



Deodorant emerging brands

Celebrating the top new brands within
deodorant

June 2021

Product attribute markers

B

Brand
Extension

O

Omni

I

Non-
binary

Cf

Cruelty
free

Pb

Plant
based

C

Clean

M

“Male-
targeted”

Og

Organic

Alf

Aluminum
free

**Free
from**

Free from

S

“Social
selling”

N

Natural

Sf

Sulfate
free

E

Exclusive

D

DTC

Af

Alcohol
free

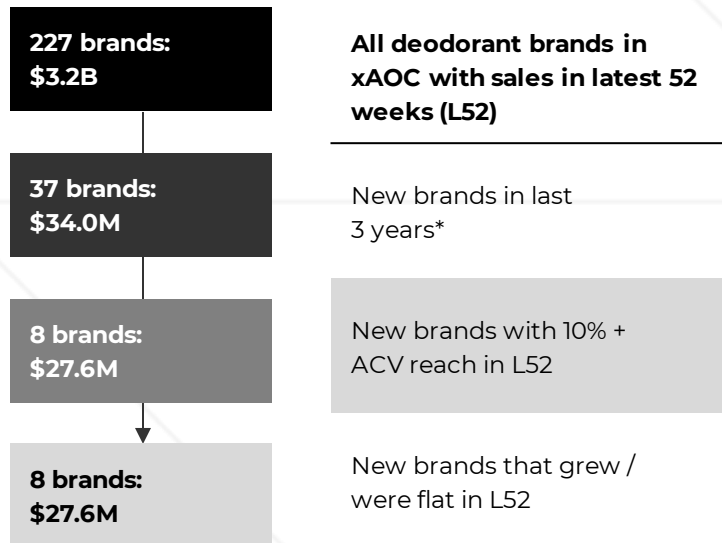
V

Vegan

“Omni” includes products that are available within xAOC (excludes specialty retailers) and online. Some online brands may not appear due to sample size.
“Exclusive” badge is used for brands that can only be purchased through one retailer/merchant.

Deodorant: A framework for identifying the top emerging brands

Deodorant—B&M



Deodorant—Online



B&M Source: Nielsen Scantrack © xAOC | 52 WE 6/12/21 | BC Department= Health & Beauty Care, BC Super Category = Deodorant, "Brand"= Brand High | Dollars listed above for Latest 52 weeks

eCom Source: NielsenIQ Total US eCommerce Measurement Powered by Rakuten Intelligence | 12 months through 05/31/21 | Deodorant

*New Brands in last 3 years: Brands whose sales began in last 3 years, and if launched 2 YAG, then those sales were 20% or less of YAG sales | New brands that grew/were flat in L52: Includes brands whose sales exceeded -20% vs YAG

In-store emerging brands

Leaders in adjacent personal care categories expand into deodorant

Category size (In-store)
\$3.2B -2.1%



Brand name	<u>Ivory</u>	<u>Harry's</u>	<u>Method</u>	<u>AOS Art of Sport</u>	<u>Duke Cannon</u>
Manufacturer	P&G	Harry's Inc.	SCJ	The AOS Group Inc.	Duke of Cannon Supply Co.
Launch date into deo	Nov 2019	Dec 2020	Sep 2019	Jan 2020	Feb 2019
L52 week sales	\$7.3 MM	\$5.9 MM	\$4.3 MM	\$3.9 MM	\$2.0 MM
Product Positioning:	Dermatologist-tested deodorant with pure and purposeful ingredients. Aluminum, parabens and phthalates free.	Harry's launched into Men's AP and Deodorant with various scents.	Aluminum-free men's deodorant line that is plant and mineral based.	Products made for athletes. AP & Deodorants are without aluminum, parabens, phthalates or talc.	Inspired by soldiers with a portion of proceeds directly supporting veteran causes. Enriched with activated charcoal.
	B O I C Free from Alf Cf	B D O M	B O M C Free from Alf Cf	B O I C Free from Alf Cf	B O

Online emerging brands

Positioning for largest new online brands is largely female-focused

Category size (Online)
\$548.6M +46.3%



Brand name	Native	Lume	Beautycounter	Megababe	Love Beauty and Planet
Manufacturer	P&G	Lume Deodorant, LLC	Counter brands, LLC	Megababe, LLC	Unilever
Launch date into deo	Earliest sales available June 2018	Aug 2019	May 2019	Mar 2019	Sep 2018
L52 week sales	\$32.9 MM	\$17.3 MM	\$13.3 MM	\$1.7 MM	\$672.1 K
Product Positioning:	Natural deodorant that is vegan and aluminum, paraben, and cruelty free. Safe, effective ingredients.	Whole body deodorants ("pits, feet and privates") in tube and stick formats. Prevents odor-causing reaction from happening on the skin. Aluminum Free.	Social selling company with refillable, clean, aluminum-free deodorant, at \$28/unit.	Clean, vegan deodorant marketed as a "solution to thigh chafe, boob sweat and funky pits."	Aluminum free, vegan, plant-based deodorant sticks. People and planet friendly disposal.
	Cf Alf B O D I Free from V	B O D Free from V Cf Alf	Alf Cf B D S C Free from E	Cf B D O C Free from V	B O Free from V Cf Alf Pb

Source: NielsenIQ Total US eCommerce Measurement Powered by Rakuten Intelligence | 12 months through 05/31/21 | Deodorant | Top 5 "new brands" by dollar sales, per criteria on slide 6



Project team

Integrating insights and expertise across organizations

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Thank you.