**COMPANY OVERVIEW**

**Insight Survey** is a South African B2B market research company with more than 10 years experience, focusing on business-to-business (B2B) market research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal or external environment.

At Insight Survey, we believe in the advantage marketing research gives business leaders to fully understand their industry, facilitate business development strategy, highlight company performance, and nurture **industry growth**.
Our bespoke Competitive Business Intelligence Research can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision.

From strategic overviews of your business's competitive environment through to specific competitor profiles, our customised Competitive Intelligence Research is designed to meet your unique needs.

Why?

- Competitor pricing research
- Store visits and store checks
- Competitor interviews
- Customer interviews
- Company website analysis
- Governmental held records

Solutions
INDUSTRY REPORT CLIENTS

Our Industry Landscape reports have been purchased by global and South African companies:
The South African Hair Care (Shampoo) Industry Landscape Report (115 pages) provides a dynamic synthesis of industry research, examining the local and global Shampoo and 2-in-1 Product Industries from a uniquely holistic perspective, with detailed insights into the entire value chain – from manufacturing to retailing, market size trends, industry trends, industry drivers & challenges, competitor and pricing analysis.

**SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:**

**For the Global Hair Care (Shampoo) Industry Section:**
- What are the current market dynamics (market environment, key markets) of the Global Shampoo and 2-in-1 Product Industries?
- What are the Shampoo and 2-in-1 Product Industries trends, drivers, and challenges?

**For the South African Hair Care (Shampoo) Industry Section:**
- What are the current market dynamics (2012-2022 market size and volume) of the SA Shampoo and 2-in-1 Product Industries?
- Who are the key manufacturing players in the SA Shampoo and 2-in-1 Product Industries?
- What are the South African Industry trends, drivers, and challenges?

**For the South African Hair Care (Shampoo) Retail and Pricing Analysis Section:**
- Who are the key retail players (pharmacies, retail stores, and online stores) in the SA Shampoo and 2-in-1 Product Industries?
- What are the prices of the most frequently purchased Shampoo products and 2-in-1 products across SA retail outlets?
115 page report filled with detailed charts, graphs, tables and insights
2. Europe

- Western Europe was the second largest region in both the global Shampoo industry and the 2-in-1 Product industry in 2017. Shampoo retail sales for the Western Europe region amounted to US$ 4.6 billion during 2017, while retail sales for the 2-in-1 Products amounted to US$ 642 million.

- In terms of Eastern Europe, Shampoo and 2-in-1 Product retail sales amounted to US$ 1.6 billion and US$ 205 million in 2017, respectively.

- Overall, the European region is expected to observe subdued growth for the next five years. The United Kingdom specifically is projected to see a volume CAGR of 0.1% for the forecast period.

- Low growth is expected due to a declining trend in hair washing among women. Women wash their hair less often due to increased concern of the harmful effects of Shampoo chemicals on their hair.

- As seen by the adjacent graph, males in the United Kingdom are more likely than females to wash their hair once a day or more. Females in the United Kingdom are more likely than males to wash their hair two to three times a week or once a week.

As female consumers in this region show a preference for washing their hair less, the demand for dry Shampoo is more than likely higher. Europe had the second largest dry Shampoo market in 2016, with 36.4% of the market in terms of revenue share.
Natural Ethnic Hair and Shampoo Products

- Amongst ethnic South African consumers, there has been a growing trend towards natural hair, as opposed to the use of wigs and weaves.
- This has partly grown out of the South African ethnic consumer’s embrace of the natural Hair Care movement, which has made its way to South Africa in recent years.
- Clicks has been a primary player in ensuring that the Hair Care product needs of ethnic South Africans are being met with an expansion of stock, as well as product ranges catering to these needs.
- Some of the ethnic Shampoo brands stocked by Clicks include Jabu Stone, Easy Waves, Dark and Lovely, and Afritrue.
- Pantene launched their “Gold Series” range which is designed for women with ethnic hair. The range has been 15 years in the making and was developed by scientists and dermatologists who have textured hair.
- This expansion of product ranges illustrates how the demand for ethnic Hair Care products, Shampoo in particular, is driving the growth of the South African Shampoo market.

Small Shampoo Businesses and Social Media

- The South African Hair Care market has seen a dramatic increase in the number of smaller Hair Care and Shampoo players entering the market, primarily out of a desire to cater for consumers embracing the natural ethnic Hair Care movement.
- Traditionally dominated by the larger brands, the South African Shampoo market is embracing smaller players, who are driving the growth of the market. They are penetrating the market through catering to the particular Hair Care needs of ethnic consumers, which includes Shampoo products with a focus on natural hair.
- An example includes the “Earthy” brand, catering to young, black, female and middle class consumers. This brand offers a variety of products, including a Shampoo Bar with activated Charcoal and Spearmint. By tapping into the needs of this particular group of consumers, small businesses like these create a sense of connection and loyalty with consumers, which have often been neglected by the major brands.
- Social media, such as YouTube, twitter, Facebook and Instagram have been used to great success by these small businesses to foster a positive connection with consumers that can be identified with.
As illustrated in the graph below, in 2017, 52.7% of all Hair Care products were distributed through Modern Grocery Retailers, while 27.1% were distributed through Non-Grocery Specialists. As indicated in the adjacent table, 44.9% of Hair Care products in 2017 were distributed via Supermarkets (a slight decrease from 45.1% in 2012).

![Channel Distribution for Hair Care Products: 2017](Image)

<table>
<thead>
<tr>
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<tbody>
<tr>
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<td>81.1% 83.0%</td>
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<tr>
<td>Grocery Retailers</td>
<td>54.7% 55.0%</td>
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<tr>
<td>Modern Grocery Retailers</td>
<td>52.3% 52.7%</td>
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<td>Convenience Stores</td>
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<td>120.7 169.2</td>
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<td>Hypermarkets</td>
<td>4.9% 5.3%</td>
<td>249.7 368.4</td>
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<tr>
<td>Supermarkets</td>
<td>45.1% 44.9%</td>
<td>2,302.8 3,107.5</td>
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<tr>
<td>Traditional Grocery Retailers</td>
<td>2.3% 2.3%</td>
<td>119.7 157.0</td>
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<tr>
<td>Independent Small Grocers</td>
<td>2.3% 2.3%</td>
<td>119.7 157.0</td>
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<td>Non-Grocery Specialists</td>
<td>25.5% 27.1%</td>
<td>1,304.0 1,875.0</td>
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<td>Health and Beauty Specialist Retailers</td>
<td>24.1% 25.8%</td>
<td>1,231.8 1,787.8</td>
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<td>Drugstores/parapharmacies</td>
<td>19.2% 18.8%</td>
<td>980.0 1,300.5</td>
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<td>Other Health and Beauty Specialist retailers</td>
<td>4.9% 7.0%</td>
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<td>Other Non-Grocery Specialists: Outdoor Markets</td>
<td>1.4% 1.3%</td>
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<td>Department Stores</td>
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<td>Mass Merchandisers</td>
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<td>Non-Store Retailing</td>
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<td>Homeshopping</td>
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<td>0.8 2.2</td>
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<td>Non-Retail Channels</td>
<td>15.3% 13.8%</td>
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<tr>
<td>Hair Salons</td>
<td>15.3% 13.8%</td>
<td>783.7 957.9</td>
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Source: Euromonitor

Image Source: Hair; Icon; Icon2; Icon3
According to the 2017 Annual Report, P&G achieved a relatively stable growth in gross profit with a 0.3% increase in gross profit from US$32.4 billion in 2016 to US$32.5 billion in 2017.

- In 2017, P&G had core Earnings Per Share (EPS) of US$3.92, an increase of 7% from 2016.
- Furthermore in 2017, P&G paid out US$7.2 billion in dividends and increased their dividend by 3%, announcing their 61st consecutive annual increase and the 127th consecutive year that P&G has paid a dividend.

- P&G’s Global Business Unit (GBUs) is split into 10 product categories of which Hair Care and Skin- and Personal Care fall under the Beauty category.
- The company’s Beauty division’s net sales were at US$11.4 billion in 2017, which was unchanged compared to 2016.
- P&G’s Hair Care business unit contributed 10% of sales in 2017, a constant contribution from 2016.
- Volume in the Hair Care segment decreased in 2017 to single digits due to smaller brand divestitures.
- As illustrated in the pie chart below, P&G reported net sales of US$65.1 billion in 2017, where the Beauty category placed third, with 18% of the total net sales.
Leading Hair Care (Shampoo) Brands/Products:

- **Aussie**: Aussie is an international cosmetics brand which focuses solely on Hair Care, with products such as Shampoos, conditioners, hair serums, gels, and sprays. Aussie’s Shampoo products are available for straight, wavy and curly hair and is used to deal with issues such as frizz, dryness, flat and damaged hair. Their Shampoo products include: Aussome Volume, Frizz Miracle, and Luscious Long. The products in this range are available in either 250ml or 300ml bottles.

- **Head & Shoulders**: This range contains a variety of Shampoo types used for the relief and treatment of dandruff conditions. Their Standard Shampoo range includes Head & Shoulders Anti-Dandruff Shampoo in citrus fresh, refreshing, cool menthol, original, soothing care, apple fresh, fresh clean, classic clean, ocean energy, and hydrating smooth and silky variants, amongst others. Products in this range is available in either 200ml, 400ml, or 600ml bottles. Their 2-in-1 Shampoo product is their Head & Shoulders Classic Clean 2-in-1 Shampoo that is available in either 200ml or 400ml bottles.

- **Pantene Pro-V**: Pantene Pro-V has a wide array of Hair Care and Styling products available in 20 collections and 8 expert collections. Pantene Pro-V has a wide variety of Shampoo products ranging from: Colour Revival, Classic Care, and Repair & Protect. Pantene Pro-V also has a 2-in-1 product. These products are available in 200ml, 400ml, and 750ml bottles.
This pricing analysis was conducted at retail stores and supermarkets during w/c 10 September 2018

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<th>BRAND AND SIZE</th>
<th>Checkers</th>
<th>Clicks+</th>
<th>Dis-Chem</th>
<th>Some</th>
<th>Makro</th>
<th>Pick n Pay</th>
<th>Shoprite</th>
<th>Spar</th>
<th>Woolworths</th>
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<td>Garnier Ultimate Blends The Nourishing Repairer Shampoo</td>
<td>400ml</td>
<td>R64.99</td>
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<td>Gill Anti-Dandruff Dry Scalp Everyday Use Shampoo</td>
<td>200ml</td>
<td>R43.99</td>
<td>R45.99</td>
<td>R41.75</td>
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<td>Hask Argan Oil From Morocco Shampoo</td>
<td>355ml</td>
<td>N/A</td>
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<td>N/A</td>
<td>N/A</td>
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<tr>
<td>Head &amp; Shoulders Anti-Dandruff Shampoo Apple Fresh</td>
<td>200ml</td>
<td>R48.99</td>
<td>R48.99</td>
<td>R48.95</td>
<td>R49.99</td>
<td>R47.45 (Special)</td>
<td>R50.43</td>
<td>R48.99</td>
<td>R79.99 (400ml)</td>
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- Noughty Detox Dynamic 2-in-1 Shampoo & Conditioner
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| Purchaser email address: |       |
| Telephone number: | VAT number:     |

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CONTACT DETAILS

CAPE TOWN

Telephone: +27 (0) 21 045-0202
Physical Address: Unit 154 B & C, Block E
Millennium Business Park
19 Edison Way
Century City
Cape Town

Contact: info@insightsurvey.co.za
Website: www.insightsurvey.co.za

JOHANNESBURG

Telephone: +27 (0) 10 140-5756
Physical Address: 1 Wedgewood Link
Bryanston
Johannesburg