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TRADE MARKETING INTERNSHIP REPORT ABOUT FABRIC AND HOME CARE PRODUCT 'ACE'

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EXECUTIVE SUMMARY

Growing society causes new cognitive needs to itself. Those needs do not only match with functionality but also matches with new meanings. As all parts of social life have bunch of meaning changes in activities such as traveling, food and beverage, shopping etc. Fabric and Home care industry is also facing with those kind of meaning changes. Personal and Home care (cleaning) have more challenges than before. Nowadays, fabric and home care products not only satisfying consumer cleaning needs, but also they are fulfilling consumer multi-tasking desires from one product while giving them feeling of cleanness.

Fater S.p.a. with its brand of ACE, attacks those new needs in the market places all over Europe. ACE was always in the market and was satisfying home care expectation of its customers. However, since the every kind of functional products got smaller with the help of technology and design, also cleaning products' size get smaller and their density gets thicker by the time. ACE, the icon of cleanness of most of the countries, was needed to modify its own products, design and communication with its customers. In order to do that, ACE has launched different kind of Start-up projects in different parts of Europe. Those projects contain new density thick ACE product and its marketing sales approaches.

Before explaining projects, here is the fact that ACE market places are divided as Eastern Europe, Central Europe, Turkey, and Morocco. Each and every local hub has its own kind of start-up project such as Turkey has 'Shazam', Eastern Europe has 'Thor' and etc. There can be a question that ACE is launching similar products but initiating different projects, the answer is easy because cultural perception of cleanness feeling is different. To illustrate this argument above, in Russia people do not use Home care products (bleach) for clothes or kitchen even though it say usable. On the other hand in Turkey, almost all kind of bleach brands are useable for both home care and clothes and consumers uses for that purposes. This is the evidence which proves different projects must be done by brand.

As the projects differ from each other also market share and brand awareness are different from each other in every single country. In some countries ACE is one of the leader innovators about this new kind of thick bleach type, in some other countries ACE is the follower. Strategic planning is crucial at this level, to do that sales and marketing analysis has to be done for ACE and for the competitors to determine what kind of positioning ACE will has and how ACE places itself as a brand. For example in one country ACE is exclusive cleaning brand, in the other ACE is cheaper competitor.

Fater S.p.a. ITALIA where is the head quarter of ACE brand takes care about analysis to evaluate market. During the internship sales and trade marketing analyses had been done by me, Hubs and countries.

1. THE OBJECTIVES OF THE INTERNSHIP

As a former Industrial Engineering grad student, my career path goes with Management Engineering Master Degree in Politecnico Di Milano. After bachelor engineering back ground, managerial approaches that I have been learning in Polimi totally changed my career point of view. In the second year of master degree I have enrolled for Entrepreneurship, Innovation and Design track to fulfil my career desires. I was hunting internships with start-ups mean while I was creating one. My start-up was failed and I have searched for the reasons, root causes. The answer was pretty obvious, lack of knowledge about market places and customer consumption behaves. Thus, I have decided to get internship that can teach me those acknowledgements.

The internship that Fater S.p.a. offered me was matching with my needs about my career path. Business description and internship objectives are as follows;

Technical analysis of sales and distribution are involved in managing the marketing and Trade Marketing of brand ACE(Category Fabric & HomeCare). The job contains activities that support Trade Marketing Strategic Plans for their relevant products, to achieve business results.

Executed activities are:

1. Extraction and analysis of data by area, channel, category and reporting them,
2. Tracking and getting insights sales volumes, values, and distributions regarding to countries,
3. Improving trade structure learning of the different countries in which ACE operates in terms of channels and commercial dynamics in order to be able to provide guidelines on all sales fundamentals,

4. Researching on consumption habits of customers by country and implementing does insights from researches into strategic trade marketing plans,
5. Communicating with international hubs in 3 different languages; Italian, English and Turkish.
6. Participating new start-up projects for brand ACE in various countries Turkey, Romania, Portugal, Morocco and etc.

Apart from main activities and business description of this job, there have been some other supportive activities, such as being an Italian-Turkish translator in some certain part of meetings, giving marketing support for customer consumption habits in Turkey bleach market and etc.

Detailed work analysis and executed activity explanations will be explained in following parts.

2. COMPANY DESCRIPTION

Fater is a company which claims to be the best possible place to work creating value growth for its brands and for people. Fater S.p.a. operates all over Europe, Middle East and Africa.

Apart from being a multinational company, Fater was founded as a pharmaceutical start-up itself. Nowadays, it still shows that feature in terms of exploring new business areas and new start-up projects in different countries.

2.1. Company Overview

FATER S.P.A.

Founded in Pescara in 1958 by the Angelini's family, since 1992 Fater is an equal share joint venture between the Angelini Group and Procter&Gamble. For more than 50 years Fater has presence in Italian homes through its products: Pampers diapers and wipes, LINES sanitary pads, TAMPAX tampons and LINIDOR and DIGNITY incontinence products. Since 2013, Fater acquired the ACE brand (bleach and house cleaning products), expanding its line of brands.

Today, Fater is an international company operating with the brands ACE and Neoblanc in Western Europe, and Central & Eastern Europe, Middle East and Africa, and in Italy thanks to its personal hygiene absorbent products.

A rare example, perhaps unique, of successful joint venture over a long period of time, Fater bases its growth on its in-depth knowledge of consumers and markets, combined with the application of multinational work methods.

Fater is a dynamic company that believes in continuous innovation and it invests 3% of its turnover in Research & Development. Fater is located in Pescara and has manufacturing plants in Italy (Pescara and Campochiaro), in Portugal (Porto) and Morocco (Mohammedia). It counts approximately 1.400 employees and 915 million Euros of turnover (ref. 2014/2015 financial statements).

2.1.1. Fater Group Brands and International Fabric and Home Care Products

Fater S.p.a. international brands are as follows;

Pampers, Lines, Intervallo, Tampax, Linidor, Dignity, ACE and COMET,

And among those brands ACE is the main topic of this internship and we will focus on this brand. ACE is operating all over Europe with two names ACE and Neoblanc. ACE brand has strong positioning all over Europe and Morocco and Russia, In Italy (home country) ACE takes the lead among others. However, for the rest of countries in which

it operates, ACE is competing a lot of competitors. The strongest competitor in those competitors is Unilever and its brands. The competition chart is as follows:

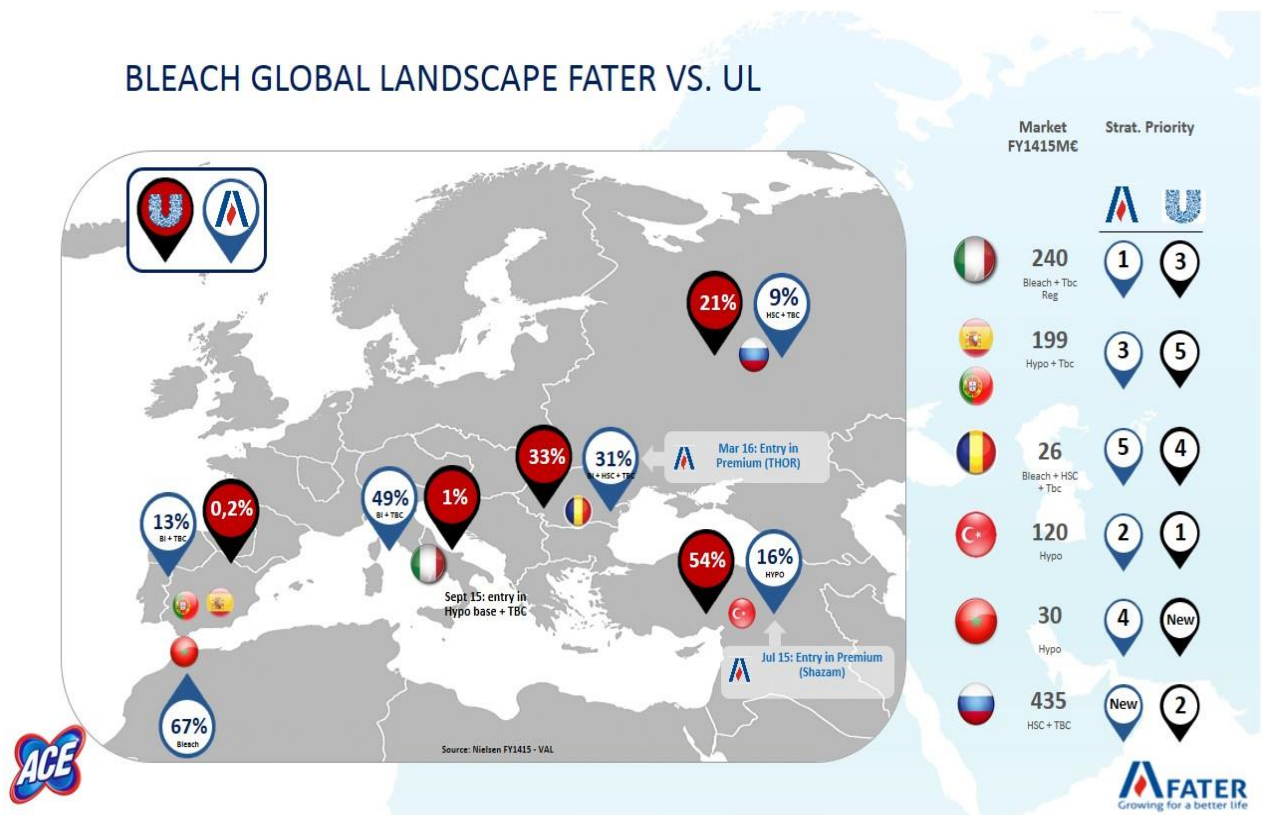


Figure 1. Bleach Global Landscape [1]

ACE constantly has top 5 positioning in terms of market share. The countries that ACE is not the leader have new positioning projects Shazam (Turkey), Thor (Eastern Europe).

3. INTERNATIONAL SALES, TRADE MARKETING OF ACE

3.1. International Sales

Multinational firms usually have sales operations running their strongest markets around the globe. They often require the hubs and Head Quarters in different countries. In order to support operations and keep them profitable, businesses can

either increase sales to existing customers or seek out new customers who needs their products and services.

Those international Hubs are responsible for finding these new consumers, for creating new business opportunities and for keeping existing customers satisfied. Just like many expanding companies, Fater S.p.a. International Sales operations are relay on the efforts of Fater international Hubs.

International Hubs are profound connections between end local customers and distributors and the main operations of Fater S.p.a. International hubs typically negotiate and arrange contracts, apart from those responsibilities they give invoice of number of local production needed and they creates reports on future forecasts of company sales according to market environment.

Other responsibilities may contain creating research on potential clients, updating new customer and consumption behaves for top management of Fater, and taking care of complaints which are coming from clients. International Hubs are explained more specifically in following parts.

3.2. Trade marketing

In recent decade, the connection and relationship between suppliers and retailers changed enormously. Nowadays, environment is more competitive and distribution is more important. Suppliers such as Fater S.p.a. need to corporate effectively with small, medium retailers and big national accounts in order to achieve their common and separated objectives. Trade marketing is the best way to deal with actual circumstances, because Trade marketing makes suppliers consider each and every retailer as a real customer. [1]

To describe Trade marketing in another way, trade marketing is a discipline of marketing which tries to increase demand at the level of retailers, wholesaler, and distributor. Trade marketing unlikely attacks at the final consumer level. Despite the fact that consumer level is not that important for trade marketing end-customer

consumption has to be managed by brand. End consumer purchases the product from retailer, brand has to appear in retail better than other brands. Thus, brand needs to do marketing not only for consumers but also for retailers to compete with other brands in-store. This marketing operations for retailer can be tangible or in tangible for retailers. It can be considered as an idea of creating demand before for products reach the final customer across the value chain.

In Fater trade marketing operations as it is explained above, Fater S.p.a. under the light of International Hubs' sales reports manages retailer marketing operations.

3.3. Customer Perception of Bleach Products Regarding to Market Places

3.3.1. Customer Perception of Bleach Products

Bleach products usage is highly wide spread all around the world. Bleach products are definitely perceived by users as cleaning products. However, the way consumers use bleach products are different. Fabric and Home care cleanings are two main options of bleach usage.

According to countries final consumers of bleach products diversify between housewives, working moms, and young bachelors. Among those consumer types, under the light of Nielsen data analysis; Turkey, Morocco, Eastern Europe hubs have more bleach usage by housewives and working moms. Western Europe, Central Europe hubs have more bleach usage by working moms and young bachelors. These data analysis gives us some kind of cultural insights. To illustrate this statement, Eastern Europe and Middle East countries woman has the cleaning role in the family. Also, those eastern families are close and unseparated families that young bachelor children still live with their families. So that, if bleach brand wants to attract those countries' consumer needs to focus on housewives and working moms customer segments and their needs. On the other hand, in Western European bleach usage shows us that woman is participating the working life more than eastern countries.

Moreover, young bachelor children are separating from their families to have independent lives that is why they need to take care about their cleaning stuff and use bleach to do so. Thus, Western and Central Europe hubs need to be taken in to consideration with working moms and young bachelors and their needs.

After identifying the user segment of the bleach industry, here are the facts that the way it is used by bleach customers. Final customers use bleach as fabric (laundry and home care cleaners). When it comes to Laundry and Home care products consumers look for something that can;

- Clean & Hygienize
- Degrease
- Remove stains

Those were our perception, here is the most profound question: What consumers think about bleach? Bleach usage is widespread, both for Laundry and for Home care cleaning. To illustrate how important for cleaners to use bleach here is the fact about Turkish market; bleach is a must have product for Turkish consumers and they are used to use it for multiple purposes. According to 92% of the housewives of Turkey without smelling bleach in any kind of cleaning product, they don't think that product cleans as well as the other products which contain and smell bleach. As a result of this consumer insight bleach companies does not produce intensive perfumed bleach products to avoid to be under qualified by consumers. All in all, consumers keep using bleach and its products because bleach related products are the best products to:

- Clean & Hygienize
- Remove stains & whiten

There are also side effects of bleach usage for fabric and home care cleaning which are holding consumers to use more bleach to avoid side effects. Here are those barriers that inhibit its use:

- Fear Of Splashes, Of Doing Damage
- Not Practical To Use
- Not Ideal For Greasy Stains
- Too Heavy Smell

As those needs and concerns are stated above people have to give too many decisions to buy and use bleach products. Most of the time consumers are buying and using different kinds and types of bleach products to empower cleanness effect and avoid its consequences.

According to those border of bleach market environment, brands have decided to produce gentile (softer, fabric-home friendly) bleach products and also they combined products which can be used for multiple purposes.

ACE is the one of the first brands who changed its formula to catch up with consumer needs and concerns in terms of cleaning. ACE launched its new series of ACE ULTRA which claims to be an Ultra bleach product. ACE ULTRA, is a product that claims to be bleach as well as degreaser. ACE ULTRA claims to be fit to use for fabric (laundry), home care cleaning, kitchen, and toilet cleaning. This is the revolutionary move for bleach industry in terms of cleaning purpose and cleaning places of one product.

3.3.2. Market Places and Trends of Bleach Products

As this internship stands for European, Turkish and Moroccan bleach business, those hubs are considered to be evaluated in terms of market share and trends. In following

Table1. it is shown that ACE market share in various countries' bleach markets, it is also shown that market size changes for last two fiscal years for those countries in which ACE Ultra and ACE classic operate.

According to the chart below, between last two fiscal year there is a common market trend which is descending among all countries. Apart from Germany, Romania and Iberia (Spain and Portugal) all those countries in which ACE operates showed decreasing trend. On the other hand if we look over ACE market share in those market places in terms of value, it is clear that ACE value share is also descending in those countries. We are not talking about big differences; however, this decreasing trend needs to be taken care in terms of brand's future positioning in the market. In following parts, it is explained that ACE initiates new start-up projects in its market places to launch New ACE THICK products.

As it is written in the following chart, the only country in which Fater shows great increase of ACE market share is TURKEY. This statement brings important question 'How it is possible, while other European countries show decreasing trend in terms of ACE market share and Turkey shows vice versa. The only answer to this question is as it is stated above, new start-up project of Turkey "Shazam". This project initiated in Sept 15' until then ACE market share increase 1,2% when we compare its market share with last Fiscal Year.

In following months ACE will show other pick points in following start-up projects such as in Central Europe and Romania hub with the project name 'Thor' in Iberia with the project name 'BLL'. All those projects were aiming to increase ACE market share, as long as we observe, it accomplishes its targets.

MARKET TREND & SHARE UPDATE



	Market Val %		FATER Value Share				Last Reading	Mkt
	1415 vs YA	YTD vs YA	14/15	pts vs YA	FYTD	pts vs YA		
 TOT FATER	102	100	11,1	0,1	11,6	-0,6		
TOT ACE (excl. HDLD)	102	99	16,4	0,8	18,2	-0,1		
ITALY	106	96	49,1	3,3	50,1	-0,4	DEC 15	Bleach + TBC
TOT IBERIA	101	102	9,6	0,8	11,3	1,2		
TOT PORT	104	103	36,8	1,9	37,9	2,1	dic-15	Bleach + TBC
TOT SPAIN	100	101	4,1	0,4	4,8	0,8	nov-15	Bleach + TBC
FRA	99	97	1,6	-0,4	1,6	-0,1	DEC 15	B&LA
UK	106	100	1,1	-0,2	1,2	0,2	DEC 15	LA
GER	90	93	2,4		2,7	-0,2	SEPT 15	LA
TOT WE	100	99	4,0	0,1	4,6	0,4		
ROM	98	102	69,1	-0,7	68,3	-0,9	DEC 15	Bleach
TURKEY	108	104	15,2	-1,1	16,2	1,2	DEC 15	Bleach
MOROCCO	103	100	66,9	-2,6	60,8	-7,5	DEC 15	Bleach
RUSSIA	105	105	7,7	-1,0	7,2	-0,4	SEPT 15	B&LA
TOT CEEMEA	104	103	17,0	-1,1	19,0	-0,4		
TOT ACE HDLD	98	98	3,8	-1,0	2,7	-1,4	DEC 15	HOLD
 TOT COMET EECAR	110	111	9,7	-0,1	10,1	-0,8		
TOT RUSSIA	112	112	9,2	-0,1	10,3	-0,3	NOV/AUG 15	HSC+TBC
UCRAINA	86	82	7,7	-1,0	7,2	-0,4	SEPT 15	HSC
KAZAKISTAN	94	80	21,1	1,8	21,1	1,8	SEPT 15	HSC

Table 1. ACE Bleach Trend According to Countries [2]

4. ACE INTERNATIONAL COUNTRY ANALYSIS

As it is stated above the company is operating with the brands ACE and Neoblanc in Western Europe, and Central & Eastern Europe, Middle East and Africa, and in Italy. Those are ACE brand Hubs in which places it operates. In Western Europe; England, France, Portugal, Spain, and the other west Europe countries, in Central & Eastern Europe; Romania, Bulgaria, Poland, Hungary, Macedonia, Slovenia, Slovakia, Turkey, In Middle East and Africa; Morocco is included. Over those countries all the marketing and sales analysis have been done with the help of local hub's data and the data from Nielsen N.V. To begin with, ACE international operation chart as follows:

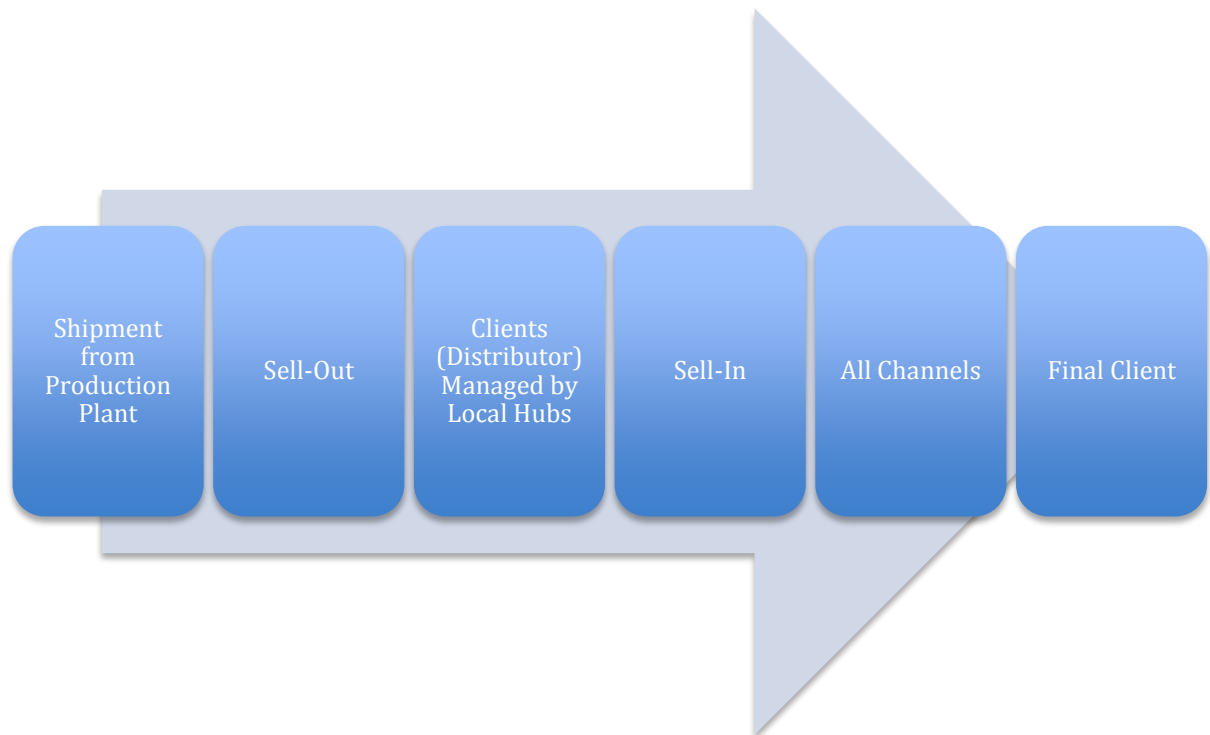


Figure 2. The procedure from beginning to final Client

Operation starts with production plans shipment order, which are generated according to local client requests. Before orders take place local hubs give data support to Headquarter of ACE to forecast order sizes more effectively. This point is very important for replenishment time for delivery, if Fater S.p.a. forecasts production effectively and never stay out of stock for shipment, this decrease delivery time. If delivery time is decreasing for distributor, they can rely on Fater agreement for future business. Moreover they can be more flexible about the future orders if order delivery time is short. After order phase, if there are enough products in inventory, shipment takes place. Otherwise, production process takes place to fulfil order quantity and then shipment departs from manufacturing plant. Now we are in the phase of local distributors, as long as shipments arrive to local distributor, that process is called Sell-out which means products are sold from the company to outsourced distributors. After Sell-out phase distributors take care about Sell-in operation under the supervision of Fater. Sell-in process is the phase of selling products between distributors and market channels. Although, this business process totally up to two different 3rd party companies, Fater S.p.a still need to over watch this process to keep business effectiveness high. To do so, there is a unique company department so called

Trade marketing. As it is stated above while explaining what is trade marketing, trade marketing department control sell-in process and tries to do marketing for market channels such as National Accounts, Traditional Stores... and etc. This department has profound role in the whole process to increase both sell-in and sell-out business results.

Finally, ACE products meet with customers in National Accounts (hyper-super markets), Cash and Carries, Hard-soft discounters and Traditional stores. Fater S.p.a. involves to in store operation once more to achieve best possible sell-in figures. ACE brand can promote its own products for distributors and market channels to reach final customers. These promotions can be discounts, physical goods, and services for distributors and market channels.

Among those process steps ACE brand has its own marketing positioning in the market. To give more details about this marketing positioning of ACE brand, here is the Marketing Mix (4P) of ACE which gives detailed information about ACE products, product price, place and finally promotions. Those operations are explained below;



Figure 3. The Marketing Mix 4P

-Product

ACE operates with classic Bleach (thin) and Ultra Bleach (thick) products. ACE thin and thick bleach colours differentiate by country because of customer perception of cleanness and main cleaning products colours in the market. In other words the sizes 1L, 2L, 4L, 500g, 1kg and etc.; the product colours pink, white, and green depend on the country. For example, in Portugal ACE THICK products are green because according to perception of the final consumers in the market, green is the colour of cleanness. However, this may change in various countries such as Turkey. To give example of all product families Product family of Turkey and Portugal are below:



Figure 4. ACE Thin (on the right hand side) and ACE Thick (on the left hand side)
Product family of Portugal and Turkey

-Price

Apart from the operations in Italy, Fater S.p.a. does not decide in store prices. Because as it is stated above, in other countries ACE brand distribution operates with 3rd party distributors. Thus, between distributors and stores there would be another business agreement. After stores (national accounts, traditional stores..etc.) purchase products of ACE, price policy depends on the store management. However, Fater S.p.a. suggests a price range or brand can put a upper or lower control limit to be competitive in the market.

Price part is mostly related to promo part in bleach market, because of bleach products' simple and fast moving characteristics. The prices of this market mostly depend on consumption habits, competitor prices and seasons of the year.

Price positioning of ACE diversify regarding to country and its projects in those country. ACE claims itself as a high quality bleach producer and place its' products according to this claim. If we have to make over all statement about ACE price positioning, we can say that ACE products have higher prices regarding to other brands. The table shows ACE price positioning according to other brands;

F&HC - PRICE POSITIONING

Thin Hypo (70% of tot GM of F&HC)

Ms % VOL YTD1516	Italy	Portugal	SPA Laundry	Romania	Turkey	Morocco
Ace	45%	34%	11%	53%	34%	56%
PL	44%	42%	52%	18%	42%	3%
Balance to mkt	11%	24%	37%	28%	24%	41%

Av. Price €/lt	Italy	Portugal	SPA Laundry	Romania	Turkey	Morocco
Ace Av. Price LT/€	0,67	0,65	0,72	0,89	0,70	0,57
Idx Ace vs Balance	176	247	137	192	202	127 (216*)
Idx Ace vs PL	175	245	173	198	226	162
Idx Ace vs AO	179	249	86	188	159	125

* incl. Bulk (35% market; price: idx 20% vs Ace)



23/08/2016



Table 2. Fabric and Home Care Price Positioning of ACE

According to Table 2, the table where percentage of volume shares are stated, ACE(Thin) has respectively higher volume share when we compare with other private labels.

It is also clear that ACE Thin products have higher index in terms of average price. So that, ACE (Thin) has higher volume share and higher price than other competitors in each country (except Portugal).

Moreover, we can conclude that there is suspected correlation between volume share and price positioning. To illustrate this statement we can say that Portugal and Turkey highest price index compared to average price of thin bleach products, on the other hand those two countries have lowest ACE (Thin) market share in terms of volume. Although, we can't directly say that weather Volume share of ACE affects price or Price positioning affects Volume share, it is obvious that there is a strong correlation.

The final statement is the most important part and so called Price gap between competitors. In recent analysis has showed that there is a strong correlation between

price gap and sales. According to this analysis price strategy is determined in following parts.

-Promotion

Promotions are the most important features of this market, because of the reasons are stated above. Competitive environment, price sensitive customer, agreement with distributors, and with stores are the most important ones. Among all those obstacles to do business in bleach market, there is a one certain opportunity in which we can profit from that is promotion. Promotions is the main opportunity and the challenge at the same time to run this business. It is an opportunity as it has supportive effect on business; it is a challenge as it is common opportunity for all competitors. Promotions attract final customers as well as stores (super hyper markets, traditional stores). In the Headquarter of ACE brand, the analysis of promotion for all countries it operates has been conducted to see whether the promotions have been done are working or not. Neilsen NV data and sell-out data helped to generate proper analysis to determine which promo type to implement. Last 3 years data from those data sources showed that some promos are working some other aren't. Furthermore, promo types are also country dependent. For example, price discount promos are not effective in Morocco, on the other hand in Turkey they are really effective. We can say the opposite thing for sensorial promos. The types diverse regarding to country as it is stated. Consumer habits differentiate in each country, so that it affect promotion types in each country as well. In general Promo types are Co-promo, Price Promo and Sensorial Promo.

Co-promo is the promo type that brand executes promo with side products. For example, ACE bleach with toilet cleaner of one of the co-brand of ACE. Price promo is discounting over core products such as 4L of ACE 20% discount. Finally, sensorial promo is promoting product with the same product type, however with special product cover or size which is produced especially for that promotion. To give

example; buying ACE 0,75L of Thick product brings 0,5L of ACE Thick for free. In the country detailed analysis we will see those promo type by country.

-Place

As it is stated above, due to the fact that ACE brand tries to be every point of the local markets, it has agreement with National Accounts (hyper-super markets), Cash and Carries, Hard-soft discounters and Traditional stores. Distribution is the key in this business, ACE has to be everywhere in local markets no matter what. Otherwise, local brands and private labels can occupy local markets. In detailed channel diversification is as follows;

1-HYPERMARKET >2500SQM/TR

2-SUPERMARKETS 1000-2500SQM/TR

3-SUPERMARKETS 400-1000SQM/TR

4-SUPERMARKETS <400SQM/TR

5-Traditional Stores (MIXED&FOOD GROCERY)

6-Discounters

7-Cash and Carries

Those channels are main streams in all countries. However, their value share in whole market differs in each country. To illustrate this statement, if the country is based on west, central Europe, we can conclude that Hyper and Super markets has the biggest value share in those countries. On the other hand, Eastern European countries, Turkey and Morocco have bigger value share in middle sized supermarkets, hard discounters, and traditional stores.

ACE brand aims to be every layer of the market without concerning its value share in that country. However, amount of value share determines how to be in those channels in that country, because as ACE has high quality brand image, its products have relatively higher price as it stated above. Thus, this feature brings new challenges for ACE brand to be in specific channels which operate with every day discount motto. Hard discounters and Cash and Carries are the channels in which ACE has struggle to stay and serve for its customer. Detailed country analysis is explained below to describe better ACE strategic approach about its placement.

Apart from channel placement, we have another great issue about in store placement. It is crucial to have competitive placement to do better marketing for brand's customers. The strategy is simple, promoting better than others. As an example, ACE has launched new ACE thick products in various countries, such as Turkey, Portugal, and Spain etc., in those countries to create new brand awareness, ACE started in store activities such as free trials, promo girls, and specific ACE product section. All those activities aim to be more competitive with the other brands. Apart from the issue above, shelf positioning is another important point for all brands. As it is discussed before, ACE brand is not the leader in each country, so that ACE has some times better competitors to contend. Shelf positioning is profound for competing with rivals. We cannot be away from where the other brands present their self in the store. ACE brand has to be close to them and needs to give better visual contact to the customer.

In those markets in store positioning is below;



Figure 5. ACE in store positioning examples

In the second visual, we will see the ACE Thick and ACE Thin products are placed together. This strategy aims to boost both product kind sales. For example, placement aims to create awareness for the customers in the case of integrated use. By placing two product kind together, ACE can give a message of the way that customer can use two different product kind at the same time in order to have better cleaning effects. Moreover, by this way we can attract customer who buys only one kind. For example, making special promotion campaign for those two kinds will encourage customers to buy both products if the discount depends on both at the same time. Furthermore, placing ACE brand next to the biggest competitor Domestos, is another strategy to force consumer to choose among these two brands. There can be many combinations to place ACE product family under the current circumstances. However, it is crucial not place away from ACE's competitors.

One of the shelf positioning example is below;



Figure 6. ACE in store shelf positioning examples

4.1. Operations by Countries

Bleach is considered to be one of the most essential home care products and it is widely used for a lot of different purposes. To illustrate this, bleach is used as a laundry needs, specifically as a stain remover, and it is also used to clean different surfaces in bathrooms and kitchens. Additionally, bleach is still used by some people when cleaning dishes in order to remove grease and help eliminate bacteria. Moreover, bleach is commonly used for home care purposes such as floor cleaning and bathroom cleaning. There are plenty of products in the market to satisfy those needs. Some of them can be used for both fabric and home care cleaning purposes, some others cannot. In the following part we will discuss about specific countries and their characteristics in which ACE brand operates.

MOROCCO

Competitive Landscape

Procter & Gamble (Fater) North West Africa maintained its leading position in bleach in 2015 with a 52% value share with ACE. Additionally, the company has adopted a

very strong distribution strategy and its Ace brand is now sold through all relevant retail distribution channels throughout the country.

Prospects

Bleach is expected to increase in value at a CAGR of 5% at constant 2015 prices over the forecast period. This growth is set to be sustained by the fact that bleach is considered to be a commoditised product in Morocco. Additionally, many Moroccan people still use bleach for numerous different purposes. Growing purchasing power is also set to push Moroccans to buy more packaged bleach over the forecast period.

(<http://www.euromonitor.com/bleach-in-morocco/report>)

ACE as it is stated above has the lead positions in the market of Morocco. However, last year (Sept.) Fater and P&G have been separated their operations in terms of distribution. Thus, it has affected weighted distribution values drastically which means ACE brand is not as effective as before when it was distributing with P&G. Thus, executive board decided to return their decision and to work with P&G in terms of distribution again. In very first months of this new decision weighted distribution value increased and value sales showed some improvements.

ACE in Morocco is competing with two other main brands, which are Maxis and Exet. These brands are second followers and they are trying to challenge with their prices and wide spread distribution in traditional markets. Since ACE is the market leader and has higher price, reaching out small stores, hard discounters, and traditional markets is not beneficial for ACE. The other two main competitors occupy this gap to compete with ACE. With the help of P&G in terms of distribution ACE has stronger positioning to reach smaller market places such as traditional stores and small stores. The activities during this internship have been done for Morocco are stated following section of this paper.

TURKEY

TRENDS

Turkish society strongly believes that bleach products are very effective in terms of cleaning purposes. Most of those tasks that bleach is used for, are coming from old behaviours of the society. Home care; surface cleaning, toilet cleaning, floor cleaning and laundry are those tasks for Turkish community for many years.

The category demonstrated volume and current value growth of 2% and 9% respectively in 2015. Latest customer analysis has showed that Turkish society prefers multiple task products to laundry, floor cleaning, and toilet cleaning at the same time. According to analysis, it is believed that this trend is caused by downstream of the economy in recent years. Thus customers are switching their choice to recognised and functional products, instead of using task-specific and more expensive bleach products.

COMPETITIVE LANDSCAPE

Unilever Turk continued to lead bleach in 2015, with a 48% value share with the brand of Domestos. They achieve this success with their extensive distributon network. Effective marketing strategy of Domestos help them to reach leader position of the bleach market in Turkey. Unilever keeps its position in the market while competing with other big competitors such as P&G(Fater) and Reckitt Benckiser. The reason that they still have the leader position is having new successful product development and early launch of more concentrated products (Thick products). Moreover their packaging strategy one of the main reasons to be famous in the market, because Angle Neck packaging style allows customer to use product for multi-tasking. For example, to clean toilet using regular package shape does not work; however, angle neck helps a lot to use product for toilet cleaning as well.

PROSPECTS

Turkish consumers have bleach depended cleaning style in their regular life. This allows us to comment on future of the bleach market. Bleach market tends to be as large as it is now and Turkish consumers will be depended on bleach products thanks to the cleaning attitudes of the nation. According to analysis among Turkish house wives, the feeling of cleanness comes from smelling bleach from the cleaning products. This proves the future expectations about Turkish Market. Moreover, we can add that in this market intensively perfumed products will not be used by consumers, due to the fact that cleanness feeling depends on smelling bleach for this society.

Nevertheless, the expected growth in bleach is significantly lower compared with the volume CAGR of 6% and value CAGR of 4% seen in the review period.

FRANCE

TRENDS

Consumer in France fears about the potential side effects of chlorine based bleach products. Recently this topic was highly argued by scientists and society. It is concluded that there would be side effects for fabrics as well as children of the household. Besides, it is believed by French people that ecologically chlorine bleach affects nature in a bad way. So that, they tend to use alternative products such as white vinegar, sodium bicarbonate, black soap etc.

COMPETITIVE LANDSCAPE

In a declining category, Colgate-Palmolive maintained its leadership in 2015 by capturing 59% of total value sales. Private label accounted for a combined 32% value share and formed the second biggest competitive block. From a broad perspective, other home care players do not invest much in bleach which is deemed as going downhill.

PROSPECTS

It is expected downhill in the market just like last five years of the pessimistic market value and volume. Increasing ecological awareness about the harmful effect of chlorine bleach products will decrease the market size and demand on those products. Thus, in the future alternative product demand will increase.

UK

TRENDS

Relative to 2014, current value growth within bleach slowed in the UK in 2015 as households used bleach for fewer cleaning tasks. Bleach is increasingly perceived as solely for use in the toilet with fewer UK consumers, particularly within younger urban households, opting to purchase it for use in general surface cleaning and stain treatment. This corresponded with stronger growth in sales of laundry and surface care products with a bleach additive, as consumers showed a distinct preference for the convenience of these instant use products over the strength of raw bleach. Value sales in 2015 continued to be propped up, in part, by the general addition of new households to the UK total.

COMPETITIVE LANDSCAPE

Increasing its value share by one percentage point to 38% in 2015, Unilever UK Ltd retained its strong lead within bleach through its Domestos brand. Well recognised by UK consumers, the brand continued to see current value growth as a result of the company's deep and frequent discounting activities over 2014 and to a lesser extent in 2015. Over the review period, the brand was increasingly threatened by the strength of private label. However, its ongoing price promotion activity largely eliminated the price gap between Domestos and private label bleach. As a result, the brand performed strongly in discounters and variety stores where its unit price often matched that of private label.

PROSPECTS

Bleach is set to see a weaker performance over the forecast period compared to the review period due to competition from products with bleach as an additive, as well as a general trend away from the use of what some consumers perceive to be a harsh cleaning product. Over the forecast period bleach is set to see growth slow in constant 2015 value terms before beginning to decline. Due to bleach's perception as being a necessity for emergencies, the forecast decline is likely to be more gradual than might be expected given the strength of substitute products. It is likely that UK households will continue to purchase bleach for storage in case of exceptional cleaning situations that require a fast acting and high strength product.

GERMANY

TRENDS

As German consumers tend to be sceptical about home care products which contain aggressive chemicals, bleach remains unpopular, showing relatively low value sales when compared with most other European countries. Moreover, the increasing number of alternative products containing less aggressive ingredients is also having a negative impact on sales of bleach in Germany, as German consumers prefer to use mild cleaning products which are less harmful, or even eco-friendly. Eco-friendliness is developing into an increasingly important factor in overall home care. Due to the effects of cannibalisation, bleach showed a moderate decline of 1% in current value terms in 2015, due to already low volume sales of bleach in Germany.

COMPETITIVE LANDSCAPE

In 2015 Colgate-Palmolive maintained its leading position in bleach in Germany, accounting for a 57% share of overall value sales. With its well-established product line Dan Klorix offering various products within bleach, Colgate-Palmolive holds a strong position in Germany. Aside from standard chlorine bleach, its product portfolio also comprises scented products, with a less aggressive smell of chlorine. The increase

in value share of Colgate-Palmolive in turn led to a continuous decline in sales of private label bleach, with its value share declining from 35% in 2012 to 33% in 2015.

PROSPECTS

Due to substitute goods in other home care categories, bleach is expected to see a further decline in volume terms and value terms at constant 2015 prices over the course of the forecast period. It is likely that an increasing number of consumers will switch to purchasing multifunctional cleaning products offered in various formats and scents instead of buying bleach, with the latter being perceived as too aggressive and ecologically harmful by many German consumers.

ROMANIA

TRENDS

Bleach products are becoming less attractive for the consumers, the bleach market showed relatively slow growth in 2015, although purchasing power of the households increase. Urban based bleach consumers are decreasing by the time; on the contrary higher percentage of the rural population uses bleach products.

COMPETITIVE LANDSCAPE

P&G (Fater) is the most successful company within bleach, due to its brand, Ace. In 2015, ACE continued to be leader of the Romanian bleach market. ACE has 55% of the value share of the total market. ACE has long history in Romanian market. Thus, consumers trust familiar ACE brand. Furthermore, ACE products are available all over country and various kinds of retailers.

PROSPECTS

Bleach products will be less and less demanded, due to the rising availability of other products such as spot and stain removers. The decrease in demand will be more

obvious in the cities, while companies focus on their distribution in rural areas. Rural market remains same, however need of multi-tasking bleach products will affect product family. To fulfil this need, ACE has already launch Thor project for Romania. This project contains multi-tasking products which do all kinds of cleaning such as floor cleaning, toilet cleaning, stain removing, and laundry.

RUSSIA

TRENDS

Although bleach registered a 6% increase in current value sales in 2015, it saw a further retail volume decrease of 8%. This is the evidence of new trends in Russia which is using more concentrated products. Thick product may has relatively higher price which increases sales in value, however it contains less volume. So that, trend in Russia is using more concentrated (Thick), multi-tasking bleach products.

COMPETITIVE LANDSCAPE

P&G (Fater), with its flagship brand Ace, led bleach in Russia with a 21% share of retail value sales in 2015. P&G (Fater) operates in Russia with two different brands ACE and Comet. Overall competitive landscape is highly separated, one big player and many local brands which are trying to give cheaper solutions to the consumers.

PROSPECTS

Bleach is projected to see further decreases in retail volume sales and value sales at constant 2015 prices over the forecast period. This is caused by new generation consumption attitude. New generations does not prefer to use old school bleach products. As it is stated above bleach will find itself in competition with multi- tasking product which does all surface cleaning, toilet cleaning, stain removing, etc.

PORTUGAL

TRENDS

Bleach remains strongly associated with extreme cleaning and disinfection, whilst also regarded as an old-fashioned way of cleaning. Strong competition from increasingly specialised products for whitening clothes and house cleaning (bathroom kitchen, and multipurpose) continued to negatively affect category development in 2015. The unpleasant smell of common bleach and the risk of ruining clothes due to its powerful effects are more of a barrier than a stimulant to purchase. Many consumers regard bleach as a substance that can potentially be harmful to the skin, respiratory system and environment, which also works against category sales. Older consumers remain its most loyal customers, tending to use it for home cleaning, clothes whitening and stain removing. All these factors contributed to a lacklustre performance over the review period.

COMPETITIVE LANDSCAPE

Procter & Gamble was the leader in bleach in 2015 with a 26% value share, with its well-known and recognised Neo Blanc brand. Javisol, the second-placed brand, is no longer owned by Colgate-Palmolive, having been acquired in December 2013 by a new start-up, BrandCare, a 100% Portuguese company which plans to refresh the image of Javisol and launch new formulas, with an expected impact on the 2016 brand results. Unilever Jerónimo Martins remained the third branded player in the category with Domestos, with a 10% value share in 2015. These three brands are well-known among Portuguese consumers due to their long history in the country.

PROSPECTS

Value sales of bleach are expected to remain stable over the forecast period, with a marginally negative CAGR at constant 2015 prices. Loyal consumers of the category will continue to find an efficient and inexpensive cleaning solution in bleach. Bleach is a mature category with residual margins which is expected to suffer from low levels

of investment and innovation over the forecast period. In addition younger urban consumers, in contact with a wide variety of specific and more convenient products, are tending to move away from the category.

SPAIN

In 2015, bleach value share declined by 1%. The difficulties in the economy in Spain resulted some consequences such as change in consumption behaviors, preference for making savings, and etc. The community prefers to buy fewer cleaning products or choosing cheaper ones. Despite the fact that all those downsides of the market, bleach is still considered an essential home care product, in terms of cleaning and disinfecting.

Competitive Landscape

There was slight change in the Spanish bleach competitive landscape in 2015. The category is highly concentrated, on two major players; Henkel and Fater. The combined share of these two company is approximitly 44%, and the rest being private players. However, overall the lead was Henkel with 34% value share, which states slight rise on the previous year.

PROSPECTS

Value sales of bleach are set to grow marginally over the forecast period at constant 2015 prices. The category is nevertheless set to record a better performance over the forecast period than over the review period, benefiting from a better economic framework. It is expected that Spanish GDP growth will be positive over the forecast period and, with it, the Spanish unemployment rate is set to decline. This will result in an increase in average disposable income, in turn supporting a greater willingness to spend among Spanish consumers.

5. EXECUTED ACTIVITIES AND RESEARCHES IN THE INTERNSHIP

5.1. RESEARCHES

5.1.1. Correlation between price gap and Sales in Volume

As a bleach producer ACE is dealing with various Multinational and local competitors. According to competitors' positioning and their pricing level, ACE tries to empower and to adjust its pricing strategy. The bleach market shows different characteristics in terms of Price Environment. Before identifying bleach market, it would be better to explain price environments Price Environment as it explained above is flexible in each country in which ACE operates.

Price environment has three sub categories; market controlled, company controlled, and government controlled. Bleach market usually shows market controlled price environment, which means there is high level of competition, similar products and little price control by individual companies. Thus, price environment is market controlled end this give the power to the consumer, their preferences, their price sensitiveness, and their consumption behaves leads this price environment.

Price positioning of ACE diversify regarding to country and its projects in those country. ACE positions itself as a high quality bleach product. Thus, pricing strategy contains price gap between ACE and its competitors. According to Table1 we can clearly see that ACE products have relatively higher prices against its local and international competitors. In the data analysis part, as a CMO international assistant, I have recognized a relation between pricing strategy and sales figures while I was dealing with Price(promotion) reports and sales in value-volume reports separately. After 3 months I have realized that, there is a fine price barrier in each country which means consumers of that specific country accept higher priced bleach products till some certain level. After that level, sales show drastic downhill trend in terms of value

and volume. Moreover, this price barrier is not that simple, because pricing strategies of brands are interdependent to each other. In other words, price barriers work if leader increases its prices and the other competitors stay still. Nevertheless, there may be the case of all market increases bleach product prices. In this case, price barrier does not work; however, price gap joins the sales game. Price gap is the numeric difference of price between competitor's average price and brand itself. We can conclude that consumers of bleach products are price sensitive as well as price gap sensitive. However, we could say only intuitive comments on this relationship. Thus, under the supervision of Daniele Giardinelli, I have been researching on effects of price gap on sales in value and volume. To do so, there was some certain need of statistical tool of Correlation.

My skills about using statistical tools comes from the unique lecture in Management Engineering master degree in Politecnico di Milano which is Quality Management(Engineering). In Quality Management lecture, we have improve extensive statistical skills which we have embedded primitive steps in bachelor engineering stage. Quality Management class enabled me to understand group of data as a piece of insight about current situation. Determining the distribution of the data, extracting meaning from them and creating related analysis are most important abilities that I have got from master degree which are used effectively in this part of my internship. Following part, correlation coefficient of two data groups are calculated and according to calculation regression model has been stated. For further analysis, distribution of these data types and their graphs will be generated in order to have accurate forecasts about future situations.

Correlation Coefficient

The correlation coefficient is a measure that determines the degree to which two variables' movements are associated. Which answers the question of 'if one variable moves in one certain direction, does the other moves as well related to the first variable'. The range of values for the correlation coefficient is -1.0 to 1.0. If a calculated correlation is greater than 1.0 or less than -1.0, a mistake has been made. A correlation of -1.0 indicates a perfect negative correlation, while a correlation of 1.0

indicates a perfect positive correlation.

Positive correlation is a relationship between two variables in which both variables move together. A positive correlation occurs when one variable increases while the other variable increases, or vice versa. In statistics, a perfect positive correlation is when we have result of correlation coefficient 1, while 0 indicates no correlation and -1 represents a perfect negative correlation. To illustrate this statement we can give a related example with main topic;

Price of the product and demand of that product can be a positive correlation example. In the circumstances of stable supply, if demand of the product increases, price of the product also increases. Moreover, this can market trends can be effected by the other market movements because those markets are positively correlated. For example, if fuel price rises, it affects airline tickets directly. Airline tickets also rise. These examples can be enlarged by country transportations tax and ACE products prices. For many countries ACE uses international transportation method to deliver its products. Consequently, Fater S.p.A. pays tax to those countries. If the tax that Fater pay increases, ACE product prices also increase.

Negative correlation is a relationship between two variables in which one variable increases as the other decreases, and vice versa. In statistics, a perfect negative correlation is represented by the value -1.00, while a 0.00 indicates no correlation.

Negative correlation is used in statistics to measure the amount that a change in one variable can affect an opposite change in another variable. To quantify predictability of the negative relationship between the two variables, analysts run a regression analysis. This procedure provides analysts with a calculation of R-squared (R^2), which is the statistical measure of how well one variable predicts the value of another variable.

Correlation table		
-1<R.<-0,5	negativly correlated	Strong
-0,5<R.<0	negativly correlated	Weak
0<R.<0,5	Positively Correlated	Weak
0,5<R.<1	Positively Correlated	Strong

Table 3. A Small Amount of Price Gap Data

For example, if the price gap between ACE brand and its competitors increase, the sales in terms of volume decreases. Because as it is stated above, consumers has price gap sensitive purchasing attitude. They want to pay more high quality product; however, they do not want to pay more than their price gap sensitivity level.

Last but not the least; we can conclude that there is suspected that there is stronger correlation between sales in volume and price gap. To illustrate this statement we can say that Portugal and Turkey highest price index compared to average price of thin bleach products, on the other hand those two countries have lowest ACE (Thin) market share in terms of volume. Although, we can't directly say that weather Volume share of ACE affects price or Price positioning, or vice versa. As it is stated while calculating correlation coefficient, sales in volume will demonstrate more accurate results.

According to activities have been done by me, the results showed that there is a strong correlation between price gap and sales in volume;

ACE Price	6,502	6,51	6,52	6,51	6,51	6,5	6,48	6,5	6,5	6,5	6,51	6,52	6,5	6,52	6,51	6,51	6,53	6,53	6,54	6,54
Maxis, Exet Price	6,117	6,11	6,22	6,15	6,09	6,02	6,13	6,04	6,04	6,12	6,12	6,11	6,1	6,12	6,09	6,12	6,13	6,16	6,17	6,21
Overall Avg.	5,717	5,87	5,89	5,88	5,82	5,77	5,83	5,79	5,92	5,95	6	5,95	6,09	6,02	5,95	6	6	5,98	5,95	6,03
Price Gap M and E	0,384	0,4	0,3	0,35	0,43	0,47	0,36	0,45	0,45	0,38	0,39	0,42	0,4	0,41	0,43	0,39	0,39	0,38	0,37	0,33
Price Gap Overall Avg.	0,785	0,64	0,62	0,62	0,69	0,73	0,65	0,7	0,57	0,55	0,51	0,57	0,41	0,5	0,56	0,52	0,53	0,55	0,58	0,51

Table 4. A Small Amount of Price Gap Data

According to **Table4** above, as an example we see Moroccan bleach market price data. The data indicates ACE 1L bleach product price for last 37 months (the table shows 20 examples of 37 months), moreover data indicates two different opponent prices the first one is average of two biggest competitors' prices (maxix and Exet) and the second on is overall average price of the market. Once again, this illustrative example has been done for Moroccan 1L bleach price environment.

According to table? It is clear to see fourth and fifth lines indicates Price gap between ACE and two other indicators. In this way, we conclude data that we need to calculate correlation coefficient. In the next table we will see correlation calculation of Price gap ACE for 1st indicator and sales in volume of ACE. The following table shows the ACE sales in volume in general and for 1L (divided by 1000L).

ACE	3184	3151	2974	3240	3420	3149	3145	3097	2876	2825	2832	2949	2993
1lt	1978	2056	1934	2163	2069	2002	1984	1828	1846	1948	1896	1864	1971

Table 5. ACE Sales in Volume In General and 1L (The Actual Figures are divided by 1000L)

There would be another explanation for taking sales in volume in to consideration. Sales in value is interdependent to the price directly. So, if we take ACE sales in value data it will be already correlated with price gap of the market. To sum up, sales in volume is the unbiased way of calculating this relationship.

In the following tables we will observe the calculation of correlation coefficients. We can easily conclude the final comment that according to results Price Gap of ACE and Sales in Volume figures of ACE are strongly and negatively correlated. The main question is how they are negatively correlated and what will be next?

X-bar	105,1419			11,20881356
Count	37			37
n-1	36			36
Stdev	1,866229			1,057858937
r(correlation coefficient)	-0,72726		r^2	0,528899884

Table 6. Calculations of Correlation Coefficient of ACE Price Gap (ACE against Average of Maxix and Exet Prices)

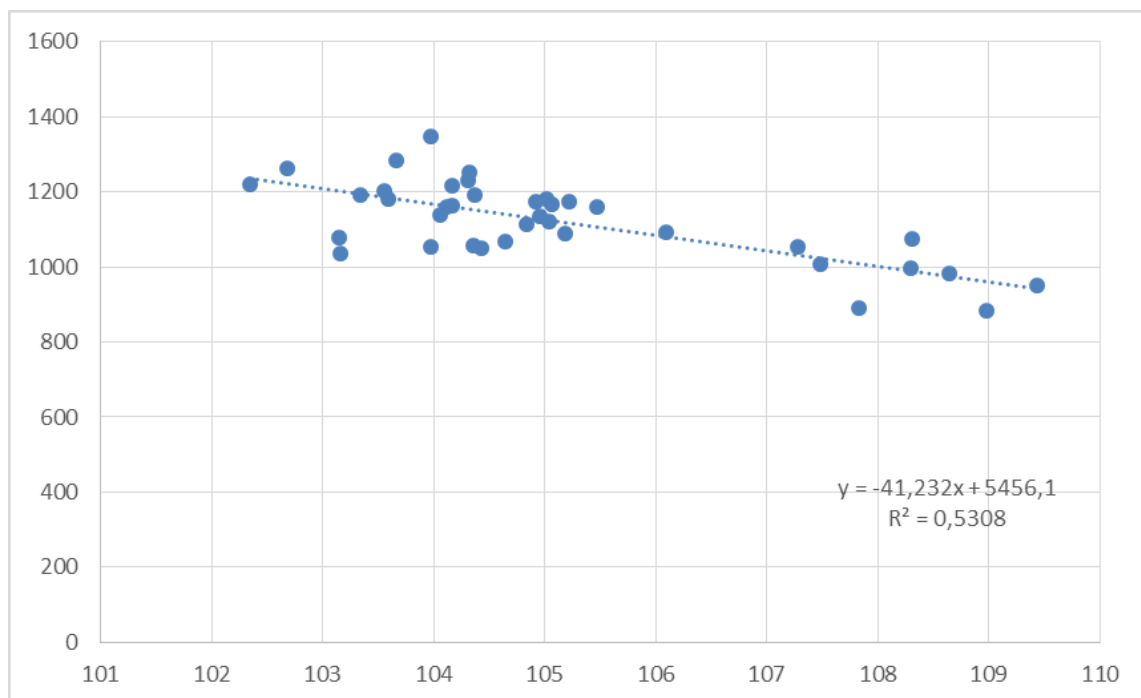
X-bar	0,618406			1267,142
Count	37			37
n-1	36			36
Stdev	105,9654			1287,045
r(correlati	-0,98939		r^2	0,978883

Table 7. Calculations of Correlation Coefficient of ACE Price Gap and Sales in Volume (ACE against Average of Overall Market Prices)[3]

The answer of the question above is simple; we need to implement this info into future pricing strategy. Regarding to results, Price gap between ACE and average of the rest of the market has stronger relationship than the first index. So, if ACE increase price gap against average of market price, its sales in volume will show downhill trend. With the same reasoning, if price gap increases between ACE and its top two competitors, sales in volume will show downhill trend as well; however, this time will be softer. In other word, if ACE wants to increase price consequently price gap, has to think carefully, because side effects on sales in volume can cause negative profit. Although, price upgrades will improve profit, downhill of the sales in volume can drastically drug this improvement down. To calculate more accurate way, we need statistical tools to understand, how sales in volume moves if we increase price gap with one unit.

Regression Model

Regression analysis is a statistical process for estimating the relationships among variables. Regression analysis helps us to get how the typical value of the dependent variable (or 'criterion variable') changes when any one of the independent variables is varied, while the other independent variables are held fixed. Most commonly, regression predicts the expectation of the dependent variable over given independent one.



Graph 1. Calculations of Regression Model of ACE Price Gap and Sales in Volume
(ACE against Average of Overall Market Prices)

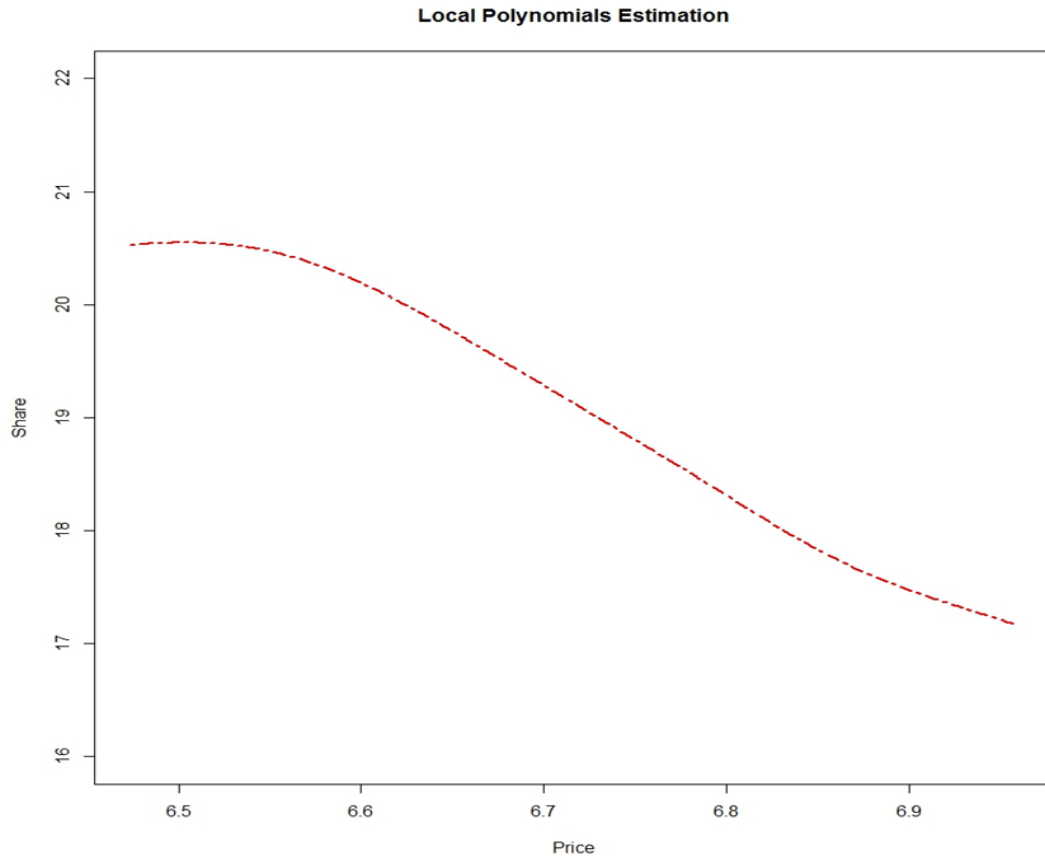
The graph represents regression line of our model. By this way we could understand 1 marginal unit effect of price gap change on sales in volume figures. To sum up, two data group Price Gap and Sales in Volume have showed strong negative correlation, according to regression model ($Y = -41,232X + 5456,1$) 1 unit of Price Gap change between ACE and avg. market price has -0,8% of sales in volume loss. As it is taught us in Quality Management (Engineering) lecture, there are two kinds of regression model according to data feature which are linear and non-linear regression model. Price gap

shows linear regression characteristics between small amounts of price changes; however, the model has nonlinear characteristics in bigger amount of price changes. To clarify doubts, following tables are presented;

	Actual Sales	Aumento di prezzo	% loss of Sales	New Sales after Price increase
6,4 - 6,6	570	6%	-1,35	562,305
	570	10%	-2,109	557,977
	570	20%	-4,219	545,953
	570	30%	-6,328	533,930
	570	40%	-8,438	521,906
6,6 - 6,8	570	7%	-2,8	554,040
	570	10%	-4,242	545,818
	570	20%	-8,485	521,636
	570	30%	-12,73	497,455
	570	40%	-16,97	473,273
6,8 - 7	570	7%	-1,65	560,595
	570	10%	-2,426	556,169
	570	20%	-4,853	542,338
	570	30%	-7,279	528,507
	570	40%	-9,706	514,676

Table 8. Effect of Price Increase on Sales in Volume

Table 8 shows that the regression analysis that we have done on ACE 1L price gap and ACE sales in volume. According to table regression models are linear between certain price limits. For example between 6,4-6,6 unit price if we increase price with 6%, we will lose 1,35% of sales in volume. If we increase price by 7% starting from the limits of 6,6-6,8 unit price , we would lose 2,8% of sales in volume. It is clear that, unit price changes affect sales in volume harder in higher price limits which was expected from our side. In the final phase, if we draw the price, share in volume graph we will have this result below which is proof of my price gap analysis.



Graph 2. ACE 1L Unit Price-Share in Volume

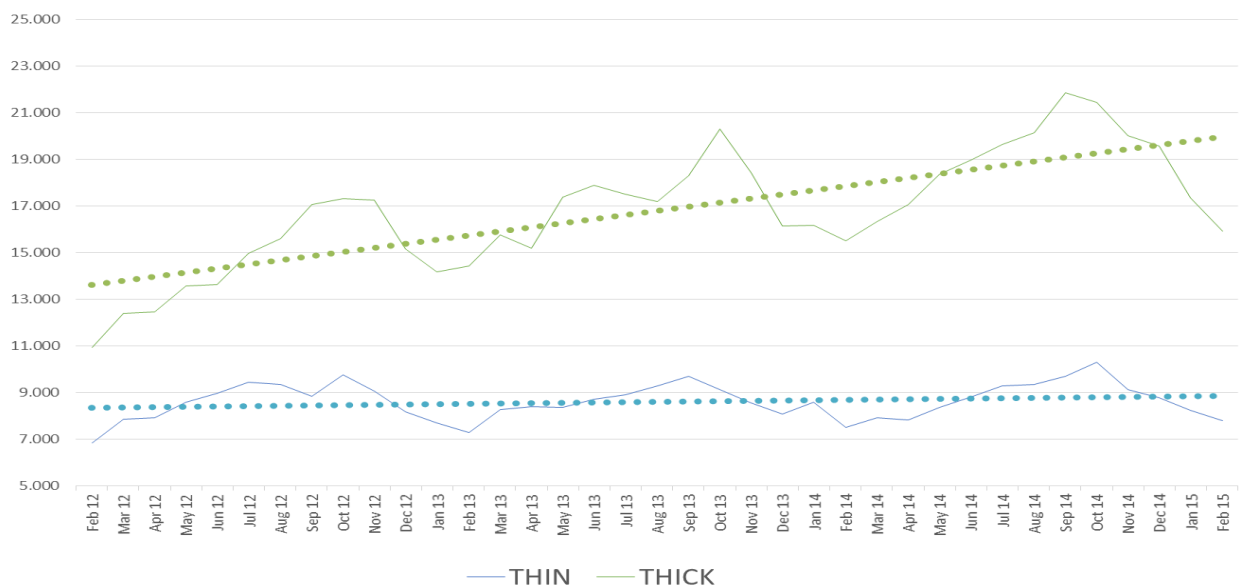
This key finding is shared with marketing and trade marketing department to help future strategic decisions.

5.1.2. Consumption behaviour, Personas, and Meanings of Turkish Bleach Market

This analysis is assigned to me according to my knowledge about Turkish Market and my abilities about understanding new meanings, personas, and their habits. Thanks to Design Management Lab and Design Strategy and Economics of Innovation classes that I have took in second year of Design Innovation and Entrepreneurship Track of

Management Engineering Master in Turkey, I achieved desired targets about this analysis.

Turkish Market changes as well as Turkey itself. Past 15 years has big effects on country economy. Last two year avg. on country GDP growth is 4,3%, this number is less than 2% in all over Europe. The final events Greek crisis and Bretix will affect tremendously GDP growth in Europe. Meanwhile, Turkey is struggling various political and ethnic events and their results. [3] Those events had big impact on economy, we can double check this last two years data of Consumer Price Index. Consumer Price index is continuously increasing in Turkey since middle of 2015.[2] From economical point of view CPI is the one of the strongest indicator of inflation. So, Turkish consumers became more price sensitive especially in FMCG market. I have controlled this information from my close family as well who live in Turkey. The results were containing important insights. People started to use singular products instead of using sophisticated products for tasks. The following chart is demonstrating,



Graph 3. 2012-2015 Thin-Thick Bleach Consumption (TL/1000)

Increase of high density bleach product consumption in terms of Turkish Lira. As it is clear, people preferences are switching from traditional cleaning purpose to multi-functional purpose.

While talking about preferences, we have to determine who prefers; personas. One of my responsibilities was the controlling if it is correct that New ACE Thick products attract right consumer in the market. So, I have conducted personas to do that.



Melisa; She is 55 years old. House wife and never worked. Her biggest responsibilities are home care, cooking, and grandchildren. She has a fixed budget to take care about all home care and grocery shopping. As the rest of Turkish community she is obsessive about cleaning. For her cleaning cannot be done without bleach smelled products.



Sevim, She is a working Mom, 39 year old. She is living in biggest city of the country, because of the traffic and working hours, taking care about home cleaning is disaster for her. Although she has job division with her husband, she has to deal with cleaning stuff. For her, budget is not that important; however, functionality and easy to use properties are crucial for her. Time is the most important thing for her.



Gamze, She is fresh graduate. She is 24 years old and just started to work in FMCG company. She just moved new separated house from her family and complains about adult life responsibilities. She has tight budget and schedule. So, for her both price and functionality really important.

Old school bleach products are used by mostly house wives (50%) and working moms (30%). Nevertheless, era of bleach environment changed these data. According to Survey which is done by ACE in Turkish market, more than 70% percent of consumers think hygiene when they hear, see, of think about bleach. So, we can say that hygiene

has strong correlation with bleach feeling. 45% of applicants stated that they use bleach product for fabric care to degrease. Moreover, almost all answers were containing whitening effect when they have been asked about using classic bleach products.

I have also researched about the reasons which inhibits bleach product use. To do so, I have looked to ACE website frequent questions part; top three question types are; fear of doing damage to product, not particular use of bleach product, not ideal greasy stains. When we take all these aspects into consideration; New ACE thick products fulfilling functional need of consumers. On the other hand, the first launch of products are made without perfumed products to give feeling of using bleach product. This strategy also satisfy cleanness feeling of consumers. The last but not least, the shape of product (Angled Neck) is easy to use Toilet, kitchen, home care and fabric cleaning. Thus, brand offering with this new launch is satisfying customer important needs and matching with bleach usage meaning.

5.2. EXECUTED ACTIVITIES

Before starting activity part, it would be beneficial to explain the business tools that I have learned to use;

Nielsen Answer Building System

This system is generated by Nielsen which is Data Analysis Company to help market competitor understand market environment and improve their activities. Nielsen, holds everyday consumption data about every kind of consumer good. In this case, ACE has access to this system to see bleach market in all over Europe. However, as data which is collected is complicated, using this data system is also difficult to use. One of my work description was understand the aspects of the system and export relevant reports. This system holds sell-out business data, as it is explained above sell-out is the transaction between Fater S.p.a. and local distributors. I have trained by Nielsen Milano local crew for 15 hours to have the access of this system. Now in

International Sales and Trade Marketing team I am the responsible about this system work load. The system interface is showed appendix1.

DB CUBE

This business tool helps to understand detailed information about shipments, shipment dates, distributors, and local stores. Also this system is generated by Nielsen to understand Sell-in (transaction between distributor and stores) part of bleach business. There can be a question about the difference between two systems, DB cube let us understand accurate data about where exactly ACE product goes. Furthermore, it is allows us to understand performance of stores about ACE sales. Weighted distribution value and Share in handlers value are generated according to this tool.

In-Store Flyer

This is the 3rd party company which give online data about promotions all over Europe. Promotion data is crucial and it is independent from Fater S.p.a. Every local store has its own promotion publication policy although, Fater pushes its promotions to the stores. Publications can be online, paper based, and guerrilla style. This company records all those publications which have ACE promotions and deliver as a report. So, it is my job to generate new insights and connecting promotion data to sales data in specific country.

5.2.1. TRACKING AND GETTING INSIGHTS SALES VOLUMES, VALUES, AND DISTRIBUTIONS REGARDING TO COUNTRIES

Tracking and synthesis of data were the most important two objective of this internship. The trade marketing and sales working activities can be done only if and only if employee's understanding on the recent data and sales figure is satisfactory to give meaning on those numbers. In other word, it can be observed that the job contains only numbers; however, they are not only the number they are stories of the market. To understand markets' current situations, as an intern I have spent many working hours to get what those numbers correspond.

TOTAL ISTANBUL (w/o Hard Disc.)	Sales in Value ON THICK SEGMENT								
	SEPT15- JULY16	SEPT14- JULY15	IDX vs YA	L2M JULY16	L2M YA	IDX vs YA	JULY 16	JULY 15	IDX vs YA
THICK	45.489,10	43.592,20	104%	8.450,90	7.555,50	112%	4.129,50	3.759,40	110%
THICK FATER	1.528,60	NA	0%	377,20	NA	0%	179,00	NA	0%
THICK FATER ACE SPRAY	768,50	NA	0%	165,90	NA	0%	82,50	NA	0%
THICK FATER ACE GEL	760,00	NA	0%	211,30	NA	0%	96,50	NA	0%
- ANGLE NECK 750/700ML	534,30	NA	0%	130,40	NA	0%	54,20	NA	0%
-THICK FATER ACE GEL X1 500*GR	75,70	NA	0%	18,20	NA	0%	6,90	NA	0%
-THICK FATER ACE GEL X1 4000*GR	149,90	NA	0%	62,60	NA	0%	35,30	NA	0%
THICK UNILEVER DOMESTOS	36.559,70	38.099,40	96%	6.398,50	6.594,60	97%	3.062,70	3.268,20	94%
THICK UNILEVER DOMESTOS SPRAY	1.056,50	915,70	115%	183,70	171,70	107%	89,80	77,00	117%
THICK UNILEVER DOMESTOS GEL	35.503,20	37.183,70	95%	6.214,80	6.422,90	97%	2.972,90	3.191,20	93%
-THICK UNILEVER DOMESTOS GEL X1 810*GR	18.226,00	18.504,20	98%	3.559,20	3.265,50	109%	1.767,60	1.653,40	107%
-THICK UNILEVER DOMESTOS GEL X1 4000*GR	7.638,20	9.158,90	83%	518,20	1.586,10	33%	189,30	774,20	24%

Table 9. Regional Based Sales Tracking Report-(Turkey/Istanbul)

Above we can see the example of Sales tracking report in regional base. To track the sales, weighted distribution, Avg Price etc. I was generating the table just like above for every country, every city, every store type (hyper market, traditional stores etc.). These tracking job was including all Eastern European Countries, Turkey, Morocco, and Portugal.

The first month tracking was the main activity, because we already had the list of events in the market have been done by ACE and the competitors. So, it was good training to check data and match this data with corresponding event. This tracking job is also extremely important to get future insights of the market. The following table is the example of the tracking system. The table contains weighted distribution values of ACE Thin products in Turkey. Weighted distribution is a percentage figure which represents brands distribution over market. For example if we think that market has 100 stores to distribute ACE products, ACE covers 93 percent of the market last two months of this year. As it is stated in the third column, last two months ACE brand lost 7% distribution when we compare that number with last year. There would be a fine

question why this downstream has been occurred. The answer is in last 2-3 months in Turkey there were chaotic environment because of the Airport bombing and military coup. These events affected social life as well as trade in the country. Fater runs its business by producing in Italy and shipping them in Turkey. Thus, delivering shipment and distributing products in the country became really hard in that period because of the extreme precautions.

TOTAL SUPERMARKETS (MAIN)	WD MAX					
	FY TD	FY YA	DIFF vs YA	L2M AUG16	L2M YA	DIFF vs YA
THIN	100,00	100,00	0,00	100,00	100,00	0,00
THIN FATER	100,00	100,00	0,00	93,00	100,00	-7,00
THIN FATER ACE LIQUID X1 1000*ML	94,00	99,00	-5,00	91,00	97,00	-6,00
THIN FATER ACE LIQUID X1 2000*ML	94,00	96,00	-2,00	86,00	93,00	-7,00
THIN FATER ACE LIQUID X1 4000*ML	98,00	99,00	-1,00	90,00	98,00	-8,00

Table 10. Tukey Weighted Average Values This Fiscal Year and Last Two Months with Last Year Values

After long training part of tracking of the data, finally I have created insight reports about countries. The insights are most of the time reached by heuristic methods. However, just as statistical analysis has been done for price gap part, in this part statistical tools are used to have accurate results.

In the following table, the information and insights about inter-size discount are demonstrated. Inter-size discount, if one brand increase its basic product size in the same product kind, is the discount per unit. To illustrate this sentence, 1L of ACE Thin costs 1a, instead 4L of ACE Thin costs 3,8a. So, 4L of ACE Thin has 0,95a unit cost which makes 5% of inter-size discount. In the table, compared with hypermarkets, ACE makes higher inter-size discounts in small and middle sized stores. Consequently, we can get insights about this strategy directly. Without looking to sales numbers, we can say that ACE is not as powerful as other brands in small and medium stores compared to hyper stores. In hyper stores ACE makes 34% of inter-size discount which is almost lowest if those store among other brands.

In the next table, the numbers shows the proof of the comment we have done above. According to table, ACE brand has absolute leadership in hyper stores. On the other hand, in the small and medium sized stores sales in value and volume tables shows that ACE is not the absolute leader in those markets. It is understandable because those stores consumer profiles are different than hyper stores. Small stores are seeking for more discount and promotional activities than hyper store. Thus, ACE inter size strategy is correct in this manner. My following job in this part is tracking figures to see whether this strategy improves ACE positions in those stores.

		intersize discount				
		>2500sqm	1000-2500smq	400-1000smq	<400sqm	Traditional
ACE	1L					
ACE	2L	-1%	6%	5%	7%	14%
ACE	4L	34%	40%	38%	39%	36%
Koruma Hypo	900ml					
Koruma Hypo	2,3L	25%	-10%	3%	-1%	18%
Koruma Hypo	3,7L	42%	23%	38%	18%	45%
ABC	926					
ABC	2L	52%	4%	3%	-8%	13%
ABC	3,7L	51%	34%	28%	21%	42%
Klorak	940ml					
Klorak	1,8L	0%	10%	10%	8%	12%
Klorak	3,5L	47%	29%	29%	32%	35%
PL	1L					
PL	2,5L	10%	12%	15%	22%	
PL	4L	27%	29%	32%	40%	

Table 11. Tukey Weighted Average Values This Fiscal Year and Last Two Months with Last Year Values

As it is claimed above, ACE has the absolute leadership is Turkish Hyper Market sales.

	FY TD	FY YA	IDX vs YA
THIN	5.462,70	6.907,30	79%
THIN FATER	3.847,20	5.065,00	76%
THIN KORUMA HYPO	49,40	34,30	144%
THIN BASER ABC	269,20	284,50	95%
THIN VIKING KIMYA VIKING	175,90	118,70	148%
THIN OTHER	275,40	304,70	90%
THIN OTHER PEROS	81,90	72,60	113%
THIN OTHER KLORAK	28,30	17,90	158%
THIN PRIVATE LABEL	846,00	1.099,70	77%

Table 12. Tukey Hyper Markets Sales in Value of This and Last Fiscal Year

		WD MAX L2M				
		>2500sqm	1000-2500smq	400-1000smq	<400sqm	Traditional
ACE	1L	86	93	94	86	79
ACE	2L	84	89	88	81	13
ACE	4L	85	91	93	88	29
Koruma Hypo	900ml	10	4	8	12	13
Koruma Hypo	2,3L	11	9	11	11	3
Koruma Hypo	3,7L	11	13	15	20	13
ABC	926	5	14	19	16	8
ABC	2L	3	5	8	11	1
ABC	3,7L	16	23	23	27	6
Klorak	940ml	4	8	7	14	13
Klorak	1,8L	4	8	6	9	11
Klorak	3,5L	4	7	6	9	3
PL	1L	50	42	24	12	0
PL	2,5L	59	36	16	12	0
PL	4L	34	39	23	14	0

Table 13. Turkey Weighted Distribution of This Fiscal Year

Weighted distribution table shows that ACE has strong distribution network compared with its competitors except Domestos. Domestos is the market leader and its WD values are around 100 in every market section. According to table there can be many insights however most important ones are ACE is relatively weak in Traditional stores, and ACE cannot support 2L distribution as well as other product sizes. Distribution in traditional stores is very profound because, traditional store covers 10% of the Turkish bleach market, which mean ACE cannot reach every part of that market. In other

word, if you distribute you sell, if you don't you cannot sell. Future projects will be on this distribution network issue.

Following table is share in handler's value table which means there is new indicators which helps Fater S.p.a. to understand the performance of the specific channel. For example, sales in value helps us to understand how sales are going. However, in hyper markets there are small number of stores compared to traditional market. This creates complicated situation, to solve this issue we add distribution index in the equation. Share of Handler's value is division of sales in value to weighted distribution value. In the end we will have percentage which represents true sales performance without distribution effect included. If ACE 1L is taking into the consideration we can easily see that without subtracting WD effect ACE 1L is the leader and doing very well; nevertheless, without WD effect it is clear that ACE 1L has way to go compared to other product sizes of ACE.

		Share in Handlers Value L2M				
		>2500sqm	1000-2500smq	400-1000smq	<400sqm	Traditional
ACE	1L	7,3%	10,6%	12,7%	13,7%	48,9%
ACE	2L	17,2%	20,9%	20,8%	21,0%	31,6%
ACE	4L	53,5%	42,3%	39,9%	38,6%	34,8%
Koruma Hypo	900ml	3,5%	8,8%	5,7%	11,8%	36,4%
Koruma Hypo	2,3L	5,9%	7,9%	10,8%	19,6%	21,0%
Koruma Hypo	3,7L	4,4%	12,3%	14,0%	9,4%	31,9%
ABC	926	6,0%	3,5%	2,7%	3,2%	24,4%
ABC	2L	1,7%	4,7%	3,1%	2,0%	6,7%
ABC	3,7L	39,3%	18,6%	19,0%	23,9%	35,9%
Klorak	940ml	2,6%	2,8%	5,7%	7,2%	39,8%
Klorak	1,8L	5,2%	5,7%	11,8%	11,1%	51,7%
Klorak	3,5L	5,5%	6,7%	14,1%	14,4%	27,7%
PL	1L	3,7%	3,9%	3,7%	6,7%	-
PL	2,5L	8,2%	10,7%	14,4%	15,0%	-
PL	4L	16,1%	16,0%	19,7%	20,8%	-

Table 14. Turkey Share in Handler's Value of This Fiscal Year for Hyper, Super and Traditional Markets

5.2.2. COMMUNICATING WITH INTERNATIONAL HUBS IN 3 DIFFERENT LANGUAGES

One of the main objectives of this internship is to understand international sales and marketing operations. The reason that I have been selected for this job is as a candidate I was the only one who speaks three languages that Fater S.p.a requires.

After final interview I have 100% commitment to achieve targets which are expected from me in this internship.

International sales and marketing operations are interdependent to each other. When the topic comes operating in foreign country, everything becomes more complicated, because communication, interaction and understanding are the keys for this business. ACE operates with central marketing, sales and trade marketing departments. Apart from that ACE has international hubs which are stated above several times. In those international hubs, according to their projects they have production, logistics, sales, trade marketing departments. The department that I work is working as a co-worker with marketing, sales and international sales departments all the time. To achieve company objective, there were pre-organized weekly and monthly based meetings. In those meeting, we were responsible to communicate to resolve international project issues. In those internal sales, marketing, project follow-up, external sales and marketing meetings, my responsibilities is the reporting meetings and communicating colleagues to let them their responsibilities according to meeting task division. Moreover, I was handling Turkey part in detailed, because of my mother tongue. I was helping them in terms of needed report and deadlines directly.

5.2.3. CONSUMPTION HABITS OF CUSTOMERS BY COUNTRY AND IMPLEMENTING DOES INSIGHTS FROM RESEARCHES INTO STRATEGIC TRADE MARKETING PLANS

As a second year Management Engineering Master Degree course Multi-Channel Customer Strategy course was the pillar for this part of my internship. Multichannel customer strategy teaches the profound points of understanding your market, consumers, creating accurate personas and finally under the light of these learning developing customer strategies in different channels.

In this part the work continuously progresses, because every day cultural norms, consumption behaves, and consumer perception changes. I was searching for new updates about business and demagogic changes all time; however, my best

participation was on Turkish business environment and its cultural aspects. To give example of this work, according to analysis last figures of Istanbul trade landscape are 33% import of whole country, 33% of total industry, 37% of total collected tax. So, Istanbul is region no brand can deny. This means, ACE has to improve its distribution more importantly in Istanbul. In Turkey, half of the stores are hyper/super markets, 20% of them are discounters, 27% of them are traditional stores. As it is stated above the reason Domestos is the way better than ACE in terms of sales in value is Traditional stores and Discounters. ACE does not make effective distribution and promotion in those kinds of stores. This market info is crucial for ACE for further strategic marketing plans. According to analysis, in near future discounters and national account super markets will keep their growing by 54% and 22%.

New internet age will effect deeply bleach business as well. After amazon prime arrival, every national account supermarkets started to let their customer make grocery shopping online. Nowadays, number of online bleach distributors are not widespread, however this online shopping will effect whole bleach market as well.

In Turkey, 2/3 of all grocery shoppers are experiential and quality shoppers. So, ACE has the advantage here as a high quality bleach brand.

	Thick	Dilute
Branded		
Cheapies		
Private Labels		

Figure 7. ACE Brand Positioning According The Consumers in Turkey

As it is mentioned, ACE is high quality bleach brand, consumer s think the same for ACE Thin products; however, new era is concentrated thick products for new generation which has multi-tasking features. ACE immediately has to move to left hand side of the table. Even if ACE has launched its thick products with the project of Shazam, consumers still has perception of brand differently.

5.2.4. PROMOTION ACTIVITIES

Promotion is one of the aspects of Marketing Mix, this knowledge is embedded in my skill portfolio during the Strategy and Marketing course. As a trade marketing intern I have mainly focused on promotion because trade marketing department aims to attract stores as well as final consumer in-store. In Strategy and Marketing lecture, we have created new imaginary service application from zero and we generated marketing strategy for this application. One of the biggest part of the marketing strategy was built on Promotions in the lecture. In this section of my internship is pretty similar with the work we have done in Strategy and Marketing Course. Turkey is one of the main markets of ACE, so Fater started new project 'Shazam' with new brand image in the country. This new project is created just like a new start-up company. ACE created its own brand image and own marketing activities for 'Shazam'. I have used promotion practices and promotion types that I have learned in the lecture.

Promotion, as it is explained, is the key feature of this business. Promotion campaigns are effective to attract consumers as well as stores. Promotion activities that has been done for this internship cover measuring promotion effectiveness, tracking them in each countries, help to increase promotion push in the stores.

First of all, measuring promotion activities is similar to sales tracking and insights. The job has three responsibilities, recording promotions, evaluating their frequency, and matching promotion effectiveness with the sales values. Starting with recording promotions, the following table contains promotions of three different private store brands in three months of 2015. The table is the example of Turkish Bleach Market promotions, the rest of the analysis will be given in appendix 1. The following chart resembles Gant chart because of its features, it helps to understand when the promotion starts, ends; what promotion offers discount, side product, sensorial products; how they appears in the flyers. The recording part is the longest part to deal with, because this giant Gant chart has to include every promotion in every country in every store brand for every product brand.

BANNER	July 15		August 15			September 15	
CARREFOUR	Domestos 4kg 8,90TL (2foto)	Ernet 1L 1,5TL	Carrefour 2,34L 3,90TL	Bingo all ultra products %20 discount	Domestos 810g free with 15TL domestos	ACE sprej 6,95 TL	
		Bingo Ultra 3,7L 8,9TL	Domestos 4L with OMO 6kg 27,9TL		ACE 4L 4,95TL	ACE delicate power jel 3,60 TL	
CARREFOUR MARKET	Domestos 4kg 8,90TL (2foto)		Domestos 750ml with CIF wood floor cleaner 1L 12,9TL	Bingo all ultra products %20 discount	Domestos 750ml free with >15TL shopping	ACE power jel 3,60 TL	
			Bingo all ultra products %20		Domestos 810g free with 15TL domestos products (3 foto)	Domestos 4kg with Omo matic 25,90TL	
MIGROS	Domestos 2x810g with Cif Cream 9,90 TL	Migros Ultra 1000ml 1,95TL	Domestos 2x810g 6,45TL	Migros 4L 3,25 TL	Migros Ultra 1000ml 1,95 TL (2foto)	Domestos 2x810g with Toy 6,45 TL	Migros 4L 3,25 TL
	Domestos 2x810g with Cif Cream 9,90 TL	Domestos 2x810g with Cif Cream 9,90 TL	ACE 2L %30 discount 3,95TL	Domestos 2x810g with Cif Cream 9,90 TL	Domestos 2x810g with Cif Cream 9,90 TL	ACE ultra sprej 700ml 6,95TL	Domestos 4kg

Figure 8. Turkish Bleach Market promotions

After recording part, now evaluation part starts. Above, two different brands promotions are marked. The green promotions are 2x Domestos promotions and they are exactly same with each other. These same promotions are prepared in the same store so called 'Migros' in different time periods. For ACE same promotions are prepared for different stores. We can calculate the frequency from this table for every

brand, country, store etc. However, in the end we need to move promotion effectiveness part. From the sales data we check Domestos products sales in value in 'Migros' stores for last three month. If we compare these last three months sales with last year and if we catch upstream in terms of sales for this brand. We can conclude that this kind of promotions specifically work and attract consumers. The same comparison can be done for ACE, if ACE sales is compared with last year sales in values for three different stores for September, we can conclude tangible results on promotion effectiveness.

Promotion penetration is also important for suppliers and stores. Most of the medium and small stores do not want to put non promo products higher shelves in the hot zones of the stores. Promotion penetration analysis is done by this table below;

Promotion Coverage Rate							
DA	7	6	A				
		#			%		
		FY 14/15	FY 15/16	FY16/17	FY 14/15	FY 15/16	FY16/17
TOT	ACE	38	111		22%	38%	
	<i>thin</i>	38	56		22%	19%	
	<i>thick</i>	0	55		0%	100%	
	Domestos	125	184		73%	62%	
	Bingo	33	43		19%	15%	
	ABC	8	3		5%	1%	
	<i>thin</i>	5	0		3%	0%	
	<i>thick</i>	3	3		2%	1%	
	Vissmate	0	18		0%	6%	
	AO-PL	71	92		41%	31%	
<i>thin</i>	54	58		31%	20%		
<i>thick</i>	17	34		10%	12%		
		172	295				
CARREFOUR	ACE	4	13		22%	54%	
	<i>thin</i>	4	5		22%	21%	
	<i>thick</i>	0	8		0%	33%	
	Domestos	13	14		72%	58%	
	Bingo	8	7		44%	29%	
	ABC	0	0		0%	0%	
	<i>thin</i>	0	0		0%	0%	
	<i>thick</i>	0	0		0%	0%	
	Vissmate	0	4		0%	17%	
	AO-PL	8	13		44%	54%	
<i>thin</i>	7	9		39%	38%		
<i>thick</i>	1	4		6%	17%		
		18	24				
MIGROS	ACE	2	11		11%	44%	
	<i>thin</i>	2	7		11%	28%	
	<i>thick</i>	0	4		0%	16%	
	Domestos	18	21		95%	84%	
	Bingo	3	1		16%	4%	
	ABC	0	0		0%	0%	
	<i>thin</i>	0	0		0%	0%	
	<i>thick</i>	0	0		0%	0%	
	Vissmate	0	0		0%	0%	
	AO-PL	8	11		42%	44%	
<i>thin</i>	7	8		37%	32%		
<i>thick</i>	1	3		5%	12%		
		19	25				

Table 15. Turkish Bleach Market promotions

The table represents promotion coverage rate and numbers. In other word, it represents the information of how many times a brand promotes its products in any store. It is not hard to get insights from this information as well, if we look carefully in total Domestos promoted last year 125 times in all stores and this year 184 times. ACE as a follower promoted 38 time last year, 111 times this year. It is not hard to understand why Domestos is the market leader with big difference. The improvement

on ACE promotions are because of the new ACE Thick products launch in Turkey in 2015. Basically, promotion part assembles with recording, evaluating, and counting.

5.2.5. KPI TRACKING and BENCHMARKING

Every year, Fater S.p.a. executive board decides targets and KPIs on Weighted Distribution, Sales in Value, Volume etc. end of the Fiscal Year. My job on this part was creating presentations on monthly base data from Nielsen Answer Builder. Targets were already determined, so I was reporting the movements on WD, sales, and activities with monthly presentations. Here is the Turkish Market targets and last month data in Project 'Shazam' (New ACE Thick Product Project)

	NIELSEN WD							
	TARGET				July 16			
	TURKEY ALL	HYP+SUP+ SUP.ETTES	DISCOUNT	TRAD. STORES	TURKEY ALL	HYP+SUP+ SUP.ETTES	DISCOUNT	TRAD. STORES
TOT SHAZAM	62	90	20	15	48	82	7	6
ACE ULTRA SPRAY MOUSSE	62	90	20	15	36	66	-	3
ACE ULTRA GEL	62	90	20	15	46	79	7	5
ACE ULTRA POWER GEL 750ML	62	90	20	15	40	72	-	5
ACE ULTRA POWER GEL 4KG	45	74	0	0	29	50	7	-
TOT WD ACE Thick (Shazam)	421	670	40	30	226	411	7	14
Benchmark competition								
THICK HAYAT KIMYA BINGO GEL					45	80	-	8
THICK GEL VISSMATE					36	64	-	6
THICK UNILEVER DOMESTOS GEL					99	100	98	96

Table 16. KPI Tracking WD (TURKEY)

It is clear that July16 data is not satisfying targets which are already put. My presentations contain the trend of ACE, and its Benchmark competitors. When we integrate all the months in the fiscal year, we would reach the yearly performance of the project 'Shazam'.

Following example demonstrate another key performance indicator which is Average Price per Unit.

Product	Avg price per Unit				JULY 16			
	TARGET				TURKEY ALL	HYP+SUP+ SUP.ETTES	DISCOUNTER S	TRAD. STORES
	TURKEY ALL	HYP+SUP+ SUP.ETTES	DISCOUNTER S	TRAD. STORES				
ACE SPRAY ULTRA MOUSSE 700ML	7,10	7,00	7,50	7,50	5,59	5,58	NA	7,33
ACE GEL ULTRA POWER GEL 750ML	3,75	3,72	3,90	3,90	3,49	3,45	NA	4,61
ACE GEL ULTRA PRECISION GEL 500ML	3,75	3,72	3,90	3,90	2,85	2,83	NA	3
ACE GEL ULTRA POWERGEL 4KG	10,35	10,20	10,20	11,50	8,55	8,88	8,13	NA
DOMESTOS SPRAY 750ML	6,60	6,49	6,99	6,99	8,34	8,56	NA	4,44
DOMESTOS GEL 750ML	3,40	3,36	3,60	3,60	3,54	3,47	3,9	3,51
- DOMESTOS 750 EXCLUDING BUNDLE	3,45	3,44	3,60	3,60	3,52	3,52	NA	3,52
- DOMESTOS 750 BUNDLE	3,10	3,13			3,31	3,32	NA	2,65
DOMESTOS GEL 4KG	9,55	9,31	9,31	10,50	10,55	9,89	11,9	10,44
DOMESTOS GEL 3,5KG					9,83	9,82	NA	10,18
<i>Idx ACE Spray vs Domestos Spray</i>	108	108	107	107	67	65	-	165
<i>Idx ACE GEL 750ml vs Domestos GEL 750ml</i>	110	111	108	108	99	99	-	131
<i>Idx ACE GEL4KG vs Domestos GEL 4KG</i>	108	110	110	110	81	90	68	-

Table 17. KPI Tracking Avg. Price per Unit (TURKEY)

Benchmarking is important as well as KPIs. Tracking data of best competitors helps us understand their technique, strategy, and trend. These reports are generated by me monthly base. Other examples of KPI reports are in Appendix3.

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8. APPENDIX

Nielsen Answer Builder System

The screenshot displays the Nielsen Answer Builder System interface, showing a list of database items and their corresponding selections. The interface is divided into two main sections: a left sidebar with navigation options and a main content area with a list of items.

Left Sidebar (Navigation):

- Database items
- Characteristics
- TOTAL TURKEY MAIN with Hard Disc CSSI
- TOTAL TURKEY with Hard Disc & SOX
- TOTAL SUPERMARKETS (w/o Hard Disc)
- TOTAL SPM (MAIN) (<1000&>1000)
- TOTAL SPM (MAIN) (<400&>400)
- Traditional Stores (MIXED&FOOD GROCERY) w/o Sub Lvl
- NIELSEN REGIONS
- ISTANBUL(Asia&Europe)
- TOTAL CITIES
- My Selections

Main Content Area (List of Items):

- TR_TOTAL TURKEY MAIN with Hard Disc CSSI
- TOTAL Hard Discounter CSSI
- TR_A101
- TR_BIM
- TOTAL TURKEY without Hard Discounter CSSI
- Total Turkey with Hard Discounters & SOX
- Total Hard discounters & SOX
- TR_SOK/TR
- TOTAL SUPERMARKETS (MAIN)
- TR_HYPERMARKET >250SQM/TR
- TR_SUPERMARKETS 1000-250SQM/TR
- TR_SUPERMARKETS 400-1000SQM/TR
- TR_SUPERMARKETS <400SQM/TR
- TOTAL SUPERMARKETS (MAIN)
- Total Supermarkets(1000+ sqm)
- TOTAL SUPERMARKETS (MAIN)
- Total Supermarkets(400+ sqm)
- Traditional Stores (MIXED&FOOD GROCERY)
- Total Turkey w/o Hard Disc.
- Total Region 1 (w/o Hard Disc.)
- Total Region 2 (w/o Hard Disc.)
- Total Region 3 (w/o Hard Disc.)
- Total Region 4 (w/o Hard Disc.)
- Total Region 5 (w/o Hard Disc.)
- Total Region 6 (w/o Hard Disc.)
- Total Cities (w/o Hard Disc.)
- ADANA (w/o Hard Disc.)
- ANKARA (w/o Hard Disc.)
- ANTALYA (w/o Hard Disc.)
- BURSA (w/o Hard Disc.)
- ISTANBUL (w/o Hard Disc.)
- ISTANBUL (Europe) (w/o Hard Disc.)
- IZMIR (w/o Hard Disc.)

Right Sidebar (Actions):

- OK
- X
- Home
- Back
- Forward
- Refresh
- Print

Appendix 2

Shelf Positioning, Promotion Activities, Promotion Share, Promotion Coverage and Joint Promotion Tables

SHELF STRATEGY	Target	Actual
% of Store where Gel is in the Bleach thick Segment	100%	100%
% of Store where Spray is in the Bleach thick Segment		100%
% of Store where Ace Thick is in Brand Block with Ace Liquid		72%
% of Store where Ace Thick is close to domestos		80%
% of Store where Ace Thick is IN Brand Block with Ace Liquid and close to domestos		52%
Aca Shelf space in total Bleach	31%	33%
Ace Thick Shelf space in Thick Segment	15%	15%
Ace Thin Shelf space in Thin Segment	55%	60%

TOT BLEACH	TARGET FY15/16	# OF ACTIVITIES		% OF ACTIVITIES	
		FY TD Jun16	Diff vs YA	FY TD Jun16	Diff vs YA
TOT ACE	10	11	5	25%	5%
ACE LIQUID	6	6	0	14%	-6%
ACE THICK	4	5	5	11%	11%
DOMESTOS	nd	19	6	43%	0%
AO+PL	nd	14	3	32%	-5%
TOT Categ.	nd	44	14	100%	0%

	Share of Foto		# of Foto	
	Oct 14- Jun 15	Oct 15- Jun 16	Oct 14- Jun 15	Oct 15- Jun 16
ACE	10%	24%	19	53
thin	10%	8%	19	18
thick	0%	16%	0	35
Domestos	53%	44%	100	97
Bingo	10%	10%	19	22
ABC	3%	0%	6	0
thin	2%	0%	4	0
thick	1%	0%	2	0
Vissmate	0%	5%	0	10
AO-PL	23%	17%	44	38
thin	19%	10%	36	23
thick	4%	7%	8	15
TOT	100%	100%	188	220

	Coverage Folder		# of Folder	
	Oct 14- Jun 15	Oct 15- Jun 16	Oct 14- Jun15	Oct 15- Jun16
ACE	20%	31%	19	37
thin	20%	15%	19	18
thick	0%	16%	0	19
Domestos	86%	66%	83	79
Bingo	16%	18%	16	21
ABC	6%	0%	6	0
thin	4%	0%	4	0
thick	2%	0%	2	0
Vissmate	0%	6%	0	7
AO-PL	37%	30%	36	36
thin	30%	18%	29	22
thick	7%	12%	7	14
TOT	100%	100%	160	180

	oct	nov	dec	jan	feb	march	april	may	june	# Tot	% Tot
ACE	5	6	6	4	1	1	4	4	4	35	100%
thin+thick	0	1	0	1	0	0	0	0	0	2	6%
solo thick	3	2	3	1	1	1	2	2	1	16	46%
solo thin	2	3	3	2	0	0	2	2	3	17	48%

Appendix 3

Ex. Turkish Market KPIs and SELL-Reports Generated

TR TOTAL TURKEY MAN with Hard	Sales in Value ON THICK SEGMENT				Sales in Volume ON THICK SEGMENT				
	SEPT15- JULY16	SEPT14- JULY15	IDX vs YA	L2M JULY16	L2M YA JULY16	IDX vs YA	L2M JULY16	L2M YA JULY16	IDX vs YA
THICK	23,373.90	23,498.20	110%	46,729.60	40,073.20	115%	23,216.40	20,656.10	113%
THICK FATER	6241.40	NA	0%	1,661.40	NA	0%	740.10	NA	0%
THICK FATER ACE SPRAY	2,511.20	NA	0%	556.20	NA	0%	225.20	NA	0%
THICK FATER ACE GEL	3,329.00	NA	0%	1,105.20	NA	0%	514.90	NA	0%
- ANGLE NECK 750/700ML	1,940.40	NA	0%	385.50	NA	0%	179.30	NA	0%
-THICK FATER ACE GEL XI 500*GR	787.80	NA	0%	147.70	NA	0%	42.50	NA	0%
-THICK FATER ACE GEL XI 4000*GR	1,001.70	NA	0%	572.10	NA	0%	293.10	NA	0%
THICK UNILEVER DOMESTOS	172,629.70	168,394.20	103%	32,289.40	31,749.30	102%	16,655.20	16,129.20	104%
THICK UNILEVER DOMESTOS SPRAY	3,240.30	2,561.10	127%	549.50	522.20	105%	274.40	248.10	111%
THICK UNILEVER DOMESTOS GEL	169,389.50	165,833.10	102%	31,739.90	31,227.10	102%	15,380.80	15,641.10	99%
-THICK UNILEVER DOMESTOS GEL XI 810*GR	69,288.40	68,439.60	101%	14,306.30	12,892.60	111%	7,256.70	6,506.80	112%
-THICK UNILEVER DOMESTOS GEL XI 4000*GR	40,260.50	41,754.10	96%	4,004.30	7,973.40	50%	1,866.30	4,055.50	41%
THICK BASER	4,445.60	2,855.90	156%	1,230.70	604.20	204%	417.20	300.20	139%
-THICK BASER ABC GEL XI 810*GR	1,383.40	1,224.70	113%	244.60	276.70	88%	124.80	134.40	93%
-THICK BASER ABC GEL XI 4000*GR	2,331.20	959.40	243%	637.00	172.20	466%	217.10	84.50	257%
THICK HAYAT KIMYA BINGO GEL	7,389.40	8,691.60	87%	1,186.30	1,519.90	78%	94.40	82.60	70%
-THICK HAYAT KIMYA BINGO GEL XI 750*GR	4,922.80	5,307.90	93%	802.80	982.30	82%	393.70	526.10	75%
-THICK HAYAT KIMYA BINGO GEL XI 4000*GR	1,691.10	2,421.20	70%	219.80	420.10	59%	123.10	215.40	57%
THICK KORUMA HPO	1,879.50	706.00	266%	478.00	275.00	174%	283.80	142.70	199%
-THICK KORUMA HPO GEL XI 750*GR	1,671.10	332.90	381%	318.30	161.60	197%	220.30	90.20	244%
-THICK KORUMA HPO GEL XI 4000*GR	268.50	87.70	306%	111.30	31.00	348%	45.20	12.40	369%
THICK VISSPLUS	3,392.60	NA	0%	1,444.80	NA	0%	748.80	NA	0%
-THICK VISSPLUS VISMATE GEL XI 810*GR	2,224.90	NA	0%	723.40	NA	0%	374.80	NA	0%
-THICK VISSPLUS VISMATE GEL XI 4000*GR	800.60	NA	0%	362.10	NA	0%	188.40	NA	0%
THICK OTHER	4,451.90	3,072.70	133%	783.20	544.70	144%	498.10	293.50	169%
THICK PRIVATE LABEL	32,633.30	28,757.40	113%	7,429.20	55,121.00	135%	3,859.70	2,870.80	134%
	1,128,595.20	1,037,917.70	109%	240,452.00	202,239.30	116%	118,553.10	104,814.90	114%
	5,232,936.80	4,958,547.70	105%	1,002,218.00	933,775.40	107%	494,048.60	478,703.30	103%
	9,559,440.00	NA	0%	32,797.70	NA	0%	15,199.50	NA	0%
	28,285.10	NA	0%	6,723.50	NA	0%	2,824.10	NA	0%
	68,329.00	NA	0%	26,074.10	NA	0%	12,355.30	NA	0%
	28,218.20	NA	0%	5,944.70	NA	0%	2,736.50	NA	0%
	8,956.40	NA	0%	2,148.10	NA	0%	593.30	NA	0%
	311,494.00	NA	0%	18,021.30	NA	0%	9,065.70	NA	0%
	333,127,710.00	345,618,840.00	96%	574,951.60	639,395.20	90%	294,799.00	328,849.00	87%
	30,463.20	26,463.40	115%	4,991.10	5,074.40	99%	2,466.50	2,365.70	103%
	33,008,079.90	34,265,749.90	96%	589,960.50	634,370.80	90%	282,332.50	325,849.20	87%
	108,827,930.00	113,512,240.00	95%	2,275,992.20	2,089,213.00	104%	1,09,669.50	1,05,339.20	104%
	114,494,810.00	123,818,870.00	93%	103,109.00	2,714,440.00	4%	42,562.40	1,231,940.00	3%
	156,994.10	95,013.70	165%	46,770.10	1,927,900.00	243%	14,202.50	924,900.00	147%
	299,124.40	28,299.40	106%	5,129.90	6,066.30	85%	2,560.20	2,954.50	87%
	961,854.50	37,248.20	258%	35,629.40	6,504.10	548%	8,661.50	3,181.70	272%
	167,558.60	207,843.30	81%	24,775.80	36,588.40	68%	12,172.80	19,340.00	63%
	92,557.00	105,464.40	88%	14,724.00	19,014.00	77%	7,257.20	10,341.60	70%
	52,119.60	78,318.70	65%	6,993.10	13,539.90	52%	3,368.50	6,993.10	48%
	67,905.50	23,624.40	287%	18,666.50	9,579.70	195%	11,348.60	4,533.80	250%
	463,639.80	109,924.70	415%	12,346.30	5,678.70	217%	9,080.30	2,790.50	323%
	10,839.60	3,400.60	311%	481.50	1,306.80	363%	1,630.10	4,949.00	32%
	909,234.00	NA	0%	35,124.30	NA	0%	17,823.00	NA	0%
	424,640.00	NA	0%	14,142.30	NA	0%	7,198.00	NA	0%
	271,684.00	NA	0%	12,624.40	NA	0%	6,724.40	NA	0%
	161,957.50	106,373.20	148%	31,291.60	20,644.20	153%	17,882.50	9,982.20	180%

Product	Avg price per Unit			
	TARGET			
	TURKEY ALL	HYP+SUP+ SUP.ETTES	DISCOUNTER S	TRAD. STORES
ACE SPRAY ULTRA MOUSSE 700ML	7,10	7,00	7,50	7,50
ACE GEL ULTRA POWER GEL 750ML	3,75	3,72	3,90	3,90
ACE GEL ULTRA PRECISION GEL 500ML	3,75	3,72	3,90	3,90
ACE GEL ULTRA POWERGEL 4KG	10,35	10,20	10,20	11,50
DOMESTOS SPRAY 750ML	6,60	6,49	6,99	6,99
DOMESTOS GEL 750ML	3,40	3,36	3,60	3,60
- DOMESTOS 750 EXCLUDING BUNDLE	3,45	3,44	3,60	3,60
- DOMESTOS 750 BUNDLE	3,10	3,13		
DOMESTOS GEL 4KG	9,55	9,31	9,31	10,50
DOMESTOS GEL 3,5KG				
Idx ACE Spray vs Domestos Spray	108	108	107	107
Idx ACE GEL 750ml vs Domestos GEL 750ml	110	111	108	108
Idx ACE GEL4KG vs Domestos GEL 4KG	108	110	110	110

	TARGET			
	TURKEY ALL	HYP+SUP+ SUP.ETTES	DISCOUNT	TRAD. STORES
TOT SHAZAM	62	90	20	15
ACE ULTRA SPRAY MOUSSE	62	90	20	15
Spray Fresh Effect 700/750ml	62	90	20	15
Spray Flowers perfume 700 ml	48	79	0	0
ACE ULTRA GEL	62	90	20	15
ACE ULTRA POWER GEL 750ML	62	90	20	15
Angle Neck Fresh Effect	62	90	20	15
Angle Neck Flowers perfume	48	79	0	0
Angle Neck Lemon Garden	48	79	0	0
Angle Neck 700ml				
Precision Gel Fresh Effect	48	79	0	0
ACE ULTRA POWER GEL 4KG	45	74	0	0
Bulk Size Fresh Effect	45	74	0	0
Bulk Size Flowers perfume	30	50	0	0
Bulk Size Lemon Garden	30	50	0	0
TOT WD ACE Thick (Shazam)	421	670	40	30