

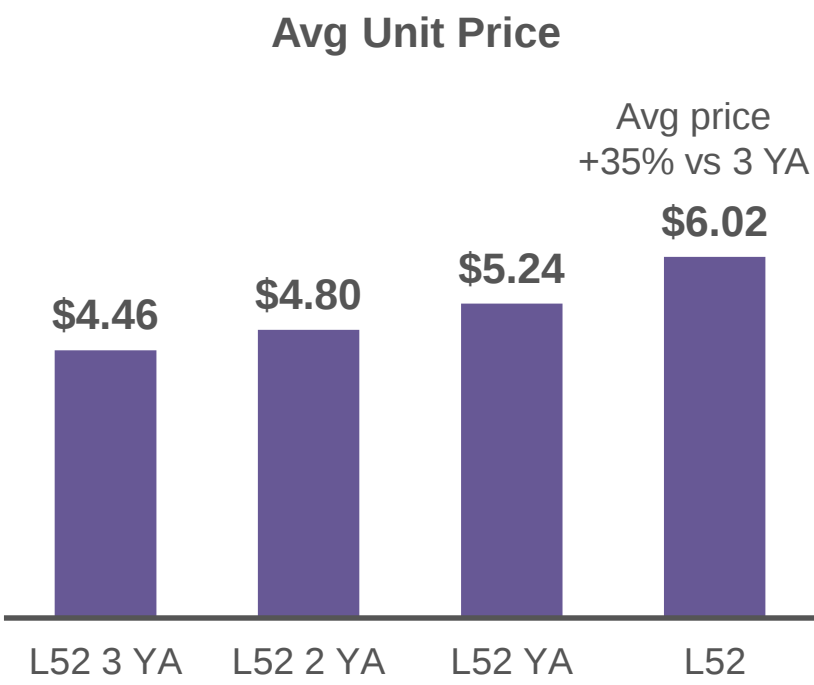
BEAUTY TRENDING INSIGHTS:

How The Deodorant Category Found Growth Through Premiumization



Total deodorant sales performance

4 year CAGR	+7.5% Dollars	-1.7% Units
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Source: NielsenIQ Retail Measurement Services, Total US xAOC L52W ending 5/27/2023

The rise in “natural” brands is one of the biggest trends we have seen in the deodorant category. Consumers are increasingly looking for these options for a variety of reasons

- Natural brands do not contain chemicals found in traditional deodorant like aluminum, parabens, phthalates, and synthetic fragrances
- Natural brands often have sustainable packaging
- Qualities like cruelty free and vegan are becoming more important to consumers
- The effectiveness of natural deodorant has greatly improved over time, allowing consumers to switch without sacrificing quality

Winning attributes

Dollar Sales

Vegan
+18.4%

Aluminum free
+25.2%

Cruelty free
+31.7%

Search
(Personal Cleanliness category)

Refillable packaging
+78%

Non toxic
+53%

Cruelty free
+34%

Source: NielsenIQ Retail Measurement Services, Product Insider, powered by Label Insight, Total USxAOC L52W ending 5/27/2023
NielsenIQ Label Insights Trending Attributes March – May 2023

Top \$ share winners

Top dollar share gainers in the category are higher price point brands

NATIVE



Premiumization of deodorant

Total deodorant avg unit price
\$6.02

The deodorant category has seen a rise in premium priced brands entering the category

Non natural Brand A
\$5.79

vs.

Natural Brand B
\$11.20

Source: NielsenIQ Retail Measurement Services, Total US xAOC L52W ending 5/27/2023