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# Men's grooming industry

Time for emerging markets to steal the  
show

## Men's grooming industry: Time for emerging markets to steal the show

*The male grooming habit is rooted in changing norms of masculinity. Metrosexual – a term derived from metropolitan and heterosexual – refers to an urban man who pays attention to his grooming and appearance. This article explores why the male groomer segment still has plenty of room to grow in Asia and global emerging markets.*

The word “metrosexual” was coined by Mark Simpson in an article, where he wrote that, “Metrosexual man, the single young man with a high disposable income, living or working in the city (because that's where all the best shops are), is perhaps the most promising consumer market of the decade. In the Nineties, he's everywhere and he's going shopping<sup>1</sup>.”

The grooming sector has been driven by gradual changes in the shopping and self-presentation habits of both men and women. To understand why the men's grooming space is poised to be the next big thing, it is important to look at the evolution of the metrosexual man – his traits, mannerism, perceptions and desire to be presented in a manner he thinks is befitting.

### Where did it all begin?

According to Simpson, the business of accessorizing masculinity and desirability<sup>2</sup> gave rise to a very lucrative men's grooming industry. “Traditional men” paid little attention to looking good, but as social mores changed, companies realized the market potential in men's grooming.

***In 2004, 69 percent of men were shopping for their own apparel.***

In 1985, only 25 percent of men's goods were bought by the men themselves. By

1998, the number of men who shopped for themselves had jumped to 52

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<sup>1</sup> Here comes the mirror men: Why the future is metrosexual, Mark Simpson.com, Mark Simpson, retrieved on 23 November 2012

<sup>2</sup> Ibid.

percent; and in 2004, 69 percent of men were shopping for their own apparel<sup>3</sup>. With time, thanks to the need for grooming, “traditional men” have gradually learnt to wear their stubble with style.

Popular television shows such as “Queer Eye for the Straight Guy” and “Queer as Folk” presented a shift in how men were perceived. In these shows, men were flattered, wooed and enjoyed much attention. In addition, with the growing number of magazines on men’s grooming and lifestyle, as well as the increasing popularity of websites selling men’s health and fitness content, today’s metrosexuals are becoming more hungry for grooming knowledge.

### **Opportunities for companies**

Metrosexual men are characterized by their consumption on personal wellness and appearance. They are typically young men who regularly obtain pedicures and facials, practise aromatherapy and spend freely on clothes. They might visit the gym, relax at a spa, visit an image consultant and shop for branded clothes.

The male grooming space in global emerging markets has grown on the back of rising urbanization, disposable incomes and the tendency towards “individualism” versus more traditional family-centric lifestyles.

Marketers are fast introducing varied male grooming products to cater to this segment in Asia and Latin America, where the growth potential is the highest:

#### **Men's shaving products**

The lion's share of sales in this category comes from razors and blades, whereas the aftershave products category only accounts for a small share. Brazil is believed to be the fastest growing market for men's shaving products, posting double digit growth since 2008<sup>4</sup>.

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<sup>3</sup> Gay or Straight? Hard to Tell, The New York Times, David Colman, 19 June 2005

<sup>4</sup> Asia Pacific and Brazil Shake Up Men's Grooming, Euromonitor International, 22 September 2012

## **Men's toiletries**

50 percent of the sales in the men's toiletries category is derived from the sale of deodorants and hair care products. Popular perfume and deodorant brands like Axe/Lynx, Handle It and Sure have managed to lure their target audience by creating an image of assertive and sexually irresistible men through advertising campaigns.

## **Men's skincare products**

To cater to the growing demand, companies focused on male skincare have launched an array of products that target problems ranging from anti-ageing and eliminating blemishes to skin brightening. However, urban males are also seeking multi-functional offerings that target multiple problems such as dry and sensitive skin, hyperpigmentation and acne. Bath and shower products remain the fastest growing category. Male anti-aging cosmetics are a niche segment with interesting growth prospects.

In 2011, almost 60% of total male skincare product sales came from the Asia Pacific region. As men in Japan, China and South Korea are more accustomed to using grooming products, these countries have become male skincare hotspots. It is estimated that the Asia Pacific region will be the second biggest contributor to the growth of male grooming products after Latin America<sup>5</sup>. Asia is believed to be an under-served male grooming market.

## **Competing for the male grooming dollar**

Special men's grooming products are included in the product portfolios of many leading cosmetics brands, such as Garnier, V-John and Fair & Lovely. However it is vital for firms to be extremely clear about the products' target

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<sup>5</sup> Ibid

age group. Firms also need to be able to adapt their male grooming products quickly to changing consumer habits.

For instance, male premium cosmetics are currently extremely popular, with anti-aging products taking the lead. Modern men are particularly interested in products that can eliminate traces of their busy lifestyle and the effects of pollution on their face, such as dark circles and puffiness under the eyes<sup>6</sup>. Companies which are able to recognize this demand first would gain a crucial competitive edge.

Adidas, Gillette and Hugo Boss are some examples of the most recognized men's grooming brands. Gillette, a brand of Procter & Gamble, has accounted for almost half of the male grooming market. Adidas is placed third in terms of the brands used most often for grooming purposes; trailing behind Lynx (26 percent) and Gillette (18 percent). Hugo Boss and Boots' own-brand products are at the bottom of the top 10 most used brands, at just 2 percent each<sup>7</sup>.

### **Poster boys**

Many male grooming product manufacturers have roped in popular stars from the film and sports industry as brand ambassadors.

One good example would be former England football team captain David Beckham, who has been associated with Ray Ban and Adidas as well as a number of popular clothing lines<sup>8</sup>. Likewise, the king of Bollywood films, Shah Rukh Khan, was invited to endorse Emami's Fair & Handsome men's fairness cream and V-John shaving cream. Philips and John Abraham have also come together for the launch of Philips "Grooming range"<sup>9</sup>. The concept of

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<sup>6</sup> Male grooming lines (February 2012), Intercharm, retrieved on 27 November 2012

<sup>7</sup> Interest rate in male beauty brands rises, Marketing Week, MaryLou Costa, 15 September 2012

<sup>8</sup> Beckham brand set for further cosmetics expansion, Simon Pitman, 1st March 2006

<sup>9</sup> Philips launches new campaign for grooming range, Best Media Info, Neha Saraiya, 30 June 2012

the campaign highlights the special features of the products through a story-telling format; showcasing the importance of men's grooming in today's world.

As men are spending more time online, brands are relying on online campaigns and social media to reach out to their target market. For example, Fiamma Di Wills Men launched a website on Google+ Hangout with key opinion leaders<sup>10</sup>. Social networking sites similar to Pinterest, such as Dudepins and Gentlemint, have also been developed to cater to men's grooming needs. These sites are rich in men's lifestyle related content<sup>11</sup>.

### **Men's grooming – A segment to reckon with**

Research Director of SPA Future Thinking, Will Ullstein, commented that “men want to shop and take pride in their appearance. Manufacturers and retailers should meet that need”.

According to a survey of 1,000 United Kingdom men aged between 18 and 64, shampoo, body spray, shower gel and fragrances were the more popular grooming products purchased, and more than two-thirds of those surveyed used these products regularly. Younger men tend to spend more per month than their older counterparts, with 18 to 34-year-olds spending GBP14.60, compared to GBP10.50 for 55 to 64-year-olds<sup>12</sup>.

From the survey findings, 47% of the men wished for outlets dedicated to selling only male grooming products. Exclusive outlets for men can be best developed in a supermarket - 86% of them were found to shop for grooming products when they do their grocery shopping<sup>13</sup>.

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<sup>10</sup> Fiamma Di Wills Men Does A Google Hangout To Launch Website, Lighthouse Insights, Prasant Naidu, 9 April 2012

<sup>11</sup> Pinterest not manly enough for you? Try these sites, bro, Cable News Network, Umika Pidaparthy, 22 June 2012

<sup>12</sup> Ibid.

<sup>13</sup> Ibid.

## Outlook for the men's grooming segment in Asia

Men's grooming was primarily a western phenomenon until relatively recently. Now it is Asian and Latin American countries that are stealing the thunder in this space.

### **China**

According to one study, the Chinese male grooming sector is expected to hit RMB10 billion by year 2014. Rising affluence has resulted in growing disposable incomes; encouraging more generous spending by younger men on themselves<sup>14</sup>.

### **India**

Some companies are going online to help Indian men realize their grooming needs. For instance, Philips India created a YouTube channel and Facebook page to generate awareness for its products.

India has witnessed a growing desire amongst urban men to look good and fresh lately. Using this willingness to their advantage, companies have launched a plethora of products targeted at men. For instance, ITC and Nivea have launched the Fama Di Wills Aqua Pulse Shower Gel and Nivea moisturizing lotion for men in 2011 respectively. Lakmé has also launched the first unisex salon in 2011 under the name Lakmé Ivana<sup>15</sup>.

### **Vietnam**

Vietnam is a growing market for health-enhancing products, including traditional medicine products. Some of this demand has flowed into troubling product categories, such as illegal rhinoceros horn. As far as grooming is concerned, it is said that Vietnamese male consumers will

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<sup>14</sup> Men's Grooming in China, Euromonitor International, May 2012

<sup>15</sup> In your face - Unisex salon chains rising in India, Business Today, G. Seetharaman, 22 January 2012

take more time to change their grooming habits, as compared to their counterparts in the rest of Asia.

## **Korea**

As exemplified by some K-Pop and TV drama stars, the metro-sexual male is on the march in Korea. Skincare has taken up more than half of South Korea's grooming market. Men's toiletries and shaving products will also show strong performance<sup>16</sup>.

### **An uneven market**

The male grooming industry is widely regarded to be recession-proof. However, male grooming habits across the world are not homogenous. Spending patterns vary sharply from region to region.

*Asian men prefer skincare products, while Brazilian men spend more on deodorants.*

Asian men, for example, prefer skincare products, while Brazilian men spend more on deodorants<sup>17</sup>. Russian men are more conservative in comparison to their Western European counterparts when it comes to experimenting with skincare products. Though antiperspirants have a huge international market, the category has much less appeal in the Indian market<sup>18</sup>.

### **The way ahead**

While male grooming products do display double-digit growth, the category's performance has not been uniform across the various regions – Latin America has posted double-digit growth, whereas Western Europe has a low single-digit gain. In Asia the picture is mixed, depending on the country and category.

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<sup>16</sup> Men's Grooming in Korea, Euromonitor International, 23 November 2012

<sup>17</sup> Asia Pacific set to shake up men's grooming, Euromonitor International, Rachel Lin, 27 August 2012

<sup>18</sup> Growing demand for grooming products, The Hindu Business Line, R.Yegya Narayanan, November 2011

In the near future, Brazil is expected to overtake the U.S. to become the leading male grooming market in 2015. Germany is likely to surpass Japan in 2013 to become the third biggest market in nominal value<sup>19</sup>. One report projects the global market value of the industry at USD33.2 billion by 2015.

The Asia-Pacific still has huge untapped potential in this space. Almost 60% of global male skincare sales in 2011 came from the Asia Pacific region and trends like disposable incomes and urbanization still have some way to grow in this region. In China alone, the sales of men's grooming products is set to increase by almost a third each year to 2014<sup>20</sup>.

Growth in this space will be stimulated by the growing middle-class and the introduction of innovative products<sup>21</sup>. However the competition is becoming increasingly intense, particularly in the men's shaving products segment. The onus is on firms to improve their pipeline of new products through intensive R&D guided by good market research.

One area stands out – grooming products for older men. The Asian region as a whole is aging fast. China, for example, is seeing a faster rate of median age increase than almost any other large country in recorded history. Tremendous demand in this space will come from older men who seek to mitigate the effects of aging. This will drive categories like hair-fall treatment, hair implantation, skin treatments and cosmetic procedures, not to mention ingestible products like dietary supplements. The future of Asian metro-sexuality may lie in making 70 the new 50.

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<sup>19</sup> Ibid.

<sup>20</sup> Chinese men avoid losing face with boom in sales of male grooming products, The National, Daniel Bardsley, 19 July 2011

<sup>21</sup> Global Men's Grooming Products Market to Exceed \$33.2 Billion by 2015, PR Web, 22 March 2010