

Sustainability, Natural Ingredients Drive Deodorant Formulation for 2022



CLEAN BEAUTY LEADS FOR PERSONAL CARE—AND CROSSES OVER INTO ORAL CARE, TOO!

By Melissa Meisel, Senior Editor

Never let them see you sweat...it's that familiar advertising tagline from the 1980s that still rings true today. After all, for the personal care consumer and any person who maintains basic hygiene, deodorant and toothpaste are daily essentials. And both product categories have come a long way.

New developments in deodorants and antiperspirants span from microbiome-boosting probiotic blends to more sustainable, environmentally-friendly aerosols. As for oral care products, see expert insight and the latest innovations on p. 66.

Mass market deodorant sales rose 12.6% to \$3.7 billion, according to data from Information Resources Inc. (IRI) for total US multi-outlet (supermarkets, drugstores, mass market retailers, military commissaries and select club and dollar retail chains) for the 52 weeks ended Aug. 7, 2022. For a deeper look into the categories, check out the chart on p. 64.

NATURAL DEODORANT COMPONENTS

Overall, category trends revolve around an emphasis on de-

odorants that are positioned as natural and clean as well as brands focused on sustainability, observed Luke Nadolny, market research analyst, consumer products, Kline.

"The recent product trend of plastic-free packaging from brands such as Dove and Native have laid the groundwork for competing brands to follow in kind as sustainability has become a primary concern with consumers in the toiletries market," he told Happi.

In fact, brands that are positioned as natural and clean are among the fastest growing brands in the category, with brands such as Kosas, Native, Every Man Jack, Drunk Elephant, Schmidt's, Kopari and Love Beauty & Planet all outpacing the overall category growth because of growing

concerns with notorious ingredients such as aluminum in established deodorants, noted Nadolny.

Additionally, consumers have more simple attitudes toward deodorants, as their primary concern is for it to last all day, which is what brands from Procter & Gamble and Unilever such as Old Spice, Secret and Dove offer. However, according to Nadolny, senti-



Truly is an indie brand on the rise.

ment is building with natural and clean brands given their growth rates in 2021, as Procter & Gamble has found the best of both worlds being the second largest toiletries company in the space as well as having the most successful natural deodorant brand Native, which had sales of approximately \$286 million in 2021—up 43% from 2020!

Dr. Heather C. Woolery-Lloyd, MD, board certified dermatologist, director of the Skin of the Color Division for the University of Miami Department of Dermatology and a paid partner for Dove, also shared with Happi what attributes shoppers expect from their deodorants right now.

“Consumers are looking for a deodorant that smells great and is gentle to the underarm skin. They want products that they can use on the go,” she said. “Cost has also become a more important factor recently, and affordability is a priority for many consumers when choosing their products.”

According to Woolery-Lloyd, aluminum-free deodorants are extremely popular right now for those who prefer a deodorant over an antiperspirant and are looking for an



Crystal is expanding with a magnesium-based formula.

aluminum-free option.

“Deodorants contain ingredients to control odor, in contrast to antiperspirants which typically contain aluminum salts that work at the sweat glands to reduce sweating,” she told Happi.

With consumers on the go, spray deodorants are also very popular. According to Woolery-Lloyd, there are aluminum-free options like Dove 0% Aluminum Deodorant Spray. Made with zinc neodecanoate, this deodorant spray





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DEODORANT SALES RISE 12.6% TO \$3.7 BILLION

According to data from Information Resources Inc. (IRI) for total US multi-outlet (supermarkets, drugstores, mass market retailers, military commissaries and select club and dollar retail chains) for the 52 weeks ended Aug. 7, 2022.

Product Categories	Dollar Sales		Unit Sales		Price per Unit	
	Current	% Change vs YA	Current	% Change vs YA	Current	Change vs YA
Deodorants	\$3,730,044,082	12.6%	690,122,328	0.9%	\$5.40	56.3%
Dove	\$847,058,607	17.9%	134,729,310	3.8%	\$6.29	75.4%
Old Spice	\$665,569,069	15.0%	118,442,449	8.0%	\$5.62	34.3%
Secret	\$579,847,606	10.1%	97,854,266	5.4%	\$5.93	25.5%
Degree	\$579,145,296	9.8%	111,114,882	-3.1%	\$5.21	61.4%
Native	\$158,035,512	50.0%	14,545,035	43.2%	\$10.87	49.8%
Gillette	\$142,606,497	12.4%	17,615,613	5.4%	\$8.10	50.2%
Axe	\$109,825,295	-0.1%	20,520,031	-14.3%	\$5.35	76.2%
Right Guard	\$87,474,642	3.2%	17,443,160	-4.4%	\$5.01	36.7%
Suave	\$82,433,163	-12.2%	39,739,875	-18.5%	\$2.07	14.9%
Mitchum	\$52,082,053	-1.1%	10,474,355	-10.7%	\$4.97	48.6%
Arm & Hammer	\$44,076,020	5.9%	15,838,717	-2.1%	\$2.78	21.2%
Mennen	\$40,228,010	-1.8%	17,864,370	-6.6%	\$2.25	11.1%
Tom's of Maine	\$39,825,219	-4.5%	6,880,200	-5.3%	\$5.79	5.2%
Speed Stick	\$31,336,471	2.1%	13,898,067	0.3%	\$2.25	3.9%
Schmidt's	\$30,931,309	-5.6%	3,720,804	-20.2%	\$8.31	128.5%
Ban	\$27,675,978	4.1%	5,597,283	-2.0%	\$4.94	28.7%
Arrid	\$26,531,004	11.7%	6,419,295	-4.1%	\$4.13	58.6%
Harry's	\$22,506,965	137.7%	4,407,265	136.4%	\$5.11	2.8%
Every Man Jack	\$19,661,121	39.0%	3,072,838	31.0%	\$6.40	37.1%
Sure	\$17,184,914	0.4%	6,983,562	-1.1%	\$2.46	3.8%

Source: IRI OmniMarket™ Total Store View

actively captures body odor and eliminates odor-causing bacteria.

Woolery-Lloyd also noted that another trend is deodorants for other parts of the body like under the inner thighs and groin—“really any area that is prone to sweating and odor as a result of sweating,” she said.

NEW & NOTEWORTHY IN DEO

For Fall 2022, Unilever launched Dove Care By Plants Deodorant, the brand’s first plant-based, natural-origin deodorant range that provides 24-hour odor protection, ac-

ording to the Happi Interantional Top 30 company.

Dove Care By Plants Deodorant is made with 99% naturally-derived ingredients and is free of aluminum, parabens and baking soda. The fragrances in the collection are 100% natural, complemented by 96% recyclable packaging.

The products, available on Amazon and at Walmart, retail for \$9.99 in four natural scents: sandalwood, eucalyptus, lemongrass and tea tree. Created with vegan wax made from sunflower, the formulations have been proven clinically using the same high standard testing methodologies at Dove, said the company. Another Unilever brand,

Schmidt's, launched its first deodorant spray. The quick-drying formula made with odor-fighting ingredients leaves no visible residue, said the company. Featuring an ozone-friendly nitrogen propellant, Schmidt's deodorant spray is formulated with powerful odor-fighting ingredients and unique essential oils that keep consumers smelling fresh for up to 48 hours.

Available in three of Schmidt's best-selling scents—Lavender & Sage, Rose & Vanilla, and Clean Powder—the spray is certified vegan- and cruelty-free, contains no aluminum salts, parabens or propylene glycol. It is dermatologist-tested and gentle on skin.

Competing brand Native of Procter & Gamble is rolling out a cornucopia of seasonal deodorant products for fall. Leading the way is a limited edition and uber popular autumn fragrance, Pumpkin Spice Latte. The familiar scents of cinnamon, cardamom and vanilla send consumers back to a “time of comfort and guilty pleasure that no one can get enough of,” said the brand.

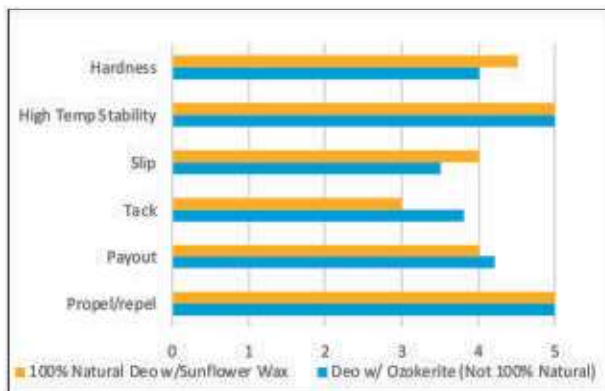


Body sprays remain popular in the men's grooming category.

REVERSE GREENWASHING

Replacing Petrochemicals in Deodorant & Other Sticks

Current market expectations for innovative deodorant products include a naturally-derived, sturdy structure with the right amount of pay-off. Deodorant formulas need to suspend a large amount of powder and remain structurally intact through the life of the product. Many sticks still use synthetic or petroleum waxes as the structuring agent. Koster Keunen laboratories has proved that Sunflower Wax outperforms Ozokerite as a structuring agent in many systems- including natural deodorants. The chart shows the panel results from one of the studies.



Sunflower wax has been found to be an excellent replacing for petrochemical waxes in existing formulas. It is the structuring wax of choice when developing new formulas (natural or traditional), due to its high effective gel strength. The full study can be found at kosterkeunen.com

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NEW DEVELOPMENTS IN ORAL CARE

A clean and hygienic mouth is a necessity for health and wellness, while fresh breath and whiter teeth are ideal for socialization and maintaining a younger look. As a result, the oral care category is showing no signs of slowing down. There’s been a barrage of innovations in the oral care marketplace in the past year.

According to celebrity cosmetic and restorative dentist Dr. Daniel Rubinshtein, DDS, New York, “We are now seeing

a shift towards health-conscious consumerism. People have been placing a greater concern on quality of their oral care products, especially toothpaste...consumers are interested in their health and physical appearance now more than ever before.

Take a look at some leading new products in the oral care category (below). For more insight from Dr. Rubinshtein, look out for an upcoming online exclusive on Happi.com.

CO. BY COLGATE

CO. by Colgate is a new oral beauty care line that targets the Gen-Z consumer. Products include CO. by Colgate - Oh So Glowing Gel Toothpaste with Charcoal, which has stain-removing power; CO. to Go On-The-Go Anticavity

Toothpaste Tabs, a waterless formula for brushing teeth on the go; and the TLC Toothbrush Starter Kit with a reusable aluminum handle and replaceable brush heads. In other news, Colgate recently partnered with Perfect Corp. for the launch of a specialized tooth whitening algorithm to bring the results of the

brands’ Colgate Optic White Overnight Teeth Whitening Pen to life through AR simulation.



wash format which uses 60% less plastic and overall less carbon emissions compared to a 500mL bottle of Listerine mouthwash. Designed with more sustainable packaging, the zero-alcohol formula kills 99% of bad breath germs, according to the company.

COCOFLOSS KIDS FLOSSER



The innovative and refillable Kids Cocoflosser is the latest launch from Cocofloss. It’s made with a durable Tritan material that is both BPA- and BPS-free. Cocofloss is non-toxic, vegan, PFAs free and spun partially from recycled water bottles.

LUSTER WHITE

For stained teeth, Luster Premium White’s Pearl Infused Pro Light Dental Whitening System works up to 7X faster

than all major whitening kits, according to the company. By using both light and heat, the patented Xenon teeth whitening light is proven more effective and quicker than other teeth whitening LED light systems. Developed by dentists, this kit includes: Pro Light, Serum, Rinse and Pearl Infused Mint Whitening Toothpaste.



WHITEGLO ACCELERATOR

Originally developed for Australian actors and models, White Glo has entered the US market. The dentist-approved



brand is available in 50 countries. White Glo’s six-pointed star represents the six key daily requirements that dentists recommend having in consumers’ everyday toothpaste to prevent cavity and decay; plaque and tartar; bacteria in the mouth; improve gum health; and leave behind fresh breath.

LISTERINE COOL MINT ZERO MOUTHWASH CONCENTRATE

A leading brand in the J&J portfolio, Listerine is entering the eco-conscious market with the launch of Listerine Cool Mint Zero Mouthwash Concentrate, a sustainable mouth-

ORAL-B IO4 & IO5

Oral-B has officially launched the iO4 and iO5 electric brushes—the newest additions to the Oral-B iO lineup. According to the P&G brand, the new iO4 and iO5 enable consumers to get better oral health results at home.

ALL CATEGORIES MAINTAIN IN DENTAL CARE SALES

According to data from Information Resources Inc. (IRI) for total US multi-outlet (supermarkets, drugstores, mass market retailers, military commissaries and select club and dollar retail chains) for the 52 weeks ended Aug. 7, 2022.

Product Categories	Dollar Sales		Unit Sales		Price per Unit	
	Current	% Change vs YA	Current	% Change vs YA	Current	Change vs YA
Mouthwash	\$1,646,542,094	2.4%	311,515,124	-2.4%	\$5.29	24.7%
Toothpaste	\$3,701,756,088	5.3%	770,948,085	0.9%	\$4.80	19.9%
Toothbrush/Dental Accessories	\$3,077,497,969	3.7%	560,559,014	-1.0%	\$5.49	25.1%

Source: IRI OmniMarket™ Total Store View

Each brush features multiple brushing modes to personalize the cleaning experience, with rainbow celebration lights upon the completion of brushing for two minutes and refill LED reminders directly on the handles. Products are sold in retailers spanning from Target to Amazon.



TWICE X CURAPROX

Having recently expanded its line of oral-wellness products, Lenny Kravitz's Twice brand turned to what would typically be seen as a competitor, Swiss oral care company Curaprox, to create Twice's own CS 5460 Toothbrush. The brush has 5,460 ultra-soft filaments to gently remove impurities from teeth and gums.



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Also new is Fall Cider & Cinnamon, Toasted Marshmallow & Vanilla, Wildwood & Cardamom, and Cashmere & Rain—four seasonal scents that create that “cozy cabin-in-the-woods feeling with a Native twist through craveable scents inspired by fireside s’mores, spiced cider, warm blankets and vibrant foliage,” according to the brand.

The Cabin Collection includes deodorant (regular, sensitive and mini) as well as hair care and body wash formulas.

SPRAYS & AEROSOL APPLICATIONS

Sprays are here to stay when it comes to antiperspirants and deodorants in development for 2022 and beyond. For example, the new Arm & Hammer Sport Collection, which includes a Sport Body Powder, harnesses the power of Church & Dwight’s Fresh Guard Technology and combines deodorizer Arm & Hammer Baking Soda with odor-neutralizing ingredients to provide “heavy duty odor defense for active people and their sports

equipment,” said the company.

P&G expanded Old Spice with Sweat Defense Dry Spray antiperspirant. According to the brand, it features a “state-of-the-armpit” formula for long-lasting protection. It goes on dry and invisible with a weightless formula. The packaging also includes a patented Encicap technology for spray application. Scent variations include Fast Break with rosemary, eucalyptus and basil as well as Knockout, a blend of patchouli and oakmoss.

Indie brand 18.21 Man Made also is expanding into sprays with Spirits Spritzer in two of its signature scents. According to the company, the body sprays impart a light fragrance needed to rejuvenate after an active day. Scents include Sweet Tobacco and Spiced Vanilla.

INNOVATIONS IN INDIE PERSONAL CARE

Natural leading indie personal care brand Crystal recently debuted a partnership with cancer organization Susan G. Komen.

“Most of us have dear friends and



Old Spice still has swagger with its Sweat Defence antiperspirant collection.

family members who have been affected by the disease,” said Laura Schneider, Crystal’s brand manager. “We are proud to partner with Komen to help build breast cancer awareness and action and empower women to be proactive when it comes to their health.”

Crystal planned several initiatives in support of Komen for October, Breast Cancer Awareness Month, including a \$50,000 donation, regardless of sales, to benefit Komen’s mission. Crystal released special Komen packaging and also leveraged its digital and social platforms to reinforce the partnership and connect customers to breast health information and resources.

Also, new and noteworthy at Crystal is its vegan Magnesium Enriched Deodorant Sticks. According to the company, the products feature 24-hour odor protection with magnesium as the key ingredient and a non-sticky texture. The brand recently was commended with a Purity Award from Clean Label Project.

Another independent name on the rise in personal care development is Hume Supernatural, maker of cruelty-free, microbiome-supporting, gender-neutral deodorants.

The brand said its prebiotic and probiotic deodorants are fast becoming the go-to clean choice for those who want healthy yet effective underarm care. Hume is made from a clean blend of botanicals, probiotics and mineral-rich ingredients that maintains the balance of the skin’s microbiome. It incorporates desert-sourced ingredients like prickly pear, aloe vera, diatomaceous earth (fossilized algae) and probiotics. Powerful prebiotics in Hume include chicory root and blue agave. These microbiome-supporting ingredients soothe and strengthen the skin while eliminating odor-causing bacteria.

“Hume deodorants are highly effective, plant-based and totally clean,” said Jeremy Horowitz, co-founder of Hume Supernatural. “We’re proud of

our growing lineup of supernatural, desert-born products.”

Hume Supernatural’s investors include notables across music, sports

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The latest scent at Hume is Wild Coral.

and entertainment sectors. The partners include international DJ Paul Fisher; celebrity wellness coach Kelly Leveque; surfing stars Griffin and Crosby Colapinto; and professional skateboarder Nora Vasconcellos.

The brand's most popular scent, Desert Bloom, has sold out four times in the past 12 months. Hume deodorant is also available in After Rain, Amber Woods, Out West and Fragrance-Free. The latest addition to the line is a Wild Coral scent.

Hume also recently entered into its first collaboration in the personal care space with a partnership with fashion retailer Vuori to sell a co-branded version of its deodorants and dry body oil mists in all its stores and online.



Misc. Goods Co. added deodorants to its personal care line.

Lifestyle brand Misc. Goods Co. relaunched its natural deodorant line with two fan favorite fragrances, Underhill and Valley of Gold. The line of natural deodorant is made in the US and was recently reformulated to be “non-irritating with long-lasting and effective odor protection,” said the company.

Based in Louisville, KY and founded by designer Tyler Deeb, Misc. Goods Co. focuses on remaining ethical in all manufacturing and partnership practices.

“We created Underhill and Valley of Gold natural deodorants because natural deodorant is more than just a trend,” said Deeb. “Wearing formulas without aluminums and parabens is about taking care of our bodies and using eco-friendly packaging is about taking care of our communities. Our new formulas offer a smoother, more enjoyable application and only include non-irritating ingredients. Getting better is a part of running a business and I am so happy to announce that our natural deodorants have gotten much better!”

Indie brand Truly is also branching out into deodorants. Its new Unicorn Fruit Skin Brightening and Smoothing Deodorant is vegan, aluminum-free and features a “sweet pink sugar” fragrance.

THE FUTURE OF AP/DEOS

What does the next year hold for this essential form of personal care?

According to Dr. Woolery-Lloyd, the next big thing in the AP/deo development is more microbiome-friendly formulations. She told Happi, “These formulas have been popular in skin care and are moving into this category. Products that offer other skin benefits like helping to even skin tone or hydrate irritated skin will also continue to be very popular. Consumers really want multi-tasking personal care products.”

Woolery-Lloyd added that eco-friendly packaging will be also be a hot topic in 2023.

“The heightened media attention on plastic waste is leading brands to look at more sustainable alternatives such as recyclable aluminum, glass, card paper and other sustainable or refillable packaging options,” she said.

Nadolny of Kline expects a continuation of what is already occurring in the AP/deo space.

“The continued dominance of brands under Unilever and Procter & Gamble’s portfolios will drive most of the growth in the category, while the continued growth of naturally positioned brands and sustainable methods of producing and packaging products will be at the forefront of not

only consumers' minds in the future, but brands and retailers as well due to the increasing demand for products that limit harmful ingredients as well as take steps to lower our carbon footprint," Nadolny said.

According to market research firm Spate, glycolic acid is an ingredient to watch in the formulation and development of deodorants in 2023. There are 1.2K searches on average every month in the US for glycolic acid deodorant, which has grown 146.4% in searches during the past year. This trend is very low volume relative to other deodorant trends, according to Spate, which credits the "skinification movement" overall for personal care in the year ahead.

Globally, growth in the deodorant and antiperspirant market is driven by consumers' rising disposable money and growing awareness of personal cleanliness. Furthermore, rising urbanization and the increased launch of innovative goods by key rivals to fulfill expanding demand are driving market growth, according to Fact.MR. For the forecast period of 2022-2032, Fact.MR said deodorant and



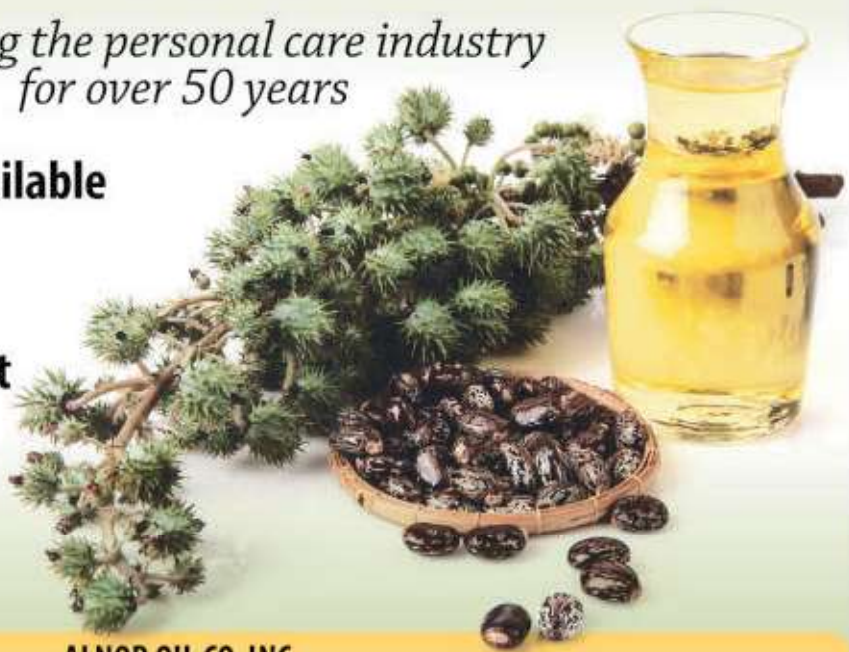
Dove's new Care for Plants is vegan.

antiperspirant market sales will grow at a 5.1% CAGR to reach \$44.5 billion by 2032. ■

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