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The Grocer Guide to...

The Grocer

Household, hygiene & personal care



Analysis

Turning a corner

After explosive sales during the Covid pandemic, a more normal trajectory is returning to the category, but consumers' hygiene habits have clearly evolved since 2019, with their trust in brands clear for all to see

It has been a pretty epic couple of years in the household, hygiene & cleaning category. The Covid pandemic saw the sales figures for many brands rocket. However, as life returns to some kind of normality, comparing 2021/22 figures with 2020/21 does not deliver the most accurate picture of how the market has evolved. A truer comparison lies in looking at the 2019 statistics and viewing developments from that perspective.

As Matt Stanton, head of insight at DCS Group, points out; "While sales of household cleaning products are down compared with the heights of the pandemic, they are still higher than pre-pandemic. For example, comparing full-year periods March to February, to align cleanly with the start of the pandemic, hard surface cleaners are up 9.2% vs pre-pandemic, dishwasher

tablets are up 9% and air care is up 8.4%¹," he says. "Comparing a slightly older period, sales of liquid handwash were up 45% in full year 2021 compared with 2019, antiseptics and disinfectants were up 40% and bleach and toilet cleaners were up 10%²."

On the other hand, personal care sales declined during the pandemic and while many categories are turning the corner, most are still below their pre-pandemic levels², he adds. "For the full year periods March to February, shave preparations have declined 16% since before the pandemic and shampoo has fallen by 6% vs 2019, although it has turned the corner and increased by 2.5% compared with the heights of the pandemic in 2020¹."

Following "phenomenal" growth during the pandemic, the disinfectant category and multipurpose have seen

a drop in sales (penetration led) due to cleaning behaviours softening as shoppers are less concerned about Covid, says Michelle Chadwick, senior brand manager at Zoflora [Thornton & Ross]. Zoflora has seen a rise of 20% in full-year 2021 vs full year 2019, largely driven by NPD, she adds.

Laura Marsden, marketing manager at Marigold [Freudenberg Household Products] confirms that sales of gloves, cloths and scourers have dropped vs the peak of the pandemic, but are also seeing an uplift in sales vs pre-pandemic levels³. "This is reinforced by the results of research conducted on behalf of Marigold, where 86% of those surveyed planned to continue with cleaning habits they incorporated during lockdown⁴," she says.

The total cleaning tools and gloves category value is now declining



following a stand-out year in 2021 driven by increased consumption as a result of the pandemic, affirms Mapa Spontex marketing manager Jo Evans.

In laundry care, too, a drop in sales value but an increase in sales volume has been seen following the sales highs sparked by the pandemic⁵, notes Chris Honeyball, senior brand and product manager for Ace at Robinson Young. The Ace brand is growing ahead of the market with sales volume up 4% and value up 9%⁵, he reveals.

In the personal care category, Unilever marketing director of deodorant and skin cleansing Monique Rossi notes that the deodorants sector has needed a makeover for some time, having been relatively stagnant since 2017⁶, with the pandemic contributing to a more recent decline. She says the category needs a reset to re-engage

with shoppers and bring more superior products to market and, as deodorants category leader with an almost 60% value share⁷, Unilever has identified different need states to shake up how it is merchandised – focusing on protection, fragrance and care.

Brand strength vs own-label

Increased engagement with cleaning has driven shoppers to trade up into brands as they seek the reassurance of well-known and trusted products that bring performance benefits, says Mapa Spontex's Evans. Brands remain strong, making up 52.3% of the cleaning tools and gloves category value vs 47.8% two years ago⁸, she says. In fact, 72% of consumers buying in the category bought brand in 2021⁸.

Shoppers needed products they could trust to do the job properly during the

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pandemic, and view the big brands as experts, agrees DCS Group's Stanton. "Brand loyalty has been maintained in household cleaning even as shoppers' finances are squeezed. Household shoppers are not trading down to private-label products, choosing to stick with trusted brands instead⁹."

With efficacy the top priority for consumers when buying hygiene and cleanliness products, the HG and Ecozone brands have continued to grow through 2021 and further in 2022, as people have trialled "and had an extremely positive user experience", says senior category development manager Matt Lothian. "So, they have come back, told friends and left outstanding reviews, which has all contributed to continued growth for us and our retailers." Between the two brands, the company offers over 300 products, he says.

Within disinfectants, category brands did outperform own-label, says Zoflora's Chadwick. In 2021, compared with 2020, own-label grew by 32% compared with the 72% growth¹⁰ in the category, she reveals.

Multiple product launches already this year have driven strong continued interest in the Scrub Daddy brand, notes Joby Cronkshaw, director at brand owner Evo Lifestyle Products, with sales in the 12 months to 20.03.22 up 167% year on year¹¹. A recent launch has been the "Tik Tok famous Damp Duster", which went viral in the US and received an enthusiastic reception when launched in the UK, he says.

In the personal care space, TOTM had three major retail launches between 2020 and 2021, with retail sales value data indicating it is the fastest-growing and No.1 sustainable period care brand in UK retail¹², says head of sales Kiley Yale. "More and more consumers are opting for sustainable period care. Despite the challenges that all brands face at the moment, we're confident consumers will continue to see the value in shopping sustainable period care products."

Sustainable actions

Leading household and personal care brands are all taking action to improve the sustainability of their products, working to reduce the amount of plastic packaging and increase the proportion of recycled plastic in their packaging,



says DCS Group's Stanton. Laundry brands are also innovating to improve the low-temperature performance of detergents to allow consumers to turn the temperature down and save energy.

Among those working on packaging sustainability is Unilever, which is aiming for all of its plastic and packaging, globally, to be fully reusable and recyclable by 2025. The company's Lynx, Sure and Dove deodorant/antiperspirant aerosols are all made from aluminium which can be "infinitely recycled" says Rossi, noting that kerbside aerosol recycling collection is offered by more than 90% of UK councils. In addition, most of its Dove cans are made with 25% recycled aluminium and it has removed tonnes of virgin plastic from circulation each year through the use of post-consumer recycled (PCR) materials.

Robinson Young recently introduced environmentally friendly packaging materials to some products within

the Ace range, shifting to 30% PCR materials. Its aim is to move all of its remaining products over to 30% PCR by 2023, says Honeyball.

While it has made "great strides in improving its sustainability credentials, the Spontex brand felt it needed to go a step further and completely rethink its approach to packaging, reveals Evans. The new Spontex Unwrapped range is its first packaging-free bulk products suitable for supermarkets, with all unnecessary packaging removed and shipping cases optimised to display them in-store. The products are also made using recycled fibres and the scourer has a 100% biodegradable sponge.

Over 95% of Scrub Daddy's packaging is cardboard, which can be easily recycled, says Evo Lifestyle's Cronkshaw. "Recent products also have many eco-conscious ingredients, such as our spray and washing up liquid, which are non-bleach formula

Inflationary environment

The UK's inflationary environment is causing people to rethink their shopping habits, with many shifting to the discount channel as a means of saving moneyⁱ, says DCS Group's Stanton. "Shoppers who are struggling financially are showing increased loyalty to local stores such as Co-opⁱⁱ, with considerations such as the cost of travel to a particular store being important."

However, in times of financial uncertainty, shoppers look for affordable luxuries to bring a little bit of happiness into their homes, he adds. So categories such as

air care and fabric conditioners offer an affordable way for shoppers to improve the environment around them.

Mapa Spontex's Evans points to spiralling energy and transport costs, which it says have driven record input cost inflation, creating the "major commercial challenge we are all facing in 2022". The company has absorbed and partially offset rising costs by using its global sourcing power and optimising its supply chain efficiencies and logistics partners, she adds.

"In previous events, such as the

2008 housing market crash, consumers were highly reactive to price," says Marigold's Marsden. "However, the broader sense of value came through as well – from price and bigger packs to perceived value – ie qualityⁱⁱⁱ." Qualitative research by GlobalData looked at the biggest brand drivers in home cleaning: the number one reason was value at 47%, with other drivers being 'reliable brand' (27%), 'brand I trust' (25%) and 'high-quality brand' (23%)^{iv}, she reveals.

Consumers are having to be more savvy as the cost of living crisis bites

and need to seek out brands that offer a great performance at a better price point, says Robinson Young's Honeyball. As the Ace range is "typically 56% cheaper than the brand leader without customers having to compromise on performance when removing stains from clothes", this enables them to access effective stain-removing products with minimal impact on budgets, he notes.

"There is potential for the category to suffer in the coming months as inflation increases, wage growth slows and therefore discretionary spend

decreases," says Chadwick at Zoflora. "Cleaning is the third most price-sensitive category in grocery as a 'have to' rather than a 'want to' buy and therefore could be more impacted by the cost of living crisis."

To mitigate against any potential changes in consumer habits, Zoflora will provide a choice of product sizes for all retailers to ensure entry-level price points, she adds.

Perhaps the last word should go to HG's Lothian, who notes that people will still have cleaning needs and challenges, so will still seek out products that really work.

and vegan-friendly." The company's Power Paste is also made from natural materials, is non-toxic and biodegradable, he adds.

Also focused on toxic reduction, Marsden says Marigold Microfibre cloths are a great way of reducing the amount of cleaning chemicals used, as they offer "deep cleaning power, with just water".

Meanwhile, HG's recent acquisition of British business Ecozone reaffirms its commitment to sustainable practices, as the latter has been creating sustainable products for over 20 years, using non-toxic formulas, plant-based ingredients and conscious packaging in a range that now consists of over 100 cleaning, laundry and lifestyle products, says Lothian. Meanwhile, he hopes that its HG Eco range, recently launched in Europe, will make its debut in the UK later this year.

In period care, TOTM has taken a strong stance on sustainability, such

as its partnership with Plastic Bank, via which it removes plastic from the ocean through sales of its cardboard tampon applicators, says Yale. "In the age of greenwashing, we choose to invest in official certifications and accreditations to give our customers the confidence they are buying a truly ethical and eco-friendly product. We publish our giveback and sustainability achievements in an annual Impact Report to keep us accountable to our mission. This includes up to date statistics such as how much plastic waste we have removed from oceans, how many products we have donated to period dignity projects across the UK and the level of carbon emissions we have offset that year."

HFSS opportunity

Category suppliers are certainly eyeing up the potential in-store opportunity afforded to them by HFSS legislation later this year.

"The HFSS legislation will create the biggest shake-up in the retail environment for decades with macro space changes throughout the store," says Unilever's Rossi. "This provides a unique opportunity to re-evaluate the way people shop. Retailers should ensure visibility is given to areas where the shopper is organically moving to anyway, such as health, wellbeing and sustainability. They will also benefit from looking to areas with high penetration and frequency that could sustain additional feature space.

Deodorant is one of the most habitually used products in personal care and is therefore a category with high penetration and frequency, she notes. "This means the category has a real opportunity to fill shelf space such as gondola ends, once the rules come into place."

If more space becomes available in stores as a result of HFSS, HG would advise retailers to consider brands

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that deliver incrementality and added value, says Lothian. “The best way to showcase products on the fixture is to create a brand block in-store as a ‘go to’ destination where shoppers can find the products they need and see the extensive wider range available. People can often be on autopilot when shopping, so this helps them avoid missing out and provides valuable education on what our products can do.”

Scrub Daddy already successfully participates in in-store promotional activity with secondary locations, says Cronkshaw, who hopes the changes to [HFSS] legislation would enable this activity to grow further for unaffected categories. Meanwhile, Robinson Young’s Honeyball believes there is definitely an opportunity for Ace and other non-food brands to start owning prime retail space. “Supermarkets have a large gap to fill and will be actively seeking ideas from suppliers... giving us a great opportunity to really promote the brand through in-store theatre and improved visibility.”

If end of aisle space does become available as a result of HFSS changes, it could be a great opportunity to drive impulse purchases, keep hygiene and cleanliness front of mind and drive engagement with the category, agrees Mapa Spontex’s Evans.

Zoflora’s Chadwick points out that using branded gondola ends and point of sale help to drive brand visibility but also educate on product benefits such as germ kill, fragrance and value for money. Given household products do not fall within HFSS guideline, there is the opportunity to drive impulse purchases, she says. However, the key to success is tailoring promotions and pack sizes to specific channels – for example, pure play online bulk formats, convenience smaller packs.

TOTM, which invests in “sustainable initiatives and taboo-breaking educational campaigns to stand out” and has run successful in-store period dignity giveback campaigns with some of its major retail partners, notes that HFSS products being removed from front of store and gondola ends will provide an opportunity to put non-food products in these areas. SanPro can also be seen as a distress purchase, so being near the front of store can benefit shoppers, adds Yale.



Future prognosis

Household cleaning products will continue to sell ahead of their pre-pandemic levels for the remainder of the year, albeit lower than the heights of 2020/21, says DCS Group’s Stanton. “In personal care, sales will remain slightly suppressed due to the reduced number of occasions brought about by lifestyle changes. However, key categories are already starting to show a turnaround, including hair care and shaving, with an increasing number of people returning to the office.”

Mapa Spontex’s Evans anticipates a reduction in cleaning occasions at home, which will cause some drop-off in sales, but says the formation of new cleaning routines and awareness of the importance of hygiene gained in the last two years will undoubtedly impact habits longer term and continue to drive category growth for some time to come.

Robinson Young’s Honeyball believes 2022 is going to be tough year for all brands. “High inflation and the cost of living crisis means consumers are much more conscious about their budgets and where money is being spent,” he says.

HG’s Lothian expects the specialist cleaning sub-category to offset declines in the wider category and buck the broader trend of household cleaning, which is currently at -14.8% vs the previous year¹³, although up 2.3% vs two years ago.

As value for money is likely to be more at the forefront of people’s minds, due to the rising cost of living, brand leaders such as Marigold will play an important role in offering value for money, long-lasting products, says Marsden.

Chadwick at Zoflora points to recent Kantar data that suggests, year-to-date, household shoppers are decreasing their category repertoire to help combat rising prices¹⁴. And she notes the disinfectant and multipurpose categories are still annualising peaks from the beginning half of 2021. “So it is likely that, in the year to go, decline will soften but combined with the impacts of inflation, the categories are likely to end the year in decline, although both will still be larger than in 2019.”

Sources

- ¹ IRI, Total Market, Value Sales, MAT to 28.02.22
 - ² Kantar, Total Market, Value Sales, 52 w/e 26.12.21 vs 2YA
 - ³ IRI, Total Gloves, Cloths & Scourers, Value Sales, 52 w/e 29.01.22 vs 2YA
 - ⁴ One poll ‘Houseproud’ consumer survey, conducted on behalf of FHP LP in June 2021
 - ⁵ Nielsen, Total Laundry Additive Market, December 2021
 - ⁶ Nielsen, Value Sales, MAT to March 2022
 - ⁷ Nielsen, Connect Express, MAT to 29.01.22
 - ⁸ Kantar, FMCG Purchase Panel, 52 w/e 26.12.21
 - ⁹ Kantar Worldpanel Division, Total Household excl Pet, w/e 20.03.22
 - ¹⁰ Kantar, data to 26.12.21
 - ¹¹ Kantar, FMCG Panel, 52 w/e 20.03.22
 - ¹² Mintel, Intimate Hygiene & Sanitary Protection Products 2022 report
 - ¹³ Kantar data, Q1 2022
 - ¹⁴ Kantar, Inflation: Getting Ahead, 9th June 2022
- Inflationary environment**
- ¹ Kantar, FMCG Panel, Feb 22 vs YA and 2YA
 - ¹¹ Kantar Worldpanel, Total FMCG, 52 w/e April 2022
 - ¹³ IRI, Inflation Analysis, 21 February 2022
 - ¹⁴ GlobalData, Home Category – Laundry & Cleaning, 2022

Robinson Young

EmbrACE the stain

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ACE, bloo, JEYES, DYLON,
Lord Sheraton, ManCave,
Vosene, Simple, Bristows,
TENA, Bodyform, Soft
& Gentle, Sleek

Source

^{1,2} Nielsen, Total Laundry
Additive Market, All grocery
stores excl discounters,
3 months to March 2022

↙ A stubborn stain used to mean clothes were destined for the rubbish bin – but laundry wizard Ace is so confident in its stain-removing powers that it is inviting customers to ‘embrACE the stain’, explains Chris Honeyball, senior brand and product manager for Ace, at Robinson Young. “Have fun, get your clothes dirty, because our range of products will tackle even those tough stains, easily, everyday,” he says.

The laundry expert is running a campaign on digital and social media to demonstrate the power of the Ace range by enlisting a group of Ace advocates, from cleanfluencers to busy mums, who are all passionate about the brand and love sharing their top laundry hacks.

“Digital and social media-based marketing campaigns, focused on consumers actually using our products, are a fantastic way of demonstrating just how great they are,” says Honeyball.

“Ace is enjoying unprecedented



“Latest data shows ACE outperforming the market and category in both sales volume and value¹”

demand – particularly Ace for Whites, which contains hypochlorite bleach that kills all viruses including Covid-19,” he adds. Latest data shows Ace outperforming the market and category in both sales volume (+18pp) and value (+15pp)¹, delivering consistent growth.

“Since working with Robinson Young, Ace sales have doubled in four years and the brand now has its highest-ever market share².”

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Dominating hand hygiene

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 SC Johnson
 PZ Cussons
 Johnson & Johnson
 Danone
 Grenade
 Entiven
 Coty
 ... and many more

↙ The need to wash and sanitise hands became automatic for many consumers during the pandemic, and sales of both hand wash and hand sanitiser skyrocketed. At the time, a considerable proportion of people (62% in one study) were saying their hand hygiene habits would change forever¹, reveals Matt Stanton, head of insight at DCS Group. And these habits have continued, although to a lesser extent since the restrictions were lifted.

“Sales are down compared to the heights of the pandemic, with the latest year-on-year position showing a 29% decline in hand wash and a 63% drop in hand sanitiser⁴,” he says. “However, these figures need to be seen in context, as growth during the height of the pandemic absolutely eclipsed the declining numbers now. In May 2020, anti-bac hand wash sales were up 180%, and an additional 3.8m shoppers had joined category compared to the year before². Growth in hand sanitiser gel was even more pronounced, with sales in May 2020 showing a more than 1400% rise vs. the previous year, adding a massive 8.7m extra shoppers to the category³. In short, sales of hand hygiene products are significantly higher than they were pre-pandemic.”

Carex is the No.1 brand in both hand wash and hand sanitiser in the total UK market⁴, notes Stanton. “It is No.1 in the independents channel too, with 20% share of the hand sanitiser category and a massive 64% share in hand wash, with the next two brands commanding just a 5% share each⁴. All Carex hand gel products, with a unique quick-dry formula, have a minimum alcohol content of 70%, much higher than 60% mandated by the World



“Sales of hand hygiene products are significantly higher than they were pre-pandemic”

Health Organization, and are proven to kill 99.99% of bacteria and viruses.”

The top-selling branded hand gel product in the UK is Carex 50ml Moisture⁴, notes Stanton. “It is the perfect size for shoppers to carry in their pocket or handbag or to keep in the car, and it is our No.1 product recommendation for all retailers, large or small,” he says. “Carex antibacterial hand sanitiser spray 100ml comes next in the SKU rankings⁴ and is a useful addition to many retailers’ ranges.”

Carex tops the charts in hand wash as well, taking all the top five slots in the total UK market⁴, he reveals. “Carex Original 250ml is No.1, with the 250ml Moisture variant coming in a close second; these are our two core recommendations for all retailers,” he says. “Next up is the 1L eco refill pack, which should be a consideration for all larger retailers. The 250ml Sensitive variant is in fourth place, and the 500ml eco refill version of the Moisture hand wash rounds out the top five. There are fun editions of the Carex hand wash range as well, including Love Hearts and Strawberry Laces – a great addition to support larger product ranges.”

Carex’s ongoing ad campaigns are set to drive even more awareness, meaning shoppers will be looking out for the brand’s key products in-store.



Source

- 1 Dunhumby Shopper Thoughts 2020
- 2 Nielsen, total market, value sales to May 2020
- 3 Nielsen and Kantar data to 11.06.20 and 12.06.20 respectively
- 4 Nielsen, Skin Cleanse, Total Market and Impulse reads, Value Sales, MAT to 29.01.22

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KEY BRANDS

Scrub Daddy

↙ In a declining market, Scrub Daddy's numbers are soaring, says brand owner Evo Lifestyle Products. "Within the last year Scrub Daddy has become the No.3 sponge/scourer brand in the UK¹, rising above some of the most recognised brands. With the total category market spend decreasing by over 10%², Scrub Daddy has grown a massive 167%³," it says.

"With multiple product launches already this year, there's no sign of Scrub Daddy slowing down," adds the company. "Assisted by our brand partners, including British influencer Mrs Hinch, the brand continues to take the social world by storm with continued viral hits across all platforms. Its recently opened TikTok shop has doubled its revenue within one month and gained over 3 million product views in two months."

"With the demand for Scrub Daddy products growing, we aim to increase our significant distribution with several upcoming grocery listings," comments Lucy Williams, marketing manager.

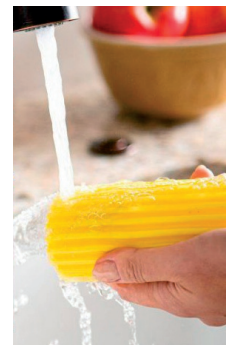
Making cleaning fun

In a category not historically known for innovation, Scrub Daddy makes cleaning easier and fun, says Williams. "Our Smile face scrubbers are engaging and help with what can be a mundane task for most," she says. "As well as the product's ease of use and effectiveness for a multitude of cleaning chores, Scrub Daddy also lasts much longer than the average sponge, so the customer gets the most out of their product spend."

The Scrub Daddy family now offers multiple products, including sponges, scourers, erasers, cloths, pastes, sprays, dispensers, accessories and storage solutions, she explains.

So what's new?

Scrub Daddy is constantly developing innovative products, with three new items launched in the past few months, says Williams. "The most recent is Dish Daddy, a soap dispensing dish wand. This free-standing, self-draining product allows you to wash your dishes with ease. The scrubbing head attaches



“The brand continues to take the social world by storm, with viral hits across all platforms. With the demand for Scrub Daddy products growing, we aim to increase our significant distribution with several upcoming grocery listings”

with hook & loop, meaning there's no plastic waste. Peel to remove, sanitise in the top rack of the dishwasher and simply press to reattach. Unlike standard dish wands, the Dish Daddy reduces product waste and mess with a dual-seal design to prevent leaks.

"Other new products include the best-selling Damp Duster, Amazon favourite Soap Daddy, Multi-surface spray, Wonder Wash up liquid, along with new special seasonal Scrub Daddy and Mommy shapes."

The year ahead

"We have a busy few months ahead and continuing into 2023," says Williams. "Our packed marketing schedule includes in-store promotions, trade shows, online advertising, PR and social media to name a few. With our social media channels performing well, we are now looking to reach different audiences though a wider approach to grow our brand."

Source
^{1,2,3} Kantar, FMCG World Panel,
52 w/e 20.03.22

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YEAR ON YEAR
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*Kantar, FMCG World Panel, 52 w/e basis 20/03/22

Freudenberg Household Products

Fresh lines for heritage brand

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Marigold

Marigold has retained its position as the UK's No.1 gloves brand, with 43% share of sales in the latest 52 weeks¹, says the company. The iconic Marigold Extra Life Kitchen gloves are the UK's best-selling household glove², it notes.

"However, the brand offers more than just yellow rubber gloves; Marigold has a range of gloves (durable and disposable), cloths and scourers, aligned with key segments within the market," it says. "With new product listings and an exciting support plan for the year ahead, the future is looking positive for the brand."

Marigold has strong heritage in the UK, being over 70 years old, yet despite its age, the brand continues to evolve, both in terms of its look and product assortment, to ensure it remains fresh and appealing to consumers.

Responding to key trends and consumer needs within the market, Marigold has two new additions to the range: the Marigold Fresh Feel Household Gloves and Marigold Let It Shine On & On! Microfibre Cloths.

"Even pre-Covid, comfort was a key need/expectation for gloves, so with many people continuing to incorporate cleaning habits they developed during lockdown, comfort during prolonged use is key," it says. "Marigold Fresh Feel Household gloves offer ultimate comfort in use – they have a unique, super absorbent lining, which keeps hands sweat-free and feeling fresh.

"Many consumers are now looking for small steps they can take, which fit



“With many people continuing to incorporate cleaning habits they developed during lockdown, comfort during prolonged use is key”

into their everyday lives, to lessen their impact on the environment,” it adds. “The new Marigold Let it Shine On & On! Microfibre Cloths are made from 100% recycled material (plastic bottles), with one cloth equalling approximately one 500ml PET bottle. These thick, durable cloths harness the deep cleaning power of microfibre to remove dirt, grease and dust with ease, using just water. Plus, they are washable, so can be reused time and time again.”

As well as a brand new website launched in Q4 2021, Marigold also utilises impactful advertising formats, to capture consumer attention at key times of the year, it says. A recent example includes a Spring Clean campaign across the Hearst Magazine group online. The interactive advertising was well received by consumers, hugely exceeding benchmarks set for engagement.

“Other activity also included a strategic partnership with TV’s cleaning expert Lynsey Crombie, who shared her expert tips using Marigold products.”

Marigold continues to invest in marketing support to ensure the brand remains top of mind. In 2022, that includes PR with campaigns at key times of the year, targeted digital campaigns, print, influencer activity and social media support.



Source

^{1,2} IRI, Household Gloves Category, Value Sales, Total UK Market, Latest 52 w/e 21.05.22

Marigold[®]

For a brighter clean

Washing up never looked so good

**NEW
for
2022**

**Innovative
scouring
layer**

**NEW
for
2022**



www.marigold.co.uk

* Source: IRI, Household Gloves Category, Value Sales, Latest 52wks to 21st May 2022, Total UK Market

FROM THE UK'S
Nº1
GLOVES BRAND*

SUPPLIED IN BRITAIN
SINCE 1947

a brand of
FREUDENBERG

HG UKI

Top cleaning secret unveiled

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KEY BRANDS

HG
Ecozone

For decades, the HG brand has been the UK's best-kept cleaning secret, says the company. "HG leverages 60 years of expertise to provide top-quality, convenient solutions that take the effort, time and hassle out of cleaning while guaranteeing the best result for every cleaning need," it says. "So, consumers can be proud of their homes and get on with doing more of what they love to do."

Meanwhile, Ecozone has been creating affordable and sustainable products for over 20 years, using a combination of non-toxic formulas, plant-based ingredients and conscious packaging to create a range that now consists of more than 100 cleaning, laundry and lifestyle products.

"Neither brand compromises on efficacy, delivering superior quality results, ease of use and exceptional value for money for every cleaning need and challenge," it says.

The household cleaning category is in decline, down 14.8% year on year¹, according to Kantar data, which also shows both the HG and Ecozone brands bucking the trend with strong growth in 2021 and 2022: an increase of 87% for HG and 233% for Ecozone across the two years, it notes. "And it is easy to see why; within household cleaning, shoppers prioritise getting the job done well with minimal effort. The Shopping Decision Tree below shows that efficacy/quality, ease of use and value for money are the top-ranked attributes that shoppers are seeking in the cleaning category. Both HG and Ecozone focus on giving



“As more shoppers discover the HG range and are wowed by the result and experience, they come back for more”

consumers the best cleaning result with minimal effort, and offer outstanding value for money.

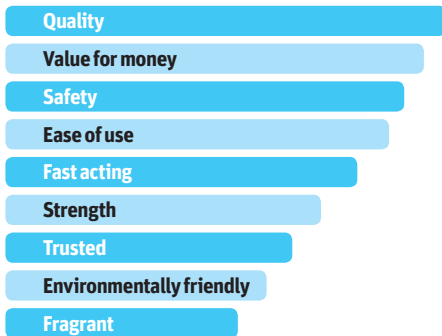
"A good example is the HG Drain & Plug Unblocker 1L, with three treatments per bottle (RRP £5, so just £1.67 per treatment), which clears the blockage within 30 minutes and keeps it away for two to three months at a time, it says. HG is also recognised as having the best mould product on the market, since it kills the mould and keeps it away for longer. The rating for HG Mould Spray on Amazon is 4.6 stars from 25,000 reviews with rave comments such as: 'No wiping, scrubbing. Just spray/leave/rinse. Seriously surprised, hugely satisfied. Money well spent'."

Over 150,000 verified consumer reviews across more than 100 HG products and an average rating of 4.5+ drives further penetration into the brands, says the company. As more shoppers discover the HG range and are wowed by the result and experience, they come back for more.

"HG is investing record levels with a 360-degree marketing activation plan in 2022 that will amplify the message, educate consumers, and drive people into its retail partners' stores to seek out the brand. We pride ourselves on unrivalled customer satisfaction, driving value and loyalty for our retail partners, and are very proud of the products we supply."



Shopper Decision Tree



– Household cleaning decision tree
 Source: Spark market research, May 2021

Source
^{1,2} Kantar Data, 52 weeks to April 2022 vs April 2020



So simple! Just pop a tablet in an empty drum on a hot wash & all done! My machine is pristine now!

Amazon Customer

RATING



4.4 / 5



So long!
mould

RATING



4.6/5

*total measured consumer appreciation at online retailers via HG.eu



Use biocides safely. Always read the label and product information before use



Great Value extends the life of your appliances & improves energy usage

HG[®]
Does what
it promises.

- no scrubbing needed
- quick visible result

**EFFORTLESS ELIMINATION
OF ALL MOULD**

HG.eu

Mapa Spontex UK

Experts in clever cleaning

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KEY BRANDS

Spontex
Spontex Unwrapped
The Essentials by Spontex
Spontex Specialist

As the UK's No.1 cleaning tools brand¹, Spontex believes a greater awareness of hygiene, brought about by the pandemic, has led to more consumers seeking the reassurance of well-known and trusted brands like theirs with products that bring performance benefits. "Spontex knows that as consumers remain engaged with cleaning, they'll continue to actively seek out the best products for the job," says marketing manager Jo Evans. The total cleaning tools & gloves category value is now declining following a stand-out year in 2021², she says. However, brands remain strong, making up 52.3% of total category value vs 47.8% two years ago³. Spontex continues to outperform the market and is gaining share as a result, up 2.5 percentage points vs two years ago to 21.8%⁴. Spontex's growth has been driven by an influx of new shoppers; the brand is now bought by almost one in three UK households⁵.

90 years of know-how

Having created the world's first cellulose sponge in 1932, Spontex has gone on to develop a complete range of products with added value features to make cleaning better, quicker and easier, it says. The company attributes its success to a category-focused approach and consumer-driven high-quality products. "Having worked closely with consumers to explore attitudes and behaviours, Spontex understands the category from a consumer perspective," notes Evans. "We have found a spectrum of cleaners – from less to more house-proud – and while it's clear that cleaning triggers and motivations are different, there are two common criteria: a good result and products that deliver this efficiently.

"In keeping with our brand principles, we always ensure our products are innovative, consumer-driven and offer a best-in-class solution for consumers and, consequently, retailers," she adds. "Our products' exceptional rates of sale vs other brands clearly demonstrate the success of this approach."

Spontex is also committed to building a sustainable range, says Evans, with



“We always ensure our products are innovative, consumer-driven and offer a best-in-class solution for consumers”

new Spontex Unwrapped, its very first packaging-free bulk products, suitable for supermarkets, embodying this ethos. "Several of our best-selling products have been relaunched in 100% plastic free packaging, now using recyclable cardboard sleeves," she says. "We are proud of our progress in removing single-use plastic and non-recyclable packaging, and our unique manufacturing know-how allows us to provide great value and long-lasting products, thereby reducing waste. When Spontex launches disposable products, it believes in giving them a second life. Through our partnership with TerraCycle®, we have succeeded in recycling more than 2 million disposable gloves."

Shelf shout

A category-focused approach is essential to stand out from the crowd and drive sales, she adds. "To help shoppers navigate the category, we have relaunched our range with an impactful design. To engage shoppers, strong promotions, activations and communication are important. We have plenty of exciting initiatives planned and are confident we'll continue to be the right branded partner in the cleaning tools category with the must-have range to drive category growth."



Source

¹⁻⁴ IRI Household, Value Sales, 52 w/e 14.05.22, Total UK
⁵ Kantar, FMCG Purchase Panel, 52 w/e 26.12.21

New from the UK's No.1 Cleaning Tools brand*



UNWRAPPED

Efficient cleaning products, packaging free!



✓ No unnecessary packaging

✓ Optimised bulk format

✓ Category leading initiative

* Source: IRI Household, Value Sales, 52 w/e 14/05/22, Total UK.

Palmer's

Reforestation in Cameroon

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KEY BRANDS

Palmer's Cocoa
Butter Formula
Palmer's Coconut
Oil Formula

Palmer's has partnered with Tree Nation to plant a forest in Cameroon, helping to fight the ongoing deforestation and climate crisis, reveals brand owner ET Browne UK.

As a brand that relies on nature to produce its hero ingredients, Palmer's has pledged to give back to the environment through the creation of this bespoke Forest which will contain 24,000 trees. This will be achieved with the help of shoppers, who will have two trees planted on their behalf, when they purchase qualifying Palmer's products, from 29 June to 9 September 2022 at any retailers in-store and online.

Palmer's has chosen to plant a range of different trees, including the Moringa Oleifer Tree – also known as the miracle tree – the fruits of which are used in medicinal and cosmetic preparations. Cameroon is also a key producer of cocoa and shea butters, two hero ingredients found in Palmer's body and haircare ranges.

Palmer's Forest will grow a total of 24,000 trees and the density will equate to 24 hectares, which is the size of around 33 football fields. The lifespan of the trees planted will be up to 150 years and will contribute to helping fight the ongoing climate crisis by, purifying the air, sustaining wildlife, and lowering the air temperature, says the company.

The Palmer's Forest will also offset 12,000 tonnes of CO2 emissions. This is equal to taking 200,000 cars off the road for a whole year or the equivalent to 100,000 short-haul flights.

In addition to the environmental impact, the Forest will also address soil erosion, assist with food insecurity and the unsustainable farming practices of smaller cocoa farmers, it says. Through



“Palmer's has chosen to plant a range of different trees, including the Moringa Oleifer Tree – also known as the miracle tree – the fruits of which are used in medicinal and cosmetic preparations”

the intercropping of multipurpose trees and fruit trees, this project is helping 500 cocoa farmers grow higher-quality cocoa beans while improving their land and livelihoods.

Commenting on the Palmer's Forest, Zahira Beddou, marketing director of Palmer's UK, says: “We are thrilled to finally launch this exciting project. Our beautiful planet provides us with amazing natural ingredients, so it is our duty as a company to protect it. We can't wait to make a positive impact in an area that provides us with our raw, natural, and sustainable materials. The Palmer's Forest development will enable us to give back to the land while making a difference to the local community.”

In addition to fighting deforestation, Palmer's will be giving all participants that have successfully registered online a chance to win a forest holiday worth up to £2,000*. This amazing holiday is for up to four people, who could stay at one of 11 locations, in a Silver Birch cabin, featuring soaring windows with dramatic woodland views, their own outdoor hot tub, wi-fi and well-equipped kitchen. The prize draw will take place on 7 October 2022 and the winner will be contacted within seven working days.

More information can be found on www.palmers-forest.com

* T&Cs apply. See www.palmers-forest.com/terms for full terms



The nature of you™

New award-winning, 5-star review facial skincare range.

Palmer's New Coconut Oil Formula facial range is your simple 4-step routine for naturally beautiful, healthy-looking skin.

Made with Fair Trade certified organic extra virgin coconut oil, Ecocert certified Monoi oil and coconut water, this range will help boost moisture, hydration, and radiance of all skin types.

The range is non-comedogenic - it will not clog your pores, dermatologist tested and hypoallergenic.

It is also free from sulphates, parabens and mineral oil.

Coming Soon at



Sofidel UK

Nicky continues to innovate

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KEY BRANDS

Nicky
fb: Nicky Tissue UK

From new products to new packaging, Nicky has a lot of exciting things to share in 2022, says Sofidel.

Nicky, which is part of the successful international Sofidel Group, strives to deliver excellence to its buyers and consumers by producing products using the most innovative technologies, not only providing core needs but exploring future paper solutions, says the company.

“We focus on innovation, sustainability, uniqueness and quality with our products,” it says.

“As we have seen the importance of toilet tissue grow over the past two years, it is key we continue to place our shoppers at the heart of the business, to deliver consumer needs,” add the company.

New design, same quality

Following the Sofidel Group’s ‘less is more’ concept – fewer words, more communication effectiveness – Nicky is introducing a new design; something which is unique, bold and clear, but nevertheless simple and impactful – changing what’s on the outside whilst keeping the same quality on the inside, says Sofidel.

“We have eliminated all unnecessary information, only presenting the key details on-pack to help make shopping easier for individuals, it explains.

“This simplicity makes the difference, adding more value and ease for consumers. There is a unique style to differentiate each product category and this creates consistency, uniqueness, reliability and instantly recognisable icons.

“Nicky’s continuous commitment to



Smart Paper



“This year we are introducing a new design – something which is unique, bold and clear, but nevertheless simple and impactful – changing what’s on the outside, whilst keeping the same quality on the inside”

supporting the environment is always at the heart of our work, therefore the new packaging will be a combination of paper packs and recycled poly making it safer for the environment.”

New Long Lasting toilet tissue

Following up on the new style, the company is also introducing a new product to its portfolio – Nicky Long Lasting toilet tissue.

“Nicky Long Lasting is the first roll on the market to offer more paper in less space with 500 sheets per roll,” it says. “A 4-roll pack is therefore equivalent to 10 standard rolls, Nicky Long Lasting not only reduces the amount of store visits needed but offers a more sustainable product through a reduction in plastic waste.

“The toilet tissue has a gentle diamond emboss for additional comfort and a delicate touch to the skin, making it perfect for the entire family.”

Apart from toilet tissue, Sofidel Group produces kitchen and hand towels, wiper roll, facial tissues, pocket tissues and napkins, all under the Nicky label.

For more information on these and the new Nicky Long Lasting toilet tissue, please visit www.nickytissue.co.uk.”



Smart Paper

NEW DESIGN SAME QUALITY



FIND OUT MORE...



nickytissue.co.uk



[@nickytissue UK](https://www.facebook.com/nickytissueUK)

Thornton & Ross

100 years of fragrance

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KEY BRANDS

Zoflora

In 1922, Zoflora developed the first fragranced concentrated disinfectant containing essential oils from real flowers. This year, the brand celebrates its 100-year anniversary of keeping homes hygienically clean and beautifully fragrant, reveals Michelle Chadwick, senior brand manager at Zoflora. “This is a pinnacle year as Zoflora continues its transition from a solus format concentrated disinfectant to a household cleaning brand with a range of products,” she says.

Launches drive brand performance

The last 12 months have been particularly strong for Zoflora having consistently outperformed the total cleaning category for the last 10 consecutive periods¹, notes Chadwick. Success can be attributed to the launch of three new product formats – Multipurpose Cleaner, Disinfectant Mist and Biodegradable Antibacterial Wipes.

Both Disinfectant Mists and Multi-Purpose Cleaners have added incremental sales to their respective categories, with 63% of Mists sales incremental and 43% of Multipurpose Cleaners. Zoflora Disinfectant Mists are now the No.2 brand in disinfectant aerosols with a 15% share², she says.

In the short term, Zoflora has also become the No.3 proprietary brand in total multipurpose cleaning, and is also joint No.3 in multipurpose trigger brand with an 11% share³. Zoflora Wipes have only just launched and, in the first four weeks of entering the market, are the No.3 brand with a 4% share, greater than both its nearest competitors⁴.



Also available in 108 pack size

“Zoflora continues to bring excitement to the category through seasonal fragrance launches such as Raspberry & Juniper berry”

Substantial media investment is supporting the product launches and capturing consumer attention with the aim of driving awareness and product trial. “In the last 12 months, Zoflora has invested £3.4m in above-the-line media with strong bursts of TV and VOD campaigns. Zoflora continues to have an always on strategy for digital, social and PR to drive brand saliency,” adds Chadwick.

Quality and long-lasting

“While the recent success of Zoflora is attributed to new formats, it is the quality and long-lasting fragrance, developed by expert perfumers which is a key driver for purchase from consumers,” she explains.

“Recognising the importance of fragrance, Zoflora continues to bring excitement to the category during the year, through seasonal fragrance launches such as Raspberry & Juniper berry which landed in Spring 2022. The latest fragrance, launched in June to mark the brand’s 100th year, brings back a fan favourite – Sweet Pea.

“2022 and beyond is an exciting period for Zoflora as it cements its position as a beautifully fragranced cleaning brand in the hearts and minds of consumers.”



Source
^{1,2} Kantar, 15 May, 2022
^{3,4} Kantar to 15 May 2022



Beautifully Uplifting Category Sales With New Launches



Zoflora **outperformed** total cleaning
for the last 10 consecutive periods*

Zoflora **innovation** driving
incremental category sales**

Media **investment of £3.4m*****
driving awareness and trial

Zoflora **CLEANS HOMES** *Beautifully*

*Total cleaning vs Total Zoflora, rolling 12w YOY% growth, Kantar, 15th May 2022

**63% of Disinfectant Mist sales have been incremental to their respective category, 42% of Multipurpose Cleaner sales have been incremental to their respective category, 52w source of growth, Kantar, 15th May 2022

***Gross media cost June 2021 to May 2022

TOTM

Sustainable stance on period care

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KEY PRODUCTS

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TOTM Organic Cotton Non-Applicator Tampons
TOTM Organic Cotton Winged Pads
TOTM Organic Cotton Liners
TOTM Reusable Menstrual Cups
TOTM Reusable Tampon Applicator
**TOTM partners with Plastic Bank to remove plastic from the ocean. Find out more at totm.com*

With recent research showing the organic/sustainable segment of the SanPro market is in growth, reflecting how consumers are switching to eco brands and products, TOTM is also building on its strong growth across all its key sales channels, says the company. In the past year it has launched in Marks & Spencer and Morrisons, adding to an already strong presence in major multiples.

TOTM is shaking up the period industry and its whole business reflects this mission, it says. “We want to give our customers affordable and eco-friendly period care, without compromise on ethics, performance or comfort. We invest time in assessing our operations to reflect our commitment to sustainability. For example, we use either FSC or recycled cardboard packaging, and we’re carbon-neutral across our business activities and organic cotton range. “Consumers appreciate the



“Our transparency and the use of quality sustainable materials sets us apart”

transparency we offer, our use of quality, sustainable materials and our stance on tackling plastic pollution*, which set us apart from other brands. “Our packaging is the boldest and brightest on shelf as we’re proud to be busting the taboo around periods. As for NPD, we have super plus pads launching next and two reusable period products arriving later in 2023.”

The fastest growing sustainable period care brand in the UK*

100% organic cotton and reusable menstrual products

“I love your products, one of the best changes I’ve made for myself and the environment”

Siobhan, TOTM customer

For more information visit www.totm.com | @totmorganic

Source: Mintel, UK retail value sales of sanitary protection products, by brand, 2020 and 2021*



WaterWipes®

WaterWipes continue to grow

DETAILS

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KEY BRANDS

WaterWipes®

Source

¹ Nielsen, Total GB Scantrack, excluding Discounters. 52 w/e 04.06.22

² Within 4 weeks in an industrial setting/plant in accordance with EN13432. Wipe material.

WaterWipes has 10.1% market share in the UK, up 0.8 percentage points versus last year¹, and has huge ambitions to drive further growth in 2022 and beyond, says the company. “As the world’s purest baby wipes, WaterWipes gently clean and help protect even the most delicate skin,” it says. “Proven to be purer than cotton wool and water, our wipes contain simply two ingredients and are 100% biodegradable² and plastic-free, allowing consumers to choose a product that is best for baby’s skin and the planet.”

WaterWipes is continuing to invest heavily in the brand to achieve its future growth ambitions. “WaterWipes are stocked in all major retailers across the UK and we are working closely with all customers to support the brand in-store and online through point of sale activation, digital marketing and price promotions,” it says.

“We have recently launched a



“We recently launched a new global brand campaign to drive brand awareness: ‘Your baby deserves less’”

new global brand campaign, ‘Your baby deserves less’, which will be communicated through our new TV advertisement and other supporting channels to drive brand awareness to a mass audience. ‘Your baby deserves less’ centres around the insight that in a world that is pushing for more, choosing less becomes a heroic act of protection for your loved one and with only two ingredients, 99.9% purified water and a drop of fruit extract, WaterWipes is your most powerful weapon in this battle.”

gently cleans and helps protect delicate newborn skin

- simply two ingredients and nothing else
- purer than cotton wool & water
- now 100% biodegradable and plastic-free wipes



Unilever

Fresh take on personal care

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KEY BRANDS

Dove
Lynx
Sure

Deodorant is one of the most habitually used products in personal care, with one of the highest penetration and frequency rates.

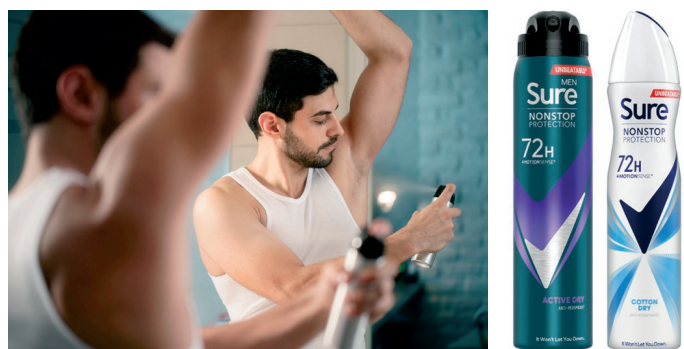
Yet while it's a staple item for shoppers, the deodorant category has been relatively stagnant since 2017¹, explains Monique Rossi, marketing director of deodorant and skin cleansing at Unilever. "Personal care habits changed significantly during lockdown, leading to a decline in usage occasions for deodorants," she says. "Sales are recovering as consumers are rebuilding their daily health and wellness routines. However, research shows that while 97% of consumers claim to be satisfied with their deodorants, one-third of them admit to having experienced odour and wetness and consider it a problem². This offers an opportunity to reinvigorate the category and re-engage shoppers with a range of superior products.

Using technology to drive value

Unilever is the nation's No.1 deodorants manufacturer with almost 60% value share³, owning the leading brands in all key deodorant need states – protection, fragrance, and care. "Recently, we unveiled a new long-term strategy to drive value and growth back into the deodorants category," says Rossi. "We launched a series of ground-breaking, technology-driven products for leading brands Sure, Lynx and Dove, and reimagined how deodorants are sold in-store using the key need states."

Protection: Spearheading this new approach is the launch of Sure Nonstop Protection. Based on ground-breaking technology, developed over more than a decade, Nonstop taps into the need for efficacious products in the category, providing 72-hour sweat and odour protection – with 72% of consumers agreeing the new antiperspirant gives them the best sweat protection ever⁴.

Fragrance: Lynx also plays a key role in the category – continuing stepping up its offer of products to deliver on fragrance needs, the second biggest need state in the (deodorant) segment⁵. Lynx Epic Fresh, launched in February, provides shoppers with a fresh fragrance and odour-bursting zinc zap technology.



“We have launched a series of ground-breaking, technology-driven products for leading brands Sure, Lynx and Dove”

Care: Research shows 77% of women in the UK suffer from underarm irritation and sensitivity⁶, so Dove upgraded its unique moisturising technology across its deodorants range to deliver a product that is kind to skin.

Remerchandising the category

To further encourage trade-up, Unilever has rolled out an entirely new approach to merchandising deodorants in-store.

"We're on a mission to revolutionise the way we shop for deodorants," says Rossi. "Based on the key deodorant need states, the fixture now mirrors the way consumers shop in-store, and drives good-better-best merchandising principles."

The initiative will enable shoppers to quickly identify which deodorant is right for them, encouraging trade-up and re-igniting excitement into the category, she says. "This forward-thinking is fundamental to category growth. Retailers will benefit from increased shopper interaction at the fixture in-store, in turn driving spend."

Source

¹ Nielsen, MAT Value Sales, March 2022
² Sure research
³ Nielsen Connect Express, MAT period ending 29.01.22
⁴ 72% of 188 agreed, 2021 study
⁵ Unilever category research
⁶ Global Dove Deos H&E 2017 – Europe Cascade

DRIVE VALUE THROUGH TRADE UP TO SUPERIOR TECHNOLOGY

WITH THE NATION'S N^o. 1 DEODORANT MANUFACTURER

PROTECTION

OUR NEXT GENERATION SWEAT PROTECTION

72-HOUR SWEAT & ODOUR PROTECTION FROM THE UK'S #1 ANTI-PERSPIRANT BRAND¹



FRAGRANCE

FRESH AND LONG-LASTING FRAGRANCE

ODOUR-BUSTING TECHNOLOGY FROM THE UK'S #1 MALE TOILETRIES BRAND²

CARE

SUPERIOR UNDERARM CARE

DOVE'S UNIQUE MOISTURISING TECHNOLOGY FROM THE UK'S #1 CARING BRAND³



1 Nielsen Connect Express, MAT period ending 29.01.22.
 2 Nielsen Share of Value in %, MAT 19th June 2021, Male UK.
 3 Nielsen Connect Express, MAT period ending 29.01.22.

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www.thegrocer.co.uk