

LOOK GOOD
USE
GROOMING
MEN

#GROOMINGFORMEN
#ALTEREGOBYALIENG

Project Guide: Sunil Pandey

Project Members:

- Ajay Kelkar
- Laxmidhar Barik
- Manoj Brambhhatt
- Pravin Santhoor
- Tejal Shende
- Wayne Soares



#GROOMING FOR MEN

- FOR MEN -
GROOMING

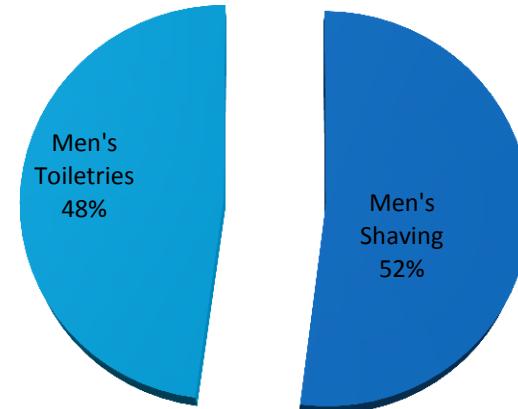
GROOMING

It's simple enough: Cleanse, Exfoliate, Moisturize,... BOOM!!!

Men's grooming market in India - Overview

- Men's grooming is relatively a new trend
- Male grooming market stands over Rs. 5400 Cr as of 2014 @20% CAGR
 - Men's Shaving- Rs. 2790 Cr
 - Men's Toiletries- Rs. 2568 Cr
- Market was limited to shaving products and deodorants
- From 2009 brands have started entering market with male specific products
 - Hair care, Skin care & other hygiene products.
- Stronger growth in urban areas driven by the urban middle and upper class

Men's Grooming



Source: Euromonitor

Shaving Category

Shaving Products

- As of 2014, the men's shaving segment stood at 2700 Cr
- It has the largest share in the men's grooming category, and is slated to grow at 14% CAGR between 2014-19
- Razors and blades contributes the largest to the shaving segment. The projected growth rate is 13% CAGR between 2014-19
- Total Shaving Cream Market Rs. 244cr
- Pre-shave products like gels, creams, and foams are projected to grow at 18.4% CAGR between 2014-19



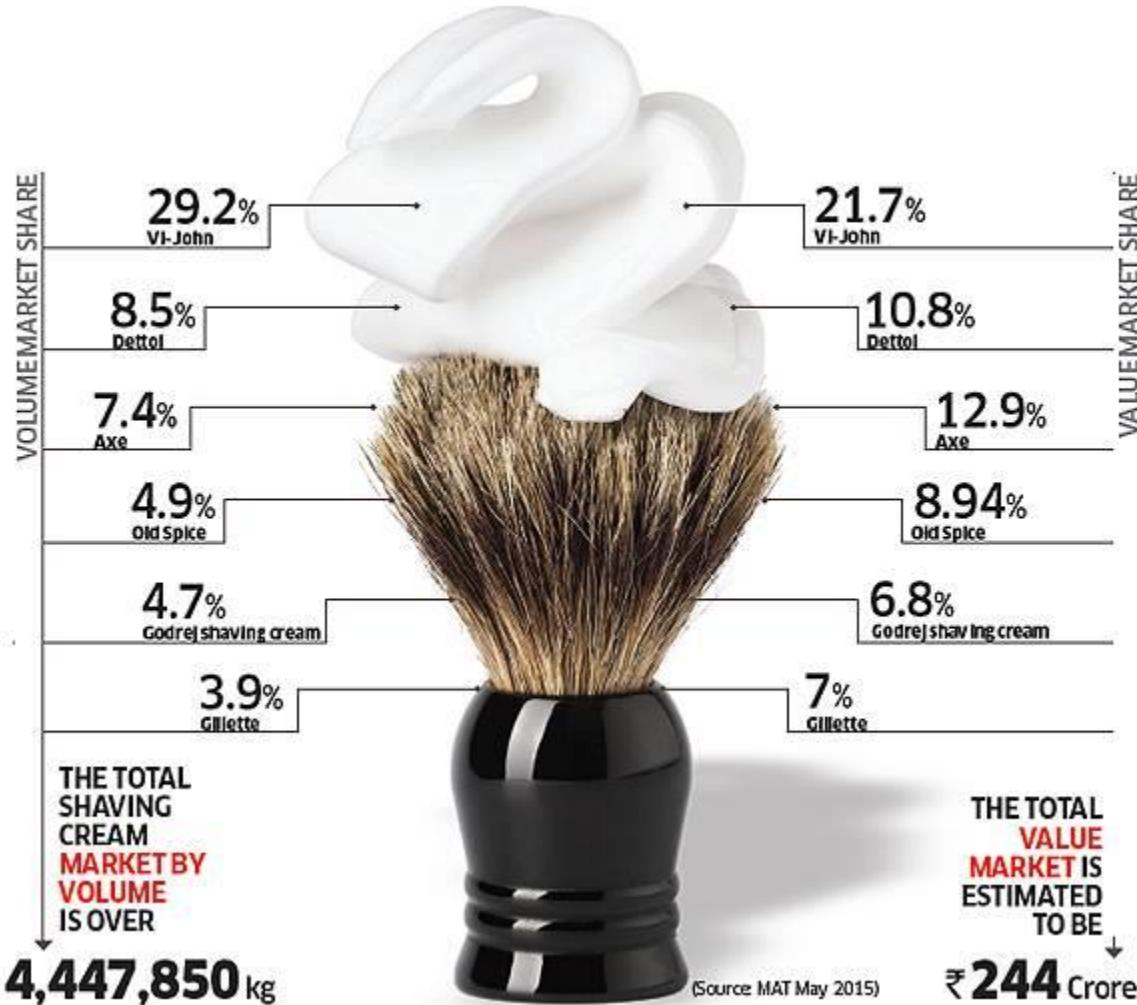
Competitive Landscape

| BRAND | Vi John | <u>P&G</u> | | Dettol | Nivea | Godrej | <u>Super Max</u> | <u>Park Avenue</u> | Axe | Patanjali | <u>Palmolive</u> | <u>Ustraa</u> |
|----------|---------|----------------|-----------|--------|-------|--------|------------------|--------------------|-----|-----------|------------------|---------------|
| CATEGORY | | Gillette | Old Spice | | | | | | | | | |
| Cream | | ✓ | ✓ | ✓ | | ✓ | | ✓ | ✓ | ✓ | ✓ | ✓ |
| Foam | | ✓ | | ✓ | ✓ | | ✓ | | | | | |
| Gel | | ✓ | | | ✓ | | | | | ✓ | | |

Pre Shave Products

| BRAND | Vi John | <u>P&G</u> | | Nivea | <u>Park Avenue</u> | Axe | <u>Ustraa</u> |
|----------|---------|----------------|-----------|-------|--------------------|-----|---------------|
| CATEGORY | | Gillette | Old Spice | | | | |
| Balm | | | | ✓ | | | ✓ |
| Lotion | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

Post Shave Products





- Established 1960
- Products portfolio includes a wide range of products across different categories like Shaving Creams, Toiletries, Perfumes/Deo's, Talcum Powders, Skin Care (Winter) and Hair Care
- Vi-John's volume market share in India stood at 29.2 per cent in May, over three times that of Dettol, almost four times that of Axe and over seven times that of Gillette.
- the biggest plus for the brand has been its 'affordability' tag
- Vi-John is available across 2.5 lakh retail outlets and at over 1 million other trading channels across the country. The brand makes over 15 lakh shaving cream packs every month
- Vi-John's case that its value share is less than the volume share
- Celebrity endorsement worked well for them



| | |
|-------------|---|
| Company | Vi John |
| Positioning | Makkhan Shave |
| Ranges | Creams, Gels, Foams & Post Shaves |
| Strengths | choice of target segment, Affordability, High volume market share |

| Foam | | | | Gel | | Cream | |
|---------------------------------|---|---------------------------------|---|-----------|---|-----------------------|--|
| Shaving Foam For Sensitive Skin |  | Vijohn Shave Foam Lemon + Lime |  | Shave Gel |  | Shaving Cream Lime |  |
| Shaving Foam For Hard Skin |  | Vijohn Shave Foam Mint + Marine |  | | | Shaving Cream Regular |  |
| Shaving Foam Regular |  | Vijohn Shave Foam Musk + Orange |  | | | Shaving Cream Menthol |  |
| | | | | | | Shaving Cream Premium |  |

Gillette

- Established by King Camp Gillette in 1901, Boston
- Co-established in India as Indian Shaving Products Ltd., promoted by House of Poddar Enterprises
- In 2005, the parent company in US got acquired by P&G
- It produces razors, blades, shaving creams, foams, gels, brushes, and aftershave lotions
- It dominates the male grooming segment, with 27% market share
- Majority of this share comes because of the heavy usage of razor and blades in India
- Net Profit: Rs. 1,170 million (2015)
- For Q3 of FY15, sales in male grooming were up by 9% from corresponding quarter of previous year

PREPARE FOR THE ULTIMATE SHAVE



| | |
|-------------|---|
| Company | Gillette |
| Positioning | The Best a man can Get |
| Ranges | Face Razors, Body Razors, Creams, Gels, Foams & Post Shaves |
| Strengths | Long standing history, Innovation, High market share |

Gillette – The Best Man Can Get

- Gillette's success is based on innovation in design and technology.
- It is a brand that has understood the Indian market immensely well and has designed products for every segment of customer, right from the bottom of the pyramid to the highest rung.
- Over the past 5-6 years, it has tried to change the traditional perception of 'hair = macho' by running several campaigns.
- In 2009, it ran a cheeky campaign during the election time, titled 'India Votes – To Shave or Not'.
- Over 12 million people, and 83% women voted that they preferred a clean shaven man.
- Sales went up by 35% in the following 8 weeks!





| Foam | | | | Gel | Cream | |
|--|---|--|--|---|--|---|
| SERIES ULTRA PROTECTION SHAVE FOAM |  | FAT FOAMY SENSITIVE |  | SERIES SENSITIVE SHAVE GEL |  | GILLETTE SHAVING CREAM REGULAR |
| SERIES CONDITIONING SHAVE FOAM |  | LEMON LIME SHAVE FOAM |  | FUSION® HYDRA GEL PURE & SENSITIVE SHAVE GEL |  | GILLETTE SHAVING CREAM LIME |
| SERIES SENSITIVE SHAVE FOAM |  | FOAMY SHAVE FOAM—SE NSITIVE SKIN |  | ULTRA COMFORT TUBE SHAVE GEL |  | |
| SERIES PURE AND SENSITIVE SHAVE FOAM |  | CLASSIC SHAVE FOAM |  | MOISTURISING TUBE SHAVE GEL |  | |
| | | MENTHOL SHAVE FOAM |  | SENSITIVE SKIN TUBE SHAVE GEL |  | |



Ustraa

MARKET DISRUPTOR

Ustraa

- **Brand Image** – Ustraa has carved out a very quirky and fun image right since its inception. The brand name itself suggests a gangster's armour, as the word is used in Indian pop culture! Given the association with the grooming industry, the name works well.
- **Consumer Insight** – The brand interviewed men and realized that they were tired of using grooming products that smell feminine. The need was to create smells that have manly associations.
- **Products** – Ustraa has the following products:
Hair – Hair Wax
Beard – Mooch & Beard Oil, Beard Softener, Mooch Wax
Bath and Shower – Face Wash, Body Wash
Skin – Moisturizing Cream
Shave – Shaving Cream, After Shave Balm, After Shave Lotion
Fragrances – Colognes
Straight Razors - Ustra



Ustraa – What is it doing right?

- **Model -**

Ustraa is an exclusively online brand. It sells through its website, and various other e-commerce platforms

Subscription model – There are 3 types of subscription plans, differentiated on the basis of budget. Each plan involves 3 shipments of the entire set. One can request the shipment whenever he wants – there is no timeline set by the company.

The subscription plan saves about 20% of the total cost.

- **Social Media** – Being a young, quirky brand, Ustraa communicates using its Facebook, Twitter, and Instagram regularly. It provides styling tips on hair, beard, moustache, and some fun posts.

- *"Save for Beer Campaign"*



The Crime Master



Time to Grow: 3 months plus



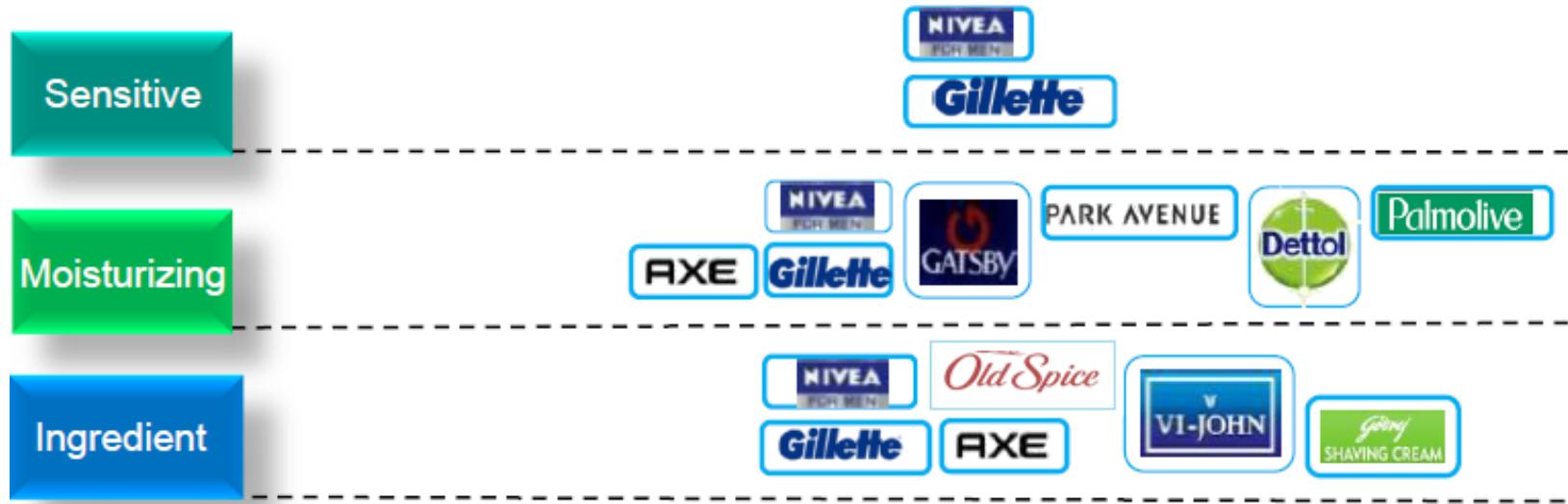
Grooming:
Use a grooming comb to work your mooth from centre to the outside. Comb it neat downwards, apply wax and workout the tip of it in a complete but small circle.

Goes Best With:
If you wear this mooth, you can wear anything.



The Company hopes to end the year in March with revenue of Rs40 Cr

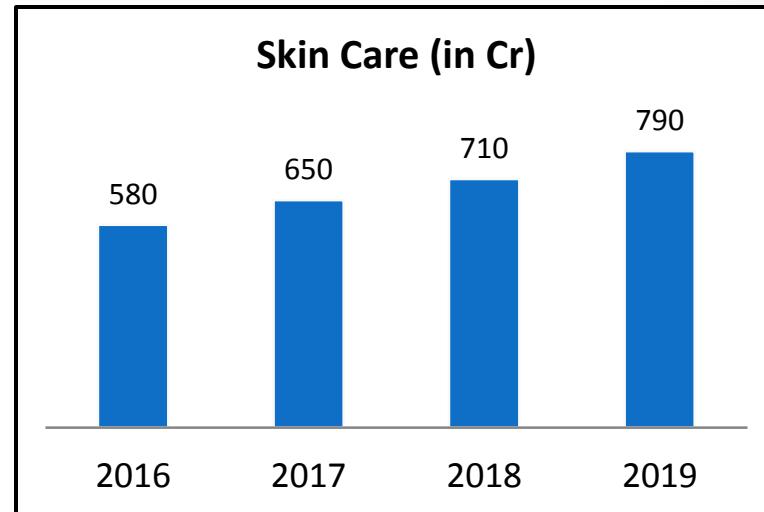
Brand Mapping



Face wash Category

Face Wash

- Facial care is the largest contributor to the skin care segment
- Men hesitated to use the existing face-wash products as their needs were different — oil, dirt and pollution were bigger worries for them, whereas the women's products were geared towards acne control.
- Market Size of Face Wash - Rs. 275-280 Cr; growing at 30-35% a year currently
- In urban India, the penetration is 14%
- Over the past couple of years, men's facial care has picked up tremendously with brands like Ponds, Nivea, Garnier, Himalaya, Fair & Handsome, etc. launching multiple products.
- Celebrity endorsements, stressful work resulting in less sleeping time, and pollution in urban cities causing skin damage have been some of the biggest demand driver of this segment.



Market Size of Men's Skin Care

Competitive Landscape

| BRAND | <u>Hindustan Unilever</u> | <u>NIVEA</u> | <u>Himalaya</u> | <u>Garnier</u> | <u>Fiama Di Wills</u> | <u>Fair and Handsome</u> | <u>Fair and Lovely</u> | <u>EverYuth</u> |
|---------------------|---------------------------|--------------|-----------------|----------------|-----------------------|--------------------------|------------------------|-----------------|
| CLASSIFICATION | Ponds Pears | | | | | | | |
| ↓ | | | | | | | | |
| Acne (Pimples) | | ✓ | ✓ | ✓ | | | | |
| Energize/Rejuvenate | ✓ | | | ✓ | | | | ✓ |
| Fight Dryness | | | ✓ | | | | | |
| Nourishes Skin | | ✓ | | | | | ✓ | |
| Oil Control | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Removes Dead Cells | | | | | | | | |
| Whitening | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Wrinkle Lift | | | | | | | | |

| Pricing (100 ml) | | | | | | | | |
|------------------|---|---|---|---|---|---|---|---|
| Up to Rs. 100 | | | | | | | | ✓ |
| Rs. 100-140 | | | ✓ | | | ✓ | | |
| Rs. 150-170 | | | | ✓ | | | ✓ | |
| Rs. 170+ | ✓ | ✓ | | ✓ | ✓ | | | |



- Launched – 2009
- First Face wash in the Men's Category
- Garnier Men is today the No. 1 brand in Mens Cleansers and is about an active, healthy life free from any skin problems.
- Garnier Men has been a driver of innovation in the Men's skincare market in India.
- **Consumer Insight** – Garnier products were launched for men who have an active lifestyle, and have a need to look good throughout the day, without spending exorbitant amount of money. Also, these men respond positively to natural products. They prefer a wash that gives them a feeling of being clean, without being overtly strong.



| | |
|-------------|--|
| Company | Garnier Men |
| Positioning | made for young, stylish, and health conscious consumers |
| Ranges | Face wash |
| Strengths | Innovator, First FW, honest, efficient and trustworthy brand |



| Product Name | Image | Claim | Support |
|---------------------------------------|--|------------------------------------|--|
| PowerLight Face Wash |  | Anit Dark Cells; Anti Impurites | 1st face wash for men that removes impurities, pollutants and dark dead cells for an intensive fairness action |
| Deep Cleansing Face Wash |  | All Day Oil Free Feel | 1st deep cleansing face wash for men: It removes excessive oil without drying while ensuring a day long oil free feel. |
| Men PowerWhite Double Action Facewash |  | Anti Pollution + Instant Whitening | first Dual Texture face wash designed to remove dust & pollution and give fairer looking skin. Formula enriched with Salicylic Active and Vitamin C |



- Launched – 2014
- Reason for Launch:
- There were no new users in the face-wash category, where growth had slid from 33-35 % to 18 %
- Men hesitated to use the existing face-wash products as their needs were different
- With men-specific focus, it has already captured 6-7 % & aims to grow till 10-12% in two years span
- Out of the total 1800 Cr FW Category, Himalaya's Share is 23%



| | |
|-------------|---|
| Company | Himalaya Herbals |
| Positioning | Sabse Pehle chehra dikhta hai |
| Ranges | Face wash |
| Strengths | Market leaders, Affordability, High market share. |



| Product Name | Image | Claim | Support |
|-----------------------------------|--|-----------------------------------|---|
| Pimple Clear Neem Face wash | A tube of Himalaya Men Pimple Clear Neem Face Wash. The tube is green and blue, featuring the brand name "Himalaya", "MEN", and "Pimple Clear Neem Face Wash". It also includes the text "GOTU KOLA & NEEM" and "GET CLEAR SKIN". | Fast and strong action on pimples | fight pimples in men. It is a blend of Neem and Natural Salicylic Extract that brings together their antibacterial and antiseptic properties to fight pimples |
| Intense Oil Clear Lemon Face wash | A tube of Himalaya Men Intense Oil Clear Lemon Face Wash. The tube is green and yellow, featuring the brand name "Himalaya", "MEN", and "Intense Oil Clear Lemon Face Wash". It also includes the text "Lemon & Indian Willow" and "GET CLEAR SKIN". | Long lasting, Oil Free skin | cleanses face and removes excess oil. It is enriched with Lemon and Indian Willow which help clear excess oil, impurities and pollutants |
| Power Glow Licorice Face wash | A tube of Himalaya Men Power Glow Licorice Face Wash. The tube is green and orange, featuring the brand name "Himalaya", "MEN", and "Power Glow Licorice Face Wash". It also includes the text "Licorice & Alfalfa" and "GET CLEAR SKIN". | Visibly Fairer and Brighter skin. | herbal formulation that gently cleanses the face. It is a fine blend of Licorice, Alfalfa and Wood Apple which helps enhance the complexion and bring about a natural glow. |

POND'S MEN

- **Launched – 2014**
- Pond's has been known as a feminine brand.
- Introduction of Pond Men range raises a lot of questions. was the transition be easy?
- **Brand Positioning** – 'Face Ka Charger' – a product that will re-energize your face after a tiring day spent in office/college and traveling
- **Target Audience** – Urban upper middle class, and lower upper class men with a hectic lifestyle
- **Consumer Insight** – The entire day's tiredness shows on the face. After a hard day at work, the face feels and appears dull. The brand targeted this everyday phenomenon in their communication.



| | |
|-------------|--|
| Company | Ponds Men |
| Positioning | Face ka Charger |
| Ranges | Face wash |
| Strengths | Unique men skin, Pollution control, Instant Energy |



| Product Name | Image | Claim | Support |
|------------------------|--|--------------------------|---|
| Energy charge | A black tube of POND'S MEN Energy Charge Face Wash. The label features the POND'S logo, 'MEN' in bold, 'ENERGY CHARGE' in red, and 'FACE WASH' in white. Below it says 'With Every Day Brightener' and 'BRIGHT + ENERGIZED'. | Bright + Energized | Give skin a charge of energy! Formulated with coffee bean extracts & cooling menthol, It energizes tired, haggard skin to give your face a healthy and active glow. |
| Acno Clear Oil Control | A black tube of POND'S MEN Acno Clear Oil Control Face Wash. The label features the POND'S logo, 'MEN' in bold, 'OIL CONTROL' in green, and 'FACE WASH' in white. Below it says 'With Mineral Clay' and 'BRIGHT + FRESH'. | Bright + Fresh | 3 powerful ingredients- Mineral Clay, Salicylic acid and Witch Hazel Extract, to control excess oil and remove 99% acne bacteria. Your skin looks clear & energized. |
| Pollution Out | A black tube of POND'S MEN Pollution Out All-In-One Deep Cleanser. The label features the POND'S logo, 'MEN' in bold, 'POLLUTION OUT' in yellow, and 'ALL-IN-ONE DEEP CLEANSER' in white. Below it says 'Powerful Charcoal Mask' and 'BRIGHT + ENERGIZED'. | All-In-One Deep Cleanser | For people with active outdoor lifestyle, this FW is powered with Charcoal Mask and Coffee Bean Scrubs to pull out even micro-pollution particles from deep inside. Your face looks brighter and instantly energized! |

NIVEA

FOR MEN

- **Launched – 2013**
- Global skin care market leader NIVEA with over 100 years of skin expertise
- NIVEA MEN is the world's No.1 MEN's Face Care Brand
- With FW launch it aims to help men fulfil their everyday potential
- Building men's confidence and enabling masculine success
- **Consumer Insight** – Nivea's research revealed that men were not too satisfied with the efficacy of female grooming products. They wanted something meant for the male audience, and were ready to make a change
- They want to be the first brand to talk to MEN like MEN do



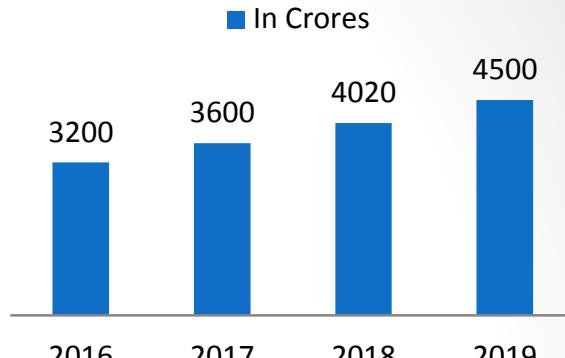
| | |
|-------------|-----------------------|
| Company | Nivea |
| Positioning | It starts with you |
| Ranges | Face wash, Face scrub |
| Strengths | most trusted brand, |

| Product Name | Image | Claim | Support |
|-------------------------------|--|--|---|
| All in 1 Face wash |  | <p>Cool fresh feeling on skin after application</p> <p>Long lasting purified skin</p> <p>Skin looks healthy and clean</p> | <p>10 skin nutrients formula with Whitanat Vita Complex Plus, Cooling mud.</p> <p>Reduces dark spots, acne and excessive oiliness with regular wash. A multi-benefit face wash that solves ALL problems on your face without any hassle</p> |
| Dark Spot Reduction Face wash |  | <p>Reduced dark spots accumulated from dirt and residues.</p> <p>Reduced oiliness & tightened pores upto 12h.</p> <p>Healthy looking & fresh feeling skin.</p> | <p>R+D17educes the appearance of dark spots and makes skin look healthy and feel fresh. The effective 10x* formula, suitable for All Skin Types, is now even better with Whitanat Vita Complex Plus that contains 10 nutrients:</p> |
| Oil Control Face wash |  | <p>Purified skin with elimination of up to 99% acne causing bacteria.</p> <p>Reduced oiliness up to 12h.</p> | <p>For oily skin, deeply cleanses skin and controls oiliness up to 12h. The effective formula repairs damaged, dull skin 10 times* better with Whitanat Vita Complex which contains 10 ingredients.</p> |

Deodorant Category

Deodorants

- Deodorant is the largest category in the male grooming space
- The deodorant market is growing at 17-18% year-on-year for last three years, however penetration of deos remains low at 32 per cent
- With male deodorant contribute 69% to total sales
- 3200 crores – the current market size of deodorants in India
- *Low brand loyalty* and impulse buying behavior drives sales in this category
- Deodorants is also finding acceptance in the rural markets which today accounts for 10% of the overall size and growing at 29% -Yr 2014



Source: Euromonitor 2015

SPRAYING FOR SALES

► Analysts say an Axe ad that had angels dropping from heaven didn't click with Indians

► But Fogg connected with consumers by promoting a higher no. of sprays per bottle of its deo

► Overall, the ₹2,100cr Indian deo market is still expanding as there's plenty room for consumption growth

Fogg 17
Park Avenue 8
Axe 6

*Approx. figures in % for March quarter

Source: <http://timesofindia.indiatimes.com/business/industry/Axe-slips-further-in-deo-market/articleshow/35445745.cms>

Overview of Major Players

| | Fogg | Wild Stone | Axe | Engage |
|-----------------|--|---|---|--|
| Market Share* | 16.60% | 10.70% | 7.10% | 6.60% |
| Positioning | No gas - hence lasts longer. More sprays per can as compared to competitors | Possibilities of unexpected liaisons after using this deodorant | Instant chic magnet ¹ - A brand that helps guys look, smell, and feel attractive | Leads to playful chemistry between two partners, who are equals. Deodorant for Couples |
| Formats | Pumps | Sprays | Sprays | Sprays & Pumps |
| Target Customer | Young male from urban areas, who are as concerned about their wallets as looks | 15-35 year old male in Urban areas, who are fashion oriented and trendy | 16-28 year old male Urban Youth, who follow Western culture and lifestyle | Upper middle class couples in urban areas |

* Source - Deodorants in India, Euro Monitor Passport Report, 2015



- VINI Cosmetics

- **Launch:** 2011
- Vini Cosmetic is one of the pioneers in the category to launch a 'Zero Gas' ranges
- Attractive concept and brilliant communication it has become the top player in no-time
- **Word of Mouth** – Fogg didn't spend a lot of money on marketing. Their campaign was conceptualized in-house and after their initial TV ads, word of mouth helped them a lot. Product reviews were good, and taglines were catchy.
- Vini's revenue grew 46% to Rs 504 crore in Fiscal Yr 14-15 with Fogg contributing 80% of the turnover
- As per IMRB household data, penetration of FOGG is around 3%



| | |
|-------------|---------------------------------|
| Company | FOGG |
| Positioning | No Gas', '800 spray Guaranteed' |
| Ranges | Deodorants |
| Strengths | most trusted brand. Disrupter |

FOGG





PARK AVENUE

- JK Helene Curtis is basically a manufacturer of premium personal products in the country and markets its products under two prime brands: 'Premium' and 'Park Avenue'
- Park Avenue has been addressing the working man since launch.
- In a lifestyle category, taste changes, the look and feel of the brand has to change too



| | |
|-------------|--|
| Company | Park Avenue |
| Positioning | Celebrating the Man and ensuring he looks good |
| Ranges | Hair, Face Body, Grooming |
| Strengths | most trusted brand, |

CLASSIC DEODORANT



ACTI-COOL DEODORANT



SIGNATURE COLLECTION





PARK AVENUE

IMPACT

PERFUME DEODORANT



PERFUME SPRAY



WILD STONE

- **Launch:** 2009 \$ Entered No gas format in 2014
- It is the second largest selling brand in the deo
- **Communication –**

Tagline – “*It Happens*”.

It gives a message that a Wild Stone user doesn't have to ‘try hard’

It followed a two-pronged approach -



Wild Stone identified that an Indian man seeks passionate encounters, but they are very different from their western counterparts. While brands like Set Wet and Axe were promoting the western ideology of getting hordes of girls, Wild Stone showed encounter with a single woman, who's very much Indian, traditional, and mysterious.

- To capitalise on the lead, the company has launched a variant, Wild Stone Grey, primarily targeted at companies and office goers.



| | |
|-------------|--|
| Company | Wild Stone |
| Positioning | It Happens! Sensuality & Seduction. |
| Ranges | Deodorant, Soap |
| Strengths | |

WILD STONE



ORIGINAL
FRAGRANCES



FINE FRAGRANCES

ENGAGE

- **Launch-** 2013
- Positioned as India's first Couple Deo
- Challenge was to move away from the stereotypical chic magnet route
- **Communication –**
Engage brings to bear the interesting proposition of '*Playful Chemistry*' between man and woman and this has been pivotal in communicating a distinctly differentiated brand story.
- company covered almost 75% of the market within four months of the launch.



| | |
|-------------|-----------------|
| Company | Engage |
| Positioning | YOU + ME. |
| Ranges | Deodorant, Soap |
| Strengths | Couple deo |

ENGAGE



DEO's

Perfume Sprays



Cologne Sprays



- **Launch-** 1999
- Axe Became The Top-Selling Deodorant by Targeting Nerdy Losers since he needs the most help in getting women, and would be easily persuaded into buying a product that could aid the woes of nerdhood.
- Unilever first analyzed the potential Axe user by breaking males down into six profiles, Natural Talent ; Marriage Material; Always the Friend ; The Insecure Novice; The Enthusiastic Novice
- Next strategy the Axe TV ads proclaimed that it will help you get chicks.
- Their research showed that the ultimate male fantasy is to be irresistible to several sexy women
- Axe's dominance has come down with a drop in penetration as well as share
- As per IMRB household data, penetration of FOGG is around 3%
- To regain it's position Axe has come up with a new Signature range- 3X times more perfume #Don't Fade away



| | |
|-------------|-----------------------------|
| Company | AXE |
| Positioning | Seduction & High Confidence |
| Ranges | Deodorant, Body Gel |
| Strengths | TV commercials |



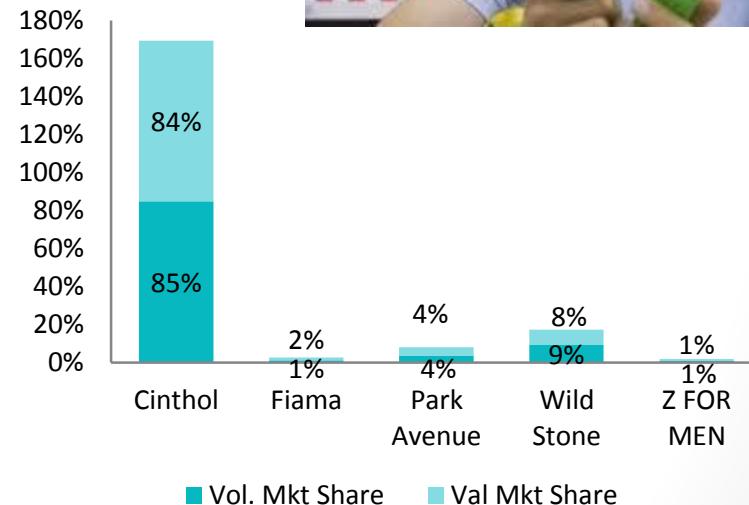
Classic Range



3X more Fragrance

Bath & Shower Category

- In 2008, the bath and shower market in India was valued at Rs 6,728 cr and was expected to reach Rs 7,142 cr by 2012
- In 2012, only the body wash segment in India was at mere Rs. 44 crore, growing at 46 %
- In 2014, the top 5 Premium men's bathing category contributed Val. Rs. 474 Cr with Vol. of 18863 MT
- Major players in the premium bathing bar category are Godrej's Cinthol, Raymond's Park Avenue and ITC's Fiama di Wills, & Wild stone



Source: Nielsen Data 2014

Do Men Prefer Using a Soap Bar or Body Wash?



On average, men spend close to 10% more on body washes and 7% more on face washes and scrubs than women every month.

CINTHOL

- Launched – 1952
- The first variant in Cinthol soap was Deodorant & Complexion with germ-killing ingredients.
- Over the first three decades, the brand monopolised the platform of freedom from body odour
- With Change in market demand the brand has always adapted
- In a bid to strengthen its freshness image it launched Cinthol Lime in 1989



| | |
|-------------|--------------------------------------|
| Company | Cinthol |
| Positioning | Alive is awesome |
| Ranges | Soap, Shower Gel, Talcum, Deo sticks |
| Strengths | Most trusted brand |

CINTHOL





PARK AVENUE



In 2009 to strengthen its market share, Park Avenue has re-launched its soap brand for men in new size and fragrances in with a position of “how a bath can be a completely male experience”

WILD STONE

WILD
STONE
it happens



LET'S
PLAY
DIRTY
WILD STONE
SOAP
FOR MEN



- **Launch** – 2009 with Aqua plus shower Gel
- **Re-launch**- 2011 with Soap
- Focus on Indian men skin type as they have tighter and oilier skin
- ITC is staying away from fairness cream and focus on wash and care segments, as fairness creams might stagnate



| | |
|-------------|---|
| Company | Fiama |
| Positioning | |
| Ranges | Soap & Shower Gels |
| Strengths | Gel Technology; combining elements of nature and science. |

| Variant Name | Image | Claim | Benefit | Variant Name | Image | Claim | Benefit |
|------------------|---|---|--|-------------------|---|---|--|
| REFRESHING PULSE |  | with Sea Minerals and Blue Lotus extracts | invigorating fragrance and freshness | QUICK WASH |  | with Tea Tree Bio actives & micro skin conditioners | lather rich formula with the power of Micro Skin Conditioners keeps you smelling fresh |
| ENERGIZING SCRUB |  | with Active purifying beads & micro skin conditioners | deeply cleanses and exfoliates dead skin cells leaving it reenergized all day long | INTENSE HYDRATION |  | with Active glycerine complex & micro skin conditioners | deep hydrates your skin and removes excess oil to keep you refreshed all day long. |

NIVEA

FOR MEN

| Variant Name | Image | Claim | Benefit | Variant Name | Image | Claim | Benefit |
|------------------------|--|--|--|----------------|--|---------------------------------|---|
| Cool Kick |  | icy cool menthol and a pleasantly fresh scent. | the icy blue gel stimulate your senses with the cooling kick of menthol | Vitality Fresh |  | refreshing Ocean Minerals | recharges your mind and body with its vitalizing ocean minerals and an uplifting scent. |
| Active Clean |  | Natural Active Charcoal | works as a dirt magnet and cleanses your skin thoroughly without drying it out | Energy |  | refreshing Mint Extract | energizes your mind and body with the power of mint extract |
| Pure Impact Shower Gel |  | Micro Particles for effective cleansing | deep cleanses your skin with its extra fine scrub particles and keeps it moisturised | Power Refresh |  | Menthol and scent of Water Mint | invigorating and refreshing fragrance of Water Mint revitalizes your senses |

Categorising Brands

Premium+

Premium

Popular

Sub-Popular



CINTHOL **NIVEA**



COMMUNICATION & ENGAGEMENT

Deodorants

Tone & Manner

- Passionate
- Sensual
- Confident
- Powerful



Imagery / visual semiotics

- Fragrance gets you noticed
- They try to graphically bring alive the spray
- Smells Strong
- Lasts long



Protagonist

- The characters come across as smart, confident, no nonsense, know it all hence, appealing.
- An effort has been made to pick protagonists whose inherent personalities are very smart, with a look of boy-next-door who is approachable



Face wash

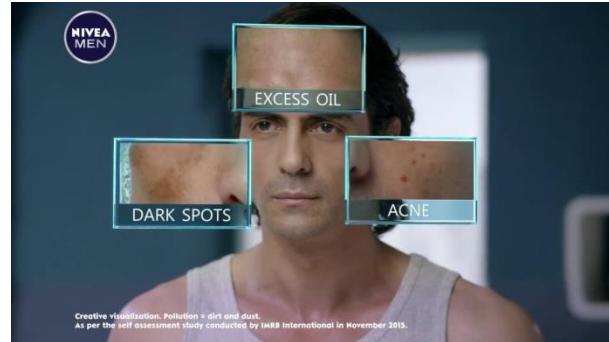
Tone & Manner

- Affected
- Aspiring
- Confident
- Powerful



Imagery / visual semiotics

- Problem- Solution
- They try to graphically bring alive the ingredients which are also the RTB and the graphics look very Hi-Tech and scientific. Even the benefits are highlighted graphically



Protagonist

- The characters come across as strong, smart, confident, no nonsense, straight to the point.
- The Protagonists emphasize on how men want to keep things simple even with their skin care products



Trend: men are taking up grooming intensely - The change in gender relations, where personality of a man is the trigger for attraction - rather than just raw physicality. In the need to pursue the modern day liberated woman. Also personality is also becoming a huge trigger for professional success Rise in indulgence spreading to men resulting in rise in male grooming. The last few years have seen a slew in products launches as men quickly adapt to skin care products.



THE NEW BEAUTY MANTRA ‘WHY SHOULD WOMEN HAVE ALL THE FUN?’

Brands not only made MALE GROOMING a mainstream by adding products in their portfolio but are also tapping into the anxiety related to appearance



Himalaya launched a range focusing on grooming for professional growth



Philips pro skin trimmer has Arjun Kapoor to promote male grooming

MENSDEPT.

CONSUMER PROFILE

The College Kid-16 to 21 year old

Rebellious Nature

Undisciplined Lifestyle

High intake of Junk Food

Indulges in Sports and Fitness Activities

Price Sensitive Consumers

Researches products before Buying

Constantly on the lookout for Promotions / Offers

Eager to try out and experiment different products



Rebellious Nature: Freedom from over protective parents and teachers in school, leads to a rebellious nature!

Undisciplined Lifestyle: Use of social media, partying and indulgences lead to an undisciplined lifestyle with sleeping late and other bad habits

High Intake of Junk Food: Constantly being out of home, leads to high intake of cheap junk food

Sports and Fitness Activities: Lack of activities and the need to get an adrenaline rush leads to a lot of Sporting and Fitness Activities.

Buying Pattern: These consumers are very price sensitive as they normally have only pocket money which their parents provide. They do a lot of research before buying so they make a good purchase and also are constantly looking for promotions and offers.

These consumers are not afraid to also try out new products.

The First Job Male- 22 to 25 year old

| | | | |
|--------------------------------------|-----------------------------------|--------------------|---|
| Eager / Curious Nature | Discipline enters their lifestyle | Very Ambitious | Try to find time to indulge in Outdoor Activities |
| Open to Spending money on themselves | Flirtatious with different Brands | Social Media Savvy | Begins to take Grooming seriously |

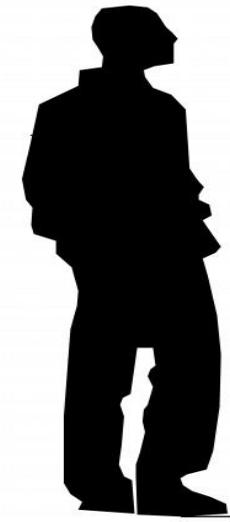
Eager / Curious Nature: On entering the workspace, they are eager to do well and curious to know different things. They also have high ambitions and only want success at any level.

Discipline enters Lifestyle: Since work becomes a part of life, there is more discipline which enters the lifestyle. They tend to sleep on time and avoid late nights.

Outdoor Activities: Weekends become important for these men and hence they indulge in outdoor activities like football, treks, etc. This helps them disengage from the pressures of work life

Social Media Savvy: Guys in this bracket want to constantly communicate to the world about their achievements and positive stories. They tend to mention all of this online on social sites.

Spending Accessibility: Since they are now earning themselves, there is a bigger openness to spend money on self. Since they are working, they begin to take grooming seriously and spend a little bit on themselves. They however are flirtatious and are aspirational towards bigger brands. However, here is where the seeds of a brand are sown.



Stable Job Male- 26 to 30 year old

Self Indulgent Nature

Social Acceptance

Seeks Change and Excitement

Pressures being to Mount

Open to Spending

Brand Loyalty starts to creep in

Desire to own Assets



Self Indulgent Nature: The individual is well to do and hence begins to indulge in different activities more frequently. Big purchases, expensive gifts etc. doesn't involve much thought.

Social Acceptance: At this stage of life, they are constantly comparing themselves with other peers with respect to jobs, finances, assets etc. They constantly seek praise and acceptance.

Seeks Change / Excitement: They tend to be at mid management levels and hence life for them is tough and mundane. They seek change and excitement. They look at travels, outings and other events are a good change.

Mounting Pressures: At this stage, pressures are felt all around by their parents, their partners, children (if any) and bosses. These pressures cause lot of stress and discomfort.

Spending Patterns: These individuals are open to spending more money, they buy bigger gifts and things for their homes. Many of them are decision makers and unattached from their parents and running houses. They have great desires to own larger assets like houses, cars, etc.

Brand Loyalty: The individuals in this category establish brand loyalty. They tend to stick to a single brand for a particular purpose now.

Analysing Consumer Insights



Shaving is an activity closely associated with 'dad' / 'father' – Every boy has had his first shave using his dad's razor and cream/foam



Afraid to use After Shave as they believe it darkens the skin with usage

In shaving, we observe the phenomena of '*Intergenerational Transmission*'



Shaving foam doesn't stay on skin easily compared to cream; also can't style beard when foam is being used.



Shaving is the first thing people talk about in grooming. It is considered one of the most important grooming activities



Shaving/ Trimming is once a week affair on weekends as styling needs time

Analysing Consumer Insights



Feel the need for Face wash to keep skin fresh; keep dirt & oil away



Awareness about face scrubbing to get rid of blackheads but no efforts taken to take of the same

Main reason to use face wash is acne and impact of pollution on skin



Unaware of men specific hair shampoo apart from dandruff shampoos
i.e Head & Shoulders/ Clear.



While bathing still soap is used to clean the face

Though hair is wash daily, Shampoo is used just once a week and not regularly due to fear of hair fall

Analysing Consumer Insights



Men still prefer soap
over
Body wash

Usage of Body wash
is

1. Time consuming
2. Sticky on skin
3. Needs lot of water to clean
4. Uneconomical





BEAUTY AWARENESS STARTS EARLIER

The 3 most important claims that Men's beauty brands make are

CLEANSING

BODY ODUR

FAIRNESS

TG - THEN

Nil

21-24 years

Didn't matter

TG - NOW

15-25 years

15-17 years

23+ years

Segmentation & Core TG

Multi Dimensional

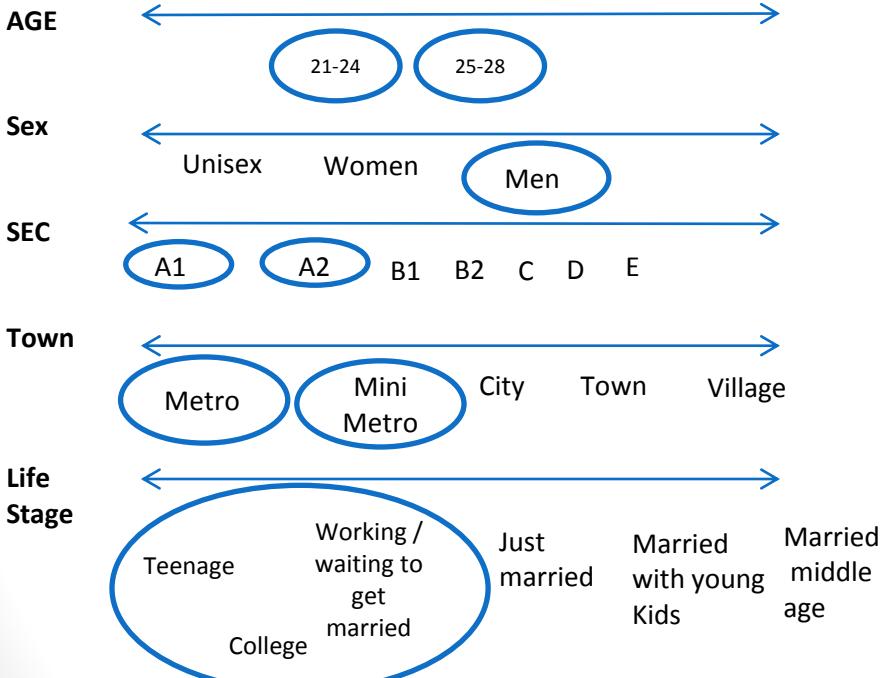


Image Conscious



Metrosexual



Road Warrior

Retrosexual

Achievers

Category Entry USP's



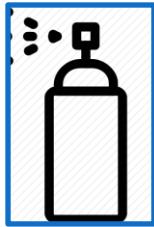
Shaving Cream: Anti Irritant

Cooling Sensation | Face Glow | Anti-Irritant



Soap: Sweat Odour control

Feel renewed and fresh | Give lasting effects against body odour



Deodorant: Sweat control / Long Lasting Perfume

Indulge in outdoor activities for a longer time. Be confident and sure!



Face wash: Oil Clear / Blemish Free

Wash off Oily and Dull skin | Curtail Pimple Problems | Look Great



2 in 1 Shower Gel: Hair and Body

Energizing and Refreshing

Breathes life into the tired and exhausted working man

Anchor Product- 1



Face wash:

- Market Size of Face Wash - Rs. 275-280 Cr; growing at 30-35%
- In urban India, the penetration is just 14%
- One of the core products in existing operations as well
- Brand USP: *Oil Clear | Blemish Free*
- Wash off Oily and Dull skin | Curtail Pimple Problems | Look Great

Anchor Product- 2



Soap:

- In 2014, the top 5 Premium men's bathing category contributed Val. Rs. 474 Cr with Vol. of 18863 MT
- Only players in the premium mens bathing bar category are Godrej's Cinthol, Raymond's Park Avenue and ITC's Fiama di Wills & Wild Stone
- One of the core products in existing operations as well
- Brand USP: *Sweat Odour control*
- Feel renewed and fresh | Give lasting effects against body odour

Peripheral Range



Face Masks



Men's Scrub
for tired, hung
over skin/
stubbly skin or
facial hair



Sunscreen for
Men with SPF
30



Skin Repair
cream/
Tan
Removal Gel



The image is a word cloud centered around the word "FINANCIAL PLAN". The word "PLAN" is the largest and most central word, rendered in a large blue font. Surrounding it are numerous other words related to finance and business, such as "forecast", "debt", "income", "spending", "success", "statements", "cashflow", "expenses", "credit", "savings", "shares", "business", and "plan". These words are in various sizes and colors, including red, orange, yellow, green, and purple, creating a dense and interconnected cluster of financial terms.

VWF Billing price from Baddi Factory to All Synergy Depot

| | Shaving Cream | Foam | | Deos | Facewash | | Shower Gel | Soap |
|---------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| | SC 70gm | SF 100+ 50gm | SF 50gm | 200 ml | FW 100ml | FW 50ml | 250 ml | 125g x3 |
| Source | Zirakpur & Punjab |
| Brand | Brand | Brand | Brand | Brand | Brand | Brand | Brand | Brand |
| Fill Weight | 70 | 150 | 50 | 200 | 100 | 50 | 250 | 125 |
| net weight | 70 | 150 | 50 | 200 | 100 | 50 | 250 | 125 |
| Pack / Bundle of | 1 | 1 | 1 | 1 | 2 | 2 | 1 | 3 |
| MRP | A | 55 | 100 | 55 | 150 | 110 | 60 | 185 |
| MARK UP on Cost | | | | | | | | |
| Retailer's Margin @ 10% on MRP | B | 5.00 | 9.09 | 5.00 | 13.64 | 10.00 | 5.45 | 16.82 |
| Scheme at 16% (A minus B) | C | 14.29 | 15.15 | 8.33 | 22.73 | 13.79 | 7.52 | 28.03 |
| Total Margin to Retailer: B + C | D | 19.29 | 24.24 | 13.33 | 36.37 | 23.79 | 12.97 | 44.85 |
| Landing to Retailer: A - D | E | 35.71 | 75.76 | 41.67 | 113.63 | 86.21 | 47.03 | 140.15 |
| Stockist Margin @ 7% Including VAT | F | 2.02 | 4.29 | 2.36 | 6.43 | 4.88 | 2.66 | 7.93 |
| Landing for Stockist: E - F | G | 33.69 | 71.47 | 39.31 | 107.20 | 81.33 | 44.37 | 132.22 |
| Tax Amount | | 4.63 | 9.83 | 5.41 | 14.74 | 11.19 | 6.11 | 18.19 |
| Post Sales Tax | H | 29.06 | 61.64 | 33.90 | 92.46 | 70.14 | 38.26 | 114.03 |
| Synergy Margin @ 10%: I * 10% | I | 2.64 | 5.60 | 3.08 | 8.41 | 6.38 | 3.48 | 10.37 |
| Cost to Synergy | J | 26.42 | 56.04 | 30.82 | 84.05 | 63.76 | 34.78 | 103.66 |
| Discount on Entry Tax | K | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Revised Cost to Synergy | L | 26.42 | 56.04 | 30.82 | 84.05 | 63.76 | 34.78 | 103.66 |
| VAT | M | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Excise (N.A) | N | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Cess (N.A) | O | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| CST @ 1.5% Baddi | P | 0.39 | 0.83 | 0.46 | 1.24 | 0.94 | 0.51 | 1.53 |
| VVF Basic Billing Price: J - (K to M) | R | 26.03 | 55.21 | 30.36 | 82.81 | 62.82 | 34.27 | 102.13 |
| Rate Master | S | 26.03 | 55.21 | 30.36 | 82.81 | 62.82 | 34.27 | 102.13 |
| No. of Pieces in 1 MT | T | 14286 | 6667 | 20000 | 5000 | 5000 | 10000 | 4000 |
| VVF Basic Billing Price Per MT | U | 415142.86 | 410933.33 | 678000.00 | 462300.00 | 350700.00 | 382600.00 | 456120.00 |
| Synergy Rate Master Per MT | V | 377428.57 | 373600.00 | 616400.00 | 420250.00 | 318800.00 | 347800.00 | 414640.00 |
| MRP Per MT | W | 785714.29 | 666666.67 | 1100000.00 | 750000.00 | 550000.00 | 600000.00 | 740000.00 |
| VVF Realisation on MRP | X | 52.84% | 61.64% | 61.64% | 61.64% | 63.76% | 63.77% | 61.64% |

VVF Billing price from Baddi Factory to All Synergy Depot

| | Shaving Cream | Foam | | Deos | Facewash | | Shower Gel | Soap |
|---------------------------------------|---------------|---------------|----------------|---------------|---------------|---------------|---------------|---------------|
| | SC 70gm | SF 100+ 50gm | SF 50gm | 200 ml | FW 100ml | FW 50ml | 250 ml | 125g x3 |
| Synergy Gross | 415143 | 410933 | 678000 | 462300 | 350700 | 382600 | 456120 | 153040 |
| Raw Material | 88000 | | | | | | | 64000 |
| Additives | | | | | | | | 13000 |
| Packaging Material | 80286 | | | | | | | 32000 |
| Conversion Charges | 50857 | | | | | | | |
| Ball park Cost | | 346667 | 1040000 | 230000 | | | | |
| Frieght | 7000 | 7000 | 7000 | 7000 | 7000 | 7000 | 7000 | 7000 |
| Total Cost | 226143 | 353667 | 1047000 | 237000 | 7000 | 7000 | 7000 | 116000 |
| Gross Margin | 189000 | 57267 | -369000 | 225300 | 343700 | 375600 | 449120 | 37040 |
| % | 46% | 14% | -54% | 49% | 98% | 98% | 98% | 24% |
| Distribution Cost @ 9.7% | 40269 | 39861 | 65766 | 44843 | 34018 | 37112 | 44244 | 14845 |
| Secondary Scheme | | | | | | | | |
| Net Contribution | 148731 | 17406 | -434766 | 180457 | 309682 | 338488 | 404876 | 22195 |
| % | 36% | 4% | -64% | 39% | 88% | 88% | 89% | 15% |
| NET Realization Value in lakhs | 11.24 | 0.31 | -15.65 | 38.98 | 44.59 | 36.56 | 24.29 | 23.97 |
| Realization | 370571 | 255733 | 422000 | 287700 | 199300 | 217400 | 283880 | 86960 |
| YTD Vol | 8 | 2 | 4 | 22 | 14 | 11 | 6 | 108 |
| Total Value Contri (in Cr) | 0.28 | 0.05 | 0.15 | 0.62 | 0.29 | 0.23 | 0.17 | 0.94 |
| TOTAL | | | | | | | | |
| Placement Norm | 6 | 2 | 3 | 6 | 3 | 6 | 6 | 12 |
| Unit offtake per outlet | 3 | 1 | 2 | 3 | 2 | 3 | 2 | 6 |
| Offtake % post activity | 7% | 2% | 7% | 7% | 7% | 7% | 2% | 9% |
| Gujarat 30000 outlets | 6000 | 667 | 4000 | 6000 | 4000 | 6000 | 1,333 | 16000 |
| Maharashtra 15000 outlets | 3000 | 333 | 2000 | 3000 | 2000 | 3000 | 667 | 8000 |
| Total Units / month | 9000 | 1000 | 6000 | 9000 | 6000 | 9000 | 2000 | 24000 |
| Vol in ton GT/ month | 0.6 | 0.2 | 0.3 | 1.8 | 1.2 | 0.9 | 0.5 | 9.0 |
| Margin generated / month (in lakhs) | 2.33 | 0.38 | 1.27 | 5.18 | 2.39 | 1.96 | 1.42 | 7.83 |

Queries & Discussion

THANK YOU

Annexures

- **MEN'S GROOMING IN INDIA:** Euromonitor International, July 2015
- Shaving:
 - <http://economictimes.indiatimes.com/magazines/brand-equity/vi-john-a-little-known-desi-brand-emerges-as-a-leader-with-a-foreign-sounding-name/articleshow/47972306.cms>
 - <http://economictimes.indiatimes.com/small-biz/startups/how-a-bunch-of-mens-grooming-startups-take-on-the-big-blades-in-the-sector/articleshow/53889459.cms>
- Face Wash
 - <http://www.thehindubusinessline.com/blink/cover/man-in-the-mirror/article6793380.ece>
 - <http://economictimes.indiatimes.com/industry/cons-products/fmcg/himalaya-eyes-doubling-mens-facewash-market-share-to-12-percent/articleshow/51381447.cms>
 - <http://www.digitalvidya.com/blog/garnier-men-drove-2-5-times-sales-through-facebook-marketing-dmblog-0106/>
- Deodorant:
 - <http://timesofindia.indiatimes.com/business/india-business/Axe-slips-further-in-deo-market/articleshow/35445745.cms>
 - <http://economictimes.indiatimes.com/industry/cons-products/fmcg/itcs-engage-range-takes-second-spot-in-deo-market-by-volume/articleshow/38377802.cms>
 - Deodorants in India, Euro Monitor Passport Report, 2015
- Bath & Shower:
 - Nielsen Data 2014
 - http://www.business-standard.com/article/management/kit-the-bath-and-shower-market-in-india-2008-108092301070_1.html

AD Claims

| Category | Product | Variant | Problem | Solution | RTB | Pay off |
|--------------|---------------------|-------------------------|---|--|---|---|
| Deos | Engage | Mixed | N/A | N/A | Lasts 24 Hours | Long Lasting - All Day Long |
| | Fogg | Mixed | | | Be Desirable | |
| | Fogg | Black Collection | | | Outlast the Party | |
| | Fogg | Perfume Body Spray | | | India's Number 1 Body Spray | |
| | Wildstone | Mixed | | | Designed in France | It Happens |
| | Park Avenue | Mixed | | | | Smell Like Wow |
| | Axe | Axe Bullet | | | | Get the Girl, Be Ready |
| | Axe Signature | Black Collection | | | Traditional Black Musk Ultra Premium Perfume | Rock Tradition |
| | Axe Signature | Deodorant | | | 3 Times more Perfume | Always in the limelight (you don't fade away) |
| Category | Product | Variant | Problem | Solution | RTB | Pay off |
| Facewash | Himalaya | Pimple Clear | Men Hate Pimples too | | Neem and Natural Salicylic Extracts | Fast and Strong Protection against Pimples |
| | Nivea Men | Pollution Control | Pollution | All in 1 Face wash | Not Complicated or Time Consuming | Reduces effects of Pollution, Dark Spots, Acne and Excess Oil |
| | Ponds Men | Energy Charge | By EOD, Face looks Dull and Tired | Face looks recharged | Coffee Bean Extract | Brightens and Energizes the Dull Face |
| | Garnier Men | Oil Clear | Oil and Dirt | Removes Oil and Dirt | Mineral Clay | Skin looks Oil Free, all day long |
| | Garnier Men | Acno Fight | Pimples, Pores, Blackheads, Oily Skin, Marks, Redness | Removes 6 signs of pimples from first wash | 6 in 1 Facewash | Get confidence to be a winner |
| | Garnier Men | Double Action Face Wash | Pollution gets in, Fairness out | Removes Pollution and Gives one tone fairer skin | First Double Textured Facewash with Black Charcoal and Icy Clay Complex | Pollution Gone - Fairness On |
| | Fiamma di Wills Men | | Men have Tougher, Oiler and Sweatiest Skin | Exfoliates, Hydrates and Brightens | Micro Gel Conditioners | Youthful Skin |
| Category | Product | Variant | Problem | Solution | RTB | Pay off |
| Shaving Foam | Wl-John | All Variants | | Smooth Cheeks | | Makhan Shave - Smooth Shave |
| Category | Product | Variant | Problem | Solution | RTB | Pay off |
| Hair Gel | Set Wet | All Variants | | | | Always have sexy hair |
| Category | Product | Variant | Problem | Solution | RTB | Pay off |
| Soaps | Wildstone | Soap | | Able to attract women | | It Happens |
| | Cinthol | Confidence + | | Clean Body | 99.9% Germ Protection Insta Deo Fragrance | Feel Alive, Feel Awesome |

AD Spends

| Category | Media Spends | Category Turnover | Advt to Sales Ratio | No od Advtser |
|------------------------|--------------|-------------------|---------------------|---------------|
| Face Wash | 150 | 280 | 54% | 8 |
| Perfumes / Deodorants | 348 | 1776 | 20% | 25 |
| Shaving Cream / Foams | 16 | 657 | 2% | 5 |
| Soaps / Shower Gels | 41 | 56 | 74% | 2 |
| Shaving System / Razor | 108 | 2327 | 5% | 1 |
| Hair Gels | 23 | | | 2 |