240 stores in the UK and Ireland and reported sales of £247m in 2013, up 15%.

With the Kruidvat purchase, A.S. Watson had established itself in several key markets at one fell swoop. In 2005 a number of major acquisitions further cemented the retail group's hold on the European beauty market. That year, A.S. Watson acquired a 40% share of Germany's



Fact file: A.S. Watson

Founded 1828; officially started trading as A.S. Watson in 1871

Owner CK Hutchison Holdings

Address Watson House, 1-5 Wo Liu Hang Road, Fo Tan, Shatin, N.T., Hong Kong

Contact telephone number +852 2606 8833

Website www.aswatson.com

second-biggest drugstore retailer Rossmann. With 3,300 outlets in Germany and five other European markets and group sales of €7.2bn, up 8.7%, in 2014, the Rossmann group is one of the biggest and most successful European drugstore chains.

Another important acquisition in 2005 was French perfumery chain Marionnaud. Marionnaud currently operates some 570 outlets in France and the chain, which is number three in the market, after LVMH-owned Sephora and Douglas-owned Nocibé, registered sales of €722m in 2013.

In addition, A.S. Watson purchased UK perfumery chain The Perfume Shop, which operates over 250 stores; Russian drugstore chain Spektr; and Turkish chain Cosmo Shop.

Looking to the East

One year later, A.S. Watson acquired Ukrainian drugstore retailer DC Group and successively rebranded the DC stores under the Watsons logo. Today, Watsons runs outlets in 45 Turkish cities while its Ukrainian business includes some 350 stores and 25 pharmacies.

Latvian drugstore chain Drogas had been acquired by A.S. Watson in 2004. With some 120 stores in Latvia and Lithuania, Watsons is one of the biggest beauty retailers in the Baltic region. Although A.S. Watson kept the Drogas store name, the logo was relaunched in Watsons' corporate colours, turquoise and white.

However, all of A.S. Watson's other Western European retail brands were left as they were after acquisition. As a result, very few European customers are aware that the store chain they shop at each day actually belongs to one of the biggest Chinese conglomerates.



A.S. Watson's Eastern European chains grew an impressive 13% to HK\$14,348m in 2014

A.S. Watson's European business has done rather well over the past year. In 2014, the group's health and beauty sales in Europe reached a total of HK\$78,853m, thereby accounting for the majority of the group's worldwide beauty sales.

The Western European chains were responsible for the lion's share of the European turnover, growing 6% to HK\$64,505m. Still, Eastern Europe managed an impressive 13% increase to HK\$14,348m. In 2014, the number of stores in this region grew 14% to 2,027, indicating that Eastern Europe is holding a key interest for the Chinese retailer. In comparison, the number of A.S. Watson's western European stores only grew 3% to 4,868 outlets.

The last few years have been quieter for the Hong Kong retailer, with no major European acquisitions to speak of. However, A.S. Watson is keeping an eye on the market and in January 2015, the group continued its European shopping spree with the acquisition of Dutch drugstore chain Dirx. The Dirx stores will be integrated into the existing Kruidvat and Trekpleister network, pending regulatory approval.

Beauty Studio by Superdrug

Last year Superdrug launched a new store format that specialises in high end beauty for the first time, enabling it to attract brands such as Marc Jacobs, Dolce & Gabbana and Prada, as well as exclusive labels such as Make Up Revolution and Love Your Skin. The store, called Beauty Studio by Superdrug and located in Cardiff, also stocks products that are available in Superdrug stores as well a number of digital and interactive elements that enables customers to try out different hair styles and colours, or take selfies and share them on social media sites.

And in 2015 Superdrug has been rolling out elements of Beauty Studio across the country, including the new Cribbs Causeway store, which opened earlier this year and includes a Beauty Studio zone.

Superdrug has also been rolling out a new standalone healthy living store, Wellbeing, the first of which opened in Banbury last year, followed by a second in Watford in February 2015.

Superdrug has further plans to roll-out these concepts and elements from them, during the course of the year. Meanwhile, the retailer has also focused on 'refreshing' 200 existing stores, bringing the total number of refreshed stores to over 700, and in May 2015 Superdrug announced

plans to open 100 new stores across the UK, with a focus on London and the South East over the next three years.

Peter Macnab, Managing Director at Superdrug, comments: "Last year we celebrated Superdrug's fiftieth birthday and we honoured that heritage by investing in the store environment, shopping experience and looking for exciting new product ranges."

He added: "The [UK] high street remains a challenging environment for all retailers. However, by understanding our customers and offering the best value and customer service, we believe the business is in a strong position to grow."



Superdrug's new Beauty Studio concept store specialises in high end beauty



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DEODORANTS

MARKET SUMMARY The \$17.1bn global deodorant market was looking patchy in 2014. Certain countries, including France, Russia, Brazil, Argentina, India and Iran were propelled by bursts of strong growth. The UK, Germany and Spain saw some moderate increases, while sales turned stale in Italy

France In one of the strongest performances in Europe last year, France posted an impressive 6% rise in deodorant sales to total €500m, according to Nielsen. Growth was driven by the innovation for compressed spray deodorants, developed by Unilever, which saw the company overtake L'Oréal as market leader in 2014 with a value share of 33.3%. Future opportunities look bright for manufacturers as the French deodorant market is not yet mature.

Germany It has been a turbulent past year for the German antiperspirant deodorant (APD) market. Although value sales overall were positive, growing by 2.6% to €668.45m and volume sales were up 3.7% to 362.16m units, there was a steep drop in sales of antiperspirants for the first time in years, according to IRI Germany. Currently accounting for more than half of the market, the category fell by 5% to €346.20m due to reports about the alleged negative effects of aluminium salts.

Italy Sales continued to stale in Italy's APD market, with Cosmetica Italia reporting a 1.2% dip to €405m and all channels suffering from the downward trend. 45% of the category's revenue comes from hypermarkets and supermarkets, but



sales fell in this channel by 1.7% to €182.4m, although perfumeries were the worst hit, declining 9.9% to €17.9m. Market performance was probably not helped by a quieter year in terms of product launches. Nevertheless, brands focused on luring customers with enticing fragrances, skin caring benefits and long lasting protection.

Europe: Top 5 deodorants by country

Total top 5

Nivea
Sure/Rexona
Dove
Lynx/Axe
Adidas

UK

Sure/Rexona
Dove
Lynx/Axe
Nivea
Right Guard

Germany

Nivea
Sure/Rexona
Lynx/Axe
Dove
Balea Men

Russia

Nivea
Sure/Rexona
Adidas
Lynx/Axe
Garnier

Spain

Sanex
Lynx/Axe
Nivea
Sure/Rexona
Dove

France

Nivea
Narta
Sanex
Dove
Lynx/Axe

Italy

Dove
Nivea
Neutro Roberts
Borotalco
Infasil

Source: Kantar Worldpanel personal care usage panel. Rankings refer to weighted penetration (% using) among men & women using deodorant & body spray over the 12 months ended March 2015. For more information contact Benji Daaku (benji.daaku@kantarworldpanel.com) or the Kantar Worldpanel team at Camargue (kantarworldpanel@camarguepr.com)

Spain Some interesting developments were afoot in Spain last year, as the men's deodorant category grew by 4% and women's deodorants rose by 3%. Overall, however, the market remained flat (0.1%) at €250.8m, according to IRI Spain, due to the 4% decline of mixed or unisex deodorants to €105.5m. Another shift was the stagnation of own brand products, which fell by 10% to €44.2m.

UK As a mature market, the chance of deodorant sales spiking in the UK is low, and with the number and depth of promotions over the past year, it has not been easy for brands. Despite this, the market did at least remain stable, up 1.3% to £582.879m according to Kantar Worldpanel. Unilever remained the dominant manufacturer, with a value share of more than 61% and sales of £399m. Meanwhile, Soft & Gentle and Tesco's Pro Formula also adopted the compressed format.

Russia Reporting growth of 6.9% to RUB21.60bn, deodorants was one of the best performing C&T categories in Russia in 2014 according to Euromonitor. While this figure was lower than expected, the category remains on a positive trend due to increased understanding of the hygiene benefits of deodorants.

Global round up This issue focuses on three interesting markets: Brazil, the world's largest, driven by near universal usage of deodorants; Argentina, a vast market with value sales that grew by a staggering 39% in 2014 according to Euromonitor; and Iran, an emerging market that increased by 29% in 2014, driven by the younger generation. Deodorant sprays are most popular, often used as an cheap alternative to fragrances among women.

Trend watch: Deodorants hot up in Brazil, Argentina, India and Iran

Manufacturers kept the US\$17.1bn global deodorant market (source: Statista) feeling fresh with new innovations in 2014, and markets including Brazil, Argentina, India and Iran benefited from increased penetration levels and growing interest in products with added benefits.

The world's leading market, Brazil, grew a staggering 82% between 2009 and 2013 according to Mintel, with the expansion of the middle-class and value-added formats driving growth. "Deodorants enjoy nearly universal usage in the Brazilian market, as it represents a personal care "staple" with most people using it more than once a day," comments Renata Moura, Mintel's Research Manager in Brazil.

Other rapidly developing deodorant markets in 2014 included India and Iran. India's deodorant market has exploded over the past six to seven years with an annual growth rate of 18% and sales totalling US\$338m in the 12 months to May 2014, according to Nielsen. Yet, being a young market, deodorants are currently only used by 10% of the 1.28 billion population, leaving plenty of scope for further penetration and product development in this market.

In Iran, deodorant sales grew by 28% in 2014 to reach US\$150.60m according to Euromonitor International. "Deodorants are still at a nascent stage in Iran," says Euromonitor. "Awareness regarding the importance of these products is very limited, with the bulk of consumers still not considering them as an everyday necessity. This represents a major opportunity for growth."

SPECIAL FOCUS

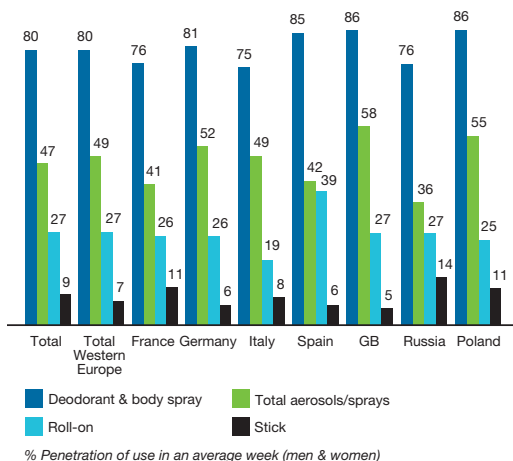
INDIA: DEODORANTS
TO RISE BY 26.8%
TURN TO PAGE 30

Deodorants: European usage facts

Each month **Cosmetics Business Markets** and **Kantar Worldpanel** present exclusive research into a product category. This month we look at deodorants

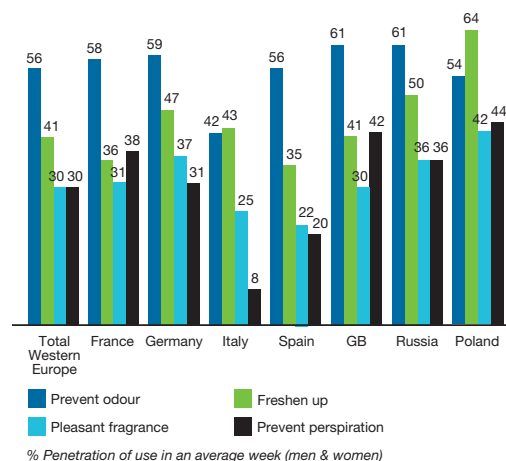
Q1 Which formats are most popular across Europe?

Aerosols are the most important format across all countries, and stand out most significantly in the UK and Poland. However, roll-ons are equal in Spain and sticks are more popular in Russia than elsewhere



Q2 Why do people use deodorant?

The most important usage driver in most countries is preventing odour. However, for Italians and Polish the need to freshen up is even more important. Preventing perspiration divides European consumers, with Italy and Spain less interested than Poland and the UK



If you have any questions on European C&T, email CBM (cbm@hpcimedia.com) or Maya Zawislak at Kantar Worldpanel (maya.zawislak@kantarworldpanel.com)

KANTAR WORLD PANEL

France Growth spurt

In 2014 France pressed the button on fresh growth in deodorants, as the market enjoyed a surge of innovation from the leading brands and some sparky new players joined the fray.

According to figures from Nielsen, the French deodorant market grew by 6% in value to €500m (sales through hypermarkets and supermarkets for the year to November 2014). Not only is this the highest growth the market has seen in recent years, it also represents the strongest progression of any of the health and beauty product categories in France, which overall grew by just 0.8% to €2.9bn.

Figures from IRI France covering the year to 31 May 2015 reflect a much flatter level of growth, however. According to these results, the market inched up by just 0.2% over this period in value terms to €481.86m however volume growth was brighter, up 2.4% to 144.58m units. Both women's and men's deodorants rose by 0.6% to €253.87m and €216.80m respectively while volumes enjoyed a 2.7% and 2.9% boost to 78.33m for women's and 62.05m units for men's.

Sprays performed best compared to other formats, for both female and male-oriented products, and they also account for the lion's share of the market. Women's sprays increased by 1.9% to €150.99m and 2.9% in volume to 48.74m units, while men's sprays grew by 2.1% to €145.71m and 3.3m to 41.94m units.

Roll-on formats, for men especially, were also more on the ball than they were last year, registering an impressive 4.8% rise in volumes to 12.24m units and 1.9% in value sales to €43.34m. An improved performance was also noted in women's roll-ons, growing by 2.3% to 25.03m units. The 1.5% decline in value terms to €84.51m was also less significant than the previous year. Sticks and creams continued to fall out of favour with consumers in general, however, as did unisex deodorants and wipes which recorded some significant losses – a double digit decline to €11.18m.

Unilever propels to No.1

The most important event in the French deodorants market in 2014 was the introduction of compressed technology, enabling packaging to be smaller in size and use 50% less gas propellant, 25% less aluminium and a carbon footprint reduction by up to 25%. But the deodorants are not just smaller; they are also more concentrated,

France: Deodorant market, 2014-2015

	€m	%+/-	Units m	%+/-
Total	481.86	0.2	144.58	2.4
Women's	253.87	0.6	78.33	2.7
Sprays	150.99	1.9	48.74	2.9
Roll-ons	84.51	-1.5	25.03	2.3
Sticks/creams	18.38	-0.6	4.56	1.6
Men's	216.80	0.6	62.05	2.9
Sprays	145.71	2.1	41.94	3.3
Roll-ons	43.34	1.9	12.24	4.8
Sticks/creams	27.74	-8.4	7.87	-2.1
Unisex and wipes	11.18	-11.7	4.20	-7.4

*Sales through super/hypermarkets, year to 31 May 2015. Totals may not equal sector values due to rounding. Source: IRI France

enabling them to deliver the same amount of uses as a regular sized spray. Unilever brought this innovation to France in February 2014 in women's sprays for its Rexona, Monsavon and Dove brands and the response from consumers has been considerable.

According to Nielsen figures, Unilever replaced L'Oréal as the number one deodorant company in France in 2014 due to its compressed aerosols, taking 33.3% of the French deodorant market, compared to L'Oréal's 32.7% with its Narta, Cadum, Ushuaia and Mennen brands. "The compressed formats have allowed us to take leadership of this market", says François-Xavier Apostolo, Vice President of Marketing for Home and Personal Care at Unilever. To put this into context, at the end of 2013 Unilever had a market share of 27% (source: Nielsen), representing a huge leap in the space of a year as the company left 2014 taking a third of all deodorant sales in France. Furthermore, sales of compressed deodorants for women already account for a market share of approximately 15%.

This is proof indeed that Unilever has been able to successfully convince French consumers that it is worth switching to the compressed format, aided by the company increasing its advertising spending by 15% last year and launching some major television campaigns. Indeed, figures from TNS Sofres reveal that 92% of French people believe that protecting the environment is important in everyday life, and (according to a Commission of Sustainable Development report) it is an important or very important purchase criterion for 77% of French.

In 2015 Unilever the company has taken "la révolution Compressé" further by launching eight new references for women to continue to grow the migration to this new technology. With the launch of new products within its Monsavon, Rexona and Dove brands Unilever will be increasing the number of compressed deodorants in its women's portfolio to 60% this year from 34% in 2014.

Joining the Dove range are two new references, including Dove Go Fresh Grenade & Verveine Citronnée which incorporates a pomegranate

“The deodorant market is not yet mature – the penetration rate is 70% – which is below the other hygiene categories like shower and hair, so there is a big potential for further recruitment that allows us to anticipate growth over the coming years”

Sophie Vassy, Product Manager, Deodorants and Liquid Soaps at Le Petit Marseillais

6%

Value growth of deodorants in France, 2014
Source: Nielsen

Unilever launched its range of compressed deodorants across its men's portfolio – Rexona Men, Axe and Williams – last year

fragrance, the number one preferred scent on the market according to Nielsen, along with verbena for a fresh yet delicate perfumed deodorant. The second new compressed deodorant is Dove Talc Soft, with a delicate powdery fragrance, which also comes in a roll-on format. Meanwhile, Monsavon's range has been extended with a new variant, Lait, Grenade & Fleur de Jasmin, a fruity and tangy milk, pomegranate and jasmine flower scent that brings the brand's total number of compressed spray deodorants to four.

And Rexona has extended its MotionSense technology throughout its range, including compressed formats and also introduced Invisible Black + White which incorporates a formula which is proven to protect clothes from white and yellow marks, as well as offering 48-hour protection. The new range is available in the 100ml compressed aerosol format and roll-on.

However, what is more likely to grow further substantial growth this year for Unilever is its launch of the compressed format across its men's brand portfolio – Rexona Men, Axe and Williams. Already launched successfully in the UK, Unilever introduced 11 references in January and the company expects that the notoriety of the compressed format with 80% of women in France will undoubtedly help to translate to sales of the men's products, as they remain the key purchasers in the deodorant category. The company launched five Axe, four Rexona Men and two Williams deodorants in the compressed format, including this year's Axe fragrance range Black, a more sophisticated and sleeker design and subtle and refined fragrance with the tagline "less is more".

As Unilever is not patenting this technology – which it says is to reaffirm its commitment to the environment and provide all competing brands the opportunity to use the compressed format – more brands are expected to launch their own deodorants with this technology.

However, Beiersdorf also launched a same-sized 100ml range with Nivea Pocket earlier this year, which does not use the compressed technology, but targets consumers looking for convenient on-the-go deodorants. The launch sparked a complaint by Unilever to the tribunal de commerce de Paris which criticised the similarity of the product designs of the Nivea Pocket range – in particular that they could lead consumers to think the deodorants used the same technology and offer the same amount of uses, while being sold for a lower price. Following the complaint, Beiersdorf made a packaging amendment after reportedly coming to an agreement with Unilever, and Nivea's Pocket deodorants continue to be sold in France.

Dynamic growth

The French deodorant market has become a hotbed of innovation in recent years, and Johnson & Johnson's significant roll-out of Le Petit Marseillais into the deodorant market last April, with four sprays and roll-ons containing essential oils sourced from Provence, has also helped to drive the category's recent dynamic growth. Speaking to **Cosmetics Business Markets** about

the brand's first year in the deodorant market, Sophie Vassy, Product Manager, Deodorants and Liquid Soaps at Le Petit Marseillais comments: "We have achieved a great launch year. We can even talk about it as the best Le Petit Marseillais launch if we compare performances spread over 12 months, to the last categories that we launched into (hair care in 2003 and body care in 2007).

At the end of December 2014, we became one of the key players in the market, in eighth position with a market share of 3.4% (between June and December). And within our segment, perfumed deodorants, we have even taken third place, in front of Tahiti (Colgate-Palmolive) and Fa (Henkel)."

Vassy notes that Le Petit Marseillais has recruited more than one million women to use the brand's deodorants: "The launch has also benefited all of the entire Le Petit Marseillais brand. In fact with deodorants, the brand has passed the threshold of 50% penetration! And we have continued our conquest with great dynamism in 2015. At the end of May value market share was 3.3%."

The importance of innovation is paramount to the growth of the deodorant category. In fact according to Vassey, innovation accounted for 40% of category growth. "In 2014, we observed a very positive context for the market which grew in value and volume (respectively up 85.2 and 5.6% vs. 2014 according to Nielsen), and continues to recruit new consumers (360, 000 individuals according to Kantar, 2014)," says Vassey. She claims that Le Petit Marseillais was



Launch highlight: Old Spice deodorants burst into France

Old Spice (P&G) has joined the French supermarket scene this year, entering supermarket chains E. Leclerc in May, followed by Auchan and Système U in June. In September it will also launch in Cora. Known for its humorous advertising and tongue-in-cheek tagline "The man your man could smell like", the brand has launched eight lines: Whitewater, Danger Time, Swagger, Lagoon, WolfThorn, HawkRidge, BearGlove and LionPride available in 150ml spray formats. The brand, which announced last year that it would be entering the French market, has supported the launch with its first advertising campaign in the country, a video specially adapted for France called Ça Va Faire Mâle (it'll make you male) featuring actor and former pro-footballer Terry Crews. Old Spice, which is also available on Amazon in France, sold out its inventory in less than a week after the video was launched on YouTube and Facebook.



the leading contributor to the growth of the women's deodorant category.

Offering reassurance

And brands have zeroed in on several trends to provide new innovation. The main market trend remains very functional: efficacy, with many brands offering 24 or 48-hour protection as standard, yet many innovations pick up on several trends. Vassey notes that a key trend is for "more naturalness and reassurance – we know that deodorant consumers want reassurance. There is a real passion for it, especially after the controversy over certain ingredients such as aluminium salts, alum stone and parabens."

Le Petit Marseillais' deodorants, for example, offer 24-hour protection and are free from aluminium salts, parabens and alcohol. They also avoid leaving white or yellow marks on clothes. The approach, says Vassey is "fun and caring" and the latest products, launched in March this year are fragranced with pomegranate, a scent that has become very popular in the deodorant market and sage essential oil. Huile Essentielle de Sauge & Grenade de Méditerranée is a sparkling and tangy

fragranced deodorant that comes in a 200ml spray and a 50ml roll-on.

L'Oréal has clearly had some stiff competition over the past year, but is fighting back with a number of innovative new ranges across its deodorant portfolio that also pick up on the trend for naturalness, reassurance and efficacy. Cadum, for example, introduced a range that is free from aluminium salts, alcohol and parabens, while also offering 48% greater efficacy against odour and humidity compared with previous formulas as well as "100% respect for the skin". Cadum Déodorant Micro Talc is formulated with soft micro-talc particles that are said to absorb nearly 50% of their weight in water, leaving skin feeling smooth, and perlites, which absorb up to 3.5 times their weight in water. Meanwhile the addition of new ingredient pidolic zinc protects against body odour. There are five perfumed varieties, including Fraîcheur Coton, Fraîcheur Anti-Traces, Fraîcheur Fleur d'Oranger, Fraîcheur Pivoine and Fraîcheur Hypoallergénique. Each is available in a spray and roll-on format, apart



Brand watch: Bourjois

Bourjois was established in 1863 by French actor Joseph-Albert Ponsin, who created make-up for stage performers. At the turn of the 20th century, the brand was purchased by Chanel's Wertheimer family, and in April this year, Bourjois was acquired by Coty. In France, the brand offers an extensive range of deodorants and shower gels as well as its core colour cosmetics products. This year the brand introduced Déodorant Haute Fidélité which is designed to combine effectiveness with femininity, with a 72-hour anti-perspirant action, stay-dry formula to keep under arms dry and allow the user to dress immediately after application, a gentle alcohol-free formula and a long lasting floral fragrance with notes of musk and peony. The product, with its eye-catching bottle design and breton stripes motif, is available in a 200ml deodorant spray. **Cosmetics Business Markets** speaks to Samya Anchoum, International Senior Product Manager – Fragrances & Body Care at Bourjois about the brand's positioning in the deodorant market

How has the past year been for the deodorant market in France?

The deodorant market in France grew by 6% in 2014, the best performance of all beauty/hygiene categories. This growth was driven by the compressed format innovation for spray deodorants. Twice as small as the usual 200ml deodorant (100ml), they contain as many active agents and can be used for as long as the 200ml size.

How does Bourjois' new High Trust deodorant respond to current consumer demands for deodorants?

Bourjois' new High Trust deodorant responds to a strong consumer expectation: efficiency. Thanks to its infallible dry formula it guarantees fresh

underarms for 72 hours. What's more, it has a long lasting sophisticated 'flowery' fragrance inspired by fine fragrance: peony and musk.

The deodorant market is mature and highly competitive. What does Bourjois offer consumers that sets it apart?

Bourjois is a challenger brand on the deodorant category which is globally over led by a few groups with high investments. Nevertheless, Bourjois has a very unique positioning which is appealing for both retailers and consumers. It relies on our specific names and execution, on textures, quality, and above all on our perfume compositions that are benchmarked on fine fragrances. We sum up our positioning by saying Bourjois hygiene products (shower gels and deodorants) offer perfumer quality at an accessible price, and on deodorant especially, we are the only brand to reconcile efficiency with high femininity and sophisticated perfumes.

What do you think the outlook is for the deodorant market in France for the coming year?

For next year, it is likely that a lot of other brands will go for the compressed format technology. Efficiency remains the main expectation on the category so we can predict that strong new technologies will emerge in this way. The promises of efficiency are growing more and more precise, adapting to each body and each user.



Samya Anchoum
International Senior
Product Manager –
Fragrances & Body
Care at Bourjois

Consumers are looking for reassurance from deodorant brands, which have responded by launching products free from aluminium salts and parabens

from Fleur d'Oranger, which comes in a spray format only.

The Group's Narta brand innovated with Déodorant Pierre d'Alun Micro-Huiles, which combines two active minerals, alum stone for its anti-bacterial properties and perlite, which absorbs moisture for provide 48-hour efficacy. However, the new range is also formulated with two micronised oils to provide the skin with softening and soothing benefits. These include virgin sweet almond oil to nourish the most delicate skin, and monoi oil to help moisturise and protect the upper layers of the epidermis. The range, which includes a spray and roll-on is fragranced with citrus and fruit accords in the top notes; a flowery heart of rose, lily, violet and frangipani; and a woody and vanilla base.

Skin soothers

Skin care benefits continue to be another important element for deodorant brands to shoehorn into their developments, even for brands that have traditionally based their ranges on other propositions, such as perfume. L'Oréal's Ushuaïa brand, for example launched a new deodorant in January in its Polynésie line that is said to be ideal for shaved underarm skin, as it combines the benefits of almond oil to protect and soothe the delicate area while also being formulated without alcohol. The neroli petal-scented Déodorant Soin Huile d'Amandier et Pétales de Nérolis spray is formulated without aluminium salts, but with perlite like L'Oréal's other launches this year, offering 24-hour anti-moisture and anti-odour efficacy for the spray and 48-hours prolonged effect for the roll-on.

Meanwhile, Narta was back with another new range, this time promising to be the first deodorant which makes underarm hair growth less visible for longer. According to a U&A France study in 2012, 94% of women shave or wax their armpits, while four in ten women complain of irritation and discomfort from rough and irregular hair growth, black shadows and ingrown hairs. Furthermore, 51% of men now shave their armpits. Narta's solution is Peau Parfaite, a range which claims to improve the quality of skin texture and soften the hair for a closer shave, making regrowth less visible and less frequent shaves possible, while also reducing irritation. The range contains a molecule called LHA, derived from salicylic acid, which helps to soften hair facilitating a closer shave and making regrowth less visible. On skin, the molecule is said to refine skin texture. The deodorants, which offer 48 hour protection, are available in both men's and women's variants in spray and roll-on formats.

A final women's deodorant launch from L'Oréal comes again from Cadum, this time focusing on a solution that is gentle on delicate fabrics, as well as sensitive skin. Invisible Délicat Extraits de Coton is free from parabens, aluminium salts and alcohol and is especially formulated to prevent spotting on clothes. It is also formulated with cottonseed extract to sooth and soften delicate underarm skin, while offering a scent of fresh clean linen.

Back at Unilever, Dove added a skin caring

deodorant to its regular range of non-compressed deodorants, called Dove Pierre d'Alun et Beurre de Karité. Combining alum stone, shea butter and Dove's 1/4 moisturising cream, it is said to leave skin moisturised and protected for 24 hours. The alcohol and paraben-free deodorant is scented with notes of mandarin, bergamot, musk, rose and magnolia.

And natural beauty brand Annemarie Börlind introduced several new deodorants with skin care benefits as part of its recently launched body care range Body Lind. Baume Déodorant Roll-on is formulated with sweet almond oil for moisturise the skin and protect it from free radicals, and camelina oil, rich in omega 3 and 6 to calm red and irritated skin and reinforce the protective barrier of the skin. The roll-on is said to be particularly delicate and guarantees a pleasant fresh sensation. There are also two sprays in the range, Spray Déodorant Naturel and the limited edition Spray Déodorant Naturel Fresh, which are gentle enough for all skin types and include sage essential oil for its disinfectant and perspiration-reducing benefits.

Just for men

The men's deodorant market tends to be driven less by skin care benefits and free-from claims and more by ultra-efficacy and fragrance. L'Oréal has innovated in both of these areas over the past year, with its Men Expert brand introducing Thermic Resist, the first 48-hour antiperspirant that is formulated to remain effective at 45°C. Designed for men to use during intense physical activity, in high temperatures or in stressful situations, Thermic Resist is billed as the "ultimate solution to fight against times of excess sweat and bad odours".

Meanwhile Ushuaïa's Homme's new range, Terre, is a collection of four nature-inspired fragranced deodorants offering intense and powerful scents and 48-hour efficacy. Terre de Feu is a hot and spicy fragrance inspired by melting magna; Terre d'Ebène is a woody fragrance that combines notes of fern and amber; Terre d'Orange incorporates aquatic and ozonic notes; and Terre D'Origine features green notes and a fresh spicy woody trail.

Deodorants and anti-perspirants may appear to be an unassuming category compared to the likes of its more glamorous C&T cousins, such as facial skin care or colour cosmetics, but it has in fact emerged as one of the most exciting. The level of innovation that brands are bringing to the French market has created growth that is simply not being achieved in other C&T categories. Plus it has another, winning reason to be quietly confident about maintaining its successful growth rate. Vassy explains: "The deodorant market is not yet mature – the penetration rate is 70%, which is below the other hygiene categories like shower and hair, so there is a big potential for further recruitment that allows us to anticipate growth over the coming years. Also, we know that the first driver of market growth is innovation, and we have already seen many great initiatives this year."



Germany

A storm of salts

The German antiperspirant deodorant (APD) market turned in satisfactory results last year. According to IRI Germany, the total sector (including men's and women's deodorants and antiperspirants) grew 2.6% to €668.45m in 2014. Volume sales reached 362.16m units last year, up 3.7%.

Looking at the figures in more detail, aerosols were, yet again, the most successful format last year. This sub-category accounted for 60.2% of the value and 66.4% of the volume market, with turnover growing 2.3% to €402.45m and 3.4% to 240.49m units respectively.

Next in line were roll-ons with a 20.9% value share and turnover worth €139.75m, up 0.4%, while volume grew 2.0% to 84.95m units which equals 23.5% of the volume market. Pump sprays reached an 11% share of the value market which translates into turnover of €73.55m, up 10.9%. And although in terms of volume sales, pump sprays only account for a 5.8% slice of the market, the sub-category shot up 15.9% to 21.14m units. Deodorant sticks were the fourth-biggest sub-category, with sales of €47.36m last year, an increase of 1.1% while volume grew 5.8% to 13.94m units.

Deodorant creams fell 6.3% to €4.77m last year with volume sales doing equally badly, down 7.3% to 1.29m units. And boxed deodorants – including crystals and other solid formats – plummeted 32.2% to €0.31m and 31.7% to 0.16m. The final category, deodorant wipes, managed increases of 3.6% to €0.26m and 5% to 0.20m units respectively.

Salt and shake up

The positive overall result of the sector is even more remarkable when you consider that antiperspirants, which account for more than half of the entire market, registered a poor performance in 2014. This category dropped 5% to €346.20m in value and 4.1% to 204.91m in volume. Standard deodorants, on the other hand, climbed 12.2% to €322.25m and 16% to 157.25m units.

This development can be traced back to the ongoing public discussion about the health dangers – or otherwise – of aluminium salts (aluminium chlorohydrate or ACH), an ingredient commonly used in antiperspirants. There is no confirmed medical data about a link between ACH and cancer but even so, this is

Germany: APD market, by format, 2014

	€m	%+/-	Units m	%+/-
Total market	668.45	2.6	362.16	3.7
Aerosols	402.45	2.3	240.49	3.4
Roll-ons	139.75	0.4	84.95	2.0
Pump sprays	73.55	10.9	21.14	15.9
Sticks	47.36	1.1	13.94	5.8
Creams	4.77	-6.3	1.29	-7.3
Crystals	0.31	-32.2	0.16	-31.7
Wipes	0.26	3.6	0.20	5.0

Source: IRI Germany. Totals may not equal sector values due to rounding

Germany, APD market, by market share, 2014

	€m	%+/-	Units m	%+/-
Total market	100.00	2.6	100.00	3.7
Aerosols	60.2	2.3	66.4	3.4
Roll-ons	20.9	0.4	23.5	2.0
Pump sprays	11.0	10.9	5.8	15.9
Sticks	7.1	1.1	3.8	5.8
Creams	0.7	-6.3	0.4	-7.3
Crystals	0.0	-32.2	0.0	-31.7
Wipes	0.0	3.6	0.1	5.0

Source: IRI Germany

something that worries many consumers. And although the aluminium salts issue pops up regularly in the German media – especially in the coverage of influential consumer testing magazines *Ökotest* and *Stiftung Warentest* – last year the debate returned in full force and on a much larger scale.

This has shaken up the entire sector: several APD manufacturers hurriedly relaunched their deodorants with distinctive aluminium-free packaging claims, a wave of ACH-free products hit the market and quite a few brands lost significant market share, while others became more popular.

An Analyst at IRI Germany confirms: “Since the increase in media reports about the alleged negative effects of aluminium salts in APD products last year, aluminium-free deodorants have shown double digit growth especially among female consumers. Turnover of antiperspirants, on the other hand, has fallen for the first time in years. As a result, organic brands like Weleda or Speick but also labels like Nivea, Sebamed and CD, which have an aluminium salts-free, natural or skin-friendly positioning, have benefited from this trend.”

The APD market is characterised by a mixture of local and international brands. The drugstore retailers' own label brands, especially DM's Balea and Rossmann's Isana, play a very important role since they frequently launch limited editions which drive the entire sector forward.

Among the retail brands, the big players include Beiersdorf's Nivea and 8x4, Henkel with Fa, Unilever's Dove, Duschdas and Rexona, Coty with Adidas, L'Oréal Paris with Garnier and

-5%

Decrease in antiperspirant value sales in 2014

Source: IRI Germany

Henkel's Fa brand primarily focuses on fragrance, but recent launches also offer 48-hour protection

“Since the increase in media reports about the alleged negative effects of aluminium salts in APD products last year, aluminium-free deodorants have shown double digit growth especially among female consumers. Turnover of antiperspirants, on the other hand, has fallen for the first time in years”

Analyst at IRI Germany



Lornamead with CD. Although most companies offer both deodorant sprays and antiperspirant in their APD line-ups, 8x4, Fa and Duschdas are among the brands that primarily focus on fragrance-based deodorant body sprays. Adidas, Rexona and Garnier, on the other hand, tend to have more functional antiperspirant products.

Free-from formulas

Nivea, the star brand of personal care manufacturer Beiersdorf, is one of the most popular deodorant brands on the market. Nivea has an extensive APD portfolio which includes almost a dozen variants. In early 2014 the brand relaunched its aerosol range with an elegant new cap-free design. There were also two new product launches last year which, perhaps not entirely surprisingly, were aluminium-free deodorants.

And indeed, IRI comments: “For Nivea in particular, aluminium-free deodorants were one of the main growth drivers last year. In addition, the brand received a good review in *Stiftung Warentest*’s study of aluminium-free deodorants last year. This also helped Nivea’s turnover.”

In October 2014, Nivea launched Fresh Pure Deodorant. The ACH-free formula includes a special ingredient, Bio-Florine complex, which is claimed to offer protection against odour for up to 48 hours. Michael Urban from Nivea Deodorant’s R&D department explains: “Sweat itself doesn’t smell. However, our skin surface – especially the moist and humid armpit area – contains millions of bacteria which react with the sweat and cause the unpleasant smell. Our antibacterial Bio-Florine complex keeps the bacteria from growing and therefore helps to prevent odour development.”

And just a few months ago, the brand came out with ACH-free Fresh Flower Deo Spray, a feminine deodorant scented with a soft jasmine fragrance.

Stablemate 8x4, another classic on the market, also came out with a summer-inspired deodorant offering in April. The aluminium-free 8x4 Ocean Fresh Deodorant Spray combines intense floral notes of blue lotus and aromatic water lily with accords of fruity peach. The light fragrance is claimed to evoke a feeling of freedom and freshness.

Like 8x4, Henkel’s Fa is more fragrance-inspired than functional. The brand’s popular bath and body care sub-brand, Moments, is regularly extended with new product ranges. These always include a deodorant spray in addition to one or two bath and shower products.

Last August Fa introduced the Glamorous Moments range, which features top notes of green tea and bergamot built around a heart of black orchid, voluptuous jasmine and sweet lily of the valley, and a base of aromatic sandalwood and vanilla. And this April, Fa relaunched its Fresh & Dry Grüner Tee (green tea) antiperspirant spray with a new formula. The ingredients complex now includes Non-Stop Fresh technology claimed to protect against wetness and odour for up to 48 hours.

DM’s Balea has a prolific launch pace across all C&T categories and this also includes the

deodorant sector. The brand’s frequent bath and body care limited editions always include a deodorant spray, too. Since Balea’s deodorants tend to be fragrance-focused rather than functional, the majority of the brand’s deodorants now carry prominent “free from aluminium salts” stickers on the packaging.

In August 2014, the brand brought out deodorant sprays to match the two limited edition shower gels, Shining Berry and Shining Kiwi. Scented with notes of sweet raspberry fragrance and fruity kiwi respectively, the aluminium salts-free deodorant

Launch highlight: Alverde Deo Cream

Alverde made deodorant headlines with its latest deodorant cream launch. Creams are a very under-represented segment of the APD market. There are few mainstream drugstore brands that even carry this format – this is hardly surprising since the average German APD user tends to prefer the more convenient aerosol or roll-on. In the organic deodorants sector, however, consumers tend to see things differently.

As a rule, organic consumers are very eco-conscious indeed. Aerosols – or any other propellant-powered APD formats – are considered a big no-go and organic brands like Speick, Weleda and Lavera offer their deodorants as pump sprays or roll-ons. And while many organic beauty fans like the convenience of these formats, the organic demographic also tends to buy more deodorant creams than the average cosmetics user.

The big mainstream organic brands rarely offer creams in their deodorant line-up, however, so many organic beauty fans buy their deodorants online. There is a host of small artisan organic brands that specialise in hand-made cosmetics – among the better known brands are Wald Seifen, Wolkenfussel and PonyHütchen – and usually offer a wide range of deodorant creams. These are typically based on shea butter or coconut oil with sodium bicarbonate, zinc oxide or starch as deodorising ingredients. However, very few retailers actually stock these products and you have to order them through the Internet.

Which is why the recent launch of Alverde’s Deo-Creme Lemongrass Salbei was eagerly anticipated on many organic beauty blogs and consumer forums. Deo-Creme Lemongrass Salbei contains anti-bacterial zinc, organic witch hazel extract, moisturising sunflower oil, organic lemongrass extract and sage extract. The texture is described as light and creamy and the product is claimed to keep the skin dry and fresh, preventing unpleasant odours.

This launch might also have a signal function for the organic deodorants market. Alverde is an immensely popular brand with a very wide distribution. And whenever Alverde – or stable-mate Balea for that matter – introduces a new product format or category, it tends to spur other retail brands into action.



sprays are claimed to protect against odour for up to 24 hours. At around the same time, Balea launched Golden Magic Deo-Bodyspray.

Golden Magic is scented with a sensual sweet fragrance and is claimed to protect against odour without leaving white residue. At around the same time there was a new limited edition, the Black Secret Deodorant Body Spray, which is scented with refreshing and aromatic notes of vanilla and orange.

Three of Balea's most recent launches were also ACH-free. Cabana Dream Deo-Bodyspray, another limited edition, came out in January 2015 and features juicy notes of maracuja and peach. Kirsche Deospray, which was launched in April, has a cherry-scented fragrance and claims to offer 24 hour protection against odour. Just one month later, the brand launched Fresh Deo-Bodyspray which is scented with an invigorating and refreshing fragrance and Shining Cocos which, as the name indicates, leans towards a tropical fragrance sensation.

The citrus-scented Pink Pomelo Anti-Transpirant Deospray, on the other hand, is an antiperspirant, as is Active Deodorant which has also just appeared on DM shelves across Germany. Claimed to protect against wetness and odour for up to 48 hours, Active Deodorant comes with a fresh, invigorating fragrance. Stablenate Alverde, DM's organic C&T brand, launched a new deodorant roll-on in January 2015. Fresh Deo Roll-On contains algae extract, organic bamboo extract and organic aloe vera juice and is said to protect against odour without leaving white residues on clothing.

Competitor Rossmann's main C&T brand is Isana. In addition, there is the teenage Isana Young range (up until early 2015, the brand was called Synergen) and the fragrance brand Mel Merio.

Mel Merio offers uncomplicated and straightforward fragrances which are priced at around €5. Last summer, the brand brought out three new perfumes each of which was accompanied by a deodorant spray. It's Blossom Time, scented with a floral fragrance combining juicy notes of fruit and delicate rose, contains moisturising panthenol and vitamin E to care for the skin. It's Glamour Time is a more sensual fragrance variant, scented with warm notes of patchouli and sweet vanilla rounded off by orange blossom and zesty mandarine. It's Pool Time is, unsurprisingly, an aquatic fragrance scented with sparkling tropical fruits.

Isana Young brings out new deodorants several times a year. This April, for example, the brand launched Vanilla Love Deospray, an alcohol-free limited edition which, needless to say, is also free from aluminium salts. Other recent deodorant launches were Fruity Flirt and the floral-inspired Romantic.

German bath and body care brand CD was launched back in 1971. CD started out with a transparent soap – at that time a bit of a novelty in the German personal care market – and then moved into bath and body care. A few years ago, the brand expanded into the facial skin care sector.

From the beginning one of the brand's claims was the so-called 'Reinheitsgebot' (purity requirement) – as few synthetic ingredients as possible and, if available, derived from natural sources. Today, CD still sticks to the Reinheitsgebot which, of course, is much more comprehensive in 2015 than it was 30 or even 15 years ago. CD products are formulated without mineral oils, parabens, silicones, colourants and animal-derived ingredients. And although CD is not an organic brand, it comes pretty close. Most consumers associate the brand with naturalness and purity. As a result, CD has weathered the aluminium salts storm very successfully.

The brand's deodorant line-up currently comprises four different variants which are available as aerosols, pump sprays and roll-ons. In June 2014 CD Glücksgefühl 24H Deo launched. Available as a roll-on and pump spray, the deodorant is scented with an uplifting orange blossom fragrance and is said to prevent odour for up to 24 hours. And CD's latest release, from May 2015, is Große Freiheit Frische Brise (great freedom fresh breeze), a marine-inspired deodorant scented with an aquatic fragrance.

Functionality rules

Unilever's Dove and Rexona brands are both major players in the German APD market. Dove's APD portfolio currently comprises 14 APDs, the majority of which are aerosols and roll-ons. In summer 2014, Dove brought out Cucumber & Green Tea Scent Deodorant Spray in the brand's Go Fresh bath and body care range. The deodorant is free from aluminium salts and comes with a fresh, invigorating fragrance. This February, Dove launched an entirely different deodorant: the alcohol-free Soft Feel 48h Anti-Transpirant Spray is scented with a warm powdery fragrance.

Stablenate Rexona relaunched most of its deodorant aerosols last year, with new packaging and improved product formulae. Even in this functional APD brand the aluminium-free trend was visible. In August 2014, a new ACH-free variant came out: Rexona Shower Clean Deodorant, a body spray scented with a fruity floral fragrance which is claimed to give a "freshly showered" feeling. Just one month later, the brand relaunched its entire range of antiperspirant roll-ons with new packaging and MotionSense technology. This ingredients complex is described as containing micro capsules which react to movement rather than wetness, thus offering antiperspirant protection much sooner than other antiperspirants.

Since Adidas (Coty) is one of the most famous sport brands ever, it comes as no surprise that the company's APDs also have a strongly functional positioning. Adidas' women's line-up was extended with a new alcohol-free 6-in-1 antiperspirant range last summer. Adidas for Women 6in1 features Cool & Care technology which is described as offering protection against wetness and odour for up to 48 hours while minimising white marks and yellow residue. The formula includes antibacterial ingredients and Active Freshness technology with freshness capsules and a zesty citrus fragrance.

Rexona also picked up on the aluminium-free trend with the launch of ACH-free Shower Clean Deodorant



In March 2015 another functional deodorant followed: Adidas Woman Climacool Anti-Perspirant Deodorant Spray contains movement-activated freshness capsules and is claimed to offer 48-hour protection against sweat and odour.

Twists and turns

2014 was a turbulent year for the APD sector. The aluminum salts debate has stirred up the industry and will most likely continue to influence the market for the foreseeable future. However, at some point the public uproar will calm down, as

ingredients scandals tend to do sooner or later. After all, most manufacturers have now confirmed their positioning, highlighting their ACH-free claims through new packaging, additional stickers and marketing campaigns. And aluminium-free launches will probably continue to dominate the market over the next year or so.

However, despite the very vocal ACH-debate in Germany, many consumers still prefer antiperspirants. Antiperspirants are not going to disappear from the market, although it might take some time for the category to bounce back.

Italy Drying up

Italy's deodorant and antiperspirant market took another dip in 2014, sliding 1.2% to €405m. The downward trend was evident in all channels. Although sales continue to be dominated by the mass market – around 45% of the category's revenue comes from hypermarkets and supermarkets – sales in this channel fell by 1.7% to €182.4m. Sales also dropped in pharmacies – by 0.2% to €57.2m – and by 9.9% in perfumeries, to €17.9m.

Deodorants make up 31% of the body care market in Italy, so any negative movement takes some of the shine off the overall category. But that doesn't mean Italian women and men are letting themselves break out in a sweat of neglect.

While the range of new deodorants that were launched in the country over the last year may not have been extensive, the benefits that they offer

reflect a demand for fragrance, effectiveness and care for sensitive skin.

Taking care of sensitive skin was the focus for Paglieri, which added a deodorant to its Felce Azzurra Dolceprotezione line of skin care products. Specially developed for sensitive skin, Felce Azzurra Dolceprotezione deodorant is said to offer 48-hour protection. Its comes in 50ml Deo roll-on and 150ml Deo Spray formats. The fragrance of the new deodorant roll-on and deo spray does not contain allergens and is unique and delicate thanks to the natural essential oils used, the brand says – “just like a caress on the skin”. Its top notes feature aldehydes, citrus and juniper; it then moves into a heart of fougere, red rose, green before finding a foundation in talc, patchouli and clove.

Earlier in 2014, Paglieri also renewed its Felce Azzurra Classico, Fresco and Ambrato deodorant lines into three formats – spray, stick and roll-on – and completely reformulated its men's line. Promising 48-hour protection, the men's line comes in four new fragrances: U.Cool Blue, U.Dynamic, U.Rebel and U.Excite. Its renewed packaging has been designed to be ergonomic, functional and durable.

Bioetec Uomo (Deborah Group) expanded its men's deodorant line with a touch of comfort for men: Deodorante Benessere – per pelli sensibili. The products in the line boast a new unique formula designed for sensitive skin. It is also anti-stain, has a fresh scent and is claimed to last up to 48 hours. Other products in the new Benessere line include Eau de Cologne Benessere and Doccia Shampoo Benessere (Comfort Shower Gel).

Neutromed (Henkel) expanded its deodorant range with Dermo Defense 5, a line that is said to deliver five benefits: fighting the bacteria responsible for odour; antiperspirant moisture management; gentle protection suitable for all skin types; anti-irritant protection; and respect for the natural pH of the skin. The line includes four different products promising five different benefits.

Dermo Defense 5 Fresh azione non-stop aims to provide 48-hour non-stop fresh protection with its

A number of brands have tapped into the trend for on-the-go freshness, including Henkel's Neutromed



-1.2%

Decline in value sales of Italy's APD market in 2014

Source: Cosmetica Italia

Italy: Deodorants and antiperspirants, market value, 2014, €m

	Pharmacies	Perfumeries	Other channels	Of which mass	Total	%+/-
Deodorants and antiperspirants	57.2	17.9	329.8	182.4	405	-1.2

Source: Cosmetica Italia

antibacterial complex. Its formula enables it to gradually release its fragrance throughout the day. It is available in spray, roll-on and stick formats. Dermo Defense 5 Sensitive ipoallergenico has a paraben-free ultra gentle formula that is said to minimise the risk of allergies and respect the natural balance of the skin. It is also suitable for use after shaving and is available in spray, roll-on and stick formats. Dermo Defense 5 Invisible anti macchie is an anti-stain deodorant, specially developed to prevent the formation of stains and residue on black, white and coloured clothing. It comes in spray and roll-on formats. Dermo Defense 5 Dry extra-asciutto (extra-dry) has a high-performance formula that is said to control perspiration for up to 72 hours. It also controls sweat during sport and other extreme conditions. It comes as either a spray or a roll-on.

Supermarket chain Migros also added sensitivity to its I am deodorant line with I am Soft & Silky deodorant roll-on, promising gentle protection for 48 hours. Its formula contains aloe vera, making it particularly suitable for sensitive skin. It is also said to provide anti-stain benefits.

Anti-stain technology continued to feature in the deodorants launched over the past year in Italy.

Lycia (Artsana Group) expanded its Invisible Fast Dry range with Lycia Gel Invisible Fast Dry (see box), while Mirato's Breeze The Bianco spray features an Invisible White formula that helps to reduce the formation of white spots on fabrics. Suitable for sensitive skin, it is formulated with Moisturising Milk, which has emollient properties, and is alcohol-free. It is also said to effectively regulate perspiration for 48 hours.

Keeping it fresh

Freshness was also high on the agenda of deodorant brands. One of the most popular deodorant brands in Italy, Nivea (Beiersdorf) launched two new deodorants designed to bring both freshness and long lasting protection into the antiodorant world. Fresh Vitality acts with maximum sensitivity on the skin and has a fresh, revitalising fragrance, while Fresh Flower has a sweet fruity fragrance and is also delicate on sensitive skin. Both deodorants promise 48-hour non-stop action against bad odours and contain no aluminium salts. They are available in 150ml spray formats.

Neutro Roberts (Bolton Group) went fresh and natural with its new line of deodorants, Bio fresh Monoï & Argan. Its formula aims to combine efficiency, naturalness and pleasure, with organic argan oil and elixir of monoï, which help to keep the skin soft and moisturised. Freshness comes from its delicate scent of fresh, fruity and floral notes. It also promises 48-hour action. The Bio fresh Monoï & Argan lines comes in three formats: spray, vapo no gas and stick.

Mirato's Breeze Squeeze also uses argan to keep the underarm area soft and moisturised while providing protection against the formation of unwanted odour. Its scent has warm and welcoming notes that ensure freshness throughout the day. It comes in a squeezable, no gas format and is free of aluminium salts. Borotalco (Bolton Group) Milk is another deodorant line promising to leave delicate

skin soft and dry. It is the first Borotalco deodorant with moisturising milk, using the action of milk proteins to preserve the natural moisture balance of the skin. In addition, natural microtalc helps to absorb sweat. Borotalco Milk's 'invisible' formula also promises to reduce yellow stains on light-coloured clothing and white residue on dark fabrics.

Naturals brand Bottega Verde brings delicate freshness into the armpits with green tea in Lineafiori roll-on con estratto di Tè verde – fresco. Its formula is enriched with extracts of green tea and is alcohol free, so it can be used after shaving. Its scent features citrus, floral woody and amber notes.

Also new from Bottega Verde is Lineafiori roll-on con latte di Cotone – delicato. Enriched with cotton milk, the alcohol-free formula promises gentle, long lasting protection and a delicate fragrance with fresh, cosmetic, floral and amber notes.

Another fresh development is Infasil (Angelini) Doccia Fresh features anti-odour technology that aims to absorb odours rather than just cover them up. It contains Molecola 2C, a beta-cyclodextrin which absorbs sweat. The brand says it also 'releases fresh energy every time you need it', giving a shower-fresh feeling, for up to 24 hours. It adds that the use of beta-cyclodextrin in the formula means the amount of aluminium salts and perfume can be reduced, minimising the risk of skin allergy.

On-the-go innovations

For those who want to keep fresh on the go, Lycia has brought out Salviettine Antiodoranti Deo&Go, antiodorant wipes in a sachet suitable for use on the armpits or feet when travelling, in the office, during leisure time or while shopping. Thanks to Lycia's antiodorant system, they are guaranteed to provide 48-hour protection. They also feature the brand's Original fragrance with Deoactive technology,

“ Around 45% of the category's revenue comes from hypermarkets and supermarkets, yet sales in this channel fell by 1.7% to €182.4m ”

Brand watch: Dove

Antonio Giglio, Brand Manager for Dove (Unilever Italia), the leading deodorant brand in Italy, talks to **Cosmetics Business Markets** about deodorant trends in the country.

What were the principal trends in deodorants in Italy over the past year?

We saw an increasing interest in specific products for women and men.

What are Italian men and women looking for in a deodorant product?

Both men and women are looking for products that can offer freshness and aren't aggressive on skin. Recently we have seen the rise of stain-resistant market products.

What formats are most popular?

Spray is the best solution for women and men, especially because of its practical and hygienic format.

What were Dove's most popular deodorant products in Italy during the past year?

Original, Invisible and GoFresh.

What are the most popular sales channels for deodorants in Italy?

Large-scale retailers, above all, with their store formats such as hypermarkets, supermarkets, etc.



which helps to eliminate odour and regulate perspiration. It comes in packages of ten sachets.

For freshness on-the-go in more intimate areas, Neutromed launched Salviettine Intime, intimate wipes in two versions: Delicatezza Suprema (supreme delicacy) and Freschezza (freshness). Delicatezza Suprema has a pH of 4.5 and is said to have a protective action that is up to two times more delicate. Freschezza has a pH of 3.5 and offers effective antibacterial action and long lasting freshness. Neutromed Salviettine Intime comes in purse-size packets of 15 biodegradable wipes.

Mirato has developed a range of body mists for on-the-go freshness: Gocce di Malizia. The line comes in four fragrances: exotic and pampering Argan; fresh and clear Green Tea; stylish and refined Orchid; and romantic and delicate Lotus Flowers. They are all available in a 75ml spray format.

Fragrant energy

Bringing fragrance into the deodorant market, Migros launched I am Deo Black Diamond, a spray deodorant that tells consumers to wrap themselves in the heady scents of vanilla, musk and precious fruits.

But the most prominent fragranced deodorants were from men's perfume brands which continued to release deodorants as part of their new fragrance ranges. Bringing the energy, sun and smells of Sardinia to its deodorant range was Acqua di Parma (LVMH).

Ginepro di Sardegna, part of its Blu Mediterraneo line of fragrances for men, opens with aromatic notes of juniper blended with bright bergamot and spicy pepper, pimento and nutmeg. Juniper is also at its heart, enhanced by resinous notes of common sage and balsamic accents of cypress. Resting on the base are the warm and woody accents of Virginia cedarwood. The perfumed deodorant is said to have an ultra-soft texture that provides an energising fresh sensation throughout the day. Also in the line are eau de toilette, Energizing Body Milk and Energizing Shower Gel.

Bvlgari (LVMH) included a deodorant stick in its new Bvlgari Man in Black range. The warm, neo-oriental eau de parfum features top notes of rum, cardamom and cinnamon; a leathery floral heart of tuberose; and a base of black amber and leather accord.

Men's perfume brands, such as Acqua di Parma accounted for the most prominent fragranced deodorant launches



Launch highlight: Lycia Gel Invisible Fast Dry

Lycia (Artsana Group) expanded its Invisible Fast Dry range with Lycia Gel Invisible Fast Dry. It is described by the brand as a product that "revolutionises the world of deodorants in a tube". Its 'invisible' formula helps to reduce the formation of stains on both white and black clothes. It is also, as the name suggests, fast drying, and its transparent gel is said to eliminate unpleasant odours and sweating and provide a sensation of freshness for up to 72 hours. The Invisible Fast Dry range also comes in spray, vapo no gas and roll-on formats.



Carven Pour Homme deodorant (Groupe J. Bogart) aims to provide a sensation of freshness and comfort throughout the day. It was designed to extend the scent of the eau de toilette. The top notes are dominated by violet leaf, underscored by grapefruit. At its heart are warm and spicy notes of nutmeg, cedar and sage, sitting on a rich base of vetiver and sandalwood. The Carven Pour Homme line also includes aftershave balm, aftershave spray and bath and shower gel.

The fragrance of Toni Gard SeaSide, launched this spring, aims to evoke a cool sea breeze in the Hamptons that is both raw and wild and unpredictable. Available exclusively in Douglas, the oceanic scent for men has citrusy top notes of bergamot, mandarin, lemon, grapefruit and red peppercorn; a heart of lavender, sage, marine accord and tea; and a base of amber, sandalwood and musk. In addition to the roll-on deodorant, the line features an eau de toilette, aftershave lotion and shower gel.

Fresh and fragrant has been a clear trend for deodorants in Italy over the past year, combining long lasting protection with caring for the skin. It seems like a simple solution but as with other cosmetic categories, Italian consumers are looking for more than just deodorising or antiperspirant benefits in their underarm products.

Spain Own brand fizzles out

4%

Growth of men's deodorants in Spain in 2014
Source IRI Spain

The shift towards retailer own brand goods has stood out as a major trend in the Spanish cosmetics sector, indeed in many consumer goods markets, since the economic crisis of 2008. A number of categories, including deodorants, noted a movement towards *marcas del distribuidor* or *marcas blancas*, seemingly as consumers looked for lower priced products. It is, however, a longer standing pattern. As highlighted by a report from Nielsen published in March, sales of own brand products have increased every year for some 20 years up to 2014. So the fact that own brand sales failed to increase market share for the first time in two decades perhaps raises the question of whether these goods have reached a natural

ceiling. Time will tell whether the stagnation in own brand is not merely a reflection of an improving economy. As Nielsen points out, the smart shopper trend remains and price is still a major factor in purchasing decisions, as are promotions. Indeed, strong brand owner activity last year is one of the main reasons that further own brand growth was held back.

It's a pattern that is to some extent reflected in IRI Spain figures for the deodorant market. Overall sales remained flat (0.1%) at €250.8m in the 52 weeks to 29 March 2015. That result is despite a drop in the amount of product purchased to 83.1m units. In terms of retail outlet, some four fifths of sales are made in hypermarkets and supermarkets, where there was a 0.5% increase in sales to €203.0m as volumes fell by 2% to 71m units. The specialist perfumeries and modern drugstores recorded a fall in sales of 1% to €47.8m, although there was a 1% increase in volumes. In line with the Nielsen analysis, own brand deodorant sales fell by 10% to €44.2m as quantities plummeted 18% to 21.5m units.

A burst of growth

IRI divides the deodorant category into three: men, women and mixed, the latter being the source of the flat growth. Indeed, products aimed directly at Spanish men and women reported a 4% increase to €96.6m and 3% to €48.7m, respectively. The mixed segment is the largest and saw sales fall by 4% to €105.5m as volumes dropped by 8% to just under 44m units.

While brand owners certainly lead the way, it's not simply a question of large FMCG and cosmetics groups. Among the smaller brands to introduce new deodorants in the last year, Perspirex (Riemann) released a product that is designed to be longer lasting than some existing lines. Perspirex Plus used the CPX skin care system to create a roll-on deodorant for people with sensitive skin that is said to protect against sweating for at least five days. Cosmetics brand Nuxe, meanwhile, has added a new deodorant for men made without aluminium salts or alcohol. As the name suggests, Nuxe Men 24H provides protection against sweating all day long thanks to the deodorant properties of salvia. Furthermore, it has been formulated to avoid leaving white marks on the skin and stains on clothing.

Instituto Español introduced a deodorant in its Piel Sana (healthy skin) collection that hit shelves last summer. The natural deo-cream antiperspirant offers 48-hour protection while moisturising the sensitive skin. The Andalusia-based firm has also redesigned the pack to make it easier to apply. A roll-on format has also been added in recent months and both are made without parabens and allergens.

Continuing the natural ingredient theme, Rituals has included two deodorants in its new men's range that was launched earlier this year. Ancient Samurai uses a range of botanic, natural ingredients such as bamboo, organic basil, aloe vera and volcanic minerals to create a body care collection that is said to be inspired by the Japanese warriors' cleansing routine before

Spain: Deodorants, market value and volume, 2014-2015*

	Total	% +/-
Value (€m)	250.8	0.1
Volume (units m)	83.1	-1.5

*52 weeks to 29 March 2015. Source: IRI Spain

Spain: Deodorants market value by segment 2015*

	Value (€m)	Volume (1000 units)
Men	96.6	24.2
Women	48.7	15.1
Mixed	105.5	43.7

*52 weeks to 29 March 2015. Source: IRI Spain

heading into battle. As well as a shave gel, scrub and shampoo, it includes Cool Deo Stick and Cool Deo Spray. Both antiperspirants use cedar wood and bamboo for the fragrance and offer 24-hour protection.

The big name in deodorants in Spain, as in other countries, is Unilever. In recent months it has added to its continually expanding Axe (Lynx in the UK) and Rexona (Sure) collections. Axe

Disna Corpore Sano Desodorante de Tomillo

Spanish firm Disna (Distribuidora de Productos Naturales) puts the environment at the heart of all its activities. It recently revealed that, in 2014, it reduced its carbon impact, or greenhouse gas emissions, by more than 35 tonnes and uses energy from renewable resources such as sun and biomass. This translates into products that, as the company's name suggests rely heavily on natural ingredients. Two recent examples are in the deodorant category that have been added to the firm's Corpore Sano collection. Desodorante de Tomillo contains 97% natural ingredients and biologically certified extracts to help control sweating and reduce bad body odour. The key component is thyme (tomillo in Spanish) that has an antimicrobial action making while triethyl citrate and glycerine help prevent the build of bacteria that cause bad odour. The second product is Desodorante de Tilo with biologically certified lime extract that works on the sweat glands. Both products contain salvia to offer a pleasant aroma.



“Strong brand owner activity last year is one of the main reasons that own brand growth was held back”

Black is billed as the brand's most “subtle and refined” fragrance for men and has been packaged in a “minimalist, masculine” format. Developed by Ann Gottlieb, the fragrance expert behind the iconic CK One perfume, Axe Black opens with fresh notes of watermelon, bergamot and frozen pear. This is followed by a blend of cedar wood and patchouli to create a masculine scent that is not overbearing. As well as the deodorant and antiperspirant, there is also a shower gel and eau de toilette. To launch the new line, the firm opted for a video in collaboration with artist Novo Amor that features a version of Guns ‘n’ Roses’ *Welcome to the Jungle* hit.

Rexona, meanwhile, introduced Invisible Black & White for men in both spray and roll-on format. The antiperspirant uses Unilever's MotionSense technology that releases fragrance as the person moves and has been designed to reduce the appearance of white marks on black clothes, or yellow stains on white garments that can result from deodorant use.

Another major international brand launch came from Garnier (L'Oréal). Mineral UltraDry is the firm's first 48-hour antiperspirant that has been enriched with Mineralite. This is a highly absorbent ingredient of volcanic origin that is said to help protect against sweating in extreme conditions. The deodorant works as a protective layer to control perspiration and bad body odour.

L'Oréal stablemate brand Biotherm, meanwhile,

has introduced Deo Pure Antiperspirant Cream that contains a tri-active mineral complex. Deo Pure is claimed to be more than just a deodorant as it contains soothing properties that are rapidly absorbed to minimise the risk of allergy or irritation of the skin. The non-greasy, non-stick formula avoids stains, while the specially created pack makes it easy to apply the right amount.

Another French brand, Yves Rocher, has launched an antiperspirant deodorant based on the aroma of Mexican lime. The alcohol-free product offers a fresh scent as well as protection against perspiration for 24 hours. However not all consumers like their deodorant fragrance to compete with their eau de cologne, and in recognition of this, Sanex (Colgate Palmolive) released Dermo No Perfume, a product that has no aroma but that is said to be just as efficient as the perfumed variety when it comes to protecting against sweating and body odour. The hypoallergenic formula means it is also suited to sensitive skin types.

It has clearly been another solid year of promotional activity from brand owners operating in the deodorant space. If, as Nielsen suggests, this has been the key factor in preventing further market growth for own brand products in Spain, it will be interesting to witness whether the continued activity over the coming months further limits the own brand presence in the deodorant category.

UK Starting to sweat

The UK may be one of the largest and most innovative deodorant and antiperspirant markets in the world, but unlike its French neighbours it is also mature, making any spurts of growth in either value or volume unlikely. Another factor at play in this category is shopping behaviour, with consumers using offers to stock up on their favourite deodorants. So how has the past year been for the brands? Donna Rankin, Senior Brand Manager for Soft & Gentle (Godrej) tells **Cosmetics Business Markets**: “It's been a tough one, to be honest. The number and depth of promotions in the last year has increased significantly, making it difficult for all brands to compete.”

Figures from Kantar Worldpanel reflect the difficulties the market has faced over the past year. Value sales of deodorants and body sprays did manage to remain stable, up 1.3% to £582.879 for

UK: Deodorant and body spray market, 2014-2015

	52 w/e 30 Mar 14	52 w/e 29 Mar 15	%+/-
Value (£m)	575.546	582.879	1.3
Volume (packs m)	371.592	367.449	-1.1

Source: Kantar Worldpanel

UK: Deodorant and body spray value share, by sector %

Sectors	52 w/e 30 Mar 14	52 w/e 29 Mar 15	%+/-
Deodorants	90.2	90.7	-5.2
Body sprays	9.8	9.3	-3.0

Source: Kantar Worldpanel

UK: Deodorant market, value share, own label versus brands

Sectors	52 w/e 30 Mar 14	52 w/e 29 Mar 15	%+/-
Branded	95.8	95.9	1.3
Own label	4.2	4.1	0.0

Source: Kantar Worldpanel

the year to 29 March 2015, but the market recorded a volume decline of 1.1% to 367.449m packs.

While it remains difficult to build value in this category, deodorants enjoy continued popularity with UK consumers. And data from Euromonitor

1.3%

Value growth of the UK deodorant market, year to 29 March 2015

Source: Kantar Worldpanel

reveals the extent to which sprays rule the roost over roll-ons as Britain's favourite deodorant format. Sales of deodorant sprays were valued at an impressive £503m by the market research company, while roll-ons totalled £119m in 2014. According to Unilever, 80% of the UK population favour aerosols above sticks and roll-ons; in fact, the company sells 187 million deodorant aerosols every year in the UK alone. The company also notes that the total antiperspirant aerosol (APA) market is now worth £151m in the UK.

Unilever has long dominated the UK market as the leading deodorant manufacturer and in 2014 it had a value share of more than 61% and sales of £399m across its brand portfolio, which includes Lynx, Sure, Dove, Vaseline Intensive Care and Impulse. The introduction of the company's eco-friendly compressed deodorant format has attracted consumers due to both the sustainability of the packaging and the convenience of the smaller can size. Introduced by Unilever in 2013 in the UK to its women's Lynx, Sure, Dove and Vaseline Intensive Care brands, and across its male portfolio last year, more than 40% of Unilever UK & Ireland's entire aerosol deodorant portfolio was compressed by the end of 2014. However, Euromonitor notes, "the launch of this new packaging format was expensive and Unilever will have to wait and see if it pays off, with its deodorant value sales increasing by 1% in 2014."

However, this year Unilever announced the particular success of Dove in the women's APA category, stating year-on-year growth in market share from 0.4% to 22.9% (source: Nielsen, week ending 3 January 2015), while Sure Women remains the UK's number one female deodorant brand in the UK (source: Nielsen week ending 8 November 2014). Sales of Unilever's Impulse body sprays also continued to rise in 2014.

The new compressed format has sparked a move among its competitors to follow suit – yet

Launch highlight: Soft & Gentle Visibly Smooth

Any product which can genuinely fulfil two or more needs in one is big news in today's multi-benefit-led C&T market, and Soft & Gentle expects its new Visibly Smooth variant in the Skin Science line to become "the most successful product in the range". The deodorant is claimed to offer hair minimising protection to leave underarms staying smoother for longer and resulting in visibly thinner underarm hair as well as a reduced 'shadow' appearance where regrowth appears. Donna Rankin, Senior Brand Manager for Soft & Gentle, says: "The growing popularity of hair minimising products, combined with a continuing demand for multi-tasking products, creates an opportunity for products such as Visibly Smooth to become a big trend. Using patented Kelisoft technology, the antiperspirant formula inhibits the VEGF protein which stimulates hair growth – resulting in significantly less hair growth in just eight weeks. This new technology not only provides customers with an enhanced experience, but streamlines their beauty regime."



this is something that Unilever, in a statement in May 2015, appears to be welcoming, "in a bid to help the whole deodorant industry cut its aerosol carbon footprint by 25%". Alan Palmer, Unilever Vice President of Research and Development for Deodorants comments: "There are three billion aerosol deodorants sold every year worldwide. If

“The deodorant market is actually in decline at the moment. However, key brands that are in growth are Nivea, Right Guard and high efficacy brand Mitchum”

Product Development Manager and Buying Manager at Tesco

Retail watch: Tesco

With 3500 stores and over 310,000 employees, Tesco is the UK's largest grocer, controlling 28.7% of the market. Tesco recently announced that it is the first retailer to offer a compressed range of deodorant products for men and women. The Pro Formula compressed range is available in 125ml sizes, which offer the same number of uses as a regular 250ml can. Tesco's Product Development Manager and Buying Manager speaks to **Cosmetics Business Markets** about the launch, and its bestselling branded deodorants

Why did Tesco decide to go compressed for its new Pro Formula Crystal range?

The market is moving towards compressed and customers are more aware than ever that compressed cans are more sustainable and use less packaging materials for the environment's benefit, while still performing the same as non-compressed versions. Being the largest retailer in the UK, we felt we also have a responsibility to drive it with the leading brands.

Other than own brand, which branded deodorants are selling well at the moment?

The deodorant market is actually in decline at the moment. However, key brands that are in growth are Nivea, Right Guard and high efficacy brand Mitchum. Unlike European and American markets, there is a greater growth in the anti-perspirant spray market than in roll-ons and creams.

What do you think customers are looking for from the latest anti-perspirant deodorants?

Confidence that the product will fulfil the lasting antiperspirant function but be kind to skin and pleasant to smell. Value for money is holding great importance to customers in the current climate as disposable income is being squeezed and the growth of the discount stores offer customers greater value for money. Tesco and Pro Formula ranges tick those quality boxes and it is also an easier price point for the customer to pick up.





High efficacy APDs are driving value growth in the deodorant market, as consumers are willing to trade up to products that meet their needs



they were all compressed, we could save 21,000 tonnes of aluminium – enough to build 10 million bicycles! For that to happen, our entire industry needs to move shoppers away from traditional aerosols and help them choose a more sustainable option. Unilever cannot do that alone – which is why we're sharing our technology with the industry."

One of the first brands to go on to utilise a new range in compressed cans was Soft & Gentle (Godrej) with its new Skin Science range (discussed in detail later), offering 75ml products that last as long as 150ml versions. Also quick on the uptake was Tesco, which this year became the first retailer to offer a collection of compressed deodorants in its own label line. Other than featuring the compressed technology, the design and packaging of the deodorants has also been redeveloped to become a standalone range within the Pro Formula brand, to emphasise the uniqueness of the compressed range. There are two deodorants for women: Pro Formula Crystal Aqua Cotton, a fragrance driven APD that features 48-hour protection against odour, wetness and helps protect against white marks; and Pro Formula Crystal Floral Soft, which provides even longer 72-hour protection. The men's variants include Pro Formula for Men Clear Ice, a fragrance-driven product, and Pro Formula for Men Stress Protect, which offers 72-hours' protection and is designed for men who sweat more when they are stressed.

Fresher for longer

Innovations that offer longer lasting or more efficient protection against sweat, wetness and odour are a key proposition in the deodorant and antiperspirant market. Claudio Bellen, Brand Manager for Sure at Unilever UK, says: "The high efficacy segment of the deodorants category is growing year-on-year and represents the single biggest sales opportunity for value growth in deodorants (source: Nielsen, value sales week ending 16 October 2014). This is due to consumers being willing to trade up to a product that will meet their needs." Commenting on the recently relaunched Sure Maximum Protection range for women, and the introduction of two new variants, Maximum Protection Stress Control and Maximum Protection Sport Strength, Bellen says that the range "taps into this sales potential as it offers double the protection of the leading antiperspirant in a unique cream format."

The new variants contain the brand's TRIsolid body responsive technology that is said to keep the user fresher for longer, and the revised packaging for the collection also contains specific labels to highlight the usage occasion to help the shopper to select an appropriate product. Unilever says that Sure Women continues to grow its "substantial market share of the high efficacy segment", which highlights the strength of Sure Maximum Protection within this space.

Adidas (Coty) is also a well positioned brand to bring greater performance to antiperspirants. For its latest range for men and women the brand has

Sector watch: Aerosol filling industry reports 7% growth in deodorants

Deodorants, antiperspirants and body sprays is the largest and one of the strongest categories for the aerosol sector, with UK producers filling 754.8 million cans last year, an increase of 7% according to the British Aerosol Manufacturers' Association (BAMA). Around 60% of deodorants filled in the UK are exported. Other personal care categories also experienced growth, in particular suntan and bronzing products with a year-on-year increase of 16% to 2.5 million, while hairspray also remains buoyant, up 10% to 97.8 million cans filled. There was, however, a notable decline for two personal care categories: colognes and perfumes in aerosol format, which decreased by 16%, and shaving products, which fell by 5%. This decline possibly reflects the difficulties that this category has experienced within male grooming, generally sparked by the trend for facial hair. **Cosmetics Business Markets** speaks to Dr John Morris, CE of BAMA, about innovation in the aerosol segment for APD products and why exports are so important for the business

How innovative do you think the aerosol segment for APD products is in the UK?

Innovation in product formulation, pack graphics and shape continue, combined with the unique properties of the aerosol delivery system. This combination keeps consumers engaged with the product format and gives shelf presence. One of the most important innovations over the last few years has been the smaller 'compressed' format which uses less propellant and packaging materials, making the products more sustainable while still giving excellent performance. In addition, formulation innovation has led to 72-hour protection products.

What are the biggest challenges that UK APD aerosol manufacturers are facing at the moment?

A key challenge is ensuring that sustainability is shown to be built into the product as consumers become more aware of the issues effecting lifestyle choices. Most aerosols currently are in metal, which is infinitely recyclable, and more than 90% of local authorities in the UK are accepting empty aerosols as a result of a campaign led by BAMA and others to improve kerbside recycling of empty aerosols along with other household recycling. Many consumers like the fact that they can recycle the packaging.

How do you expect the market to continue to develop over the coming year?

We expect UK aerosol fillings to continue to grow against a backdrop of a mature domestic market, underlining the importance of exporting. There is no reason to suppose that the growth in fillings in this aerosol category will falter. People like to use aerosols for deodorant protection, so as long as the product format continues to provide consumer satisfaction there are still many markets with growth potential.

utilised its ClimaCool technology, which it uses in sports apparel and shoes to help ventilate and keep the wearer cool and dry. The ClimaCool technology contains fresh capsules which are activated by movement, bursting throughout the day for an instant, refreshing citrus fragrance. Adidas also took a new step with its packaging, moving away from black and using a silver colour code for its male variant and white for the female antiperspirant, with bright blue wave graphics across both packs to represent the capsule technology in action all day.

A major development on the UK market this year has been the new Skin Science range from Soft & Gentle, a collection of three deodorants that demonstrates how today's consumers are looking for added benefits from their antiperspirant deodorants. Within this line is high efficacy deodorant Ultra Protect, which offers 72-hour protection and a light fresh fragrance as well as a 'unique skin synergy complex' that is said to help prevent irritation and promise reliable sweat protection. Soft & Gentle expects the Ultra Protect product to be one of the key performers of the new line, says Rankin: "We expect to see the Ultra Protect variant perform well, given the need for products that deliver long lasting results. The advanced 72-hour protection is perfect for people on the go, looking for that extra level of protection. With no need to reapply it gives them the confidence to go all day.

Naturally more

The Skin Science range is focused on offering added benefits as well as offering choice to fit with different lifestyles, and the two further products are Really Pure, which offers natural protection, and Visibly Smooth which offers hair minimising protection (see *Launch highlight*). The Really Pure variant offers the what consumers would expect from a natural alternative, being free from alcohol, aluminium chlorohydrate and allergens, and being

formulated instead with a natural mineral. It contains potassium alum to adjust pH and prevent odour-causing bacteria from growing. However, as with other products in the Skin Science range, it offers further benefits such as 48-hour protection, and it also includes oat oil, which "soothes and nourishes sensitive underarm skin that can sometimes be prone to irritation," explains Rankin, who can see the multibenefit trend growing in deodorants. "We believe we will see a rise in formulations bringing in extra benefits to give the customer added value and practicality," she says. "This year we expect that there will be an increase in APDs and deodorants that care for underarm skin as well as protecting against odour – seeing more ingredients that have traditionally before only been used in skin care."

Dove's latest antiperspirant moves into this arena. Following the likes of Beiersdorf's Nivea, which launched Powder Touch last year, Dove Soft Feel marks the brand's first move into the powder deodorant market. It includes the brand's ¼ moisturising cream and leaves skin feeling dry and soft on application. Tom Stone, Brand Manager for Dove Deodorants at Unilever UK, says: "Consumers are increasingly looking for products which care for their underarm skin. Dove Soft Feel taps into the growing trend for powder products and allows consumers to experience a new kind of underarm softness with a cracking fragrance. We're confident the launch will drive category growth by encouraging consumers to trade up to this premium product."

Scent continues to be an important purchase driver, and recognising this, natural brand Salt of the Earth (Crystal Spring) introduced its first fragranced product last August. Pure Aura spray is made from 100% natural ingredients, infused with a lavender and vanilla scent and features a combination of over 15 natural botanical extracts and oils. Free from

Scent remains an important purchase driver in this market. Natural brand Salt of the Earth recognised this by launching its first fragranced deodorant



Retail watch: Asda

Asda has over 525 stores across the UK with over 175,000 employees, and has been part of the Wal-Mart group since 1999. It is the UK's second-largest grocer with 17% market share. Earlier this year the retailer announced plans to invest £600m in opening 17 new supermarkets and revamping 62 stores in 2015. **Cosmetics Business Markets** speaks to Asda's Category Planning Manager for Beauty & Toiletries, Gemma Crowe, about its most successful brands in the deodorant and body spray category

Which deodorant/body spray brands have been bestsellers at Asda over the past year?

Lynx has been a consistent bestseller across the men's category and gifting – we're always amazed

at the volume Lynx Africa continues to sell.

What do you offer in terms of own label or exclusive brands of deodorants or body sprays?

We have our own label essentials and the mid-tier range. We don't have any exclusive brands but do have exclusive skus within some of the brands we have on offer to shoppers, for example Palmolive, Garnier and L'Oréal.

What promotions work well in the body spray/deodorant category at Asda?

Our shoppers are always passionate about great value and this year we have seen some great results through linksave mechanics on deodorants and body sprays.

ASDA



Gemma Crowe, Category Planning Manager, Beauty & Toiletries at Asda

UK: Deodorants, top five retailers*

Tesco

Boots

Asda

Sainsbury's

Morrisons

*based on spend share

Source: Kantar

Worldpanel

aluminium chlorohydrate, triclosan and parabens, it also includes aloe vera for its skin-soothing benefits and antibacterial honeysuckle, and being made from natural ingredients it leaves no white marks on clothes.

The Body Shop (L'Oréal) frequently launches fragranced limited edition body care ranges featuring perfumed sprays, and this summer it introduced a Virgin Mojito collection featuring an innovative fragrance format, Body Splash. The product is designed to be splashed onto the body after showering for a long lasting feeling of refreshment.

Meanwhile, in the men's category this year Lynx introduced Black, a range that offers a change of direction for the brand toward a more subtle and refined fragrance, as according to Mark Aschmann, Brand Manager for Lynx at Unilever UK, the brand "identified that in 2015 consumers will be looking for more premium and refined fragrances." Available as a body spray, APA and with a wider toiletry range, Lynx Black is designed to appeal to more understated tastes with a scent that opens with notes of watermelon ester, bergamot and frozen pear, combined with fresh fruits and a moss, cedar wood and patchouli blend.

The spray ahead

As manufacturers continue to raise the bar in the number and level of their innovations, competition between brands has grown stiffer. The past year has even seen Unilever UK having an advertisement banned by the Advertising Standards Authority for implying that Sure Invisible Black+White antiperspirant was a superior product to Nivea's Invisible Black and White for protection against yellow stains, but that this implied claim was not substantiated.

The deodorant category in the UK is challenging for all players, yet there is also optimism among them. Rankin says: "We believe innovation and product differentiation will enable us (Soft & Gentle) to build loyalty and continue to grow our brand."

Euromonitor notes that because the category is mature, pricing must be competitive and packaging should provide consumers with convenience.

Wipes present a convenient packaging solution, and Halo Wipes, which offers a range of skin care and hygiene wipes including deodorant wipes last year repackaged the whole line to give it a contemporary look and identity to resonate with existing customers while attracting fresh interest. Ian Anderson, Marketing Director of Halo Wipes, says "The stylish new look is cleaner with bolder prints and sharper lines which gives the packaging a brighter, more vibrant appearance – making our full Halo range more visually appealing for our target audience."

The Body Shop
launched an innovative
Body Splash format in
its limited edition Virgin
Mojito range

**PR watch: L'Oréal Paris Men Expert secures most press coverage**

Phoebe Rilot, Client Coordinator at Mymarketmonitor.com, tells **Cosmetics Business Markets** which deodorant products secured the most PR coverage in 2015

Deodorant may not be the most glamorous product that the health and beauty industry has to offer, but it serves an important purpose in our bathroom cabinets. Along with body sprays – the softer alternative to full-on edts and parfums – they feature regularly in magazines, particularly in advice columns. L'Oréal leads again here, as is usual, with Men Expert 48H Dry Ice Anti-Perspirant, followed by two heritage brands: Roger & Gallet and Crabtree & Evelyn. The calming and relaxing This Works Deep Sleep Body Therapy Spray closely follows La Source, with another anti-perspirant (Sure's Maximum Protection for Women) closing out the top five.



mymarketmonitor.com

UK: Top deodorant launches in the press

Product	Value £ 2014
Total	145,531
1 L'Oréal Paris Men Expert 48H Dry Ice Anti-Perspirant	7,124
2 Roger & Gallet Eau des Bienfaits Fragrant Body Mist	6,734
3 Crabtree & Evelyn La Source Refreshing Body Mist	5,651
4 This Works Deep Sleep Body Therapy Spray	5,459
5 Sure Women Maximum Protection Anti-Perspirant	4,556

For more details contact Phoebe Rilot
email phoebe@mymarketmonitor.com
tel +44 20 8831 7570 www.mymarketmonitor.com

Going forward, the compressed packaging format will continue to "become the norm for major companies in deodorants," believes Euromonitor, and Rankin agrees: "We believe we will continue to see innovation coming through and continued focus on compressed. Consumers are slowly beginning to accept the compressed format. An increased importance on sustainable and responsible manufacturing, coupled with the convenience and portability of the smaller size, will continue to drive demand for this format."

Russia Feeling fresh

Deodorants was one of the best performing C&T categories in Russia last year, recording value growth of 6.9% in 2014 according to Euromonitor. This level of growth makes it one of the higher growth countries covered in this issue's market report, but in fact the figure was lower than the 9% CAGR for the five year review period. Nevertheless, it was an improvement on the 2013 results, when Russia's deodorant market grew by 6.2%.

If growth is starting to wane, it is due to the gradual saturation of the deodorant category. According to Euromonitor, there is still a continuous inflow of new consumers, but this slowed down towards the end of the review period. Other factors include price increases being kept moderate due to the expansion of modern retailing and very high competition among brands within the category. As such, this means that there is a growing number of promotional activities and price offers.

Despite these factors, category growth remains highly positive and this is due to the increased level of importance and understanding about hygiene among Russian people.

Unlike other categories, the performance of deodorants is unique due to consumers' loyalty to formats rather than brands, notes Euromonitor. Consumers tend to buy deodorants on special offer and remain loyal only to the format of the products, such as roll-ons or sprays. Consumers considered roll-ons to be the most effective, and the most important product driver was protection, so manufacturers focused most of the development within this category. Deodorant sticks recorded a less dynamic performance, as these products, despite their efficiency, often leave white marks on clothes.

Unilever dominates

Whatever the country, the leading deodorant companies remain pretty much identical, and Russia is no different. In 2014, Unilever continued its leading position with a 22% value share, due to its wide portfolio of brands, Rexona, Dove and Axe, for which it has built a strong presence in the country. The next four largest companies are all among the largest international players in C&T too, with Beiersdorf taking a 15.5% share, Colgate Palmolive in third place with 9.6%, P&G hot on its heels with 9.3% and L'Oréal Groupe accounting for 8.8% of the market.

Russia: Top five deodorant companies, 2014

Company	% share
Unilever Group	22.90
Beiersdorf AG	15.50
Colgate-Palmolive Co	9.60
Procter & Gamble Co	9.30
L'Oréal Group	8.80

Source: Euromonitor International

Russia: Top five deodorant brands, 2014

Brand	Company	% share
Rexona	Unilever Group	18.50
Nivea	Beiersdorf AG	15.50
Mennen	Colgate-Palmolive Co	9.60
Fa	Henkel AG	8.00
Garnier	L'Oréal Groupe	7.50

Source: Euromonitor International

Yet while it was traditionally believed that Russian producers would not be able to compete with western European brands in the production of deodorants, today the situation has changed dramatically. Due to the growing demand for these products, the development of technology and production capacity, domestic manufacturers have come to the market, and nowadays many Russian brands – big as well as niche – have deodorants in their product assortments.

Local leaders

One of the largest manufacturers of aerosol products, Arnest introduced to the market a new generation of high performance antiperspirants called Deonica. The collection includes four lines: Deonica for men, Deonica Nature Protection with alunite mineral, Deonica Pro-Zaschita with 72-hour efficacy, Deonica Invisible and Deonica hypoallergenic for sensitive skin. All of the products in the range leave clothes mark-free and come in two formats: spray and roll-on.

Viking Deodorants, a range from another leading Russian producer, Krasnaya Liniya, is designed especially for men. The products work to prevent unpleasant odour and impart a feeling of freshness throughout the day. Deodorant Viking Blue Ice provides

6.9%

Growth of Russia's deodorant market in 2014

Source: Euromonitor International

Dr. Foot redesigned its range of foot care products, including a Refreshing Spray Deodorant for feet





“If growth is starting to wane, it is due to the gradual saturation of the deodorant category”

control over perspiration and protects against odour with a bright, strong and energetic fragrance that is said to give vigour and vitality. There are two further products in the line, Viking Fresh Deodorant for maximum protection against odour and Viking Sensitive, designed for sensitive skin.

Moscow-based SM Michel Laboratory recently redesigned its foot care range, Dr. Foot. All products contain active ingredients that have functional curative and preventive properties, which brings them closer to pharmaceuticals. The line consists of five highly effective means to address cosmetic skin problems for feet, including Refreshing Spray Deodorant for feet and Intense Liquid Talc to protect feet from sweat and odour.

Keeping it natural

Natural deodorants continued to show growth last year due to health concerns, with some consumers caring about the use of certain ingredients such as aluminium in deodorants. However, the share of such naturally-positioned products remained very small in 2014 as these products tend to have low awareness among many consumers, and considered by some to be less effective than regular deodorants. As such, it remains a very niche area within deodorants.

However, year-on-year natural deodorant launches have increased, and local manufacturer Don, which produces cosmetics based on Siberian plant extracts and active ingredients, introduced Deodorant Etna. The deodorant claims to offer a completely new approach and a universal solution for keeping the body feeling fresh as well as long term protection from sweat. It is based on 100% natural ingredients and features the mineral potassium alum to

provide maximum protection from the unpleasant smell of sweat.

In addition, the formulae consists of various extracts that enhance the action of the mineral, such as oak bark extract, which has tanning properties due to the high concentration of tannin; chamomile extract which offers an anti-inflammatory and soothing effect; and CO² extract of Siberian fir with its bacterial action and vitamin-rich composition. The product, which is said to relieve skin irritation and has a wound-healing effect, is fragrance-free and free from preservatives, solvents and alcohol. It leaves no white marks on clothing, and is said to be safe and suitable for sensitive and irritated skin.

Meanwhile, Persei Company has developed natural mineral deodorant stick Laquale featuring a pine extract in a solid single crystal within a special plastic container. It has a translucent crystalline structure with a light natural shade. The inclusion of pine is said to reinforce the protective effect of the deodorant and offer anti-inflammatory properties, while also offering a subtle natural fragrance of pine needles.

Protect and soften

Domestic manufacturer Krasnopolyanskoe Mylo, located in Medoveevka, ten kilometres away from Krasnaya Polyana, Sochi, specialises in creating soaps using the town's ancient methods of combining a mix of vegetable fats and a water solution of caustic soda (sodium hydroxide) to create a chemical reaction. Various additives, such as oils, milk and honey, are then added to the soap before it hardens. In addition to the soaps, which are supplied to spa salons, elite bath-houses, stores and outlets selling natural cosmetics, the brand also has a deodorant product which contains only natural ingredients. It utilises baking soda for a deodorising effect, cornstarch to gently absorb excess moisture, while protecting and drying the skin. Shea butter is included for its nourishing and anti-inflammatory action, as well as cocoa butter to support skin hydro-lipid balance. Beeswax is also incorporated to help heal delicate underarm skin by creating a weightless protective film that protects the skin without clogging the pores. Finally, allantoin is included for its strong disinfectant properties. The deodorant as a result is said to soften and protect the skin, leaving it with a light floral scent.

The deodorant category is forecast to continue to develop positively in Russia over the coming years, with Euromonitor attributing future growth to an increasing hygiene culture in the country and growing health concerns among consumers. And while traditional formats will continue to win over consumers, it is likely that as manufacturers continue to roll out some of the more unusual products highlighted in this report, consumers will be increasingly open to trying new types of deodorants.

Arnest, one of the largest domestic players, launched Deonica, a new range of high performance APDs



Russia: Deodorant market value, 2014

	2013	%+/-	2014	%+/-
Value (RUB bn)	20.20	6.2	21.60	6.9

Source: Euromonitor International

Based on a report courtesy of InterCHARM (Reed Exhibitions Russia)

Global round up

Brazil is the world's largest deodorant market, with products enjoying near universal usage. However, Argentina is hot on its heels as another rapidly emerging market. This issue also looks at Iran's deodorant category, which, still at a nascent stage, presents a strong opportunity for growth

BRAZIL

With estimated sales of R\$6.29bn in 2014 (US\$2bn) Brazil has the largest market for deodorants in the world. It is a personal care staple used by virtually the entire population, often more than once a day. It has also been one of the fastest growing markets, particularly during 2012 and 2013 when annual growth reached 23% and 22% respectively.

"The expansion of the middle class, the growth of segments with value-added formats, such as aerosols (31% in 2013 and 39% in 2012) and the growing interest of consumers in innovations, such as non-staining formulations and technology that provides higher protection against perspiration are factors that have influenced this growth," explains Renata Moura, Research Manager at Mintel in Brazil. "The growing interest in value-added formats and formulations translate into higher spending in the category, which is fuelling the market growth."

Aerosols represent the largest proportion of category sales value, taking 51% of the total market, and also experienced the highest level of growth, rising by a staggering 31% in 2013 as the level of penetration of this format has increased. According to Mintel, 41% of the population in Brazil used aerosol deodorants in June 2012, yet by January 2014 this figure had risen to 47%.

Roll-ons, however, have greater penetration in Brazil, with 53% of consumers using this format. However, this segment is not as valuable in terms of sales, representing a quarter of the market in 2013. Mintel notes that creams and gels have shown significant growth (24% in 2013) even though the

Brazil: Deodorant market value, 2012-2019

Year	R\$m	%+/-
2012	4,373	23.2
2013	5,330	21.9
2014 (est.)	6,294	18.1
2015 (fore.)	7,528	19.6
2016 (fore.)	8,973	19.2
2017 (fore.)	10,594	18.1
2018 (fore.)	12,374	16.8
2019 (fore.)	14,251	15.2

Source: Mintel

segment is still very small. Moura explains:

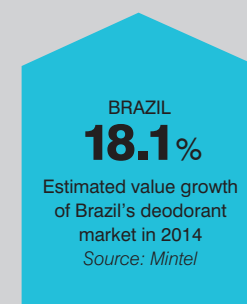
"Products like Rexona Clinical have contributed to the sales growth of this segment."

Unilever Brasil leads the market as the largest deodorant manufacturer with a share of 38.5% in 2013, thanks to the might of its flagship brands Rexona, Axe and Dove, marketing investments and new product innovations. Natura follows with 9.7%, having lost market share over the previous three years, but the launch of its Ecomcompacto check line of spray deodorants last September is expected to bolster its market position. The line offers a compressed format aerosol, containing the same number of uses as a 150ml spray but in 75ml packaging, reducing environmental impact by 48%.

Compressed aerosols appeal due to their environmentally friendly positioning and because on-the-go formats may be popular in this market, due to the high frequency of deodorant use. Furthermore, notes Moura, "non-staining, long lasting and high levels of protection against wetness are the leading innovations consumers are interested in trying. About one third of Brazilians are also willing to pay more for these innovations, indicating a potential for premium products."

Other opportunities for further growth in Brazil's market include "targeting the emotional cause of sweat or adding micro-encapsulated ingredients for a long lasting protection," says Moura, as well as developing penetration, claims and formats in specific demographic groups. For example, aiming deodorant products with moisturising benefits at middle-aged women, who value these features.

By 2019, Brazil's deodorant market could be worth as much as R\$14bn if average annual growth of 18% is achieved. However, with the current state of the economy and a deceleration in growth generally in Brazil's C&T market, it looks unlikely that it will reach the dizzying double digit growth of 2012 and 2013 in the years to come. Nevertheless,



High protection formulations and additional benefits are boosting sales in Brazil and Argentina



Brazil: Deodorant value sales by format, 2012-2013

Year	Aerosols		Creams/gels		Pumps		Roll-ons		Sticks	
	R\$m	%+/-	R\$m	%+/-	R\$m	%+/-	R\$m	%+/-	R\$m	%+/-
2012	2,091	39.3	221	21.0	844	7.3	1,206	12.8	11	29.0
2013	2,739	31.0	274	24.0	979	16.0	1,327	10.0	11	3.8

Source: Mintel

“Deodorants enjoy near universal usage in Brazil thanks to the country’s high temperatures”

deodorants enjoy near universal usage in Brazil, thanks to the country’s high temperatures. And with the growth of high performance, value-added formulations on the market, Brazil’s deodorant category is likely to stay fresher for longer than other C&T segments.

Data and analyst comments courtesy of Mintel
www.mintel.com

ARGENTINA

Brazil is not the only Latin American country with a high value and high growth deodorant market. Argentina is hot on its heels with total value sales of US\$1.9bn in 2014, and registering staggering market growth in both 2013 and 2014, of 32% and 39% respectively. Volume growth, however, has remained much more sober, in the region of 2% or 3%. The strong difference between value and volume growth is due to high inflation in Argentina.

Despite this, the market continues to register strong development, boosted by new products in that offer additional benefits, such as protection against stains on clothes, the release of fragrance during physical activity and even water resistance. For example, Unilever de Argentina SA, the country’s leading player with 61% value share in 2013, introduced Rexona Men Aquashield that remains on the skin even after contact with water. Meanwhile, Beiersdorf released Nivea Stress Protect and Nivea Men Stress Protect, which claim to reduce perspiration by up to 50% in stressful situations and offer 48-hour protection.

New products tend to focus innovation on deodorant sprays rather than roll-ons or creams, since aerosols represent an overwhelming 80% volume share. In 2014 this segment accounted for \$1.1bn and registered value growth of 41%, exceeding the total market. Sprays enjoy such strong usage among Argentinians due to their practicality and low cost compared to other formats.

Roll-ons follow as the second most important format, and while it does benefit from new product launches from manufacturers, it suffers from low public awareness. The other categories – pumps, creams and sticks – are all tiny in terms of volume sales, yet despite this, they are all developing, with pumps even registering growth of 80% in 2014.

Unilever, with both the number one and number two deodorant spray brands, Rexona and Axe, will continue to dominate the category in Argentina with its strong investment in both innovation and advertising campaigns. The market in general is expected to enjoy a good level of performance to

ARGENTINA

39%

Value growth of
Argentina’s deodorant
market in 2014
Source: Euromonitor

Unilever’s Axe brand takes a 15% share of Iran’s deodorant market



Iran: Deodorant market value, by format, 2014*

	US\$m	%+/-
Total deodorants	150.60	27.8
Roll-ons	48.30	29.0
Sprays	26.50	84.90
Sticks	13.00	17.40

Source: Euromonitor International

2019, with a predicted volume CAGR of 2%.

Data and analysis courtesy of Euromonitor International
www.euromonitor.com

IRAN

The deodorant market in Iran is only just emerging. Awareness of the benefits of deodorant product use is very limited, with many consumers considering them unnecessary for daily use. However, this is starting to change, particularly among the younger generation, which accounts for the majority of sales of deodorants, particularly sprays.

In 2014 Iran’s deodorant market grew by an impressive 28% to IRR3,905bn (US\$150.6m). However, this actually represents a slight slowdown compared to 2012 and 2013. This was mainly due to a more than 50% price increase during those years, whereas the performance in 2014 was based on per capita consumption.

A unique characteristic of this market is the current development of deodorant sticks, a category that is experiencing exponential growth, up 31% in 2014, albeit starting from a lower sales base. However, it is also due to the wider availability of Gillette (P&G) products and consumers discovering sticks as an alternative to deodorant sprays. Sprays continue to reign as the largest category, however, accounting for more than 56% of value sales.

As in other countries, such as India (see page 30), deodorant sprays are often used as a cheaper alternative to fragrances, especially among women, and given as gifts for special occasions. Deodorant range extensions from premium fragrance brands such as Kenzo and Amore are available. However, traditional deodorants account for the majority of the market, with imported mass products from big multinational brands leading the way.

Shekofa Kish’s Nivea brand accounted for the largest value share of the market in 2014 with 31%, while Unilever Iran’s Rexona and Axe took 15% and 8% respectively, benefiting from widespread availability and generally being considered by consumers as offering good quality products. Other imported brands such as 8x4 (Beiersdorf), Gillette and Fa (Henkel) have also been competing to target potential new consumers. Currently the market has no significant competition from domestic players, although this may change in the future.

Iran’s deodorant category is expected to register continued positive growth with a CAGR of 4% at constant 2014 prices to 2019. With the country’s market still at a nascent stage, it represents a major opportunity for growth.

Data and analysis courtesy of Euromonitor International
www.euromonitor.com

Argentina: Deodorant market value, by format, 2014

	US\$m	%+/-
Total deodorants	1,943.10	39.0
Creams	26.70	31.40
Pumps	3.30	80.30
Roll-ons	751.00	36.30
Sprays	1,134.20	41.00
Sticks	27.90	36.00

Source: Euromonitor International

India Young and vibrant

*India's deodorant category only burst into life about six years ago, and today it is one of the world's fastest growing markets. Reporting from New Delhi, **Raghavendra Verma** finds out why it is developing so rapidly and the opportunities it presents for manufacturers*

India's deodorant market is still developing and spreading into the vast consumer base of the world's second largest population – 1.28 billion.

According to global information and market research firm Nielsen, in the 12 months to May 2014, Indian deodorant sales revenues were £214.994m (US\$338m). And according to Mintel, this figure is expected to increase by a staggering 26.8% to total £273.604 in 2015.

"It's just a six to seven year-old story for deodorants in India," says Darshan Patel, Chairman and Managing Director of Vini Cosmetics Ltd, based in the state of Gujarat's largest urban centre Ahmedabad. "The annual growth rate of the industry is around 18% and this rate is expected to continue for another four to five years."

India is expected to be one of the fastest growing markets globally for deodorant sprays over 2012-2016, with the category set to add 77 million units to global consumption. Indian per capita consumption of deodorant sprays is predicted to increase from 12.5ml in 2012 to 20.3ml in 2016. This will still only be just over a third of the global average consumption rate, which suggests plenty of scope for further penetration and product development, according to market research company Euromonitor.

The high growth rate is due to the low market penetration of deodorant products, which are currently used by only 10% of the population, says S Raghunandan, CEO and Director of Mumbai-based Jyothy Laboratories Ltd, the manufacturer of Henkel's Fa deodorants in India.

India: Deodorant market value, 2014 – 2015

Year	Value (£m)	% +/-
2014	214.994	9.4
2015	272.604	26.8

Source: Mintel



Above: Deodorants for sale at Big Bazaar retail outlet in Noida, Delhi. Below: Wild Stone is a popular men's body spray brand in India

Furthermore, India's tropical weather makes deodorants more popular, Raghunandan tells **Cosmetics Business Markets**: "It is dusty, it is smelly, and the weather is very hot and humid," he explains. "No one wants to smell and stink." According to Raghunandan, 85% of all deodorant sales take place in the big cities.

To deal with the resulting sweat problems, there is already a big market for talcum powder in India with annual sales of £159m (US\$250m), says Raghunandan. "The market is now upgrading to deodorants because talcum powders do not destroy bacteria and therefore the smell remains," he explains.

Spray and share

Aerosol sprays are the most popular deodorant format, due to their ease of application, immediate dryness and durability. Other sub-categories of deodorants, such as roll-ons and gels, constitute only 5% of the market.

Euromonitor notes that one reason why sprays are so popular in India is because they can be shared by a family, while roll-ons are for a single user. As a result, sales of larger-sized aerosol cans





for deodorant sprays in India, such as 101ml-300ml, are popular. Hindustan Unilever launched Dove deodorant spray in a practical family sharing aerosol can, for instance.

Rising income levels and increasing awareness about hygiene and personal grooming, especially among the younger population, have provided perfect conditions for the rapid expansion of India's deodorant market.

"Previously people started using deodorants as they entered college, but now lot of youngsters are using them while in school," says Narendra Kumar Daga, Director of McNroe Consumer Products, manufacturer of Wild Stone deodorant, a leading brand which targets young men aged 18 to 30.

A recent product launch from the brand was Wild Stone's Grey variant, introduced in 2014. The fragranced deodorant specifically targets young corporate executives with its scent and campaign. "It is a fresh and sophisticated fragrance built on citrus and musk accord. The entire campaign was designed around this fragrance proposition and the campaign line was 'Strictly office wear'", explains Daga.

In fact, as much as two-thirds of the Indian deodorant market caters to male consumers, explains Raghunandan. This is because "the number of women who are out in the sun is much less and if you are at home, you do not need so much deodorant."

Brand leaders

The major deodorant brands in India include Axe (Hindustan Unilever); Fogg (Vini Cosmetics); Engage (ITC Ltd); Spinz (CavinKare Ltd), Nivea (Beiersdorf); Old Spice (Procter & Gamble); Park Avenue (Raymond Group); Yardley London (Wipro Ltd); Brut (Idelle Labs Ltd); KamaSutra (J K Ansell Ltd); Adidas (Coty); Reebok (Reebok International Ltd); and Garnier (L'Oréal)

In January this year, Indian personal care company Vanesa Care Ltd launched its ENVY After Dark series, targeting the upper segment of the market and advertising heavily on television channels.

According to Saket Govind, Senior Brand Manager of Vanesa Care's ENVY brand, which includes After Dark, aims to challenge the stereotypes of the category, like the use of deodorants to attract girls. "Our commercial says that girls don't get attracted by deodorants but through your attitude," he says.

Brands have also been using increasingly high profile stars to promote their products. For example, in June 2014, Emami Ltd launched its He deodorant brand in 23 cities with the top Bollywood action star Hrithik Roshan as its official brand ambassador.

Axe, Wild Stone, Garnier, Adiction (Mankind Pharma) and several other brands also use Bollywood stars to promote their brands, which is becoming increasingly necessary in a market with a large variety of choice, both from domestic brands and lesser known imported ones.

India's top online retailer Flipkart lists more than 175 deodorants brands on its website, for

example, with prices ranging from US\$10-\$70. The cheapest deodorant offered is from Germany-based ZeVa GmbH and the most expensive is from US brand Estée Lauder. However, in most neighbourhood stores, there are only ten to 15 deodorant brands available at any point of time with prices ranging from \$2-\$4.50 for a 120ml can.

Online on the up

The increasing popularity of online shopping among the target group of consumers could well

Launch highlight: ENVY After Dark

ENVY After Dark was launched in December 2014 as a premium product range by Delhi-based Vanesa Care. Available in four variants – Techno, Trance, Rock and Hip Hop– it is sold mainly through high end stores in big towns and cities. Vanesa's Marketing and Sales Director, Saurabh Gupta, says: "Indian consumers are now fast maturing into quality seekers who need [the] best in whatever they consume."

As the name suggests, the product is meant for evening use and is marketed to modern male consumers, with the tagline 'Unleash your dark side'. The company claims that the range contains pure fragrance without any aerosol gas and that a 120ml can will last for eight months with 1,000 sprays.

Each variant contains different fragrance notes: Techno contains woody and sweet notes with amber sandal and musk; Trance is an aromatic spicy fragrance with bergamot, mandarin, amber and sandal; Rock contains fragrances of vetiver, rose, lily, musk, sandalwood, patchouli, cedar and oakmoss; and Hip Hop has citrus, jasmine, spices, rich sandal, vetiver and vanilla.



ENVY's premium deodorant range, After Dark, was launched last December

26.8%

Estimated growth of
India's deodorant market
between 2014 and 2015
Source: Mintel

lead to changes in the way companies handle their distribution in the country. According to a July 2014 McNroe company release, Wild Stone is currently sold in 260,000-270,000 outlets through 980 distributors around the country. Such a wide network may not be needed by new companies as the online business grows, and it could also help them overcome constraints relating to displays at retail stores and availability in remote regions.

Within the deodorant category there is only a limited range of more expensive products to choose from. However, Daga notes that: "Consumers are moving to more premium and expensive formats like those priced in the range of \$3.50 and \$4.50, and this is helping to drive value growth."

Furthermore, according to Daga, Indian deodorant consumers have been shifting to products that come with a secondary carton in their packaging. "This is a fast growing space, with Wild Stone perfume body spray, Axe Signature and Fogg Black already contributing 7 to 8% of the overall deodorant category," he says.

The spray ahead

One new trend within the spray formats is a shift from aerosols to non-aerosol based deodorants. "Almost all brands in the category have launched



new product ranges and extensions in this format in the last two years," says Daga.

The pioneer in this segment has been Patel's Fogg brand, which ran a very successful television advertising campaign highlighting the non-use of gas in its cans. "Our bottle will last longer than a bottle that uses gas," says Patel. Launched in 2011, Fogg is available in several dozen variants and according to Patel, sells two million cans every month. "We use a different form of spray that is meant for non-gaseous products," he explains.

Describing the idea behind the new format and advertisement campaign, Patel says Vini Cosmetics was entering a very crowded deodorant market and had to innovate. "We needed to differentiate ourselves and the only way to do that was with this format," he explains.

Non-aerosol products already account for about 20% of the deodorant market share and according to Patel, in another five to seven years, they will gain half of the market share.

Two million cans of Fogg deodorant are sold every month

Retail watch: Hallmark Creative Creations

Cosmetics Business Markets speaks to Navdeep Thareja, Owner of Hallmark Creative Creations, a retailer in Great India Place Mall that sells personal care products.

What are the sales trends in the deodorant market?

I have been selling deodorants for the last six years and sales have been constantly increasing. It is a fast market, which is always changing. Some companies say their product is better for their skin while some claim it has a better fragrance, and consumers are ready to try them.

Which are the most popular deodorants?

Wild Stone is selling, Fogg is selling, in fact all of them are selling. There are ten to 15 popular brands available at my shop, where I mostly sell gift items. The big store in this mall only offers imported deodorant brands as they manage better sales margins.

Who are your main customers for deodorants?

I get both rich and not-so-rich consumers. Most of them are women who buy it for themselves or give as a gift to their loved ones. Often these gift packs contain more than one variant of the same brand.

What are their preferences and reasons for choosing a product?

Most consumers are brand cautious and only purchase well-known brands. Some of them also look for particular fragrances and test them before purchasing.

Perfume replacements

While Indian deodorant companies are claiming the body spray market is expanding quickly, they are well aware their products are largely used as cheap perfumes, and are happy to exploit the situation. "Ideally, the deodorants and the antiperspirants should be used on the body but here [in India] even the television advertisements show people spraying it all over themselves while fully dressed," Monisha Mullick, Creative Head of Fine Fragrances at Goldfield Fragrances, in Mumbai, tells **Cosmetics Business Markets**.



“Consumers are moving to more premium and expensive formats like those priced in the range of \$3.50 and \$4.50, and this is helping to drive value growth”

Narendra Kumar Daga,
Director, McNroe
Consumer Products

According to Mullick, one of the reasons for the increase in deodorants usage is that perfumes are expensive, often costing more than \$32. However, Indian consumers certainly look for strong, long lasting fragrances in a deodorant, which Daga says is partly driven by India's tropical climate. Mullick adds that the durability of a fragrance is a very important criterion for deodorant manufacturers. “In their briefs for perfumers, companies always want something that lasts six to eight hours,” she says. They also usually mention some specific perfume notes for further development, but sometimes also go for fragrances that are already popular, Mullick explains.

Deodorant companies also usually have a strict budget for the purchase of fragrances, says Mullick. “At any given time we have several fragrances in our library,” she said. “Sometimes we may tweak them according to the requirement or they might accept what we have.”

The perfume making company only charges for the price of fragrance and there is usually no separate developmental cost. “Depending on the client, the cost of the fragrance is \$20-\$40 per kilogram,” says Mullick. “We cannot use very high end materials like pure essential oils when working on deodorants.” However, she notes the largest cost component when developing a deodorant is the expense of producing metal cans.

Scents of attraction

With increased focus on male customers, deodorant companies are looking for attractive male fragrances, which Mullick says tend to be more citrusy, woody, amber-orientated, ozonic, watery and fresh, while female fragrances are more floral and sweet.

That being said, women have begun interchanging their fragrances, says Mullick. “Young people don't have very strong preferences and are more experimental, but as one grows older, one tries to stick to more tried and tested fragrances,” she says. However, when it comes to fine fragrances, consumers tend to be more loyal.

Yet specialised fragrances in deodorants may be a passing phase, says Raghunandan. As income levels rise even further, the Indian market may move away from deodorants towards real fragrances. Already, he says, there is a luxury sub-segment where people are ready to pay more for high end deodorants. “Layer'r Shot from Adjavis Venture Ltd is a new body splash brand sold as a premium fragrance but priced at \$3.50,” he says. ENVY After Dark and ENVY 1,000 are also premium brands, and Patel predicts it will only take five years for consumers to start shifting to “real perfume products”.

However, according to Daga, the number of discerning consumers in India is very few. “Although segregation has been felt in consumers' needs, they are still uneducated to a large extent in regards to what is suitable for a day fragrance or what might work well for night,” he says.

Daga believes that brands will play a big role in educating consumers and offering them fragrances meant for different occasions. The products for the future, according to Daga, will revolve around finer fragrances and will include those that combine skin care benefits with fragrance.

For now, deodorant companies are focusing on widening their consumer base and building stronger brands. As companies expand, product innovation and diverse marketing strategies will ensure that consumers are never short of choices.

Retail watch: Future Group

Devendra Chawla is Group President of FMCG brands at Future Group, which runs popular retail chains such as Big Bazaar and Food Bazaar. He speaks to **Cosmetics Business Markets** about the rising popularity of deodorants in India

What deodorants/body sprays are becoming more popular in India?

Nivea, Park Avenue, Axe and Yardley are consistent players over the past few years. Engage has recently become a strong brand within this category. The market is clearly moving towards functional benefits and premium deodorants.



Popular retail chain Big Bazaar has found that consumers are favouring premium deodorants and products with functional benefits

Who are the consumers of these products?

Although it is a recent personal care category addition, deodorants have a wide appeal and have become more mainstream in the last few years.

Is there a luxury sub-segment in this market?

Premiumisation is happening as more added value products are coming in the category. Consumers are willing to pay more, as in the last two years the market has shifted from a \$2.50 price point to \$4.50. Non-gas brands have seen good traction and we expect this trend to grow.

What do manufacturers have to do to successfully compete against other brands?

Spending on brand building, keeping the consumer engaged through news around new variants and the functional benefits of their products. Sampling is a powerful tool to let consumers experience the product/brand.

How do you differentiate the various deodorant brands in your stores?

We have classifications for men and women as categories, and antiperspirants are treated separately. Otherwise, we brand block in stores as the same brand variants need to be together.

ELECTRIC REVOLUTION

*News hit last year about the world's first smart electric deodorant applicator, ClickStick. On the brink of its release, **Cosmetics Business Markets** talks to Co-Founder Gilad Arwatz about the unique innovation which could just revolutionise the deodorant market*

What is ClickStick?

ClickStick is a battery operated smart electric deodorant applicator. With a one click push-button application, it enables users to apply exact amounts of deodorant, while avoiding stains, eliminating irritation and stickiness. It comes with a mess-free refill kit and a free mobile app that gives the user advice on the amount of deodorant they need, based on their activity level. It then sets the required amount and ClickStick's internal microprocessor, which controls a small electric motor, delivers the same amount of deodorant every time. The ClickStick also has a digital display that gives the user their refill status so they know when it's time to re-order, and it comes with two AAA replaceable batteries. As usage time is low, batteries last up to a year.

What deodorant does ClickStick use?

The ClickStick comes with an eco-friendly container filled with a deodorant of the user's choice. We offer everything from natural to clinical strength deodorant and a wide range of scents.

How does it eliminate the cause of stains?

Currently, all stick deodorants on the market require the formulation to be exposed before the user is ready to apply it. This is the number one source of deodorant stains. ClickStick's push-button technology enables the user to get the deodorant in the right place every time.

ClickStick claims to be the only deodorant product to dispense an accurate dosage, eliminating irritation and staining



How environmentally friendly is ClickStick?

Almost everyone uses deodorant. It is a huge market. But it also generates a tremendous amount of waste. Six billion dispensers are sold and dumped every year, which is equivalent to the weight of seven Titanics. The ClickStick, with its refillable container and refill pouches, reduces plastic waste by as much as 90%.



Why do you think ClickStick could revolutionise the deodorant category?

Other than being a completely new device, it is also a new model on the market. There have been updates and technology advancements in several areas of personal care, but the deodorant applicator has been the one area where innovation has been lacking. ClickStick is the only product that dispenses an accurate dosage and helps to avoid staining, one of the main problems that other brands have. It is also a nice, luxury device to use. It's fun. We wanted to make one of the few things you do every day enjoyable and easy, but also smart and advanced. The features of ClickStick make putting on deodorant a better experience, but the application technology can be used with virtually anything.

How much will it retail for?

The deodorant retails at \$20 and once the consumer has bought the device they keep it and buy refills once it runs out. A refill costs \$3. This makes it actually cheaper than current deodorants on the market by about \$2 to \$3, so after four to five months, the user breaks even.

When is the product due to launch?

The device is in production and we will see the first products soon. We hope it will be on the market within the next two to three months. Initially we are targeting high end cosmetics retailers but I would like to see it in the mass market. A similar evolution happened with the electric toothbrush.

Where will ClickStick be available?

Initially in the US, because that's where we're based, but then internationally. We will also sell online through the ClickStick website.

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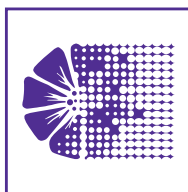


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