

Although the sector has enjoyed a renaissance in recent years, the history of male grooming has been a series of highs and lows. "In specialised men's grooming areas you see two main groups of men – those up to the age of 40 and another group who are 60 plus. The second group is a generation that has visited such establishments for a wet shave with hot towels and a haircut every month for most of their lives," says Michael Sheridan, chairman of design consultancy Sheridan & Co. "Between the two was a lost generation... a lot of men's toiletries became part of a weekly shop rather than a ritualistic, specialised area."

Fast forward to 2009 and male grooming is a fixture once more following a decade of steady if not stratospheric growth.

The recession appears to have had little impact on men's personal care spend; according to Euromonitor International, the men's market maintained an encouraging level of growth in 2008, rising 6.1% to over \$18bn, of which \$10bn was from shaving products and \$8bn from toiletries.

"Men's grooming is not as susceptible to the effects of consumer trade down as other more commoditised categories such as... oral hygiene," comments Carrie Lennard, industry analyst, beauty & personal care, Euromonitor International.

Indeed, the most sluggish sub-sector within the men's market in terms of growth was a commodity sector – hair care, which increased by just 2.2%. "In hair care, men are far happier to trade back down to unisex products," explains Lennard, adding that the figures are "indicative of the lack of resilience against trade down in the wider hair care market".

As a whole, however, male grooming has remained robust with major brand owners continuing to invest in the sector. Procter & Gamble this year expanded its men's portfolio, purchasing premium brands Art of Shaving and Zirh. "The acquisition of Gillette in 2005 was the first step – 750 million men use Gillette. But with Gillette we weren't serving them [male consumers] as completely as we could," Damon Jones, global communications director, P&G Grooming tells SPC. "By offering products at prestige and mass market levels we can serve more consumers. Our aim is to serve all men's needs, wherever they shop, and to serve those needs more fully."

Unilever, meanwhile, aimed to increase market penetration in the men's deodorant segment with its Dove Men + Care range, which launched in France this year and is due in the US next year.

Geographically, growth was driven by a continued increase in sales in emerging markets. While men's grooming in western

To boldly go...

As traditional male grooming product markets become more saturated, brands are introducing an increasingly diverse offering for men

Europe and North America rose 4.4% and 1.7% respectively, the Latin American market climbed 12.4% to \$3.2bn. Hardware specialist e Shave, founded by artist Danielle Malka in 1996, recently launched in the Ukraine, exemplifying the trend for brands from mature market regions branching into newer ones as their domestic markets get busier.

SENSITIVE SOULS

In 2008, skin care maintained its status as the fastest growing product sector, rising 10.7% to \$1,195.9m. Men's skin care, like skin care in general, is an area that lends itself to diversification, a factor that has contributed to the segment's success in spite of the downturn and which Lennard predicts will continue in the future. "As the men's skin care category grows and becomes more

TABLE 1: MALE GROOMING, GLOBAL MARKET (US\$M), 2008

	2008	%
Total	18,161.8	6.1
Men's shaving	10,023.8	5.4
Men's pre-shave	1,740.2	4.9
Men's razors and blades	7,475.5	5.6
Men's post-shave	808.1	5.2
Men's toiletries	8,138.0	6.9
Men's bath and shower	772.3	6.6
Men's deodorants	4,434.1	7.7
Men's hair care	1,735.7	2.5
Men's skin care	1,195.9	10.7

Source: Euromonitor International



Soap & Glory

saturated it's becoming more segmented, so I think we're likely to see more similarities between what's happening in men's skin care and what's happening in the wider market," she states.

A notable number of recent skin care launches for men are designed to soothe and protect the skin. Statistically the average man spends 3,000 hours of his life shaving, so it is unsurprising that skin sensitivity remains a common complaint and that such products are in demand.

L'Oréal Paris grew its Men Expert portfolio with Hydra Sensitive, a four-sku line featuring the brand's first moisturiser claimed to soothe the sensation of razor burn, while Beiersdorf's Nivea For Men introduced Extreme Comfort, a shaving gel and post-shave balm containing chamomile and licorice root extracts for a close shave without irritation.

TABLE 2: TOP FIVE MEN'S GLOBAL TOILETRIES BRANDS, 2008

Brand	Company name
Axe/Lynx/Ego	Unilever Group
Nivea for Men	Beiersdorf AG
Rexona	Unilever Group
Old Spice	Procter & Gamble Co, The
Gatsby	Mandom Corp

Source: Euromonitor International



Cold weather accentuates the tightness associated with sensitive skin. With this in mind, Oriflame launched North for Men, a range based around polar botanical *Rhodiola rosea* root extract, said to protect skin against thermal stress and adapt to internal and external aggressors, and Gillette (P&G) added two Winter Defence products to its Gillette Series line.

Meanwhile, Green People added to the expanding natural and organic men's grooming sector with Organic Homme. Featuring products that contain an average of

TABLE 3: BREAKDOWN OF MEN'S GROOMING MARKET, 2008 (US\$M)

	2008	%
Western Europe		
Men's grooming	5,868.4	4.4
Men's shaving	3,559.4	3.7
Men's toiletries	2,309.0	5.4
North America		
Men's grooming	3,675.0	1.7
Men's shaving	1,890.6	-0.1
Men's toiletries	1,784.3	3.7
Latin America		
Men's grooming	3,202.6	12.4
Men's shaving	1,726.5	11.9
Men's toiletries	1,476.2	13.0

Source: Euromonitor International

85% certified organic ingredients, the line (also free from SLS, SLES, parabens, ethyl alcohol and GMOs) is described as "the natural choice for those with sensitive skin".

Men with dry, sensitive or acne prone skin as well as first time shavers were catered for by King of Shaves, whose Azor S hit shelves in October. The hinge on the Azor S is made from a softer elastomer than the standard Azor's hinge, which helps hold the blades against the skin without any undue pressure.

For those suffering from ingrown hairs, razor bumps and razor burn of both genders the team behind Anthony For Men created The Cool Fix, the first product launched under the company's new Shaveworks brand. The blue gel combines glycolic acid, salicylic acid and phytic acid to kill bacteria under the skin and dissolve dead skin to free trapped hairs. Boerhavia root extract helps soothe skin and reduce redness.

STOPPING TIME IN ITS TRACKS

The economic crisis has had interesting repercussions for the beauty business with middle-aged city types (under threat from ambitious younger workers) trying to turn back the clock using 'Boytox'. Up to 300,000 American men admit to getting regular injections and one fifth of UK plastic surgery specialist The Harley Medical

FINE AND DANDY

Trend forecaster Antoinette van den Berg tells SPC why men's make-up is the next big thing

There are many different things going on to show that men are ready. In the fashion and music industries you have Gerard Way from My Chemical Romance, Jared Letto from 30 Seconds to Mars, Green Day's Billy Joe Armstrong and the singer Patrick Wolf. Here the most notable products are eyeliner and black nail varnish.

I think that there is a niche for good men's make-up brands. They [the products] should be practical and not a copy of women's ones. You have to start to think in a fresh way. Look at products for eyes, lips and eyebrows and begin thinking how they should be for men.

In the past we mirrored fashion magazines written by professionals and stylists, but now there are fashion blogs featuring street style and real people from all over the world. What we see is an increased use of eyeliner and nail varnish. And it's an international mix. Because of style blogs and more frequent travel people are swapping style; we see Chinese people wearing English styles and English people in Japanese fashions.

To purchase the full digital presentation, *Issue 2 Men's make-up*, visit the Future-Touch website at www.future-touch.com

Group's Botox clients are male.

This fear among professional men of looking past their sell-by-date has also impacted the skin care sector. According to ceo of online retailer mankind.co.uk, Hilary Andrews, mankind.co.uk is now selling more anti-agers than anti-acne and oil control solutions, and anti-ageing continues to be an area in which brand owners are willing to invest.

Premium L'Oréal brands Biotherm and Vichy both extended their men's ranges in 2009. Biotherm Homme Force Supreme Total Anti-Ageing Gel contains Pro-Xylane and Pure Thermal Plankton, as well as Japanese cedar bud, and is said to prevent signs of ageing in later life, while Vichy Homme Liftactiv anti-wrinkle active care anti-fatigue is designed to correct deep wrinkles with its blend of hyaluronic acid and AHA.

Following in the footsteps of Boots No7 For Men and Touche Eclat Pour Homme, Beiersdorf introduced a version of its successful DNAge Anti-Age Moisturiser under the Nivea For Men brand. Lennard believes that such mass market products will

help sustain the men's skin care market in coming years. "Although men's skin care originated in premium, it is now cheaper, mass brands such as Nivea For Men that are driving growth," she says. "It is these mass products that have developed the male specific skin care category beyond a niche area, largely purchased as gifts, to being part of the daily grooming routine for men."



Soap & Glory for Men's fun take on grooming and Kyoku's brand story help them stand out in a crowded market

ABOUT A BOY

When it comes to appearance, the best defence is a preemptive strike and experts are encouraging men to look after their skin younger and younger. "Most consumers really only start to invest in their skin from the age of 35, which is such a shame as in order to really change the metabolism in your skin and thus slow the ageing process of your skin, you need to start from an early age," comments Asim Akhtar, founder of newly launched skin care brand Kyoku for Men.

As well as boasting an interesting back story – Akhtar was inspired by the perennially youthful residents of Japan's Yuzuri Hara village and created the products using the natural ingredients used in their skin care rituals and cooking – Kyoku's slick packaging has been designed to appeal to younger consumers. "Our branding appeals to the younger demographic because we see the value in educating men to invest in their skin at an early age," adds Akhtar.

Also new is Soap & Glory for Men, an extension of Bliss founder Marcia Kilgore's Soap & Glory brand. "We really wanted to develop a range of fun and functional products that had incredible stand out and appealed to an edgier, entertainment oriented customer," says Victoria Montrasio, Soap & Glory's global brand manager. The line aims to appeal to younger men through Ferrari-red packaging, attention-grabbing names like Eau Man (body spray) and The Clean of England (shower gel), and ingredients selected for the rock-and-roll appeal of their names – Soap'er Man, for example, contains a cationic conditioning agent called Jaguar Gum.

"Men's grooming is a tough sector and we wanted to do something different," adds Soap & Glory's senior product development manager, Judy Phillips. "We are bridging the gap in price and positioning between Lynx and high end prestige products."

Meanwhile, problem skin specialist Oxy introduced Spot Defence Shave Gel and Post Shave Repair Balm. The low-foam gel enables the user to see where they are shaving helping them to avoid slicing the tops off already inflamed spots.

"It is possible to market to youngsters, but I think a lot of younger guys like to discover things for themselves," warns Sheridan. "The younger generation is so brand sensitive that it is difficult to break into the market. But if you can get the media positioning right – using networking sites like Facebook and Bebo – if you have the right vehicle then you'll do fine."

SCENT STORY

Although the men's fragrance market has grown in past years, Euromonitor's Lennard notes: "Both male and female fragrances have suffered as consumers of both sexes make cutbacks due to the recession either through less frequent purchases or streamlining their fragrance wardrobes."

To attract today's choosier recession hit consumers fragrance brands are maximising their products' on-shelf impact with bold flacon designs. Diesel Only the Brave (L'Oréal) comes in a clenched fist bottle while Lacoste Challenge (P&G) harks back to the brand's roots with a tennis racket handle lid. Limited edition bottles of Issey Miyake's L'Eau d'Issey (designed to resemble graffitied concrete) and P&G's Hugo Man, as imagined by designer Karim Rashid, were also launched in 2009.

Trends included a revival of traditional, masculine scents such as Tom Ford Grey Vetiver, a rich, woody, sixties inspired juice featuring vetiver extracted using a new technique allowing for a greater quantity of the ingredient to be used than before; Estée Lauder's Aramis Gentleman's Collection, comprising revamped classics from 1974 to 2006; and innovative concepts including Acqua Attiva from Italian brand Collistar, an invigorating toning fragrance created by perfumer Alberto Morillas containing pro-vitamin B5, vitamin E and a cooling ingredient, Cryogenyl, to moisturise and freshen skin. Unilever, meanwhile, launched a market first with Lynx Bullet, a pocket sized 3.23g canister available in the brand's



Dark Temptation, Vice and Instinct fragrances.

THE BODY BEAUTIFUL

Store shelves have been awash with products claiming to slim, tone and boost women's figures for some time and now the men's market is showing signs of catching up. "Slimming is big and getting bigger with products such as LAB Series Ab Rescue and Poignees d'Amour [Love Handles Firming Gel] by Nickel," says mankind's Andrews.

French spa brand Nickel leads the way when it comes to sculpting men's bodies. As well as Poignees d'Amour, which uses a blend of caffeine and theobromine to stimulate lipolysis, Nickel launched two other toning body products, Super Pecs and Faux Cul. As reported in March 2009's ECM male grooming market report, Super Pecs works by plumping up fatty cells and toning skin to improve the appearance of the user's pectoral muscles, while Faux Cul contains ingredients claimed to firm the buttocks and re-inflate slackened skin.

In their quest for perfection men are not just reshaping their bodies, they are depilating them. "The use of hair removal products has grown as the smooth look is popular. An interesting new product is BTB, which stands for Below The Belt, a shaving product for 'that' area," Andrews tells SPC. BTB, the newest addition to Scandinavian soccer star Hans F Hansen's men's C&T line, is said to soothe and nourish, helping reduce hypersensitivity. Andrews adds: "A friend who writes a beauty blog tells me that the question most frequently asked by men is: how do you shave your area?" With this in mind, BTB could be the first of many products tailored specifically towards men's intimate grooming.

Andrews also expects supplement use to become more common in men. "As in the women's market, the use of nutricosmetics is growing," she says. "Men's supplements will be more to do with improving skin and hair; men tend to relate to claims about energy and vitality as opposed to beauty."

"Where the women's market goes the men's market follows – usually about one year behind," she adds, a statement echoed by Lennard, who expects to see increased "mimicry of female personal care products" in 2010. So for a glimpse of the future male consumers may want to take a peek in their girlfriend's bathroom cabinet. **cb**