

USHINDI Laundry Bar

Territory-Wise Brand Strategy

Executive Analysis & Actionable Recommendations

1. Executive Summary

USHINDI Laundry Bar faces significant growth opportunities across all territories in Kenya, with high white space scores indicating substantial untapped potential. However, the brand also confronts challenges including low market share, intense competition, and supply-demand mismatches in several regions.

Metric	CENTRAL	COAST	LAKE	NAIROBI	RIFT VALLEY
SKU Cluster	Blue A	Green B	Blue B	Yellow B	Blue A
White Space Score	58.47	47.45	54.97	64.69	56.68
Client Share	3.30%	11.80%	2.04%	6.18%	3.61%
Competitor Strength	19.63%	22.32%	16.20%	24.56%	23.80%
ERP/Nielsen Ratio	0.27	2.68	0.47	2.61	0.73
Z-Score	0.14	1.59	-0.09	0.74	0.26
TA Fit	41.01%	33.25%	30.34%	64.12%	32.50%

Key challenges across territories include:

- Low client share despite high white space scores
- Strong competitive pressure in most regions
- Supply-demand mismatches (both under and oversupply)
- Varying levels of target audience fit

Strategic priorities:

1. Aggressively expand distribution and improve retail availability
2. Implement targeted micro-promotions to drive trial and conversion
3. Enhance brand visibility and differentiation through localized marketing
4. Optimize pricing and pack strategies to improve competitiveness
5. Strengthen RTM capabilities and collaboration with GT teams

2. Territory Sections

CENTRAL

SKU Cluster: Blue A (Positive Momentum)

White Space Score: 58.47 (High)

Client Share: 3.30% → Significant headroom for growth

Competitor Strength: Medium (19.63%)

ERP/Nielsen Ratio: 0.27 → Severe undersupply vs. demand

Z-Score: 0.14 → Early momentum

TA Fit: 41.01%

Insights

The CENTRAL territory shows strong potential for USHINDI bar with a high white space score of 58.47, indicating ample room for growth. However, the current client share is only 3.30%, underlining the need for aggressive market share capture. With competitors holding 19.63% share, differentiated positioning and execution will be critical. The ERP/Nielsen ratio of 0.27 reveals a severe undersupply issue that must be urgently resolved.

Strategic Action

- Rapidly ramp up distribution to close ERP gaps, prioritizing high-potential locations
- Launch targeted consumer activation to drive trial and build loyalty

GT Actionables (Sales Team)

1. Expand distribution footprint in top 10 high-potential locations

Increase ERP coverage in MURANGA (AWS 58.47), NYERI (AWS 40.48), KARATINA (AWS 22.84), MERU (AWS 57.09), and KERUGOYA/KUTUS (AWS 37.07) to align with Nielsen potential. Set 30-day targets of 50% coverage and 60-day targets of 75%.

2. Drive higher throughput per outlet in locations with strong RTM traction

Leverage existing retail equity in EMBU (QTY_SHARE_REGION_BRAND 2.57%), CHUKA (2.26%), and ISIOLO (1.63%) to push higher purchase volumes. Introduce retailer incentives tied to 30% volume growth over 90 days.

3. Improve brand visibility in high-footfall locations

Deploy premium POSM and enhance shelf space in NANYUKI (AWS 12.49), OTHAYA (AWS 10.01), MARAGUA (AWS 6.32), and RUNYENJES (AWS 8.10). Measure impact through retail audits and target 20% SOV within 60 days.

GT Actionables (Marketing Team)

1. Launch targeted consumer activation in top 5 towns

Drive trial and build brand awareness in MURANGA, NYERI, MERU, KERUGOYA/KUTUS, and KARATINA through high-impact consumer activations. Employ a mix of open market sampling, mall activations, and door-to-door campaigns to reach 50,000 target consumers within 90 days.

2. Amplify brand visibility through localized OOH

Secure strategic OOH sites in high-density areas of key towns (MURANGA, NYERI, MERU) to build brand salience. Aim for 20% SOV on billboards and bus branding, and measure impact through brand health trackers. Target a 10 pp lift in aided awareness over 6 months.

3. **Leverage influencer partnerships for credible endorsement**

Engage local micro-influencers in MURANGA, NYERI, MERU for authentic brand endorsement and user-generated content. Co-create a 3-month always-on influencer campaign with a collective reach of 1M and engagement rate above 5%.

RTM Actionables (Field Ops/Management)

1. **Resolve ERP undersupply with surgical redistribution**

Bridge ERP gaps in MURANGA (AWS 58.47), NYERI (AWS 40.48), MERU (AWS 57.09) by reallocating stock from low-throughput outlets. Execute a 30-60-90 day S&OP plan to progressively close 100% of priority gaps.

2. **Expand direct coverage in top 20 outlets per town**

Extend direct coverage to top 20 high-potential outlets each in MURANGA, NYERI, MERU, KERUGOYA/KUTUS, and KARATINA. Assign dedicated sales resources to secure 100% coverage and measure velocity improvements within 60 days.

3. **Introduce targeted micro-promotions to drive sell-out**

Launch outlet-specific promotions (e.g., BOGOs, discounts) in outlets with high AWS but low velocity. Focus on NANYUKI (AWS 12.49), OTHAYA (AWS 10.01), MARAGUA (AWS 6.32), and RUNYENJES (AWS 8.10). Target a 25% lift in sell-out within 30 days.

COAST

SKU Cluster: Green B (High Competition)

White Space Score: 47.45 (High)

Client Share: 11.80% → Significant room for growth

Competitor Strength: Medium (22.32%)

ERP/Nielsen Ratio: 2.68 → Undersupply relative to demand

Z-Score: 1.59 → Positive momentum

TA Fit: 33.25%

Insights

The COAST territory presents a significant growth opportunity for USHINDI bar, with a high white space score of 47.45. However, the brand faces stiff competition, limiting its current market share to 11.80%. The ERP/Nielsen ratio of 2.68 indicates an undersupply issue that needs to be addressed. While the brand has positive momentum (Z-score 1.59), the moderate TA fit of 33.25% suggests a need for positioning and targeting improvements.

Strategic Action

- Aggressively expand distribution to close undersupply gap and capture white space
- Differentiate brand positioning to improve TA fit and combat competitive pressure

GT Actionables (Sales Team)

1. **Rapid Distribution Expansion in High-Potential Locations**

Leverage the high AWS scores in MOMBASA (47.45), LIKONI (3.84), and KILIFI (3.62) to prioritize distribution expansion. Set a 60-day target to increase ERP coverage by 30% in these locations, aiming to bring the ERP/Nielsen ratio below 2.0.

2. **Targeted Micro-Promotions in Competitor Strongholds**

Combat competitive pressure in high-potential but underperforming locations like VOI (AWS 6.38, QTY share 3.78%) and MALINDI (AWS 2.41, QTY share 1.43%). Implement targeted micro-promotions and retailer incentives to drive trial and steal share. Aim for a 20% QTY share increase within 90 days.

3. **Strategic Pack Sizing and Pricing in Growth Markets**

Optimize pack sizes and pricing in growth markets like UKUNDA (AWS 2.42, QTY share 1.44%) and THIKA (AWS 2.94, QTY share 1.74%) to drive adoption. Introduce smaller trial packs and promotional bundle offers to improve accessibility. Target a 25% volume growth in these locations over the next 60 days.

GT Actionables (Marketing Team)

1. **Targeted TA Campaigns in High AWS Locations**

Develop targeted marketing campaigns to improve TA fit in high AWS locations like MOMBASA (AWS 47.45), VOI (AWS 6.38), and LIKONI (AWS 3.84). Utilize localized influencers, vernacular messaging, and high-visibility POS materials. Measure impact through brand health tracking studies, aiming for a 10 percentage point TA fit improvement in 90 days.

2. **Differentiated Positioning and Communication Strategy**

Craft a differentiated brand positioning and communication strategy to stand out in the highly competitive COAST market. Emphasize USHINDI's unique value proposition, quality credentials, and any sustainable or social impact initiatives. Develop a 360-degree campaign including TV, radio, outdoor, and digital touchpoints. Assess impact through brand awareness and consideration metrics, targeting a 15% increase over the next 120 days.

3. **Localized Activation Campaigns in Emerging Growth Pockets**

Identify emerging growth pockets like WATAMU (AWS 0.63, QTY share 0.37%) and TAVETA (AWS 0.56, QTY share 0.33%) for localized brand activation campaigns. Engage consumers through experiential marketing activities, product demonstrations, and trial generation programs. Aim to drive a 30% increase in sales volumes from these locations within 60 days.

RTM Actionables (Field Ops/Management)

1. **Focused RTM Expansion in Undersupplied High-Potential Areas**

Accelerate RTM expansion in undersupplied high-potential areas like KALOLENI (AWS 2.66, QTY share 1.58%), MARIAKANI (AWS 3.19, QTY share 1.89%), and MAZERAS (AWS 2.06, QTY share 1.22%). Appoint new sub-stockists, improve outlet coverage, and enhance retailer engagement. Target a 40% increase in RTM sales from these locations within 90 days.

2. **RTM-GT Joint Business Planning in Priority Growth Locations**

Implement joint business planning sessions between RTM and GT teams in priority growth locations such as MOMBASA, KILIFI, and LIKONI. Align on outlet expansion plans, retail visibility initiatives, and localized promotion calendars. Conduct monthly review meetings to track progress against key metrics like outlet coverage, weighted distribution, and sales volumes.

3. Proactive RTM Demand Sensing and Inventory Management

Leverage the granular RTM sales data to proactively sense demand shifts and optimize inventory management across the COAST territory. Implement a robust S&OP process to align demand forecasts, production plans, and inventory allocations. Utilize the AWS scores to guide stock deployment at a sub-location level. Aim to maintain territory-level OSA >98% and reduce the ERP/Nielsen ratio below 1.5 within 120 days.

LAKE

SKU Cluster: Blue B (Stagnant)

White Space Score: 54.97 (High untapped potential)

Client Share: 2.04% → Significantly under-penetrated

Competitor Strength: High (16.20%)

ERP/Nielsen Ratio: 0.47 → Undersupply relative to demand

Z-Score: -0.09 → Slightly negative momentum

TA Fit: 30.34%

Insights

USHINDI bar soap has a major growth opportunity in the LAKE territory, with a high white space score of 54.97 indicating significant untapped potential. However, the brand is struggling with a low market share of just 2.04%, facing intense competition (16.20% competitor strength). There is also a supply-demand mismatch, with an ERP/Nielsen ratio of 0.47 suggesting undersupply to retail outlets. Slight negative momentum (Z-score -0.09) compounds these challenges.

Strategic Action

- Aggressively expand distribution to improve availability and visibility
- Implement targeted micro-promotions to drive trial and boost momentum
- Optimize price positioning to be competitive yet profitable

GT Actionables (Sales Team)

1. Expand distribution in top RTM locations

Focus on improving weighted distribution in key locations like KISII (AWS 1.0), MIGORI (AWS 0.51), HOMA BAY (AWS 0.43), and RONGO (AWS 0.28). Set targets to grow weighted distribution by 20-30% in next 60 days.

2. Improve shelf visibility in high potential outlets

Conduct retail audits in locations with high RTM sales but low GT offtake, such as KEROKA (AWS 0.32), OYUGIS (AWS 0.16), and NYAMIRA (AWS 0.16). Ensure prominent shelf positioning and implement visibility enhancing POS materials. Aim for a 10% lift in sales rate.

3. Drive aggressive wholesale stocking in undersupplied areas

Push wholesale stocking and range selling in locations with high demand but low ERP servicing, such as VIHIGA (ERP/Nielsen 0.30), LITEIN (ERP/Nielsen 0.20), and SOTIK (ERP/Nielsen 0.18). Work with distributors to improve stock depth and frequency. Target a 25% increase in average stockholding.

GT Actionables (Marketing Team)

1. **Launch targeted micro-promotions in promising locations**

Implement sharp promotional offers in high AWS locations like BONDO (AWS 0.38), KENDU BAY (AWS 0.22), and LUANDA (AWS 0.12) to drive trial and boost sales velocity. Promotions could include discounts, bonus packs, or bundling. Aim for a 15-20% sales lift during promo period.

2. **Deploy influencer campaigns to build brand equity**

Identify and onboard local micro-influencers in key markets like KISII, MIGORI, and HOMA BAY to amplify brand messaging and drive positive word-of-mouth. Influencer content should showcase key product benefits and usage occasions. Target a 10% improvement in brand awareness and consideration scores.

3. **Optimize price-pack portfolio based on local preferences**

Review price-pack architecture and identify opportunities to introduce new SKUs or optimize pricing based on local affordability thresholds and competitor benchmarking. Key locations to assess include KISUMU (AWS 0.10), KERICHIO (AWS 0.09), and AWENDO (AWS 0.10). Aim to improve value perception and grow volume share by 5-10%.

RTM Actionables (Field Ops/Management)

1. **Conduct retail census to identify high potential outlets**

Deploy field teams to map and census all retail outlets in top AWS locations, starting with KISII, MIGORI, HOMA BAY, RONGO, and KEROKA. Identify high throughput stores for priority GT activation. Update retail database and aim to acquire 200-300 new outlets in the next 30 days.

2. **Improve in-store execution and merchandising compliance**

Launch a retail excellence program to improve in-store execution standards across key RTM locations. Focus on planogram compliance, share of shelf, and POS visibility. Deploy mystery shopper audits to track improvement. Target a 20% increase in compliance scores within 60 days.

3. **Expand RTM coverage to leverage micro-market potential**

Identify high potential sub-locations with strong AWS but limited RTM presence, such as NYAMARAMBA (AWS 0.0009), KENYENYA (AWS 0.0010), and OPAPO (AWS 0.0008). Appoint new micro-distributors or motivate existing partners to expand coverage. Aim to double RTM reach in these micro-markets in the next 90 days.

NAIROBI

SKU Cluster: Yellow B (Struggling)

White Space Score: 64.69 (High)

Client Share: 6.18% → Significantly underperforming

Competitor Strength: Medium (24.56%)

ERP/Nielsen Ratio: 2.61 → Undersupply issue, demand exceeds supply

Z-Score: 0.74 → Positive momentum

TA Fit: 64.12%

Insights

The NAIROBI territory represents a major growth opportunity for USHINDI bar soap, given the high target audience fit of 64.12% and white space score of 64.69. However, the brand is currently struggling with a client share of just 6.18%, indicating significant underperformance. The undersupply issue (ERP/Nielsen ratio of 2.61) suggests demand is outpacing supply, while medium competitive strength (24.56%) poses a

challenge. Positive momentum (Z-score 0.74) provides a foundation for targeted interventions.

Strategic Action

- Correct supply-demand mismatch by increasing ERP coverage in high-potential locations
- Improve brand perception and differentiation through targeted marketing campaigns
- Increase localized promotional activities in top-performing RTM locations

GT Actionables (Sales Team)

1. Expand ERP coverage in top 20 RTM locations

Increase ERP coverage by 25% in the top 20 RTM locations (e.g., THIKA, KITENGELA, ONGATA RONGAI) over the next 60 days to address undersupply. Monitor sell-through rates and adjust inventory levels accordingly.

2. Introduce targeted trade promotions

Launch trade promotions focused on the top 30 RTM locations, offering volume-based incentives to retailers. Aim for a 10% lift in sales volumes in these locations within 90 days.

3. Strengthen distributor partnerships

Identify the top 5 distributors in NAIROBI based on RTM sales data. Develop joint business plans with each distributor, setting quarterly growth targets and providing marketing support. Aim to increase distributor-driven sales by 15% in FY23.

GT Actionables (Marketing Team)

1. Launch targeted digital campaigns

Develop a series of digital campaigns tailored to the NAIROBI market, highlighting USHINDI's unique value proposition and promotions. Focus on high-AWS locations like THIKA, KITENGELA, and ONGATA RONGAI. Target a 20% increase in brand awareness and 10% sales lift in these locations within 6 months.

2. Conduct brand activation events

Plan and execute monthly brand activation events in top RTM locations, showcasing USHINDI's superior performance and value. Engage local influencers to amplify reach. Aim for a 15% increase in trials and a 5% conversion rate in each location.

3. Implement visibility enhancements

Work with trade marketing to enhance USHINDI's in-store visibility in high-potential outlets across NAIROBI. Introduce eye-catching POS materials, shelf talkers, and product demos. Monitor visibility compliance and sales uplift, targeting a 10% improvement in both metrics within 60 days.

RTM Actionables (Field Ops/Management)

1. Prioritize top 50 RTM locations

Focus field sales efforts on the top 50 RTM locations based on AWS scores. Ensure consistent product availability, visibility, and promotional compliance in these outlets. Conduct weekly store audits and address any gaps within 48 hours.

2. Optimize RTM route planning

Analyze RTM sales data to identify efficiency opportunities in route planning. Optimize sales rep visits to prioritize high-potential locations and minimize unproductive time. Implement the new route plans within 30 days and monitor productivity metrics.

3. Expand RTM coverage to untapped locations

Identify 20 untapped locations in NAIROBI with high AWS scores (e.g., KIMENDE, GIKUNI, HURUMA CORNER). Develop a targeted expansion plan to establish RTM presence in these locations within the next 120 days. Set clear sales targets and review performance monthly.

RIFT VALLEY

SKU Cluster: Blue A (Positive Momentum)

White Space Score: 56.68 (High untapped potential)

Client Share: 3.61% → Low market penetration

Competitor Strength: High (23.80%)

ERP/Nielsen Ratio: 0.73 → Undersupply relative to demand

Z-Score: 0.26 → Early signs of growth momentum

TA Fit: 32.50%

Insights

USHINDI bar soap has substantial room for growth in the RIFT VALLEY territory, as evidenced by the high White Space Score of 56.68. However, the brand's low client share of 3.61% and high competitor strength at 23.80% indicate significant barriers to capturing this potential. The ERP/Nielsen ratio of 0.73 suggests an undersupply issue that may be limiting retail availability and stunting growth.

Strategic Action

- Aggressively expand distribution coverage and depth to improve retail availability
- Implement targeted micro-promotions and visibility campaigns to drive trial and conversion

GT Actionables (Sales Team)

1. Expand distribution in top AWS locations

Target top 20 locations by AWS score (Lodwar 1.0, Nakuru 1.0, Narok 0.38) for intensive distribution drives. Aim to grow weighted distribution by 25% in Q3 through new outlet onboarding and order size increases.

2. Improve ERP-RTM alignment in undersupplied locations

Analyze ERP/Nielsen ratio at location level and correct supply gaps. Key locations: Chewele (AWS 0.70 vs. ERP/Nielsen 0.73), Eldoret (AWS 0.69 vs. 0.73). Target 90%+ ERP-secondary alignment by end of Q3.

3. Drive USHINDI visibility in high potential outlets

Identify outlets with high category sales but low USHINDI share. Deploy POSM, shelf talkers, and special displays to grow share +10% in Q3. Focus on Kapenguria, Makutano, Kapsabet.

GT Actionables (Marketing Team)

1. **Launch targeted trial generation campaign**

Develop trial pack and introductory price promo for top 30 AWS locations. Bundle with high-affinity categories to drive trial. Aim for 10% increase in trial rate over 60 days.

2. **Amplify brand awareness in high AWS-low share areas**

Rollout geo-targeted digital campaign and retail activations in Lodwar (AWS 1.0, share 9.8%), Nakuru (AWS 1.0, share 22.2%) and Narok (AWS 0.38, share 8.4%). Target 20% aided awareness lift by year-end.

3. **Localize brand messaging to improve TA resonance**

Conduct qualitative research to uncover territory-specific product use cases and value perceptions. Develop localized communication assets to boost TA Fit score from 32.5% to 40%+ by Q4.

RTM Actionables (Field Ops/Management)

1. **Plug availability gaps in top AWS locations**

Deploy RTM sales blitz in Lodwar, Nakuru, Narok to address 10%+ availability gaps vs. key competitors. Ensure 95%+ SOT in top 100 outlets and implement daily fill-in system.

2. **Improve RTM-GT collaboration for demand planning**

Institutionalize monthly S&OP process with RTM partners to align territory-level forecasts, inventory norms, and promo plans. Aim to reduce forecast MAPE by 5 pp and eliminate stock-outs/returns.

3. **Upskill RTM field force for effective GT execution**

Conduct training workshops for RTM salesforce in RIFT VALLEY to drive perfect store SOP adherence. Emphasize USHINDI brand standards, POSM placement, and share of shelf norms. Target 90%+ compliance by Q4.

3. Implementation Matrix

Initiative	Territory	30 Days	60 Days	90 Days
Expand distribution in high-potential areas	All	Identify top 20 locations per territory	+15% weighted distribution in focus areas	+25% weighted distribution vs. baseline
Improve ERP-RTM alignment	All	Conduct ERP/Nielsen gap assessment	Implement corrective supply plans	90%+ ERP-secondary alignment across territories
Drive USHINDI visibility	All	Design standardized POSM kit	Deploy POSM in top 50 outlets per territory	+10% share in focus outlets
Launch targeted trial generation campaign	All	Finalize trial pack and promo mechanics	Execute promo in top 30 AWS locations per territory	+10% trial rate vs. pre-promo baseline
Amplify brand awareness	All	Develop geo-targeted creative and media plan	Launch digital and retail activations	+20% aided awareness in focus geographies
Localize brand messaging	All	Complete qualitative research	Develop and test localized communication assets	Improve TA Fit score by 5-10 percentage points
Plug availability gaps	All	Define perfect store SOPs	Deploy RTM sales blitz	95%+ SOT in top 100 outlets per territory
Improve RTM-GT collaboration	All	Align on S&OP process and norms	Conduct first S&OP cycle	Reduce forecast MAPE by 5 pp
Upskill RTM field force	All	Develop training modules	Complete training workshops in 50% of territories	90%+ GT execution compliance across all territories
Optimize pricing and pack strategy	All	Conduct price sensitivity analysis	Implement optimized pricing in test markets	Roll out new pricing/pack strategy nationally
Enhance distributor capabilities	All	Assess current distributor performance	Implement capability building programs	+15% improvement in key distributor KPIs

4. Cross-Territory Synergies

- National Key Account Strategy:** Leverage strong performance in COAST and NAIROBI to negotiate improved terms with national key accounts. Develop a unified key account strategy to drive consistent execution and growth across all territories.
- Integrated Brand Campaign:** Create a national brand campaign for USHINDI that can be localized for each territory. Focus on core brand benefits while allowing for territory-specific nuances in messaging and activation.
- Best Practice Sharing Platform:** Establish a cross-territory best practice sharing forum. Regular sessions to discuss successful initiatives, challenges, and learnings from each territory. Aim to rapidly replicate winning strategies across regions.
- Centralized Data Analytics:** Implement a centralized data analytics platform to aggregate and analyze performance data across all territories. Use insights to inform national strategy and identify cross-territory opportunities.
- Supply Chain Optimization:** Leverage territory-level demand data to optimize national production planning and inventory management. Aim to reduce overall inventory costs while improving product availability across all regions.

6. **Unified Trade Marketing Toolkit:** Develop a standardized trade marketing toolkit with customizable elements for each territory. Include POSM designs, promotional mechanics, and merchandising guidelines to ensure consistent brand presentation nationwide.
7. **Cross-Territory Consumer Promotion:** Design and implement a national consumer promotion that can be executed across all territories. Use a common mechanic with territory-specific prizes or experiences to drive engagement and sales lift.
8. **RTM Excellence Program:** Create a national RTM excellence program, leveraging best practices from high-performing territories. Standardize KPIs, route planning tools, and field force management processes across all regions.
9. **Innovation Pipeline:** Establish a cross-territory innovation working group to identify territory-specific consumer needs and product opportunities. Use insights to inform national innovation pipeline and ensure new product launches address pan-Kenya market needs.
10. **Talent Rotation Program:** Implement a talent rotation program for high-potential sales and marketing staff across territories. Aim to cross-pollinate ideas, build national perspective, and develop future leaders with multi-territory experience.

By implementing these cross-territory synergies, USHINDI can leverage its national scale while still maintaining the agility to address territory-specific challenges and opportunities. This balanced approach will be crucial in driving sustainable growth and market leadership across Kenya.