



The Future of the Personal Hygiene Market in South Africa to 2017

Market Size, Distribution and Brand Share, Key Events and Competitive Landscape

Reference Code: HB0343ER

Published: February 2014

SAMPLE



Table of Contents

1. Introduction.....	12
1.1 What is this Report About?.....	12
1.2 Definitions.....	12
1.2.1 This report provides 2012 actual sales; while forecasts are provided for 2013 – 2017 ...	12
1.2.2 Category Definitions.....	12
1.2.3 Distribution Channel Definitions.....	13
1.2.4 Volume Units and Aggregations.....	14
1.2.5 CAGR Definition and Calculation.....	15
1.2.6 Graphical representation of Brands.....	15
1.2.7 Exchange Rates.....	15
1.2.8 Methodology Summary.....	16
2. South Africa Personal Hygiene Market Analysis, 2007–17	17
2.1 Personal Hygiene Value Analysis, 2007–17	17
2.1.1 Overall Personal Hygiene Market Value, 2007–17	17
2.1.2 Personal Hygiene Market Value by Category, 2007–17.....	19
2.1.3 Market Growth Dynamics by Value – Personal Hygiene, 2007–17	21
2.2 Personal Hygiene Volume Analysis, 2007–17	22
2.2.1 Overall Personal Hygiene Market Volume, 2007–17	22
2.2.2 Per-Capita Consumption - Personal Hygiene, 2007–17.....	23
2.2.3 Personal Hygiene Market Volume by Category, 2007–17.....	24
2.2.4 Market Growth Dynamics by Volume – Personal Hygiene, 2007–17	26
3. South Africa Anti-Perspirants & Deodorants Market Analysis, 2007–1727	
3.1 Anti-Perspirants & Deodorants Value Analysis, 2007–17	27
3.1.1 Anti-Perspirants & Deodorants Market by Value, 2007–17	27
3.1.2 Average Consumer Price/Unit – Anti-Perspirants & Deodorants, 2007–17	29
3.1.3 Anti-Perspirants & Deodorants Market Value by Segments, 2007–17	30
3.2 Anti-Perspirants & Deodorants Volume Analysis, 2007–17	33
3.2.1 Anti-Perspirants & Deodorants Market by Volume, 2007–17	33
3.2.2 Anti-Perspirants & Deodorants Market Volume by Segments, 2007–17.....	34
3.3 Market Growth Dynamics – Anti-Perspirants & Deodorants, 2007–17.....	36
3.3.1 Anti-Perspirants & Deodorants Market Growth Dynamics by Value, 2007–17.....	36
3.3.2 Anti-Perspirants & Deodorants Market Growth Dynamics by Volume, 2007–17.....	37
3.4 Aerosol Anti-Perspirant Analysis, 2007–17	38
3.4.1 Aerosol Anti-Perspirant Market by Value, 2007–17	38
3.4.2 Aerosol Anti-Perspirant Market by Volume, 2007–17	39
3.5 Body Spray Analysis, 2007–17	40

3.5.1	Body Spray Market by Value, 2007–17	40
3.5.2	Body Spray Market by Volume, 2007–17	41
3.6	Deodorant Creams Analysis, 2007–17	42
3.6.1	Deodorant Creams Market by Value, 2007–17	42
3.6.2	Deodorant Creams Market by Volume, 2007–17	43
3.7	Deodorant Gel Analysis, 2007–17	44
3.7.1	Deodorant Gel Market by Value, 2007–17	44
3.7.2	Deodorant Gel Market by Volume, 2007–17	45
3.8	Roll-On Deodorants Analysis, 2007–17	46
3.8.1	Roll-On Deodorants Market by Value, 2007–17	46
3.8.2	Roll-On Deodorants Market by Volume, 2007–17	47
3.9	Sticks and Solids Analysis, 2007–17	48
3.9.1	Sticks and Solids Market by Value, 2007–17	48
3.9.2	Sticks and Solids Market by Volume, 2007–17	49
3.10	Anti-Perspirants & Deodorants Brand Analysis, 2009–12	50
3.11	Anti-Perspirants & Deodorants Distribution Channel Analysis, 2009–12	53
4.	South Africa Bath and Shower Products Market Analysis, 2007–17....	56
4.1	Bath and Shower Products Value Analysis, 2007–17	56
4.1.1	Bath and Shower Products Market by Value, 2007–17	56
4.1.2	Average Consumer Price/Unit – Bath and Shower Products, 2007–17	58
4.1.3	Bath and Shower Products Market Value by Segments, 2007–17	59
4.2	Bath and Shower Products Volume Analysis, 2007–17	61
4.2.1	Bath and Shower Products Market by Volume, 2007–17	61
4.2.2	Bath and Shower Products Market Volume by Segments, 2007–17	62
4.3	Market Growth Dynamics – Bath and Shower Products, 2007–17	64
4.3.1	Bath and Shower Products Market Growth Dynamics by Value, 2007–17	64
4.3.2	Bath and Shower Products Market Growth Dynamics by Volume, 2007–17	65
4.4	Liquid Bath Products Analysis, 2007–17	66
4.4.1	Liquid Bath Products Market by Value, 2007–17	66
4.4.2	Liquid Bath Products Market by Volume, 2007–17	67
4.5	Other Bath Products Analysis, 2007–17	68
4.5.1	Other Bath Products Market by Value, 2007–17	68
4.5.2	Other Bath Products Market by Volume, 2007–17	69
4.6	Shower Products Analysis, 2007–17	70
4.6.1	Shower Products Market by Value, 2007–17	70
4.6.2	Shower Products Market by Volume, 2007–17	71
4.7	Bath and Shower Products Brand Analysis, 2009–12	72
4.8	Bath and Shower Products Distribution Channel Analysis, 2009–12	75

5.	South Africa Soap Market Analysis, 2007–17	78
5.1	Soap Value Analysis, 2007–17	78
5.1.1	Soap Market by Value, 2007–17	78
5.1.2	Average Consumer Price/Unit – Soap, 2007–17	80
5.1.3	Soap Market Value by Segments, 2007–17	81
5.2	Soap Volume Analysis, 2007–17	83
5.2.1	Soap Market by Volume, 2007–17	83
5.2.2	Soap Market Volume by Segments, 2007–17	84
5.3	Market Growth Dynamics – Soap, 2007–17	86
5.3.1	Soap Market Growth Dynamics by Value, 2007–17	86
5.3.2	Soap Market Growth Dynamics by Volume, 2007–17	87
5.4	Bar Soap Analysis, 2007–17	88
5.4.1	Bar Soap Market by Value, 2007–17	88
5.4.2	Bar Soap Market by Volume, 2007–17	89
5.5	Liquid Soap Analysis, 2007–17	90
5.5.1	Liquid Soap Market by Value, 2007–17	90
5.5.2	Liquid Soap Market by Volume, 2007–17	91
5.6	Soap Brand Analysis, 2009–12	92
5.7	Soap Distribution Channel Analysis, 2009–12	95
6.	Profiles of Companies Active in the Global Personal Hygiene Market	98
6.1	The Procter & Gamble Company	98
6.1.1	The Procter & Gamble Company Business Analysis	98
6.1.2	The Procter & Gamble Company Major Products and Services	99
6.1.3	The Procter & Gamble Company Key Competitors	100
6.1.4	The Procter & Gamble Company SWOT Analysis	100
6.1.5	The Procter & Gamble Company History	106
6.1.6	The Procter & Gamble Company Key Employees	109
6.1.7	The Procter & Gamble Company Locations and Subsidiaries	112
6.2	Unilever PLC	117
6.2.1	Unilever PLC Business Analysis	117
6.2.2	Unilever PLC Major Products and Services	118
6.2.3	Unilever PLC Key Competitors	119
6.2.4	Unilever PLC SWOT Analysis	119
6.2.5	Unilever PLC History	124
6.2.6	Unilever PLC Key Employees	127
6.2.7	Unilever PLC Locations and Subsidiaries	129
6.3	Henkel AG & Co. KGaA	133
6.3.1	Henkel AG & Co. KGaA Business Analysis	133
6.3.2	Henkel AG & Co. KGaA Major Products and Services	134

6.3.3	Henkel AG & Co. KGaA Key Competitors	137
6.3.4	Henkel AG & Co. KGaA SWOT Analysis.....	137
6.3.5	Henkel AG & Co. KGaA History	142
6.3.6	Henkel AG & Co. KGaA Key Employees.....	145
6.3.7	Henkel AG & Co. KGaA Locations and Subsidiaries	147
6.4	Colgate-Palmolive Company.....	158
6.4.1	Colgate-Palmolive Company Business Analysis.....	158
6.4.2	Colgate-Palmolive Company Major Products and Services	159
6.4.3	Colgate-Palmolive Company Key Competitors.....	160
6.4.4	Colgate-Palmolive Company SWOT Analysis	160
6.4.5	Colgate-Palmolive Company History.....	166
6.4.6	Colgate-Palmolive Company Key Employees	169
6.4.7	Colgate-Palmolive Company Locations and Subsidiaries	172
6.5	Maxingvest AG.....	178
6.5.1	Maxingvest AG Business Analysis.....	178
6.5.2	Maxingvest AG Major Products and Services.....	179
6.5.3	Maxingvest AG Key Competitors	180
6.5.4	Maxingvest AG SWOT Analysis.....	180
6.5.5	Maxingvest AG History	185
6.5.6	Maxingvest AG Key Employees.....	186
6.5.7	Maxingvest AG Locations and Subsidiaries	187
6.6	Avon Products, Inc.	190
6.6.1	Avon Products, Inc. Business Analysis	190
6.6.2	Avon Products, Inc. Major Products and Services	191
6.6.3	Avon Products, Inc. Key Competitors.....	192
6.6.4	Avon Products, Inc. SWOT Analysis	192
6.6.5	Avon Products, Inc. History.....	196
6.6.6	Avon Products, Inc. Key Employees	199
6.6.7	Avon Products, Inc. Locations and Subsidiaries.....	201
6.7	LG Corp.	206
6.7.1	LG Corp. Business Analysis	206
6.7.2	LG Corp. Major Products and Services	207
6.7.3	LG Corp. Key Competitors.....	209
6.7.4	LG Corp. SWOT Analysis	209
6.7.5	LG Corp. History.....	214
6.7.6	LG Corp. Key Employees	216
6.7.7	LG Corp. Locations and Subsidiaries.....	217
6.8	Beiersdorf AG	225
6.8.1	Beiersdorf AG Business Analysis.....	225
6.8.2	Beiersdorf AG Major Products and Services	226

6.8.3	Beiersdorf AG Key Competitors	226
6.8.4	Beiersdorf AG SWOT Analysis	227
6.8.5	Beiersdorf AG History	230
6.8.6	Beiersdorf AG Key Employees.....	232
6.8.7	Beiersdorf AG Locations and Subsidiaries	233
6.9	Arata Corporation.....	237
6.9.1	Arata Corporation Business Analysis	237
6.9.2	Arata Corporation Major Products and Services.....	238
6.9.3	Arata Corporation Key Competitors	239
6.9.4	Arata Corporation SWOT Analysis.....	239
6.9.5	Arata Corporation SWOT Analysis - Overview	239
6.9.6	Arata Corporation History	243
6.9.7	Arata Corporation Key Employees.....	245
6.9.8	Arata Corporation Locations and Subsidiaries.....	246
6.10	Wipro Limited	249
6.10.1	Wipro Limited Business Analysis	249
6.10.2	Wipro Limited Major Products and Services.....	250
6.10.3	Wipro Limited Key Competitors.....	251
6.10.4	Wipro Limited SWOT Analysis.....	251
6.10.5	Wipro Limited History	256
6.10.6	Wipro Limited Key Employees	261
6.10.7	Wipro Limited Locations and Subsidiaries.....	263
7.	News and Key Events in the Global Personal Hygiene Market	268
7.1	Category News	268
7.1.1	Ruma Organics launches new deodorant.....	268
7.1.2	Real Purity rolls out organic deodorant	268
7.1.3	Real Purity introduces new stick deodorant.....	269
7.1.4	Nubo launches Laser Eraser Stretch Mark Solution	269
7.1.5	Unilever to invest over €150 million in a new factory in Turkey	269
7.1.6	Interim report - third quarter of 2013: Schouw & Co.....	270
7.1.7	Herbalife announces record third quarter 2013 and introduces 2014 earnings guidance.....	271
7.1.8	Zion Health ClayDry deodorant now available at Whole Foods Market, California	272
7.1.9	Speer Laboratories launches new therapeutic moisture bar	272
7.1.10	KIK introduces new Clorox Brand pool care products.....	273
8.	Deal Activities in the Global Personal Hygiene Market	274
8.1	Category Deals	274
8.1.1	Parfums de Coeur acquires Teal's Therapeutic Solutions from Advanced Beauty	274
8.1.2	Godrej Consumer Products to acquire remaining 49% stake in Darling Nigeria from Darling Group Holdings	275

8.1.3	Herbalife to raise US\$1 billion in private placement of convertible notes.....	277
8.1.4	Sensible Organics raises US\$1.71 million in equity funding.....	278
8.1.5	Johnson & Johnson prices US\$550 million senior unsecured notes due 2023	279
8.1.6	Johnson & Johnson prices US\$600 million senior unsecured notes due 2018	280
8.1.7	Johnson & Johnson prices US\$500 million senior unsecured notes due 2043	282
8.1.8	Johnson & Johnson prices US\$800 million floating rate unsecured notes due 2016	284
8.1.9	Johnson & Johnson prices US\$650 million senior unsecured notes due 2033	285
8.1.10	Sirius Financial Services acquires Farmica Africa	287
9.	Appendix	289
9.1	About Canadean	289
9.2	Disclaimer	289

List of Figures

Figure 1: South Africa Personal Hygiene Market Value (LCU m) and Growth (Y-o-Y), 2007–17	18
Figure 2: South Africa Personal Hygiene Market Value (LCU m) by Category, 2007–17	20
Figure 3: South Africa Personal Hygiene Market Dynamics, by Category, by Market Value, 2007–17	21
Figure 4: South Africa Personal Hygiene Market Volume (Units m) and Growth (Y-o-Y), 2007–17	22
Figure 5: South Africa Per-Capita Personal Hygiene Consumption (Unit/head & Y-o-Y growth), 2007–17	23
Figure 6: South Africa Personal Hygiene Market Volume (Units m) by Category, 2007–17	25
Figure 7: South Africa Personal Hygiene Market Dynamics, by Category, by Market Volume 2007–17	26
Figure 8: South Africa Anti-Perspirants & Deodorants Market Value (LCU m) and Growth (Y-o-Y), 2007–17	28
Figure 9: South Africa Anti-Perspirants & Deodorants Average Consumer Price (LCU) and Growth (Y-o-Y), 2007–17	29
Figure 10: South Africa Anti-Perspirants & Deodorants Market Value (LCU m) by Segments, 2007–17	32
Figure 11: South Africa Anti-Perspirants & Deodorants Market Volume (Units m) and Growth (Y-o-Y), 2007–17	33
Figure 12: South Africa Anti-Perspirants & Deodorants Market Volume (Units m) by Segments, 2007–17	35
Figure 13: South Africa Anti-Perspirants & Deodorants Market Growth Dynamics by Value, 2007–17	36
Figure 14: South Africa Anti-Perspirants & Deodorants Market Growth Dynamics by Volume, 2007–17	37
Figure 15: South Africa Aerosol Anti-Perspirant Market by Value (LCU m), 2007–17	38
Figure 16: South Africa Aerosol Anti-Perspirant Market by Volume (Units m), 2007–17	39
Figure 17: South Africa Body Spray Market by Value (LCU m), 2007–17	40
Figure 18: South Africa Body Spray Market by Volume (Units m), 2007–17	41
Figure 19: South Africa Deodorant Creams Market by Value (LCU m), 2007–17	42
Figure 20: South Africa Deodorant Creams Market by Volume (Units m), 2007–17	43
Figure 21: South Africa Deodorant Gel Market by Value (LCU m), 2007–17	44
Figure 22: South Africa Deodorant Gel Market by Volume (Units m), 2007–17	45
Figure 23: South Africa Roll-On Deodorants Market by Value (LCU m), 2007–17	46
Figure 24: South Africa Roll-On Deodorants Market by Volume (Units m), 2007–17	47
Figure 25: South Africa Sticks and Solids Market by Value (LCU m), 2007–17	48
Figure 26: South Africa Sticks and Solids Market by Volume (Units m), 2007–17	49
Figure 27: South Africa Anti-Perspirants & Deodorants Market Value by Brands (LCU m), 2009–12	52
Figure 28: South Africa Anti-Perspirants & Deodorants Market Value by Distribution Channel (LCU m), 2009–12	55
Figure 29: South Africa Bath and Shower Products Market Value (LCU m) and Growth (Y-o-Y), 2007–17	57
Figure 30: South Africa Bath and Shower Products Average Consumer Price (LCU) and Growth (Y-o-Y), 2007–17	58
Figure 31: South Africa Bath and Shower Products Market Value (LCU m) by Segments, 2007–17	60
Figure 32: South Africa Bath and Shower Products Market Volume (Units m) and Growth (Y-o-Y), 2007–17	61
Figure 33: South Africa Bath and Shower Products Market Volume (Units m) by Segments, 2007–17	63
Figure 34: South Africa Bath and Shower Products Market Growth Dynamics by Value, 2007–17	64
Figure 35: South Africa Bath and Shower Products Market Growth Dynamics by Volume, 2007–17	65
Figure 36: South Africa Liquid Bath Products Market by Value (LCU m), 2007–17	66
Figure 37: South Africa Liquid Bath Products Market by Volume (Units m), 2007–17	67
Figure 38: South Africa Other Bath Products Market by Value (LCU m), 2007–17	68
Figure 39: South Africa Other Bath Products Market by Volume (Units m), 2007–17	69
Figure 40: South Africa Shower Products Market by Value (LCU m), 2007–17	70
Figure 41: South Africa Shower Products Market by Volume (Units m), 2007–17	71
Figure 42: South Africa Bath and Shower Products Market Value by Brands (LCU m), 2009–12	74
Figure 43: South Africa Bath and Shower Products Market Value by Distribution Channel (LCU m), 2009–12	77
Figure 44: South Africa Soap Market Value (LCU m) and Growth (Y-o-Y), 2007–17	79
Figure 45: South Africa Soap Average Consumer Price (LCU) and Growth (Y-o-Y), 2007–17	80
Figure 46: South Africa Soap Market Value (LCU m) by Segments, 2007–17	82
Figure 47: South Africa Soap Market Volume (Units m) and Growth (Y-o-Y), 2007–17	83
Figure 48: South Africa Soap Market Volume (Units m) by Segments, 2007–17	85
Figure 49: South Africa Soap Market Growth Dynamics by Value, 2007–17	86
Figure 50: South Africa Soap Market Growth Dynamics by Volume, 2007–17	87
Figure 51: South Africa Bar Soap Market by Value (LCU m), 2007–17	88
Figure 52: South Africa Bar Soap Market by Volume (Units m), 2007–17	89
Figure 53: South Africa Liquid Soap Market by Value (LCU m), 2007–17	90
Figure 54: South Africa Liquid Soap Market by Volume (Units m), 2007–17	91
Figure 55: South Africa Soap Market Value by Brands (LCU m), 2009–12	94
Figure 56: South Africa Soap Market Value by Distribution Channel (LCU m), 2009–12	97

List of Tables

Table 1: Category Definitions - Personal Hygiene Market	12
Table 2: Distribution Channel Definitions - Personal Hygiene Market.....	13
Table 3: Volume Units for Personal Hygiene Market	14
Table 4: South Africa Exchange Rate LCU (Local Currency Unit) – USD (Annual Average), 2007 – 2012.....	15
Table 5: South Africa Personal Hygiene Market Value (LCU m) and Growth (Y-o-Y), 2007–17.....	17
Table 6: South Africa Personal Hygiene Market Value (USD m) and Growth (Y-o-Y), 2007–17	17
Table 7: South Africa Personal Hygiene Market Value (LCU m) by Category, 2007–12.....	19
Table 8: South Africa Personal Hygiene Market Value (LCU m) by Category, 2012–17.....	19
Table 9: South Africa Personal Hygiene Market Value (USD m) by Category, 2007–12	19
Table 10: South Africa Personal Hygiene Market Value (USD m) by Category, 2012–17	20
Table 11: South Africa Personal Hygiene Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by Value (LCU m).....	21
Table 12: South Africa Personal Hygiene Market Volume (Units m) and Growth (Y-o-Y), 2007–17	22
Table 13: South Africa Per-capita Personal Hygiene Consumption (Unit/head & Y-o-Y growth), 2007–17	23
Table 14: South Africa Personal Hygiene Market Volume (Units m) by Category, 2007–12	24
Table 15: South Africa Personal Hygiene Market Volume (Units m) by Category, 2012–17	24
Table 16: South Africa Personal Hygiene Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by volume (Units m)	26
Table 17: South Africa Anti-Perspirants & Deodorants Market Value (LCU m) and Growth (Y-o-Y), 2007–17.....	27
Table 18: South Africa Anti-Perspirants & Deodorants Market Value (USD m) and Growth (Y-o-Y), 2007–17	27
Table 19: South Africa Anti-Perspirants & Deodorants Average Consumer Price (LCU) and Growth (Y-o-Y), 2007–17	29
Table 20: South Africa Anti-Perspirants & Deodorants Market Value (LCU m) by Segments, 2007–12	30
Table 21: South Africa Anti-Perspirants & Deodorants Market Value (LCU m) by Segments, 2012–17	30
Table 22: South Africa Anti-Perspirants & Deodorants Market Value (USD m) by Segments, 2007–12.....	31
Table 23: South Africa Anti-Perspirants & Deodorants Market Value (USD m) by Segments, 2012–17.....	31
Table 24: South Africa Anti-Perspirants & Deodorants Market Volume (Units m) and Growth (Y-o-Y), 2007–17	33
Table 25: South Africa Anti-Perspirants & Deodorants Market Volume (Units m) by Segments, 2007–12	34
Table 26: South Africa Anti-Perspirants & Deodorants Market Volume (Units m) by Segments, 2012–17	34
Table 27: South Africa Anti-Perspirants & Deodorants Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Value (LCU m), by Segments	36
Table 28: South Africa Anti-Perspirants & Deodorants Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Volume (Units m), by Segments	37
Table 29: South Africa Aerosol Anti-Perspirant Market by Value (LCU m), 2007–17	38
Table 30: South Africa Aerosol Anti-Perspirant Market by Value (USD m), 2007–17	38
Table 31: South Africa Aerosol Anti-Perspirant Market by Volume (Units m), 2007–17.....	39
Table 32: South Africa Body Spray Market by Value (LCU m), 2007–17	40
Table 33: South Africa Body Spray Market by Value (USD m), 2007–17	40
Table 34: South Africa Body Spray Market by Volume (Units m), 2007–17.....	41
Table 35: South Africa Deodorant Creams Market by Value (LCU m), 2007–17.....	42
Table 36: South Africa Deodorant Creams Market by Value (USD m), 2007–17	42
Table 37: South Africa Deodorant Creams Market by Volume (Units m), 2007–17	43
Table 38: South Africa Deodorant Gel Market by Value (LCU m), 2007–17.....	44
Table 39: South Africa Deodorant Gel Market by Value (USD m), 2007–17	44
Table 40: South Africa Deodorant Gel Market by Volume (Units m), 2007–17	45
Table 41: South Africa Roll-On Deodorants Market by Value (LCU m), 2007–17	46
Table 42: South Africa Roll-On Deodorants Market by Value (USD m), 2007–17	46
Table 43: South Africa Roll-On Deodorants Market by Volume (Units m), 2007–17	47
Table 44: South Africa Sticks and Solids Market by Value (LCU m), 2007–17.....	48
Table 45: South Africa Sticks and Solids Market by Value (USD m), 2007–17	48
Table 46: South Africa Sticks and Solids Market by Volume (Units m), 2007–17.....	49
Table 47: South Africa Anti-Perspirants & Deodorants Market Value by Brands (LCU m), 2009–12	50
Table 48: South Africa Anti-Perspirants & Deodorants Market Value by Brands (USD m), 2009–12.....	51
Table 49: South Africa Anti-Perspirants & Deodorants Market Value by Distribution Channel (LCU m), 2009–12	53
Table 50: South Africa Anti-Perspirants & Deodorants Market Value by Distribution Channel (USD m), 2009–12	54
Table 51: South Africa Bath and Shower Products Market Value (LCU m) and Growth (Y-o-Y), 2007–17.....	56
Table 52: South Africa Bath and Shower Products Market Value (USD m) and Growth (Y-o-Y), 2007–17	56
Table 53: South Africa Bath and Shower Products Average Consumer Price (LCU) and Growth (Y-o-Y), 2007–17	58

Table 54: South Africa Bath and Shower Products Market Value (LCU m) by Segments, 2007–12	59
Table 55: South Africa Bath and Shower Products Market Value (LCU m) by Segments, 2012–17	59
Table 56: South Africa Bath and Shower Products Market Value (USD m) by Segments, 2007–12	59
Table 57: South Africa Bath and Shower Products Market Value (USD m) by Segments, 2012–17	60
Table 58: South Africa Bath and Shower Products Market Volume (Units m) and Growth (Y-o-Y), 2007–17	61
Table 59: South Africa Bath and Shower Products Market Volume (Units m) by Segments, 2007–12	62
Table 60: South Africa Bath and Shower Products Market Volume (Units m) by Segments, 2012–17	62
Table 61: South Africa Bath and Shower Products Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Value (LCU m), by Segments	64
Table 62: South Africa Bath and Shower Products Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Volume (Units m), by Segments	65
Table 63: South Africa Liquid Bath Products Market by Value (LCU m), 2007–17	66
Table 64: South Africa Liquid Bath Products Market by Value (USD m), 2007–17	66
Table 65: South Africa Liquid Bath Products Market by Volume (Units m), 2007–17	67
Table 66: South Africa Other Bath Products Market by Value (LCU m), 2007–17	68
Table 67: South Africa Other Bath Products Market by Value (USD m), 2007–17	68
Table 68: South Africa Other Bath Products Market by Volume (Units m), 2007–17	69
Table 69: South Africa Shower Products Market by Value (LCU m), 2007–17	70
Table 70: South Africa Shower Products Market by Value (USD m), 2007–17	70
Table 71: South Africa Shower Products Market by Volume (Units m), 2007–17	71
Table 72: South Africa Bath and Shower Products Market Value by Brands (LCU m), 2009–12	72
Table 73: South Africa Bath and Shower Products Market Value by Brands (USD m), 2009–12	73
Table 74: South Africa Bath and Shower Products Market Value by Distribution Channel (LCU m), 2009–12	75
Table 75: South Africa Bath and Shower Products Market Value by Distribution Channel (USD m), 2009–12	76
Table 76: South Africa Soap Market Value (LCU m) and Growth (Y-o-Y), 2007–17	78
Table 77: South Africa Soap Market Value (USD m) and Growth (Y-o-Y), 2007–17	78
Table 78: South Africa Soap Average Consumer Price (LCU) and Growth (Y-o-Y), 2007–17	80
Table 79: South Africa Soap Market Value (LCU m) by Segments, 2007–12	81
Table 80: South Africa Soap Market Value (LCU m) by Segments, 2012–17	81
Table 81: South Africa Soap Market Value (USD m) by Segments, 2007–12	81
Table 82: South Africa Soap Market Value (USD m) by Segments, 2012–17	81
Table 83: South Africa Soap Market Volume (Units m) and Growth (Y-o-Y), 2007–17	83
Table 84: South Africa Soap Market Volume (Units m) by Segments, 2007–12	84
Table 85: South Africa Soap Market Volume (Units m) by Segments, 2012–17	84
Table 86: South Africa Soap Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Value (LCU m), by Segments	86
Table 87: South Africa Soap Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Volume (Units m), by Segments	87
Table 88: South Africa Bar Soap Market by Value (LCU m), 2007–17	88
Table 89: South Africa Bar Soap Market by Value (USD m), 2007–17	88
Table 90: South Africa Bar Soap Market by Volume (Units m), 2007–17	89
Table 91: South Africa Liquid Soap Market by Value (LCU m), 2007–17	90
Table 92: South Africa Liquid Soap Market by Value (USD m), 2007–17	90
Table 93: South Africa Liquid Soap Market by Volume (Units m), 2007–17	91
Table 94: South Africa Soap Market Value by Brands (LCU m), 2009–12	92
Table 95: South Africa Soap Market Value by Brands (USD m), 2009–12	93
Table 96: South Africa Soap Market Value by Distribution Channel (LCU m), 2009–12	95
Table 97: South Africa Soap Market Value by Distribution Channel (USD m), 2009–12	96
Table 98: The Procter & Gamble Company Fast Facts	98
Table 99: The Procter & Gamble Company Major Products and Services	99
Table 100: The Procter & Gamble Company History	106
Table 101: The Procter & Gamble Company Key Employees	109
Table 102: The Procter & Gamble Company Subsidiaries	112
Table 103: Unilever PLC Fast Facts	117
Table 104: Unilever PLC Major Products and Services	118
Table 105: Unilever PLC History	124
Table 106: Unilever PLC Key Employees	127
Table 107: Unilever PLC Subsidiaries	129
Table 108: Henkel AG & Co. KGaA Fast Facts	133
Table 109: Henkel AG & Co. KGaA Major Products and Services	134
Table 110: Henkel AG & Co. KGaA History	142

Table 111: Henkel AG & Co. KGaA Key Employees	145
Table 112: Henkel AG & Co. KGaA Subsidiaries	147
Table 113: Colgate-Palmolive Company Fast Facts	158
Table 114: Colgate-Palmolive Company Major Products and Services	159
Table 115: Colgate-Palmolive Company History	166
Table 116: Colgate-Palmolive Company Key Employees	169
Table 117: Colgate-Palmolive Company Other Locations	172
Table 118: Colgate-Palmolive Company Subsidiaries	173
Table 119: Maxingvest AG Fast Facts	178
Table 120: Maxingvest AG Major Products and Services	179
Table 121: Maxingvest AG History	185
Table 122: Maxingvest AG Key Employees	186
Table 123: Maxingvest AG Subsidiaries	187
Table 124: Avon Products, Inc. Fast Facts	190
Table 125: Avon Products, Inc. Major Products and Services	191
Table 126: Avon Products, Inc. History	196
Table 127: Avon Products, Inc. Key Employees	199
Table 128: Avon Products, Inc. Other Locations	201
Table 129: Avon Products, Inc. Subsidiaries	203
Table 130: LG Corp. Fast Facts	206
Table 131: LG Corp. Major Products and Services	207
Table 132: LG Corp. History	214
Table 133: LG Corp. Key Employees	216
Table 134: LG Corp. Subsidiaries	217
Table 135: Beiersdorf AG Fast Facts	225
Table 136: Beiersdorf AG Major Products and Services	226
Table 137: Beiersdorf AG History	230
Table 138: Beiersdorf AG Key Employees	232
Table 139: Beiersdorf AG Other Locations	233
Table 140: Beiersdorf AG Subsidiaries	234
Table 141: Arata Corporation Fast Facts	237
Table 142: Arata Corporation Major Products and Services	238
Table 143: Arata Corporation History	243
Table 144: Arata Corporation Key Employees	245
Table 145: Arata Corporation Subsidiaries	246
Table 146: Wipro Limited Fast Facts	249
Table 147: Wipro Limited Major Products and Services	250
Table 148: Wipro Limited History	256
Table 149: Wipro Limited Key Employees	261
Table 150: Wipro Limited Other Locations	263
Table 151: Wipro Limited Subsidiaries	266

1. Introduction

1.1 What is this Report About?

This report is the result of Canadean's extensive market research covering the Personal Hygiene Market in South Africa. It provides detailed segmentation of historic and future Personal Hygiene Market, covering key categories and segments.

As such the report is an essential tool for companies active across the Personal Hygiene industry and for new players considering entry into South Africa's Personal Hygiene market.

1.2 Definitions

All the data is collected in volume terms. Personal Hygiene Market refers to domestic Market only and includes imports. Please note that rounding errors may occur.

1.2.1 This report provides 2012 actual sales; while forecasts are provided for 2013 – 2017

1.2.2 Category Definitions

Table 1: Category Definitions - Personal Hygiene Market

Category	Segment	Definition
Anti-Perspirants & Deodorants	Aerosol Anti-Perspirant	A subgroup of deodorants, antiperspirants, affect odor as well as prevent sweating by affecting sweat glands. Antiperspirants are typically applied to the underarms. Includes anti-perspirants packaged under pressure for release as a spray, as well as body sprays with anti-perspirant properties. Examples include Suave Aerosol Anti-Perspirant-Deodorant (US), Dove Deodorant Anti-Perspirant Spray (Denmark), Nivea Deodorant 24h Anti-Perspirant (Australia).
	Body Spray	Body spray is a perfume product, similar to aerosol deodorant, which is intended to be used elsewhere on the body besides the armpits. Body sprays are lighter in strength than cologne, generally less expensive, and doubles as a deodorant. Examples include Nivea Deodorant For Men Deodorant Spray (Germany), Lenthéric Deodorant Body Spray (New Zealand).
	Deodorant Creams	This is generally a soft substance that has a consistency that can range from lotion to body butter. It is normally sold in some type of small, pot-like container, which allows the user to dip fingers in and apply the substance with hand. Includes all deodorants and anti-perspirants applied in cream form, either packaged in a small tub or in a dispensing stick. Examples include Mitchum Anti-Perspirant & Deodorant Cream (US), Linden Voss Quick Dry Cream Anti-Perspirant, Rexona Confidence Anti-Perspirant Deodorant (New Zealand).
	Deodorant Gel	Deodorants and anti-perspirants that come in gel form, often dispensed by a twist applicator. Gels are typically clear and will not leave white residue on your clothes. Examples include Axe Dry Anti-Perspirant & Deodorant Gel (US), Fa Deo Gel (Germany), Ban Watery Gel Deodorant (Japan).
	Roll-On Deodorants	Roll-on deodorant covers all liquid deodorants and anti-perspirants dispensed through a ball device. Examples include Ban Beautifully Soft Anti-Perspirant & Deodorant Roll-On (US), Neutro Roberts Deodorante White Fresh Roll-On (South Africa), Rexona 24 Hr Men Anti-Perspirant Deodorant (Indonesia).

Table 1: Category Definitions - Personal Hygiene Market

Category	Segment	Definition
Bath and Shower Products	Sticks and Solids	Deodorants and anti-perspirants that come in solid form, generally dispensed by a twist applicator. Examples include Adidas Clear Stick Active Deodorant (US), Palmolive Dry Stick Deodorant (Portugal), Nivea Deo Stick Antiperspirant Deodorant For Women (Australia).
	Liquid Bath Products	Liquid products that are added to bath water and/or body washes for bath-time usage. Examples include Skin Milk Soften Foaming Bath (US), Oriflame Aromacare Relaxing Foam Bath (Denmark), Fushgi Na Nyuyokuryo Bubble Bath (Japan).
	Other Bath Products	Non-liquid products that may be added to the bath water, such as salts, bath bombs and bath beads. Examples include Batherapy Natural Mineral Bath (US), Hugo Boss Woman Perfumed Bath Crystals (Germany), Lush Bath Bomb (Japan).
	Shower Products	Shower products are all cleansing products that may be used in the shower, including shower gels. Examples include Lever 2000 Refresh Body Wash (US), Montana Comor Shower & Bath Gel (France), Palmolive Aroma Crème Shower Milk (Australia).
Soap	Bar Soap	Solid soap formulated for cleaning hands, face and body. May also moisturize the skin and/or inhibit odor-causing bacteria. Examples include Dial Antibacterial Soap (US), Nivea Bath Care Crème Soap (Portugal), Priya Yours Malai Soap (India).
	Liquid Soap	A liquid product formulated for cleaning hands and/or face. Does not include facial cleansers or other skincare-specific products. Examples include Softsoap Antibacterial Hand Soap (US), Bohemia Cosmetics Liquid Soap (Czech Republic), Zest Liquid Soap (China).

Source: Canadean

© Canadean

1.2.3 Distribution Channel Definitions

Table 2: Distribution Channel Definitions - Personal Hygiene Market

Distribution Channel	Definition
Cash & carries & warehouse clubs (Cash & Carry)	Cash & carries sell from a wholesale warehouse to customers (small retailers, professional users) who pay on the spot and transport goods away themselves. Warehouse clubs are no-frills stores that sell discounted goods to members who pay an annual fee. Delivered wholesale sales are not included. In our data only sales from these stores direct to the public (for example through work place deals allowing otherwise regular consumers to shop there) are covered. Example: Makro, Metro, Costco, Sams Club
Discount, variety store & general merchandise retailers (Dollar Stores)	Dollar Stores, Variety Stores & General Merchandise Retailers - A variety store or price-point retailer (including Dollar stores) is a retail store that sells inexpensive items, often with a single price for all items in the store, or a general low price policy. Typical merchandise includes cleaning supplies, toys, household goods and gardening equipment, basic foods and beverages. A general store, general merchandise store, or small town store carries a (broad) general line of merchandise, often in a medium (and sometimes small) store format, serving the needs of either the surrounding town or rural area. They differ from convenience stores or corner shops in that it will be the main shop for the community rather than a convenient supplement and typically carries a broader product line. Example: 9 to 9 Dollar Shop.
Convenience stores & gas stations (Convenience stores)	Convenience Stores - Includes all sales through stores of an area generally less than 300 sq m, that specialize in a limited range of food & grocery products designed primarily for consumers with top-up shopping needs. Also includes sales in retail outlets attached to gas stations, where fuel is the main revenue driver, kiosks, and newsstands. This also includes small independent retailers, particularly those present in countries such as China and India.
Department stores (Department stores)	Department Stores - Includes all sales through multi-category retailers, focusing primarily on non-grocery categories with distinct departments specializing in defined product areas. Examples include Bloomingdale's, Macy's, John Lewis and El Corte Ingles.

Table 2: Distribution Channel Definitions - Personal Hygiene Market

Distribution Channel	Definition
Hypermarkets & supermarkets (Hyper/ Super Markets)	Hypermarkets& Supermarkets (incl. discounters) - Hypermarkets/mass merchandisers include all sales through retailers with floor area over 2,500 sq m that carry full lines of both grocery and general merchandise (e.g. Walmart). Supermarkets include all sales through retailers with a floor area of 300 sq m -2,500 sq m that offer a wide, departmentalized range of groceries, and may carry some general merchandise lines (e.g. Sainsbury's, Kroger). It also includes hard grocery discounters such as Walmart.
Vending machines (Vending machines)	Vending machines - Includes paid-for sales from all vending machines not located within a store (e.g. public places, workplaces, pubs & Bars).
Drug stores & Pharmacies (Pharmacies)	Drug stores & Pharmacies - Stores licensed to dispense prescription (Rx) and over-the-counter (OTC) healthcare products and where these sales account for the majority of revenues. Also known as Drug store and Health store. This channel does not include supermarkets with pharmacy counters. Example: Hetro and Apollo pharmacies in India.
Food & drinks specialists (Food & drinks specialists)	Food & drinks specialists - Includes bakers, butchers, delicatessens, drinks specialists, fishmongers, greengrocers, Food & drinks only stores, and single category stores (e.g. stores selling only cheese, or only olives, or only honey, or only Confectionery products) Example : Amul Dairy shops In India.
eRetailers (eRetailers)	eRetailers - Includes all sales that take place over the internet, irrespective of whether the vendor is a pure-play internet company or the online offering of a physical retailer. Example: Amazon, SPAR and FutureBazaar.com in India.
Health & Beauty Stores	Retailers that generate the majority of their revenue through a specific product type. In the personal care market, this includes specialist stores other than drugstores. Example: Boots in UK, Himalaya In India.
Other general retailers (Others)	Others - Includes other generalist retail channels not included in the categories above (e.g. market traders, charity stores, student union stores, direct sales, and Duty Free shops).
Source: Canadean	
© Canadean	

1.2.4 Volume Units and Aggregations

Table 3: Volume Units for Personal Hygiene Market

Table of Volume Units for Personal Hygiene market		
Category	Segment	Units
Personal Hygiene	Anti-Perspirants & Deodorants	Units m
	Bath & Shower Products	Units m
	Soap	Units m
Source: Canadean		© Canadean

1.2.5 CAGR Definition and Calculation

Compound Annual Growth Rate (CAGR) is the year-over-year growth rate of a value over a specified period of time.

For this report, CAGR for historic time period is Calculated from 2007-2012, as

$$\text{CAGR} = ((2012 \text{ Value} / 2007 \text{ Value}) ^ {1 / (2012-2007)}) - 1$$

CAGR for forecast time period is Calculated from 2012-2017, as

$$\text{CAGR} = ((2017 \text{ Value} / 2012 \text{ Value}) ^ {1 / (2017-2012)}) - 1$$

For Brand Analysis and Distribution Channel Analysis, CAGR is Calculated from 2009-2012, as

$$\text{CAGR} = ((2012 \text{ Value} / 2009 \text{ Value}) ^ {1 / (2012-2009)}) - 1$$

1.2.6 Graphical representation of Brands

Top 10 brands are considered for each category in the market subject to availability of such data. Brand analysis charts are displayed only for categories where data is available for more than two brands.

1.2.7 Exchange Rates

All research is conducted in local currency in nominal prices. US dollar conversions for all historic data and for the latest year of actual data (2012 in this report) are made using an annual average exchange rate. For details please refer to table below. As we do not forecast exchange rates, the forecast data (from 2013 to 2017) is converted using a fixed 2012 exchange rate. As a result, annual growth rates for historic data will differ between local currencies and US dollar conversions, whereas they will be the same for forecasts.

Table 4: South Africa Exchange Rate LCU (Local Currency Unit) – USD (Annual Average), 2007 – 2012

Currency	2007	2008	2009	2010	2011	2012
LCU – USD	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
Source: Canadean						© Canadean

1.2.8 Methodology Summary

In order to create the data for all the reports in this series and ensure its robustness, a comprehensive and empirically robust research methodology has been adopted. This combines both a large-scale program of industry research with the results of extensive primary industry interviewing and calling. Furthermore, all definitions are standardized across products and countries to ensure comparability.

The two main research methods, secondary research and primary research (the program of interviewing industry contacts), are brought together and because both sets of research processes have been designed in conjunction with each other they can be combined and consolidated into the final, integrated data sets.

The secondary research process involves covering publicly available sources, trade associations, specialist databases, company annual reports, and industry publications. While primary research involves a major program of interviewing leading industry executives for each category covered in each country – all with local country experts; typically brand, product and marketing managers for major brands within each country. These processes help analysts in capturing both qualitative and quantitative information about the market.

The final stage of the process is the triangulation of inputs obtained from all the research methods with the analyst's own understanding of the market in order to finalize the data. Once the data is finalized, it goes through various top level quality checks prior to publishing.

2. South Africa Personal Hygiene Market Analysis, 2007–17

2.1 Personal Hygiene Value Analysis, 2007–17

2.1.1 Overall Personal Hygiene Market Value, 2007–17

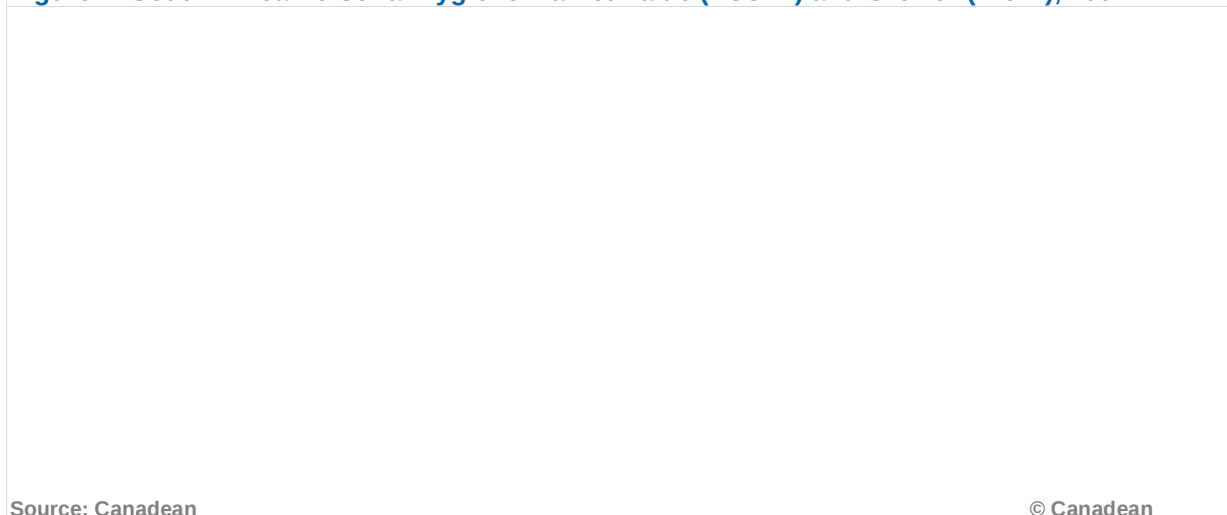
Table 5: South Africa Personal Hygiene Market Value (LCU m) and Growth (Y-o-Y), 2007–17

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Market Value											
Y-o-Y growth											
Source: Canadean	© Canadean										

Table 6: South Africa Personal Hygiene Market Value (USD m) and Growth (Y-o-Y), 2007–17

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Market Value											
Y-o-Y growth											
Source: Canadean	© Canadean										

Figure 1: South Africa Personal Hygiene Market Value (LCU m) and Growth (Y-o-Y), 2007–17



2.1.2 Personal Hygiene Market Value by Category, 2007–17

Table 7: South Africa Personal Hygiene Market Value (LCU m) by Category, 2007–12

Category	2007	2008	2009	2010	2011	2012	CAGR 2007–12
Anti-Perspirants & Deodorants							
Bath and Shower Products							
Soap							
Overall							
Source: Canadean							© Canadean

Table 8: South Africa Personal Hygiene Market Value (LCU m) by Category, 2012–17

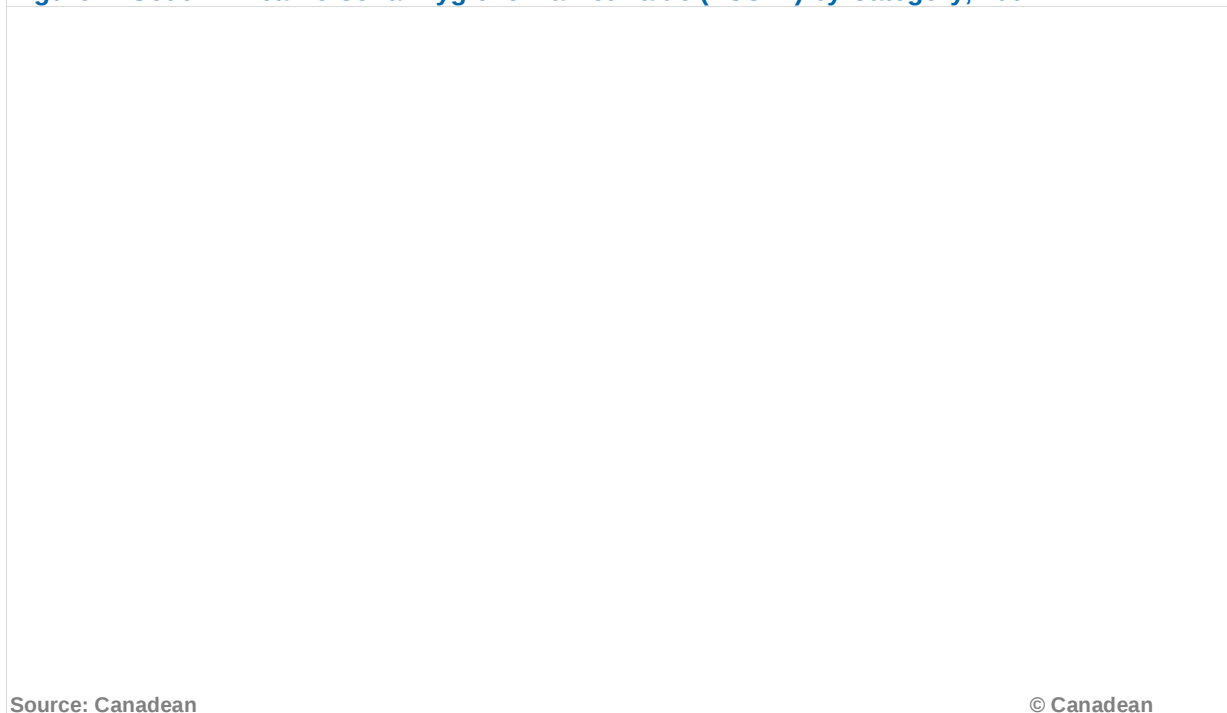
Category	2012	2013	2014	2015	2016	2017	CAGR 2012–17
Anti-Perspirants & Deodorants							
Bath and Shower Products							
Soap							
Overall							
Source: Canadean							© Canadean

Table 9: South Africa Personal Hygiene Market Value (USD m) by Category, 2007–12

Category	2007	2008	2009	2010	2011	2012	CAGR 2007–12
Anti-Perspirants & Deodorants							
Bath and Shower Products							
Soap							
Overall							
Source: Canadean							© Canadean

Table 10: South Africa Personal Hygiene Market Value (USD m) by Category, 2012–17

Category	2012	2013	2014	2015	2016	2017	CAGR 2012–17
Anti-Perspirants & Deodorants							
Bath and Shower Products							
Soap							
Overall							
Source: Canadean							© Canadean

Figure 2: South Africa Personal Hygiene Market Value (LCU m) by Category, 2007–17


Source: Canadean

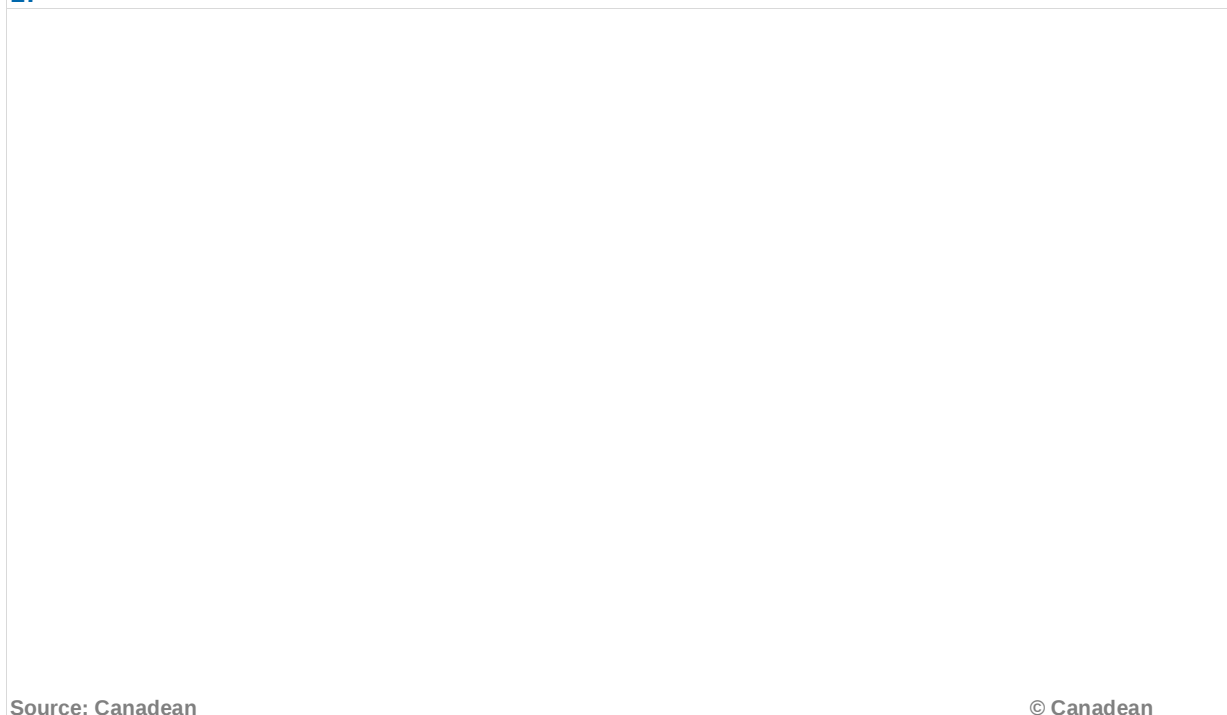
© Canadean

2.1.3 Market Growth Dynamics by Value – Personal Hygiene, 2007–17

Table 11: South Africa Personal Hygiene Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by Value (LCU m)

Category	CAGR 2012–17	CAGR 2007–12	Market Size 2007	Market Size 2012	Market Size 2017
Anti-Perspirants & Deodorants					
Bath and Shower Products					
Soap					
Overall					
Source: Canadean			© Canadean		

Figure 3: South Africa Personal Hygiene Market Dynamics, by Category, by Market Value, 2007–17



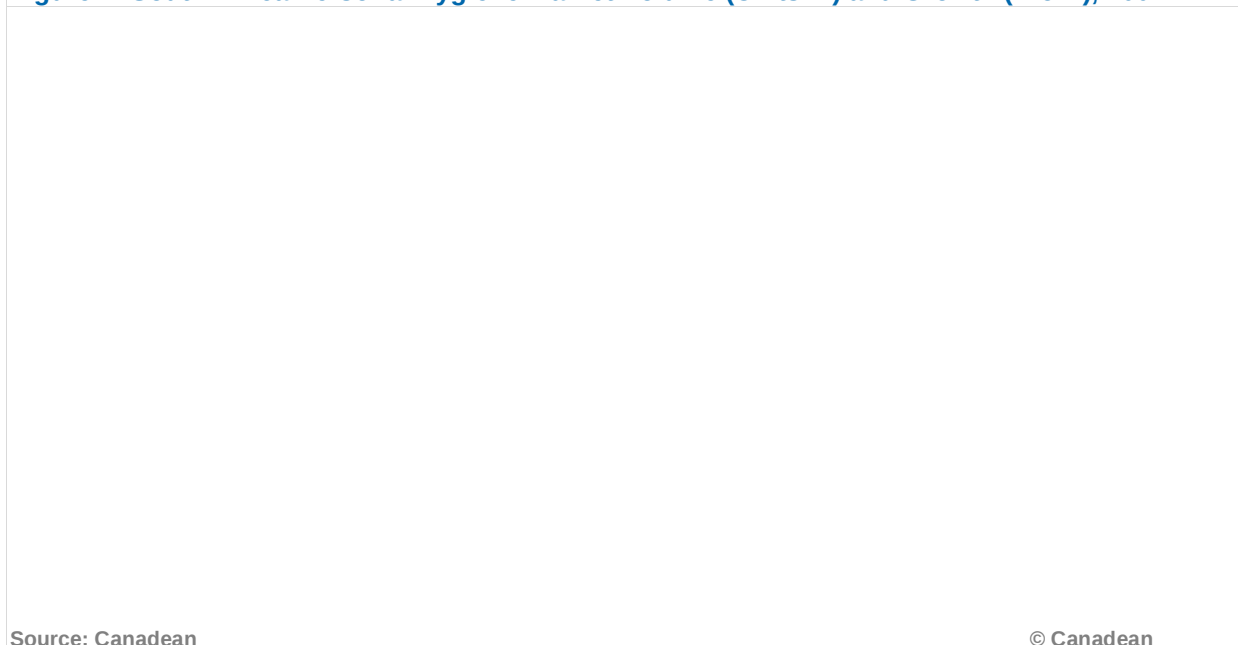
2.2 Personal Hygiene Volume Analysis, 2007–17

2.2.1 Overall Personal Hygiene Market Volume, 2007–17

Table 12: South Africa Personal Hygiene Market Volume (Units m) and Growth (Y-o-Y), 2007–17

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Market Volume											
Y-o-Y growth											
Source: Canadean	© Canadean										

Figure 4: South Africa Personal Hygiene Market Volume (Units m) and Growth (Y-o-Y), 2007–17

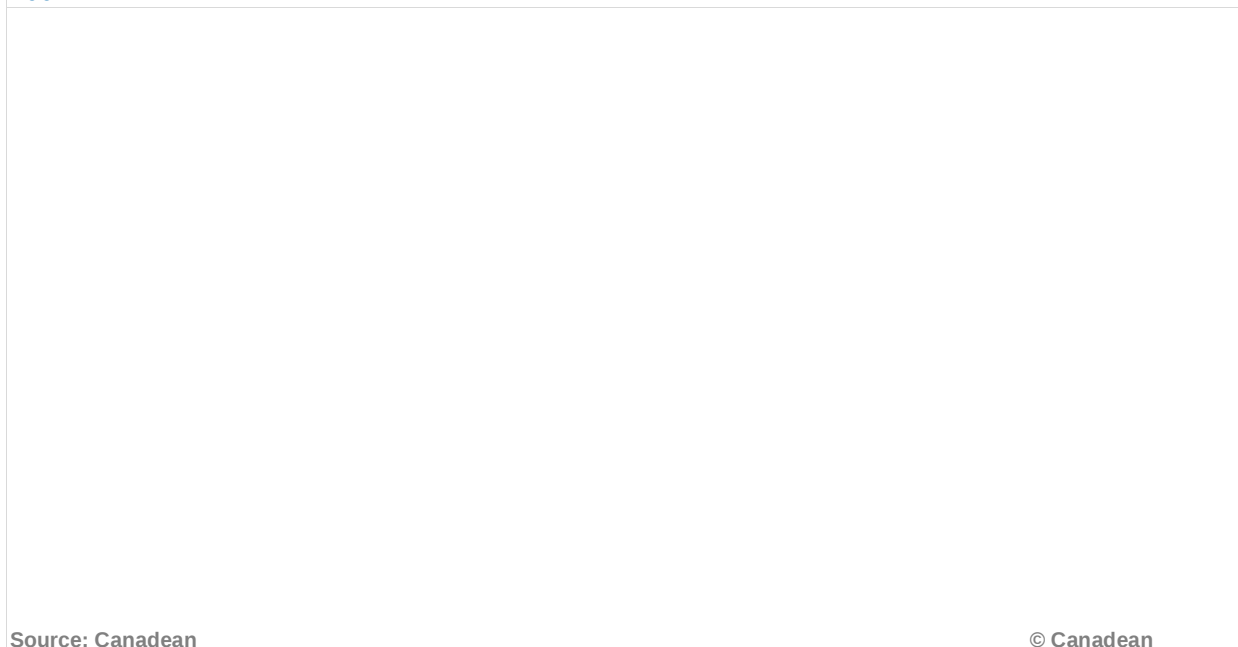


2.2.2 Per-Capita Consumption - Personal Hygiene, 2007–17

Table 13: South Africa Per-capita Personal Hygiene Consumption (Unit/head & Y-o-Y growth), 2007–17

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Per-Capita Consumption											
Y-o-Y growth											
Source: Canadean	© Canadean										

Figure 5: South Africa Per-Capita Personal Hygiene Consumption (Unit/head & Y-o-Y growth), 2007–17



2.2.3 Personal Hygiene Market Volume by Category, 2007–17

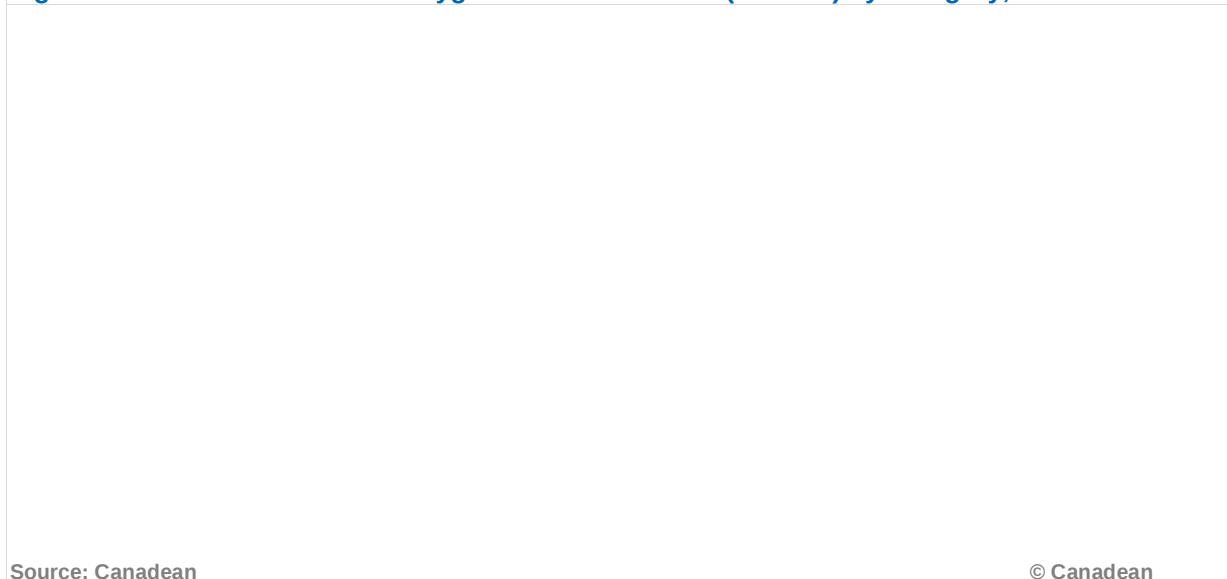
Table 14: South Africa Personal Hygiene Market Volume (Units m) by Category, 2007–12

Category	2007	2008	2009	2010	2011	2012	CAGR 2007–12
Anti-Perspirants & Deodorants							
Bath and Shower Products							
Soap							
Overall							
Source: Canadean							© Canadean

Table 15: South Africa Personal Hygiene Market Volume (Units m) by Category, 2012–17

Category	2012	2013	2014	2015	2016	2017	CAGR 2012–17
Anti-Perspirants & Deodorants							
Bath and Shower Products							
Soap							
Overall							
Source: Canadean							© Canadean

Figure 6: South Africa Personal Hygiene Market Volume (Units m) by Category, 2007–17



2.2.4 Market Growth Dynamics by Volume – Personal Hygiene, 2007–17

Table 16: South Africa Personal Hygiene Market Dynamics: past and future growth rates (2007–12 & 2012–17) and market size (2007, 2012 & 2017), by Category, by volume (Units m)

Category	CAGR 2012–17	CAGR 2007–12	Market Size 2007	Market Size 2012	Market Size 2017
Anti-Perspirants & Deodorants					
Bath and Shower Products					
Soap					
Overall					
Source: Canadean			© Canadean		

Figure 7: South Africa Personal Hygiene Market Dynamics, by Category, by Market Volume 2007–17

