



Trends-In-Sight: U.S. Antiperspirant & Deodorant Market: No Sweat

By Amy Marks-McGee

According to Mintel, a Chicago, USA-based market research firm, the U.S. antiperspirant and deodorant market was estimated to be worth over \$2.9 billion in 2012 and is predicted to reach \$3.3 billion by 2017. Historically, the U.S. has been an antiperspirant stick market based on performance and the ability to stop wetness and odor. However, and surprisingly, the younger male generation of the U.S., has propelled the market in a new direction by embracing and aggressively purchasing deodorant body sprays. This trend was clearly evidenced by the successful introduction of Unilever's Axe Body Sprays in 2002. The foundation of the U.S. market continues to be dominated by underarm antiperspirants with a focus on long-lasting freshness based on well established technology. There are a few brands that are creating antiperspirants intended for alternative uses such as hands, face, and feet. Clinical-strength formulas, with long-lasting claims and natural deodorants, without the use of aluminum based sweat absorbents are the two most recent trends in the U.S. Elimination of aluminum based salts is related to the possible connection between these trivalent salts and loss of mental cognition.

Clinical Strength

The U.S. demand for **functional and performance-driven** products has led manufacturers to create antiperspirants/deodorants that stop perspiration for an extended period of time with claims such as "48-hour odor and wetness protection." To connote efficacy, the newest marketing buzzword phrase is "clinical strength." To support this claim, antiperspirant/deodorant manufacturers are using 20% Aluminum Zirconium Tetrachlorohydrate GLY in their formulas. Another recent emerging marketing term for these products is "skin conditioning" with the intention of expressing soothing and gentle properties to sensitive areas. Brands are co-branding and playing on their heritage by borrowing existing ingredients and technologies from their skin care brands such as Olay and Dove.

At the beginning of 2013, **Secret Clinical Strength** added a Stress Response variant formulated with a patented Betacyclodextrin (BCD) technology which uses odor-neutralizing molecules. According to Procter & Gamble, the product offers "4X stress sweat protection vs. the wetness protection required of an ordinary antiperspirant." **Secret Outlast** launched last year and features Dual Action Odor Technology relying on a special delivery system "to provide a burst of freshness when you need it most." Procter & Gamble claims the pH of the formula "helps minimize odor-causing bacteria and provides long-lasting 48-hour protection." Within the

line, the Secret Outlast & Olay available in Completely Clean and Protecting Powder, combines 48 hour odor protection with Olay's skin conditioners.

Right Guard, owned by Henkel, released the Xtreme™ line in four variants - Xtreme Fresh Energy, Xtreme Fresh Recharge, Xtreme Cooling and Xtreme Dry. The Xtreme Fresh products claim "long-lasting freshness that provides 72 hours of protection from odor and 48 hours from wetness" while the Xtreme Cooling also features a "cooling with Air Conditioning Effect® that also utilizes a delivery system that activates on demand." The Xtreme Dry uses an Advanced Dry™ formula that touts "the best odor protection yet, 96 hours of protection from odor and 48 hours of protection from wetness."

Additionally in 2013, Unilever introduced Dove Men+Care skin care range in the U.S. The brand's tagline for the antiperspirants/deodorants is "Dove Men+Care: Tough On Sweat, Not On Skin" and is offered in both formulas in Aqua Impact, Cool Silver, Clean Comfort, and Extra Fresh scents. Clinical Protection antiperspirant is an additional variant. According to the company, the products contain a "clinically proven, non-irritating formula and ¼ moisturizer technology [that] provides 48 hours of odor and wetness protection for antiperspirant and 48 hours of odor protection for deodorant." Last year, Dove released Clear Tone antiperspirants/deodorants for women made with calendula and sunflower seed extracts. The company claims the products visibly moisturize the skin, help to reduce dark marks and evens skin tone. Skin Renew uses notes of violet, lilac and rose with vanilla musk and Sheer Touch highlights citrus notes with almond and coconut milk. Dove Clear Tone Pink Rosa, which launched in September, is the newest variety. Shea Butter with ¼ moisturizers and vitamins E & F is a new product under the Dove Go Sleeveless umbrella and Restore Blue Fig & Orange Blossom recently joined the Dove Go Fresh line.

Degree, also in Unilever's portfolio, launched Degree Men Clinical Strength with Recharge Technology. The product is available in Clean, Extreme Fresh, Sport Strength and Thermo Dry variants. The company claims these variants provide "up to 3X wetness protection when compared to a basic antiperspirant." Another recent introduction in the Degree range is the Adrenaline Series with MotionSense™ technology, which "responds directly to your body movement." Adventure, Ironman, Everest, Extreme, and Sport Defense are the five scents available. Using the same MotionSense™ technology based on the idea of triggering the required action by body movement, Degree Women offers Clinical Protection Antiperspirant & Deodorant in four fragrances. Cotton Fresh is the newest

one and is described as smooth and soft, with white rose petals and jasmine buds. Additionally, this year, Degree added Peach Burst and Daisy Fresh scents to the Expert Protection line, which also boasts the MotionSense™ technology.

In May 2013, Idelle Labs Ltd repackaged the Sure antiperspirant/deodorant line and created two new variants in a Conditioning Solid, invisible formula. Vitamin Infusion Conditioning Solid is unscented and according to the company “conditions and repairs skin with Vitamins A and E,” while Pure Essence Conditioning Solid features a light fragrance with soothing aloe extracts.

Alternative Body-Part Antiperspirants

There are a few brands creating antiperspirants intended for alternative body parts such as hands, face, and feet. Gamer Grip Hand Antiperspirant is a novel, non-slip, antiperspirant formula that is designed for athletes to improve their grip and last between 4-6 hours per application. Neat 3B Face Saver is an antiperspirant gel for the face that can be applied before makeup. Fresh Body just launched Fresh Breasts, a natural deodorant free from aluminum, parabens and talc. The product is designed specifically to keep women's breasts dry and prevent chafing.

Fragrant Deo Sprays

In the U.S. younger male consumers, age range 18-34, are the heaviest users of body sprays driven by the variety of scents available. Unilever's Axe continues to fuel the category with new launches. Axe Black Chill is the newest fragrance with notes of citrus, mint and cedarwood while Axe Apollo launched earlier in the year and features crisp sparkling fruits, sage, and creamy musk accords. In 2012, Axe launched Anarchy for Him and for Her. It was the first time the brand launched a female scent as a limited-edition matching fragrance. Anarchy for Him is described as fresh and fruity with sweet woods like sandalwood and amber. Anarchy for Her highlights sparkling fruity notes of apple and blackberry with soft florals, sandalwood, amber and vanilla. The Anarchy For Her was widely accepted in the U.S. and riding the coattails of its success, in August 2013 Unilever announced the launch of Anarchy and Anarchy II For Her Shower Gels. Anarchy For Her combines blackcurrant, jasmine, rose coconut and rich woods and Anarchy II For Her blends apple, mandarin, jasmine petals, vanilla and sandalwood. Procter & Gamble's brand Old Spice added Danger Zone to its Red Zone Body Spray line last year.

A Natural Interest

Like other consumer packaged goods across categories, the U.S. demand for “natural” continues to increase as consumers look for

natural alternatives. The deodorant category is no exception and there has been a plethora of independent brands introducing new products in stick and cream applications. “Aluminum free” is the most popular formula claim and even without this ingredient, brands are touting improved efficiency claims.

This year, Soft & Dri by Newhall Laboratories, a mass market U.S. brand originally owned by Gillette, launched Aluminum Free Deodorant in Powder Fresh. According to Soft & Dri, the company uses non-aluminum ingredients and describes the product as “gentle on skin while safely and effectively neutralizing odor without blocking sweat pores.” Tom's of Maine, a leading natural U.S. brand, just released Naturally Dry in Unscented and Natural Powder varieties. The new antiperspirant sticks are said to “provide clinically proven 24-hour wetness and odor protection made entirely from ingredients derived from plants and minerals.” According to the company, the formula contains an ingredient made from recycled aluminum, originally derived from natural mineral bauxite ore, and olive leaf extract.

In 2012, several natural personal care brands launched deodorant sticks including GeoDeo, Nourish Organic Clean & Fresh, and For Pits Sake. GeoDeo Natural Deodorant Plus with Detox Complex is 97% naturally derived from a vegetable-based formula made of volcanic minerals, Icelandic algae, enzymes, bamboo, aloe and vitamin E. Additionally, the formula is allergen-free and does not contain questionable ingredients such as aluminum salts, sulfates, parabens, petrochemicals, dyes, or phthalates. Rainforest with passion fruit and acai berry is the fourth scent to join the line; Island, Ocean and Unscented are the other three. Nourish Organic Clean & Fresh Organic Deodorant is crafted with cornstarch and vegetable protein, shea and cocoa butters, beeswax and coconut oil and is available in five scents - Almond Vanilla, Fresh Fig, Lavender Mint, Wild Berries and Pure Unscented. Like Nourish, For Pits Sake Natural Deodorant is formulated with Cocos Nucifera (coconut oil), beeswax, Sodium Bicarbonate (baking soda), Zinc Oxide, Butyrospermum Parkii (shea butter), and Calendula Officinalis. “The 100% Natural Deodorant that Actually Works! Guaranteed free of parabens, propylene glycol and aluminum” is offered in five scents - Citrus, Clove, Lavender, Lime and Unscented.

Fresh Kidz by UK's Keep it Kind company, is a notable new natural product that launched in the U.S. during the National Association of Chain Drug Stores (NACDS) trade expo. The natural roll-on deodorant is marketed to tweens between 8 and 14 years old, and is free of aluminum based salts, parabens and alcohol.

A Return To Cream

In the U.S., cream is a less popular application than stick because it's messier and requires the use of one's fingers. Nonetheless, it has been returning in the natural segment. Soapwalla offers a Deodorant

Cream made with organic and food-grade ingredients such as superfine vegetable powders and clays as well as lavender, peppermint and tea tree oils to absorb moisture and inhibit bacteria. According to the company, the formula does not contain ingredients such as Sodium Lauryl Sulfate, parabens, harsh and harmful chemicals, petroleum, or aluminum compounds. Whiff, the self-described holistic and healthy deodorant, employs a humorous tagline "Getch yo stank off" and features Citrus, Eucalyptus, and Tea scents. The products are made with organic ingredients including coconut oil, shea butter, corn or arrowroot starch, baking soda and beeswax. They do not contain parabens, aluminum salts, triclosan, synthetic fragrances, or Sodium Lauryl Sulfate.

The **Canadian company**, Leaves of Trees, offers Eucalyptus Mint and Lavender Tangerine cream deodorants. The main ingredients used are sodium bicarbonate to deodorize and kaolin clay to absorb moisture. The company has taken the Canadian Environmental Defence's Just Beautiful Pledge and creates products free of the "toxic ten" ingredients including Triclosan, artificial musks, parabens, phthalates, petrolatum, formaldehyde releasing agents, Sodium Laureth & Sodium Lauryl Sulfate, silicone chemicals, coal tar derived colours and BHT (butylated hydroxytoluene).

Challenges Ahead

The U.S. market is still heavily focused on efficacy with the need to stop wetness and odor. In response, the market is being driven by "clinical strength" performance claims with several leading manufacturers using 20% Aluminum Zirconium Tetrachlorohydrate GLY in their formulas. At the same time, consumers are demanding natural products, which have led independent brands to launch natural stick and cream deodorants with a backlash against the use of aluminum salts. The younger U.S. male generation has welcomed the use of scented deodorant body sprays and Axe has begun to parlay its success into the female segment. Additionally, as children mature faster and individuals perspire in different areas, there are opportunities for manufacturers to address these growing needs.

The U.S. and Canadian consumers' desire for effective and long-lasting, yet natural products, will challenge deodorant/antiperspirant manufacturers as well as independent brands to explore and formulate with new, alternative and natural materials. ■



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