

Original Paper

The U.S. Deodorant Market: A Competitive Profile

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Abstract

This is the twenty-first paper—and the 22nd study--that follows the footsteps of twenty one studies that have tried to analyze the competitive profiles of U.S. consumer markets: Men's Shaving Cream, Beer, Shampoo, Shredded/Grated Cheese, Refrigerated Orange Juice, Men's Razor-Blades, Women's Razor-Blades, Toothpaste, Canned Soup, Coffee, Potato Chips, Alkaline AA Battery, Facial Tissue, Toilet Paper, Paper Towel, Disposable Diapers, Sanitary Pads, Automatic-Dishwasher Detergent, Hand-Dishwashing Detergent, Household Liquid Non-Disinfectant Cleaner, and Heavy-Duty Liquid Laundry Detergent.

Michael Porter associates high market share with cost leadership strategy, which is based on the idea of competing on a price that is lower than that of the competition.

However, customer-perceived quality—not low cost—should be the underpinning of competitive strategy, because it is far more vital to long-term competitive position and profitability than any other factor. So, a superior alternative is to offer better quality vs. the competition.

In most consumer markets, a business seeking market share leadership should try to serve the middle class by competing in the mid-price segment; and offering quality better than that of the competition: at a price somewhat higher to signify an image of quality, and to ensure that the strategy is both profitable and sustainable in the long run.

The middle class is the socio-economic segment that represents about 40% of households in America.

Quality, however, is a complex concept, consumers generally find difficult to understand. So, they often use relative price, and a brand's reputation, as a symbol of quality.

The U.S. Deodorant Market had retail sales of \$1,324million in 2008. It had five segments: Aerosol, Cologne Type, Rollon, Stick/Solid, and Remaining Deodorants. We have chosen the Stick/Solid segment because it was by far the largest with 2008 U.S. retail sales of \$911 million, constituting 69% sales of this market.

We have focused our attention on the 2.5-2.8 Oz size because it was the most popular.

Using Hierarchical Cluster Analysis, we tested two hypotheses: (I) That the market leader is likely to compete in the mid-price segment, and that (II) Its unit price is likely to be higher than that of the nearest competition.

For both 2008 and 2007, the data did not support Hypothesis I because Secret, the market leader, was a member of the premium segment.

For 2008, the data supported Hypothesis II, because Dove (2.6 Oz), the runner-up, had a price lower than that of Secret, the market leader.

For 2007, technically, the data did not support Hypothesis II, because the unit price of Dove (2.6 Oz) with a unit price of \$3.36, was just a little higher than the \$3.29 unit price of the market leader, Secret (2.6 Oz).

So, we have determined, that for all practical purposes, the data did not negate Hypothesis II.

We found that relative price was a strategic variable, as we have hypothesized.

We also discovered three strategic groups in this market.

A pattern is emerging in price-quality segmentation analysis. In thirteen of the twenty-two studies—that exclude Men’s Razor-Blades, Women’s Razor-Blades, Coffee, Toilet Paper, Paper Towels, Disposable Diapers, Sanitary Pads, Liquid Heavy-Duty Laundry Detergent, and Deodorants—the market leader was found to be a member of the mid-price segment, as we have hypothesized.

Also, results in eleven markets supported Hypothesis II.

Keywords

U.S. Deodorant Market, market segmentation, cost leadership strategy, price-quality segmentation, market-share leadership, relative price a strategic variable, strategic groups.

1. Introduction

This is the *twenty first* paper—and the 22nd study--that follows the footsteps of *twenty one* studies (Note 1) that have tried to analyze the competitive profiles of U.S. consumer markets: Men’s Shaving Cream, Beer, Shampoo, Shredded/Grated Cheese, Refrigerated Orange Juice, Men’s Razor-Blades, Women’s Razor-Blades, Toothpaste, Canned Soup, Coffee, Potato Chips, Alkaline AA Battery, Facial Tissue, Toilet Paper, Paper Towel, Disposable Diapers, Sanitary Pads, Automatic-Dishwasher Detergent, Hand-Dishwashing Detergent, Household Liquid Non-Disinfectant Cleaner, and Heavy-Duty Liquid Laundry Detergent (Datta, 2012, 2017, 2018a, 2018b, 2018c, 2019a, 2019b, 2020a, 2020b, 2020c, 2020d, 2021, 2023a, 2023b, 2023c, 2023d, 2024a, 2024b, 2024c, 2024d).

This research relies on a broader, *integrated* framework of market segmentation which includes *both* the demand *and* supply sides of the competitive equation. This approach is based on the idea that *starting* with ‘product’ characteristics is both an *easier* and more *actionable* way of segmenting markets, than the *traditional* marketing approach that typically begins with the customer or ‘people’ characteristics (Datta, 1996).

This analysis is based on the notion that the path to market share leadership does *not* lie in lower price founded in *cost leadership* strategy, as Michael Porter (1980) suggests. Rather, it is based on the premise—according to the PIMS database research (Note 2)—that it is *customer*-perceived quality that is crucial to long-term competitive position and profitability. So, the answer to market share leadership

for a business is to *differentiate* itself by offering quality *better* than that of the nearest competition (Datta, 2010a, 2010b).

To make this idea *operational* requires *two* steps. The *first* is to determine *which* price-quality segment to compete in? Most consumer markets can be divided in *three* basic price-quality segments: *premium*, *mid-price*, and *economy*. These can be extended to *five* by adding two more: *ultra-premium* and *ultra-economy* (Datta, 1996).

The answer lies in serving the *middle* class by competing in the *mid-price* segment. This is the socio-economic segment that represents about 40% of households in America (Datta, 2011). It is also the segment that Procter & Gamble (P&G), the largest American multinational corporation, has successfully served in the past (Datta, 2010b).

2. The Strategic Importance of Price Positioning

The *second* step for a business seeking market share leadership is to *position* itself at a price that is *somewhat* higher than that of the nearest competition. This is in accord with P&G's practice based on the idea that although higher quality does deserve a "price premium," it should *not* be excessive (Datta, 2010b). A higher price offers *two* advantages: (1) It promotes an *image* of quality, and (2) It ensures that the strategy is both profitable and sustainable in the long run (*ibid*).

As mentioned above, the *middle* class constitutes about 40% of households in America. So, in a *competitive* market one would normally expect more than one major brand competing in the *mid-price* segment.

A classic example of price positioning is provided by General Motors (GM). In 1921 GM rationalized its product line by offering "a car for every purse and purpose"—from Chevrolet to Pontiac, to Oldsmobile, to Buick, to Cadillac.

More importantly, GM *positioned* each car line at the *top* of its segment (Datta, 1996, 2010a).

A more recent and familiar example is the *economy* chain, Motel 6, which has positioned itself as "offering the *lowest* price of any national chain." Another example is the Fairfield Inn. When Marriott introduced this chain, it targeted it at the *economy* segment. And then it positioned Fairfield at the *top* of that segment (Datta, 1996).

2.1 Close Link between Quality and Price

As mentioned above, *customer*-perceived quality is the most important factor contributing to the long-term success of a business. However, quality *cannot* really be separated from price (Datta, 1996). Quality, in general, is an intricate, multi-dimensional concept that is difficult to comprehend. So, consumers often use *relative* price—and a brand's *reputation*—as a symbol of quality (Datta, 1996, 2010b).

3. Deodorant vs. Antiperspirant

Antiperspirants are meant to reduce *sweating*. On the other hand, deodorants are intended to cover up the body *smell* (Note 3).

4. Major Players in the U.S. Deodorant Market

There were *three* major corporate players in this market: Procter & Gamble (P&G), Unilever, and Colgate-Palmolive.

The *market leader* was Secret, followed by Dove, the *runner-up*.

5. Secret

Procter & Gamble (P&G) developed Secret deodorant in the 1950s. This was the *first* antiperspirant *and* deodorant specifically designed for and marketed to *women* (Note 4).

P&G created Secret to cater to the desire of women for a product that would contribute to their “feelings of femininity, daintiness and freshness” (Notes 5, 6).

In 1972, P&G introduced the now-famous Secret *tag line* ‘Strong enough for a man, but made for a woman.’ “The tagline still remains one of the most *famous* advertising lines of all time” (*italics added*; Notes 5 and 6).

6. Old Spice

Old Spice Deodorant is manufactured by P&G. It was launched in 1937 as “Early American Old Spice” by William Lightfoot Schultz's company: Shulton Inc. It was originally targeted to women. By the end of 1937 the company introduced the men’s version (Note 7).

7. Dove

The Dove brand was started by Lever Brothers, a British soap and detergent company. In the 1950s it was able to secure the original patents for Dove manufacturing (Note 8).

Unilever *expanded* Dove's product line beyond the soap bar to include *deodorants*, body washes, and more in the 1990s and 2000s (Note 8).

8. Degree

The history of Degree deodorant is *linked* to Rexona, which was purchased by Lever Brothers in the 1930s (Note 9).

In the 1960s Rexona was introduced worldwide, and later it became Degree in the United States; and in 1996 Unilever acquired the Degree brand from Helene Curtis (Note 9).

In 2021 Degree partnered with several organizations to create the world's *first* deodorant designed for people with *disabilities* (Note 9).

9. Mennen

The Mennen Co. was founded in 1878 by a German immigrant, Gerhard Heinrich Mennen, in Newark, New Jersey. In 1992, the company was sold to Colgate-Palmolive (Note 10).

10. The U.S. Deodorant Market —Price-Quality Segmentation Profile

This study is based on U.S. retail sales of this market for 2008 and 2007 (Note 11). The data includes total dollar and unit sales, no-promotion dollar and unit sales, and promotion dollar and unit sales (Note 12).

The U.S. Deodorant Market had retail sales of \$1,324 million in 2008. It had *five* segments: Aerosol, Cologne Type, Rollon, Stick/Solid, and Remaining Deodorants. We have chosen the Stick/Solid segment because it was by far the largest with 2008 U.S. retail sales of \$911 million, constituting 69% sales of the Deodorant market.

We have focused our attention on the 2.5-2.8 Oz size because it was the most popular (Table 1).

11. Hierarchical Clustering as the Primary Instrument of Statistical Analysis

We have used cluster analysis as the *primary* statistical tool in this study. As suggested by Ketchen and Shook (1996), we have taken several steps to make this effort as *objective* as possible:

- First, this study is *not* ad-hoc, but is grounded in a *theoretical* framework, as laid out below.
- Second, we are fortunate that we were able to get *national* U.S. sales data for our study for *two* years.
- Thus, this data provided a *robust* vehicle for subjecting cluster consistency and reliability to an *additional* test.
- Third, we wanted to use two different techniques—KMeans and Hierarchical—to add another layer of cluster consistency and reliability. However, we found Hierarchical cluster analysis to be *superior* in meeting that test. So, we did *not* consider it necessary to use the KMeans technique.

12. Theoretical Foundation for Determining Number of Clusters—and Their Meaning

As already stated, a major purpose of this paper is to identify the market share *leader* and determine the price-quality segment—based on unit *price*—it was competing in.

An important question in performing cluster analysis is to figure out the *number* of clusters based on an *a priori* theory. Most consumer markets can be divided in *three* basic price-quality segments: *premium*, *mid-price*, and *economy*. These three basic segments can be extended to *five*: with the addition of *super-premium* and *ultra-economy* segments (Datta, 1996).

Therefore, *three* represents the *minimum* and *five* the *maximum* number of clusters (Datta, 2012, 2017, 2018a, 2018b, 2018c, 2019a, 2019b, 2020a, 2020b, 2020c, 2020d, 2021, 2023a, 2023b, 2023c, 2023d, 2024a, 2024b, 2024c, and 2024d).

An equally crucial issue is to find out what each cluster (e.g., *economy*, *mid-price*, and *premium*) really means.

Perhaps a good way to understand what each price-quality segment stands for in *real* life is to look at a socio-economic *lifestyle* profile of America. It reveals *six* classes (Note 13). Each class is associated with a price-quality segment typified by the retail stores where they generally shop: each a symbol of their *lifestyle* (Datta, 2011).

12.1 Guidelines for Cluster Consistency and Reliability

In addition to laying a theoretical foundation for the *number* of clusters, we set up the following guidelines to *enhance* cluster consistency and reliability (Datta, 2012, 2017, 2018a, 2018b, 2018c, 2019a, 2019b, 2020a, 2020b, 2020c, 2020d, 2021, 2023a, 2023b, 2023c, 2023d, 2024a, 2024b, 2024c, and 2024d):

- In general, there should be a *clean break* between *contiguous* clusters.
- The *anchor* clusters—the top and the bottom—should be *robust*. In a cluster-analysis project limited to a range of three to five clusters, a robust cluster is one whose membership remains *constant* from three- to four-, or four- to five-cluster solutions.
- Finally, we followed a step-by-step procedure to determine the optimal solution. First, we start with *three* clusters. Thus, the bottom cluster obviously becomes the *economy* segment, and the top cluster the *premium* segment. Next, we go to *four* clusters, and *tentatively* call them: *economy*, *mid-price*, *premium*, and *super-premium*. Then we go to *five* clusters. If the membership of the *bottom* cluster remains unchanged from what it was in the four-cluster result, it clearly implies that the *ultra-economy* segment does *not* exist. Then, if the membership of the *top* cluster also remains the same from a four- to a five-cluster solution, then the *top* cluster becomes the *super-premium* segment.
- This signifies that even in a five-cluster solution we have only *four* price-quality segments: *economy*, *mid-price*, *premium*, and *super-premium*.
- It means that either the *premium* or the *mid-price* segment consists of *two sub-segments*.

12.2 External Evidence to Validate Results of Cluster Analysis

Whenever possible, we have tried to seek *external* evidence to validate the results of cluster analysis. For example, many companies identify on their websites a certain brand(s) as a *premium* or luxury brand. A case in point is that of P&G which says that its plan is to compete in all “price points”: *super-premium*, *premium*, and *mid-price*: *except* the *economy* segment (Datta, 2010b).

13. Results of Hierarchical Cluster Analysis

We tested two hypotheses:

- I—That the market share leader would be a member of the *mid-price* segment.
- II—That the market share leader would carry a price tag that is *higher* than that of the nearest competition.

For both 2008 and 2007, the data did *not* support Hypothesis I because Secret, the market leader, was a member of the *premium* segment.

It is important to point out that a significant reason for the above result was that--*unlike* other deodorant brands (Ch. 5), Secret was designed and marketed to *women* who desired a product that would contribute to their “feelings of femininity, daintiness and freshness”: for which they were willing to pay *premium* prices.

For 2008, the data supported Hypothesis II, because Dove (2.6 Oz), the *runner-up*, had a price that was *lower* than that of Secret, the *market leader*.

For 2007, technically, the data did not support Hypothesis II, because the unit price of Dove (2.6 Oz), the *runner-up*, with a unit price of \$3.36, was *just a little* higher than the \$3.29 unit price of the *market leader* Secret (2.6 Oz).

So, we have determined, that for all practical purposes, the data did *not* negate Hypothesis II.

14. Relative Price a Strategic Variable

Finally, we performed one more test to determine the consistency and reliability of the results of cluster analysis in this study. So, we *ranked* the unit price of Deodorant brands for 2008 and 2007. All *three* measures of *bivariate* correlation—Pearson, and non-parametric measures Kendall’s tau_b, and Spearman’s rho—were found to be *significant* at an amazing 0.01 level!

We believe that these surprising results became possible only, because management in the U.S. Deodorant Market must have been treating *relative* price as a strategic variable, as we have hypothesized.

15. The Role of Promotion

We performed *bivariate* correlation between total retail sales vs. promotional (PROMO) sales. The results were significant for *all* three measures—Pearson, Kendall, and Spearman—at an amazing 0.01 level!

For 2008 the promotional sales of the U.S. Stick/Solid Deodorant Market averaged 30.6% of total retail sales (Table 2). Its highlights are presented below:

- Leaving aside the Men’s and Women’s Razor Blades markets, the average promo score for the Stick/Solid Deodorant market is among the *lowest*. In the *non-food* group of markets that cater to customers’ *personal* needs, e.g., Men’s Shaving Gel (Datta, 2012), Shampoo (Datta, 2018a), Toothpaste (Datta 2020a), Sanitary Pads (2024a), and Deodorants fall in this category, with an *average* promo score ranging from 30 to 37.

16. A Pattern Emerging in Price-Quality Segmentation Analysis

This is the *twenty-first* paper--and the 22nd study--that encompasses analysis of competitive profiles of U.S. consumer markets. In each study we have tested two hypotheses:

- I—That the market-share leader would be a member of the *mid-price* segment.
- II—That the market-share leader would carry a price tag that is *higher* than that of the nearest competition.

17. Men’s and Women’s Razor-Blade Markets Did Not Support Hypothesis I

In the Men’s Razor-Blade market for 2008, the *market leader* was Gillett Mach 3 in the *premium* segment, and Gillette Fusion, the *runner-up*, was in the *super-premium* segment (Datta, 2019a)

In the Women’s Razor-Blade market for 2008, the market leader Gillett Venus, the *market leader*, and Schick Intuition Plus, the *runner-up*, were *both* members of the *premium* segment (Datta, 2019b).

So, what are the factors that these two markets have deviated from our theory (Datta, 2019a, 2019b):?

- The technology for making Men’s and Women’s Razors and Blades has now become quite *intricate*, based as it is on *three* fields: metallurgy, chemistry, and electronics, which, in turn, raises the *cost* of production,
- Gillette has been pursuing a strategy of *innovation* and constant improvement, offering new features—and benefits—than ever before, which has consequently made it possible for it to charge *premium* prices.
- Gillette’s virtual *monopoly* of the industry is another factor, that has enabled it to position itself in the *premium* and *super-premium* segments: rather than the *mid-price* segment.
- Many men—and women--consider shaving an important part of *personal grooming*, for which they are willing to pay *premium* prices: because they regard it an “affordable luxury.”

18. Seven More Markets--Coffee, Toilet Paper, Paper Towel, Disposable Diapers, Sanitary Pads, Liquid Heavy-Duty Laundry Detergent, and Deodorant--Did Not Support Hypothesis I

In the *Coffee* market, the *market leader*, Folgers, and the *runner-up* Maxwell House, were *both* members of the *economy* segment, although Folgers’ unit price was *higher* than that of Maxwell House, as we have hypothesized (Datta, 2020c).

This is truly an *astounding* result! In all the remaining *twenty-one* markets, *not* a single market leader competed in the *economy* segment.

This implies that both Folgers and Maxwell House were following the *cost leadership* strategy--based on *lower* price, rather than better quality--and treated coffee as a *commodity* to gain market share. So, it is not unreasonable to conjecture that such a strategy is *not* likely to have been very profitable (Datta, 2020c).

The results in the Toilet Paper study also did *not* support Hypothesis I, because Charmin, the *market leader*, was a member of the *premium* segment (Datta, 2023b).

Toilet activity is quite complex, in which personal *hygiene* plays a vital role. Although a *bidet* is quite popular in Europe, very few people in America use it (*ibid*).

So, in the *absence* of a substitute, Americans are willing to pay *premium* prices for toilet paper, because

it serves an *important* need: an *antidote* to germs and disease (*ibid*).

In the Paper Towel market, the *market leader*, Bounty, was a member of the *super-premium* segment (Datta, 2023c).

So, *what* made this extraordinary result possible?

P&G *revolutionized* the industry with a 2-ply paper towel, Bounty, that was not only *soft* and *strong*, but was *unmatched* in being *quick* and *absorbent* on spills (*ibid*).

Whereas most paper towel makers were marketing *strength* or *softness*, P&G discovered that consumers generally *preferred* something else: *absorbency*: for which 39% of American customers paid *super-premium* prices for Bounty paper towel in 2008 (*ibid*).

And that is why P&G uses the slogan “*The Quicker Picker Upper*” in its advertisements for Bounty (*ibid*).

In the Disposable Diapers market, Pampers, the *market leader*, was a member of the *super-premium* segment.

In the words of Peter Drucker, Pampers disposable baby diapers “*created* customers” and served them *better* than the competition (Datta, 2023d).

Another reason, according to P&G, is the rising cost of *pulp*--a raw material used to make Disposable Diapers--and higher transportation and freight costs (*ibid*).

In the Sanitary Pads market, the *market leader*, Ultra-thin-with-Wings, was a member of the *premium* segment.

Menstruation is an activity that is so *complex* that it is synonymous with *femininity* itself. So, it is not surprising that many women are willing to pay *premium* prices for such a fundamental need (Datta, 2024a).

The Liquid Heavy-Duty Laundry Detergent market also did not support Hypothesis I because the *market leader*, Tide (100 Oz), was a member of the *premium* segment. The primary argument is that Tide was such a *dominant* player in the market that allowed P&G to *position* Tide in the *premium* segment.

Yet, we offer one more argument. Let us compare Liquid *Laundry* detergent market with Liquid *Dishwasher* detergent market. In the latter, the market leader was P&G’s Cascade that was a member of the *mid-price* segment. In both markets clean dishes and clean clothes are important. Nevertheless, there is an important *distinction* between the two. Clean dishes are normally *not* on public display (except when one has guests). However, clothes *are* on *public* display. So, many customers are willing to pay *premium* prices for a laundry detergent brand such as Tide.

Finally, in the Deodorant market the *market leader*, Secret, was a member of the *premium* segment. It is important to point out that a major reason for Secret’s impressive performance is that--*unlike* other deodorant brands—it was designed for and marketed to *women* who desired a product that would contribute to their “feelings of femininity, daintiness and freshness”: for which they were willing to pay *premium* prices.

However, all *seven* markets *supported* Hypothesis II.

19. Results in Thirteen Markets Supported Hypothesis I

In thirteen of the twenty-two markets—that *exclude* Men’s and Women’s Razor-Blades, Coffee, Toilet Paper, Paper Towel, Disposable Diapers, Sanitary Pads, Liquid Heavy-Duty Laundry Detergent, and Deodorant—the market leader was found to be a member of the *mid-price* segment for *both* 2008 and 2007 (see Note 14), as we have hypothesized. Those market leaders are:

- Edge Men’s Shaving Gel, (2) Bud Light Lager Beer, (3) Pantene Shampoo, (4) Kraft Shredded/Grated Cheese, (5) Tropicana Refrigerated Orange Juice, (6) Crest Toothpaste, (7) Campbell Chicken Broth, and Campbell Chicken Noodle Soup, (8) Lay’s Potato Chips, (9) Energizer Alkaline AA Battery (Note 14), (10) Kleenex Facial Tissue, (11) Cascade Automatic-Dishwasher Detergent, (12) Palmolive Hand-Dishwashing Detergent, and (13) Formula 409 Household Liquid Non-Disinfectant Cleaner.

20. Results in Eleven Markets Supported Hypothesis II

The Men’s Razor-Blades market did not support Hypothesis II (Ch. 17).

Although, technically, in three of the thirteen markets mentioned above in Ch. 19, the results did *not* support Hypothesis II, in reality, only *two*—Chicken Noodle Soup, and Facial Tissue--did not.

In the Chicken Noodle Soup market, the *runner-up* Progresso, was a member of the *premium* segment.

The results in the Facial Tissue market also did *not* support Hypothesis II, because the *runner-up* Puffs, was a member of the *premium* segment with a clearly *superior* quality, and a price tag *higher* than that of the market leader Kleenex: a member of the *mid-price* segment (Datta, 2023a).

In the Shampoo market, the *runner-up*, Head & Shoulders was a member of the *mid-price* segment. Yet, its price was *higher* than that of the *market leader*, Pantene. However, this result did *not* negate Hypothesis II, because it was due to the fact that the former was a *specialty* shampoo which always sells at a *higher* price (2018a).

That leaves us with the following *eleven* markets that supported Hypothesis II:

- (1) Men’s Shaving Gel, (2) Lager Beer, (3) Shampoo, (4) Shredded-Grated Cheese, (5) Refrigerated Orange Juice, (6) Toothpaste, (7) Potato Chips, (8) AA Alkaline Battery (9) Automatic-Dishwasher Detergent (Note 15), (10) Hand-Dishwashing Detergent (Note 16), and (11) Deodorant.

In the above eleven markets the *runner-up* had a price tag that was *lower* than that of the market leader (see Notes 15 and 16).

21. Strategic Groups in the U.S. Deodorant Market, 2008

We found *three* strategic groups in this market. Their 2008 overall *brand* market shares are as follows (Table 1):

1. Procter & Gamble:
 - a. Secret—*Market Leader* 16.1% (Note 17)
 - b. Old Spice 6.1%
 - c. Right Guard—2.0%
 - d. Gillette 0.8%
2. Unilever:
 - Dove—*Runner-up* 9.7% (Note 17)
 - Degree 14.2%
 - Axe 3.8%
3. Colgate-Palmolive
 - Mennen 7.7%

21.1 Procter & Gamble (P&G)

P&G is the largest American multinational corporation, which was created back in 1837.

For 2023 P&G has reported worldwide net sales of \$82 billion (Note 18).

21.2 Unilever Corporation

Unilever is a multinational consumer products company. It had global sales of \$64.2 billion for 2023 (Note 19).

21.3 Colgate-Palmolive

Colgate-Palmolive is a multinational consumer goods company. Its world-wide sales were \$19.5 billion for 2023 (Note 20).

22. Conclusion

The path to market share leadership does *not* lie in *cost leadership* strategy: a path that is grounded in a *price that is lower* than that of the competition, as Michael Porter has suggested. Rather, a business in pursuit of market-share leadership should try to serve the *middle* class by competing in the *mid-price* segment; and offering quality *superior* to that of the competition: at a somewhat *higher* price to connote an image of quality, and to ensure that the strategy is both profitable and sustainable in the long run.

The *middle* class is the socio-economic segment that represents about 40% of households in America.

Quality, however, is a complex concept that consumers generally find difficult to understand. So, they often employ *relative* price and a brand's *reputation* as a symbol of quality.

The U.S. Deodorant Market had retail sales of \$1,324million in 2008. It had *five* segments: Aerosol, Cologne Type, Rollon, Stick/Solid, and Remaining Deodorants. We have chosen the Stick/Solid segment because it was by far the largest with 2008 U.S. retail sales of \$911 million, constituting 69% sales of this market.

We have focused our attention on the 2.5-2.8 Oz size because it was the most popular.

Using Hierarchical Cluster Analysis, we tested two hypotheses: (I) That the market leader is likely to

compete in the *mid-price* segment, and that (II) Its unit price is likely to be *higher* than that of the nearest competition.

For both 2008 and 2007, the data did *not* support Hypothesis I because Secret, the *market leader*, was a member of the *premium* segment.

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We found *three* strategic groups in this market.

A *pattern* is emerging in price-quality segmentation analysis. In *thirteen* of twenty-two markets—that *exclude* Men’s Razor-Blades, Women’s Razor-Blades, Coffee, Toilet Paper, Paper Towel, Disposable Diapers, Sanitary Pads, Liquid Heavy-Duty Laundry Detergent, and Deodorant—the results *supported* Hypothesis I: that the *market leader* was going to be to be a member of the *mid-price* segment. Those market leaders are:

- (1) Edge Men’s Shaving Gel, (2) Bud Light Lager Beer, (3) Pantene Shampoo, (4) Kraft Shredded/Grated Cheese, (5) Tropicana Refrigerated Orange Juice, (6) Crest Toothpaste, (7) Campbell Chicken Broth, and Campbell Chicken Noodle Soup, (8) Lay’s Potato Chips, (9) Energizer Alkaline AA Battery (Note 13), (10) Kleenex Facial Tissue, (11) Cascade Automatic-Dishwasher Detergent, (12) Palmolive Hand-Dishwashing Detergent, and (13) Formula 409 Household Liquid Non-Disinfectant Cleaner.

Also, results in *eleven* markets supported Hypothesis II.

Finally, we discovered *three* strategic groups in this market.

Table 1. Hierarchical Cluster Analysis: The U.S. Deodorant Market, 2008

PQ Segment	Stick/Solid Deodorant 2.5-2.8 Oz	Upr.2008	ClusCtr	MktSh%		Sales\$M	
				2.5-2.8 Oz	Brand	2.5-2.8 Oz	Brand
Superp-Premium	AXE DRY 2.7 Oz	\$4.11	\$4.07	8.6%	3.8%	\$32.9	\$34.5
	ADIDAS 2.8 Oz	\$4.11		0.3%	0.4%	\$1.0	\$3.3
Premium	MITCHUM SMART 2.5 Oz	\$3.98		2.0%	0.8%	\$7.6	\$7.6
	TAG 2.7 Oz	\$3.83	\$3.69	1.1%	0.5%	\$4.1	\$4.1
	OLD SPICE RED ZONE 2.6 Oz	\$3.81		8.0%	6.1%	\$30.6	\$55.5
	GILLETTE 3X 2.6 Oz	\$3.80		1.4%	0.8%	\$5.3	\$6.9
	RIGHT GUARD XTREME POWER STRIP 2.6 Oz	\$3.65		4.5%	2.0%	\$17.3	\$18.6
	SECRET 2.6 Oz Market Leader	\$3.54		20.8%	16.1%	\$79.6	\$146.8
	DOVE 2.6 Oz Runner-up	\$3.51		18.6%	9.7%	\$71.3	\$88.3
Mid-Price	DEGREE 2.6 Oz	\$3.05	\$3.01	13.5%	14.2%	\$51.8	\$129.7
	MENNEN SPEED 2.7 Oz	\$2.94		5.4%	7.7%	\$20.8	\$70.0
Economy	BANO 2.6 Oz	\$2.53	\$2.40	2.7%	1.1%	\$10.2	\$10.4
	SURE 2.6 Oz	\$2.32		3.3%	2.7%	\$12.6	\$24.3
	ARRID 2.7 Oz	\$2.32		2.5%	1.5%	\$9.7	\$13.6
	SOFT & DRI 2.6 Oz	\$2.30		1.3%	0.7%	\$4.8	\$6.0
	ARM & HAMMER ULTRAMAX SO 2.8 Oz	\$2.29		2.3%	1.4%	\$8.7	\$12.9
Ultra-Economy	SUAVE 2.6 Oz	\$2.03	\$2.03	3.7%	2.1%	\$14.1	\$18.7
				100.0%	71.5%	\$382.6	\$651.2
						42.0%	71.5%
	Total				100.0%		\$910.9

Table 2. Promo Sales to Total Sales: The U.S. Stick/Solid Deodorant Market, 2008**Brands with Sales over \$10 Million (2.5-2.8 Oz)**

BRANDS	PQSegment	Promo %	Promotional Intensity	Brand MkSh %
DEODORANT STICK/SOLID				
MENNEN SPEED STICK STICK/SOLID	<i>Mid-Price</i>	39.1%	Moderate	7.7%
RIGHT GUARD XTREME STRIP/ SOLID	<i>Premium</i>	38.8%		2.0%
BANO STICK/SOLID	<i>Economy</i>	35.9%		1.1%
ARM & HAMMER ULTRAMAX STICK/SOLID	<i>Economy</i>	34.9%		1.4%
OLD SPICE RED ZONE STICK /SOLID	<i>Premium</i>	33.3%		6.1%
ARRID STICK/SOLID	<i>Economy</i>	33.0%		1.5%
DOVE STICK/SOLID (runner-up)				
DEGREE STICK/SOLID	<i>Mid-Price</i>	28.4%	Low-Moderate	9.7%
SECRET STICK/SOLID (market leader)	<i>Premium</i>	28.0%		16.1%
SURE STICK/SOLID	<i>Economy</i>	27.5%		2.7%
AXE DRY STICK/SOLID	<i>Super-Premium</i>	27.0%		3.8%
SUAVE STICK/SOLID	<i>Ultra-Economy</i>	25.8%		2.1%
Av. Promo score		30.6%		

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Notes.

Note 1. The paper titled: The U.S. Automatic-Dishwasher and Hand-Dishwashing Detergent Markets involved *two* studies.

Note 2. Profit Impact of Market Strategies.

Note 3.

<https://oldspice.com/blog/deodorant-vs-antiperspirant-which-is-best-for-you/#:~:text=Let's%20start%20with%20deodorant.,technology%2C%20but%20also%20reduce%20sweating.>

Note 4.

https://www.google.com/search?q=P%26G%3A+Hisory+of+Secret+Deodorant&sca_esv=5018db4a768ab707&sca_upv=1&source=hp&ei=At7LZrW3N_eWwbkPkuXgmQk&iflisig=AL9hbdgAAAAZsvsEn8q1Uf2FELmCiAsahLIOVeAhaSJ&ved=0ahUKEwi1wP-ixJGIAxV3SzABHZIyOJMQ4dUDCA8&uact=5&oq=P%26G%3A+Hisory+of+Secret+Deodorant&gs_lp=Egdnd3Mtd2l6Ih9QJkc6IEhpc29yeSBvZiBTZWNYZXQgRGVvZG9yYW50MgcQIRigARgKMgcQIRigARgKMgcQIRig

Note 5. <https://secret.com/en-us/about>

Note 6.

[https://en.wikipedia.org/wiki/Secret_\(deodorant_brand\)#:~:text=4%20External%20links-,History,%2C%20and%20marketed%20to%2C%20women.](https://en.wikipedia.org/wiki/Secret_(deodorant_brand)#:~:text=4%20External%20links-,History,%2C%20and%20marketed%20to%2C%20women.)

Note 7.

https://www.google.com/search?q=History+of+Old+Spice+Deodorant&sca_esv=3cd07ac50fd5c89b&ca_upv=1&source=hp&ei=Kn7UZvDWLeuPwbkPleqC6Aw&iflsig=AL9hbdgAAAAZtSMOgemFih2ONbSWj4UjzfDdtlmsVus&ved=0ahUKEwjwk5-R_qGIAxXrRzABHRW1AM0Q4dUDCBA&uact=5&oq=History+of+Old+Spice+Deodorant&gs_lp=Egdnd3Mtd2l6lh5IaXN0b3J5IG9mIE9sZCBTcGljZSBEZW9kb3JhbnQyBRAhGKABMgUQIRigATIFECEYoAEyBRAhGKABMgUQIRigATIFECEYqwJIjQkBUPQKwMyJAXABeACQAQCYAYkBoAGeFKoBBDIzLje4AQPIAQD4AQGYAh-gAoQVqAIKwgIQEC4YAxjlAhjqAhiMAxiPacICEBAAGAMY5QIY6gIYjAMYjwHCAhEQLhiABBixAxjRAXiDARjHAcICCxAAGIAEGLEDGIMBwgIIEAAYgAQYsQPCAgUQABiABMICCxAuGIAEGNEDGMcBwgIOEC4YgAQYsQMY0QMYxwHCAG4QABiABBixAxjDARiKBcICCBAuGIAEGLEDwgIU EC4YgAQYxwEYmAUymQUYngUYrwHCAG4QLhiABBixAxjDARjUAsICDhAAGIAEGLEDGIMBGMkdWgILEAAYgAQYkgMYigXCAG4QLhiABBjHARiOBRivAcICCxAuGIAEGMcBGK8BwgIF EC4YgATCAGYQABgWGB7CAGgQABgWGB4YD8ICCxAAGIAEGIYDGIoFwgIIEAAYgAQYogS YAWiSBwQyNC43oAf04QE&scient=gws-wiz

Note 8.

[https://www.google.com/search?q=Google%3A+History+of+Dove+Deodorant&sca_esv=99a2e4c7d4e137bc&source=hp&ei=roPUZuTQNGGzwt0P2bmB2Ak&iflsig=AL9hbdgAAAAZtSRvoiaNkybzqecF1KHDVtOZ2VRQZy&ved=0ahUKEwj36-yg6KIAxXRmbAFHdlcAJsQ4dUDCBA&uact=5&oq=Google%3A+History+of+Dove+Deodorant&gs_lp=Egdnd3Mtd2l6liFHb29nbGU6IEhpc3Rvenkgb2YgRG92ZSBEZW9kb3JhbnQyBRAhGKABMgUQIRigATIFECEYoAEyBRAhGKABMgUQIRigATIFECEYqwJI5tQBUABYjLkBCAB4AJABAjgBcKABwxKqAQQzMi4xuAEDyAEA-AEBmAlhoAKnE8ICERAUgIAEGLEDGNEDGIMBGMcBwgILEAAYgAQYsQMYgwHCAGgQABiABBixA8ICDhAuGIAEGLEDGIMBG IoFwgIFEAAAYgATCAG4QLhiABBixAxjRAXjHAcICDhAuGIAEGLEDGIMBG OUEwgIIEAAYgAQYCsICBhAAGBYHpgDAJIHBDMyLjGgB5y0AQ&scient=gws-wiz](https://www.google.com/search?q=Google%3A+History+of+Dove+Deodorant&sca_esv=99a2e4c7d4e137bc&source=hp&ei=roPUZuTQNGGzwt0P2bmB2Ak&iflsig=AL9hbdgAAAAZtSRvoiaNkybzqecF1KHDVtOZ2VRQZy&ved=0ahUKEwj36-yg6KIAxXRmbAFHdlcAJsQ4dUDCBA&uact=5&oq=Google%3A+History+of+Dove+Deodorant&gs_lp=Egdnd3Mtd2l6liFHb29nbGU6IEhpc3Rvenkgb2YgRG92ZSBEZW9kb3JhbnQyBRAhGKABMgUQIRigATIFECEYoAEyBRAhGKABMgUQIRigATIFECEYqwJI5tQBUABYjLkBCAB4AJABAjgBcKABwxKqAQQzMi4xuAEDyAEA-AEBmAlhoAKnE8ICERAUgIAEGLEDGNEDGIMBGMcBwgILEAAYgAQYsQMYgwHCAGgQABiABBixA8ICDhAuGIAEGLEDGIMBGIoFwgIFEAAAYgATCAG4QLhiABBixAxjRAXjHAcICDhAuGIAEGLEDGIMBG OUEwgIIEAAYgAQYCsICBhAAGBYHpgDAJIHBDMyLjGgB5y0AQ&scient=gws-wiz)

Note 9.

https://www.google.com/search?q=Unilever%3A+History+of+Degree+deodorant&sca_esv=5018db4a768ab707&sca_upv=1&ei=x-PLZtyIO4D8wbkP2pfA6Ag&ved=0ahUKEwiciKjyZGIAxUAfjABHdoLEIQ4dUDCA8&oq=Unilever%3A+History+of+Degree+deodorant&gs_lp=Egxnd3Mtd2l6LXNlcna iJVvuaWxldmVyOiBiIaXN0b3J5IG9mIERIZ3JlZSBkZW9kb3JhbnQyCBAhGKABGMMEMggQIRigARjDBEisVIDoDliqMHABeAGQAQCYAVegAZQFqgEBOLgBDMgBAPgBAZgCCaACTAXCAGoQABiWAXjWBBhHwglKECEYoAEYwwQYCsICCBAAAGIAEGKIEmAMAIAYBkAYIkgcBOaAHrhk&scient=gws-wiz-serp

Note 10.

https://www.google.com/search?q=Google%3A+History+of+Mennen+deodorant&sca_esv=ec94a8f682f800d7&source=hp&ei=4p7UZteKGsmrwbkPrrGBoAQ&iflsig=AL9hbdgAAAAAZtSs8jO3oshfKdkQId5KLLkmju2F7iWO&ved=0ahUKEwjXg4qrnaKIAxXJVTABHa5YAEQQ4dUDCBA&uact=5&oq=Google%3A+History+of+Mennen+deodorant&gs_lp=Egdnd3Mtd2l6liNHb29nbGU6IEhpc3Rvenkgb2YgTWVubmVuIGRlb2RvcnFudDIFECEYoAEyBRAhGKABMgUQIRigATIFECEYoAEyBRAhGKsCMgUQIRirAkidygFQyBRY17oBcAF4AJABAjgBigKgAagVqgEGMzMuMS4xuAEDyAEA-AEBmAljoALMFagCCsICEBAuGAMY5QIY6gIYjAMYjwHCAhAQAABgDGOUCGOoCGIwDGI8BwgIREC4YgAQYsQMY0QMYgwEYxwHCAgsQABiABBixAxiDAcICCBAAGIAEGLEDwgIOEC4YgAQYsQMYgwEYigXCAGUQABiABMICDhAuGIAEGLEDGNEDGMcBwgIOEC4YgAQYsQMYgwEY5QTCAGcQABiABBgKwgIIEAAYFhgeGA_CAgYQABgWGB7CaggQABiABBiiBJgDBJIHBjMzLjEuMaAHh8QB&sclient=gws-wiz

Note 11. This data is from food stores with sales of over \$2 million, and drug stores over \$ 1 million; it also includes discount stores, such as Target and K-Mart, but *excludes* Wal-Mart as well as warehouse clubs, e.g., Sam’s Club, Costco, and BJ’s. It also does not include the “dollar” stores, such as Dollar General, and others.

Note 12. For those stores for which, during a week, there were feature ads, coupon ads, display, or temporary price decrease of at least 5%.

Note 13. The six classes are: “The Poor”, “The Near Poor”, “Traditional Middle Class”, “The Upper-Middle Class”, “The Very Rich/The Rich”, and “The Mega Rich—Masters of the Universe”.

Note 14. For 2007 the results did not support Hypothesis I, because the market leader, Energizer was found to be a member of the *premium* segment.

Note 15. In the Automatic Dishwasher Detergent market, the results for 2008 supported Hypothesis II, but *not* for 2007.

Note 16. In the Hand Dishwashing segment, the results for 2007 did support Hypothesis II, but *not* for 2008.

Note 17. The data to determine market leader and runner-up is based on sales data for 2.5-2.8 Oz. size deodorant.

Note 18. <https://us.pg.com/annualreport2023/financial-highlights/>

Note 19.

https://www.google.com/search?q=global+revenue+of+unilever+for+2023&sca_esv=c46fc0e2b66f1220&sca_upv=1&source=hp&ei=8PbLZpKSDNGTwbkPhdepeQ&iflsig=AL9hbdgAAAAZswFAGL7p v1Vd7sFJKJeJcP8SiOUC46i&ved=0ahUKEwiSyyuqF3JGIAxXRSTABHYVrKg8Q4dUDCA8&uact=5&oq=global+revenue+of+unilever+for+2023&gs_lp=Egdnd3Mtd2l6liNnbG9iYWwgcMv2ZW51ZSBvZiB1bmlsZXZlciBmb3IgmjAyMzIFECEYoAEyBRAhGKABMgUQIRigATIFECEYoAEyBRAhGKABSND_dAVDdDFjTsQFwAXgAkAEAmAGDAaAB9RWqAQQzMy4yuAEDyAEA-AEBmAlkoALuFqgCCsICEBAAGAMY5QIY6gIYjAMYjwHCAhAQLhgDGOUCGOoCGIwDGI8BwgILEAAYgAQ

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https://www.google.com/search?q=global+sales+of+Colgate+Palmolive+for+2023&sca_esv=c46fc0e2b66f1220&sca_upv=1&ei=EPfLZoKTD-mTwbkPgsqTiAg&ved=0ahUKEwiC246V3JGIAxXpSTABHQLIBIEQ4dUDCA8&oq=global+sales+of+Colgate+Palmolive+for+2023&gs_lp=Egxnd3Mtd2l6LXNlcniAiKmdsb2JhbCBzYWxlcyBvZiBDb2xnYXRlIFBhbG1vbG12ZSBmb3IgmjAyMzIIEAAygAQYogRI7pgCUOEeWNL5AXABeAGQAQCYAcYBoAGmHqoBBDQ0LjO4AQzIAQD4AQGYAjCgAo0fwgIKEAAySAMY1gQYR8ICChAhGKABGMMEGARcAggQIRigARjDBMICBhAAGAcYHsICCBAAAGAcYCBgewgIIEAAyBRgHGB7CAGsQABiABBiGAXiKBcICCBAAAGKIEGikFwgIGEAAyCBgewgIGEAAyBRgemAMAiAYBkAYIkgcENDUuM6AH2rkB&scient=gws-wiz-serp#cobssid=s

Note 20.

https://www.google.com/search?q=global+sales+of+Colgate+Palmolive+for+2023&sca_esv=c46fc0e2b66f1220&sca_upv=1&ei=EPfLZoKTD-mTwbkPgsqTiAg&ved=0ahUKEwiC246V3JGIAxXpSTABHQLIBIEQ4dUDCA8&oq=global+sales+of+Colgate+Palmolive+for+2023&gs_lp=Egxnd3Mtd2l6LXNlcniAiKmdsb2JhbCBzYWxlcyBvZiBDb2xnYXRlIFBhbG1vbG12ZSBmb3IgmjAyMzIIEAAygAQYogRI7pgCUOEeWNL5AXABeAGQAQCYAcYBoAGmHqoBBDQ0LjO4AQzIAQD4AQGYAjCgAo0fwgIKEAAySAMY1gQYR8ICChAhGKABGMMEGARcAggQIRigARjDBMICBhAAGAcYHsICCBAAAGAcYCBgewgIIEAAyBRgHGB7CAGsQABiABBiGAXiKBcICCBAAAGKIEGikFwgIGEAAyCBgewgIGEAAyBRgemAMAiAYBkAYIkgcENDUuM6AH2rkB&scient=gws-wiz-serp#cobssid=s