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The Grocer Guide to...

The Grocer

Household, hygiene & personal care



Analysis

Fresh and fragrant

When times are tough, consumers tend to look for simple sources of comfort. Clean and fragranced environments bring a sense of tranquillity, enhancing moods that can also be stimulated by indulging in self-care products – but in this climate, all of it needs to be efficient and affordable, say suppliers

With so many challenging events happening around the world in recent years – such as Covid, the war in Ukraine, climate-induced natural disasters and the difficult economic climate – consumers increasingly look for comfort within the relative safety of their four walls. Household and personal care are two areas where they can feel in control and can boost their mood, so at-home hygiene and fragrance, plus looking after personal health and wellbeing are currently high priorities for many.

In a 2023 report on Global Household Care Trends¹, Mintel focuses on two particular themes: home economics and homemade joy. In the first strand, it notes that the need to kill germs gives way to the need to save money, indicating that consumers will reassess what value means to them. In the

second, it says that, faced with difficult times in the world around them, consumers will look to homecare as an inexpensive way to destress and find joy. That latter theme could also be true of personal care, with consumers increasingly seeking ways to nurture their mental and physical health in times of turbulence in the wider world.

So, mindful of the stresses placed on today's consumers, suppliers in the household, hygiene and personal categories are focused on value, quality and innovative fragrance.

In household categories, Ineos has seen a shift from brands to private-label – or indeed from premium to mid-table brands – and a rejection of 'additional' purchases², as one impact of the cost-of-living crisis on shopper behaviour. "Shoppers want their lives to be simplified, so are opting for multi-

purpose options instead of buying specific products for each household task," says Caroline Reynolds, head of marketing & innovation. "Most household categories are in growth purely from an inflationary perspective, not volume-driven. So people are paying more for the same or, in some cases, less volume."

As the UK's fastest-growing hand wash brand³, Ineos plans to use the relationships developed with retail partners as a platform to launch the brand into new categories, she reveals.

Meanwhile, Thornton & Ross cleaning brand Zoflora has had a strong year in a static market, experiencing double-digit growth⁴, up 10.4% compared to a total cleaning market down -0.3%, reports the company. Own-label cleaners are down -0.2% in value and -9.2% in



volume⁴ compared to overall brands down -2/5% in value and 11.5% in volume⁴, it adds.

Over in the cloths, scourers and gloves category, the market is also relatively flat at -0.4% year on year⁵, reveals Marigold marketing manager Laura Marsden. “As budgets are squeezed, we are seeing a move towards more ‘intentional spending’ – a 2023 trend identified by Mintel⁶ – with shoppers looking to make their money go further, such as wanting to buy fewer products, but of better quality,” she says. Marigold, remains the No.1 gloves brand in the market, with a 45% market share by value⁷, she adds, and its marketing efforts for the year are focused on educating consumers on each product’s unique benefits – “specifically their durability and the value for money they offer”.

For Mapa-Spontex, more time spent at home coupled with habits formed during the pandemic are driving increased consumption through more frequent cleaning occasions, says marketing manager Jo Evans. In terms of the cleaning tools & gloves category, there’s no evidence currently of any significant trading-down, with better-value products often being branded lines that last longer and do a better job, she says. “Shoppers still seek the reassurance of well-known and trusted products like ours that bring performance benefits. Additionally, the price difference between brand and own-label tends to be relatively small in this category vs some others, so there’s not always a huge saving to be had by trading down, especially if product efficiency and longevity is compromised.”

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Analysis

However, she agrees that the cost-of-living crisis has made value for money more important than ever before and says the company has working tirelessly to manage inflationary pressures and limit the impact on customers and shoppers. The company has absorbed and partially offset rising costs by using its global sourcing power, and is constantly monitoring and improving supply chain efficiencies, she says. In addition, upweighted promotional activity and a change in the product mix, such as the launch of Spontex Unwrapped products that are sold as singles at a lower price point, have played a role in ensuring the business offers products at affordable prices.

Elevated inflation and a depreciating currency have been the main factors in causing a nationwide household squeeze, especially in the markets of food and groceries, says Evo Lifestyle Products managing director Joby Cronkshaw. “We have been witnessing an increase in prices across all markets. The inflationary environment affects all businesses and [our] Scrub Daddy [brand] is by no means isolated from these.” However, with a large and dedicated customer base and significant unrealised potential in terms of further distribution, the brand is well positioned to weather the storm, he adds. “Positive feedback and endorsements from satisfied users have contributed to the brand’s popularity and growth.”

With Scrub Daddy’s products now more widely available in multiple grocers, including Tesco and Asda, this has contributed to its sales growth, up 33.3% year on year⁸ and establishing the brand as the No.3 sponge/scourer brand in the market for the second year running⁹, he adds.

In the personal care category, Ordo has seen a noticeable change in the way consumers approach dental hygiene, says co-founder Barty Walsh. “Consumers are certainly looking for better-value propositions, and they are being more cautious about their spending habits and ensuring more consistent value for money,” he says. “However, we strongly believe that health and wellness shouldn’t be compromised and this is a big part of the education piece as a brand that we are trying to grow – that oral care



should never be compromised and high-quality oral care shouldn’t be expensive.”

Some consumers are downgrading to less expensive dental care products that they perceive to be better value due to the “false RRP’s some brands have created in the category”, he adds. “This is especially noticeable with dental hygiene products, such as toothbrushes, toothpaste and mouthwash.”

Recognising this shift in consumer spending has prompted the company to bring forward some new product development originally planned for later in the year. In September, Ordo will be launching its Sonic Lite toothbrush, which has been “carefully value engineered and uses the same technology as our hero product Sonic+ but with an even more affordable price tag (£34.99), making our range even more accessible to our consumers”, he says.

Hygiene drivers

With multi-purpose products popular as consumers look to save money, efficiency and achieving optimum results are still the name of the game in household cleaning.

“Consumers are looking for cleaning products that offer versatility and can be used for multiple surfaces and purposes,” says Evo Lifestyle’s Cronkshaw. “This trend is driven by convenience and a desire to reduce clutter by having fewer specialised cleaning products,” he says. “Multi-purpose cleaners, wipes and all-in-one solutions are examples of products that cater to this demand.”

Alongside this there is also a demand for specialised cleaning solutions that target specific surfaces or areas, such as stainless steel cleaners, granite countertop cleaners and carpet stain removers, he adds. “Consumers are willing to invest in products tailored to their specific needs for optimal



-0.3%

Performance in value of the total cleaning market⁴

Kantar

-0.4%

Performance in value of the cloths, scourers and gloves market⁵

Kantar

78%

of UK adults purchased beauty and personal care products in-store in the last 12 months¹¹

Mintel

cleaning performance.” Scrub Daddy is in the process of developing an eco-friendly stain removal product, which will be coming to the market this year, he reveals.

Thornton & Ross also points to a trend for simplified repertoires using more multi-purpose products. In addition, notes the company, there is growing interest in fragranced products, with mood-enhancing fragrances, or fragrances used to suit seasonal changes.

At Ineos, some of the big trends observed include sustainability (washing at lower temperatures, refills, concentrates), a continuing desire for new and on-trend fragrances (trickle-down from fine fragrance), the growth of fruity & citrus fragrances in the household, and simplification (reduced clutter). “We have used all of these to inspire our ranges,” says Reynolds.

While some shoppers are focused on low prices, others are looking to

make their money go further, wanting to buy fewer products, but of better quality, says Marigold’s Marsden. With education key to its marketing efforts, the company is focused on communicating the durability of its products, such as Marigold Extra Life Kitchen Gloves, which are triple-layered, helping them to last longer or the fact that Marigold cloths are reusable and machine-washable.

In personal care, there is a growing trend towards natural and sustainable products that don’t compromise on performance, says Ordo’s Walsh. “Consumers are looking for products that are gentle on their teeth, gums and the environment while still delivering the desired effective result. At the same time, oral hygiene is becoming more important than ever, with people focusing on preventative care to maintain a healthy smile,” he says.

“In terms of flavours, the majority are still traditional mint, with unique

flavours having large peaks and troughs. Therefore, we see a trend towards mint flavours with hints of other fresh and clean flavours. The reason mint is used in toothpaste is not just the refreshing feel it gives, but it also acts as a natural antibacterial that helps maintain good oral hygiene. However, we see an increasing interest in unique and exotic flavours that offer a more sensory experience.”

Personal and planetary health

Sustainability continues to be a key focus, but consumers are struggling to find choices that deliver on efficacy while being affordable at the same time, says Ineos’ Reynolds. The company has introduced a first-to-market fully recyclable trigger for its multi-purpose spray, so all of its packaging is fully recyclable and contains recycled plastic, she reveals. “We are also launching a refill for every variant.”

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She notes that wellness remains a really important macro trend in household as well as personal care, and the company has introduced proprietary fragrance technology for its ranges, with 'active fragrances' designed to help improve wellbeing and promote better sleep, among other benefits.

At Marigold, the full gloves range and their plastic packaging can be recycled through TerraCycle®, for free, says Marsden. "Consumers can participate either by using public drop-off locations or can register as private collectors (enabling collection from the comfort of their home). In addition, in 2022, the company launched Marigold Let it Shine On & On! Microfibre Cloths, made from 100% recycled plastic material (PET plastic bottles), with each cloth approximately equal to one 500ml PET plastic bottle, she says. "These cloths harness the deep cleaning power of microfibre, using just water to remove dirt, grease and dust, without the need for chemicals, and can be machine-washed and used again and again," she says.

For Evo Lifestyle, meanwhile, Scrub Daddy's Power Paste, made from natural materials is non-toxic and biodegradable, says Cronkshaw. "Our sponges are well known for their longevity due to their resistance to odour – the most common reason for sponge replacement – as well as the ability to be sanitised in the dishwasher and durability. These qualities mean they are replaced far less frequently than the traditional kitchen sponge/scourer, therefore reducing wastage.

While product efficiency remains the primary purchase driver for consumers, says Mapa-Spontex's Evans, she acknowledges that they are now attaching a lot more importance to the environment when choosing their cleaning products. "Shoppers are aware of the impact consumables have on the planet, so we have and will always consider this during our product development. For us it's key to deliver sustainability improvements such as plastic-free packaging and recycled materials... without compromising efficiency. Our Soap Pads are a great example of what we are striving to achieve as they have a 100% recyclable cardboard pack that's very different to anything used in this sector. We



use 100% biodegradable soap that's free from animal ingredients and hazardous preservatives, plus 85% recycled steel wool to make the pads."

Among other product initiatives, the company has recently created its new Spontex Unwrapped range, which Evans says is the "first packaging-free bulk products suitable for supermarkets". The products themselves are made using recycled fibres and the scourer has a 100% biodegradable sponge, she reveals. "The Unwrapped range really resonates with consumers; it's performing above expectations, driving incremental sales and attracting new shoppers to the category," she adds.

For Ordo, sustainability is a key pillar and it has big plans to make a big impact, says Walsh. "Many of our products, such as our toothpaste and mouthwash, are vegan and cruelty-free. They contain no SLS (which is an irritant) and we only use

natural flavourings in all our oral care products." In terms of packaging, its toothpaste tubes are made from fully recyclable HDPE and, by 2024, the company aims to have less than 3% single-use plastic packaging. "While it's true that inflation has impacted the cost of these products, this is something we have never passed on to the consumer," he says. "It's a non-negotiable for us as we believe our consumers shouldn't have to compromise on ethics, especially within the cost-of-living crisis."

The company is also introducing the world's first closed loop brush head recycling scheme, in which consumers can return their used heads, which will then be cleaned, melted down and made into new products to be used in the bathroom "This 360-degree approach is key in ensuring that, as a brand, we follow through on our promises to be more environmentally aware, offering a fully sustainable solution," he explains.



Could category merchandising improve?

Evo Lifestyle Products MD Joby Cronkshaw points to a continued need for products to be seen more within grocers and, to help, its Scrub Daddy brand has rolled out branded shelf-ready packaging to improve recognition in-store. This, he says, is helped by the brand's iconic fluorescent orange, making it easy to spot among other brands.

Ineos head of marketing & innovation Caroline Reynolds says it has worked really hard with retail partner Asda to merchandise differently for its launch. All its ranges will be merchandised together, so that people can shop different categories without moving from aisle to aisle.

Launching new-to-market 'cross-category fragrances' designed to work across the whole range, means that if a shopper likes the fragrance of their multi-room spray, they can also pick up the same fragrance in wipes or washing up liquid, she explains.

For Thornton & Ross, the top four multiples do merchandise their categories effectively in cleaning. "We know from research that, when shoppers are in-store on a cleaning mission, they shop by product type first and then by format – for example, firstly looking for a multi-purpose product then deciding if they want a trigger or a wipe and then making a brand choice," it says. "From a budget point of view,

generally shoppers expect to find the best deals on the ends."

Mapa-Spontex marketing manager Jo Evans believes the cleaning tools & gloves category is largely merchandised in line with shopper expectations, being segmented by product type, with a 'good, better, best' hierarchy to deliver ease of shop. However, she says more impactful category signposting and educational POS would help to keep hygiene & cleanliness front of mind and drive engagement with the category. The company has relaunched its complete range of cloths and scourers with a simplified colour-coded packaging design

based on category segmentation, she reveals. "This has increased the visibility of Spontex in-store and helps shoppers to make quick decisions at the fixture."

Retailers are always looking for new and innovative ways to merchandise the oral care category effectively, says Ordo co-founder Barty Walsh, but he notes that not all the responsibility can be placed on the retailers.

"Ordo provides educational materials and displays to help consumers understand the differences between various products – for example, information on the benefits of electric toothbrushes versus manual," he says.

The power of social media

For many suppliers across the categories, social media has become a prime way to reach out to consumers – in particular the younger generation.

Social media is the new word-of-mouth endorsement with the rise of the influencer, says Thornton & Ross. "Instagram is the most popular platform, with rich content from users," it says. "Meanwhile, TikTok is growing in popularity, with growth in 'cleantok'," it notes.

Scrub Daddy maintains an active presence on various social media platforms to engage with customers, share product updates, cleaning tips and interact with the community, reveals Cronkshaw. "TikTok has seen an impressive reach, particularly with younger audiences," he says. "We share creative cleaning-related videos, hacks and tips, and we engage with the TikTok community by participating in trends, challenges and collaborations with

influencers to showcase our products and demonstrate their cleaning capabilities in an entertaining way."

Trialling TikTok this year is Ineos, with some of its 'Go Humans Academy' content (a year-round effort to support people to live better for longer), as this platform has "huge levels of engagement with younger consumers for the right content", says Reynolds. "Social media influencers remain important to the category, especially since the birth of 'cleanfluencers' like Mrs Hinch. Facebook remains the largest social media channel and Instagram still has strong engagement levels," she adds.

Instagram and TikTok have a huge impact among younger consumers, prioritising short form, engaging content, agrees Ordo's Walsh. "Oral care brands must create visually appealing content that resonates with the younger generation, who are most likely to be influenced by trends, while

still ensuring the content is educational and true. Consumers trust relatable influencers, so videos demonstrating oral hygiene routines or reviewing new products can be very beneficial in connecting with this audience."

Platforms like Instagram, TikTok or even Snapchat are where our young target audience is spending more time," says Zahira Beddou, marketing director at Cocoa Butter Formula moisturising brand Palmer's. "Our target audience is watching less and less TV and using a lot less offline media, so the best way to get their attention remains social media. The help of our Palmer's Squad on these platforms is essential in getting our message across and reaching new potential young shoppers. Our Squad is made up of a selection of content creators who are real fans and users of the brand and who can talk authentically about our products. The Palmer's Squad keeps growing year

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on year as we work across different platforms and projects.”

At Marigold, the brand has collaborated with influencers such as @dazlincleaning to create content which taps into the trend for low-cost and chemical-free cleaning, reveals Marsden. “This shares tips and hacks to clean using household items and, of course, the Marigold range,” she says. “In the fmcg sector and specifically the cleaning sector, it’s vital that we show end-users the key benefit of products in an easy-to-understand and digestible manner. Influencers allow us to reach target demographics, show the superior quality Marigold offers and deliver key communication messages, which are often not seen by the consumer when looking on the shelf.”

Mapa-Spontex is also very active across several social media platforms, including Instagram and TikTok, both of which are “key to target and communicate with a younger audience”, says Evans. “Influencers also have a valuable role to play. However, we’ve seen that, in our category, brands that focus too heavily on endorsements often experience short-term benefits but are unable to match the consistent performance of our consumer-driven, high-quality products.” As such, she says, TV coupled with in-store media and activations at point of purchase remain some of the company’s most effective tools.

Looking ahead

The household, hygiene and personal care categories are dominated by brands that have been around for years, and continue to attract a similar audience, says Ineos’ Reynolds. “Every retailer is struggling to convert shoppers into their household categories, so brands need to offer newness and innovative ways of attracting new shoppers, and that can deliver on the purchase drivers of each category – such as sustainability, fragrance, efficacy and design-led packaging – at affordable prices.”

While the cleaning tools & gloves category seems “quite resilient” to economic crisis, with no significant evidence of trading down currently, Mapa-Spontex’s Evans says the company does anticipate some switching or decreased consumption moving forward if households continue



to face mounting financial pressures. “As consumers spend more time at home and remain engaged with cleaning, driven by habits formed during the pandemic – such as new cleaning routines and awareness of the importance of hygiene – many will continue to actively seek out the best product for the job,” she says.

As for beauty and personal care (BPC), a new report by Mintel¹⁰ says that many consumers turn to beauty for an affordable mood boost and, while sales across Europe may have been sluggish in 2022, the sector has historically proven resilient against economic headwinds. Consumers are expected to continue spending cautiously in BPC, it says, however this translates to more conscious consumerism – with consumers maybe buying less, but more willing to spend on products they deem worthy.

In terms of the oral care sector, Ordo believes there is still a lot of opportunity for growth, particularly in developing truly new and innovative products which meet the ever-changing needs of consumers and challenge industry norms, says Walsh. “Maintaining a strong position in

the market requires continuous innovation and adaptation,” he notes. “Value proposition and educating consumers on the true value of products is something that we as a brand truly believe. We see a huge shift towards consumers looking for quality and value.”

Perhaps the last word should go to Mintel¹, which notes that “political division, global pandemics and decades-high levels of inflation have all put stresses and strains on ordinary people. As result they are looking for ways they can derive enjoyment from everyday life to offset the worrying issues they are facing”. Both the household and personal care categories are ideally placed to build on this and give consumers accessible and affordable moments of joy.

Sources

¹ <https://tinyurl.com/47ajdatv>

² The number of household categories consumers are buying has dropped by 10% in the past 3 years, meaning people are looking for products with multipurpose benefits as a way of keeping an eye on expenditure

³ Kantar, Volume (‘000 packs), 52 w/e 19.03.23

⁴ Kantar, Value, 52 w/e 13.03.23

⁵ Circana, Total UK market value sales, Household gloves category, 52 w/e 22.04.23

⁶ Mintel, Global Annual Trends 2023, 26.10.22

⁷ See 5

⁸ Kantar, Brands in Total Market, 52 w/e 16.04.23

¹⁰ <https://tinyurl.com/2p8k67hp>

¹¹ <https://tinyurl.com/2p9pzur2>

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WaterWipes®

Source

- Nielsen total market excl Discounters, 52 w/e 03.06.23
- Wipe made from regenerated cellulose (viscose) utilising wood pulp as a precursor.
- This claim does not refer to the full product lifecycle nor the external plastic packing and relates to the wipes only. For more information see our website.
- Kantar WorldPanel total market incl. discounters, 52 w/e 19.02.23

WaterWipes has grown ahead of the market throughout 2022 and into 2023, with volume up 7.8% versus a category decline of 2.8%¹, and has huge ambitions to drive further growth in 2023 and beyond, says the company. “WaterWipes gently cleans and helps protect even the most delicate skin,” it says. “Purer than cotton wool and water, our wipes contain simply two ingredients and are plant-based² and plastic-free³, allowing consumers to choose a product that is best for baby’s skin and the planet.”

WaterWipes was one of the first major brands to convert to plastic-free, it adds. “In 2020 only 14% of wipes could make this claim, but this figure has risen to 63% and is expected to grow further.”

Investment for growth

WaterWipes continues to invest heavily to achieve its future growth ambitions. “Stocked in all major retailers across the UK, the brand is



“Purer than cotton wool and water, our wipes contain simply two ingredients and are plant-based and plastic-free”

supported in-store and online through POS activation, digital marketing and price promotions,” it says. “Making the category easy to find and using effective secondary displays next to complementary products are key as the baby wipes category has the highest level of purchases by households without children, at 61%⁴.”

“We also continue to invest in our global brand campaign, ‘Your baby deserves less’, communicated via TV ads and other supporting channels.”

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KEY BRANDS

Scrub Daddy

Scrub Daddy has experienced significant brand growth over the past 12 months up almost 34% year on year¹, reveals owner Evo Lifestyle Products. This has been driven through recruitment of shoppers, as well as frequency of purchase², says managing director Joby Cronkshaw.

Scrub Daddy has had impressive growth over the years, driven by greater product demand and expanded distribution, he adds. “The unique design and effectiveness of the Scrub Daddy sponge have contributed to its popularity, leading to revenue growth for the brand. It has developed from a niche product to a widely recognised and sought-after cleaning brand through the years and that hasn’t changed in the past 12 months,” he says.

“Our products are now available in various retail stores and online platforms, allowing them to reach a broader consumer base. We have expanded our product line to include variations of the original Scrub Daddy sponge, as well as other cleaning tools and accessories. By diversifying our product offerings, we have been able to cater to different cleaning needs and thereby further fuel brand growth.”

Looking ahead in the coming months and into 2024, Scrub Daddy is closing the gap to the No.2 position for sponge/scour brand, which would be a big accomplishment, notes Cronkshaw.

“The distinctive orange packaging of Scrub Daddy products makes them stand out among competing brands on-shelf,” he says. “The vibrant colour draws attention and entices consumers to explore the product further, even if they are not already familiar with the brand. This creates curiosity and generates interest, leading to increased



“By diversifying our product offerings, we have been able to cater to different cleaning needs and thereby fuel further brand growth”

product visibility and potential sales. By making the brand more easily recognisable, shelf-ready packaging can potentially drive higher sales.”

Innovation and customer appeal

New product development (NPD) is crucial for Scrub Daddy to stay competitive, meet customer needs, and drive growth, explains Cronkshaw. “We have expanded our product offerings beyond the original Scrub Daddy sponge. We have introduced variations such as seasonal shapes, the award-winning Dish Daddy, and the viral Damp Duster, catering to different cleaning needs and preferences. Our ideas come from sources such as market research, customer feedback, internal innovation programs and competitive analysis. Market demand, feasibility, strategic fit and profitability are all considered to narrow down the ideas to a manageable set.”

Scrub Daddy has earned numerous accolades for its innovative products. These include winning the Household category in The Grocer’s New Product Awards 2022 for its Scrub Daddy Dish Daddy product. It was also recently named as a finalist in the Household Goods Brand of the Year category in The Grocer Gold Awards 2023.

“We are a brand known for our commitment to creating unique and effective cleaning products, and we will continue to develop new products to fit consumers’ needs.”



Source
^{1,2} Kantar Worldpanel – 52 w/e
 16.04.23 – Brands in Total
 Market

Scrub Daddy

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Sponge/Scour
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www.scrubdaddy.co.uk

*Kantar, FMCG World Panel, 52 w/e basis 16/04/23

Freudenberg Household Products

Marigold continues to shine

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KEY BRANDS

Marigold

↙ The 2023 trend report from Mintel¹ predicts a drive towards ‘intentional spending’, with shoppers aiming to make their money go further, such as wanting to buy fewer products, but of better quality.

“We know how much price is impacting shopper decisions currently, but this isn’t the first recession we’ve seen, says Laura Marsden, marketing manager UK consumer at Freudenberg Household Products. “During the last recession, shoppers also wanted value (not just price, but also promotions and perceived value), and quality/efficacy².

“Quality lies at the heart of the UK’s No.1 gloves brand, Marigold³, with products designed to be durable, long-lasting and have benefits tailored to meet specific needs,” she says. “For example, the Marigold Extra Life Kitchen Gloves (the UK’s best-selling rubber glove)⁴, are triple-layered for extra protection and durability.

The Marigold Longer Bathroom Gloves, which are in 27% value growth YOY⁵, are another example of a product developed to meet specific consumer needs. With bathrooms one of the top areas for cleaning, Marigold offers its consumers extra protection from splashy and dirty tasks, thanks to the longer cuff length of these gloves.”

With many consumers looking for ways to lessen their impact on the environment, Marigold offers consumers the ability to recycle their old Marigold gloves (and the plastic packaging) through TerraCycle[®] – a free service allowing consumers to give their gloves a new lease of life.

While the Marigold brand is best known for its gloves, its range of cloths and scourers includes products that are not only durable and long-lasting, but



“Marigold products are designed to be durable, long-lasting and have benefits tailored to meet specific needs”

save consumers much needed time, reveals Marsden.

“Microfibre cloths account for the largest proportion of cloth sales (25% of value sales⁶) with consumers increasingly understanding the benefits microfibre offers,” she says. “Responding to this trend and the demand for more sustainable options, Marigold launched the Let it Shine On & On! Microfibre cloths. Harnessing the deep cleaning power of microfibre, these cloths are made from 100% recycled material, with each cloth approximately equal to one 500ml PET plastic bottle.”

2023 will also see a new look for the Marigold Squeaky Clean Microfibre cloth. Launching this summer, it will offer even more benefits, and will be supported with in-store media, digital, social and influencer activity.

“The brand continues to evolve to meet changing consumer demands and trends,” says Marsden. “Over the last couple of years, it has relaunched its look and feel to a bold, modern and distinct identity. In response to the rising costs of living, education has been a key priority – showcasing the unique USPs the products offer and demonstrating how they can make customers’ money go further.”

Social media remains a key channel for the brand and a new strategy, implemented in Q4 2022, has seen engagement figures flourish.



Source

- ¹ Mintel Global Annual Trends 2023, October 2022
- ² Mintel Recession and the cost of living crisis: UK, January 2023
- ^{3,5} Circana, Total UK Market value sales for the Household gloves category, for the period comprising 52 w/e 22.04.23
- ⁶ Circana, Grocery Market to 22.04.23, excl floor cloths & specialist

Marigold[®]

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a brand of
FREUDENBERG

*Source: Circana, Total UK Market value sales for the Household gloves category, for the period comprising 52 weeks ending on 22nd April 2023

INEOS Hygienics

Revolutionising cleaning

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KEY BRANDS

INEOS
INEOS GRENADEIER
 Belstaff

Global brand Ineos is launching three new household ranges this summer, set to revolutionise the category, it says.

The UK's fastest-growing hand wash brand¹ is bringing its innovative, science-driven approach to the cleaning aisles, an area that has been mired by stagnant sales in recent years, explains head of marketing & innovation Caroline Reynolds.

The products are exclusively available in Asda, having beaten another high street name to stock all four products across 600 stores nationwide.

Each next generation, plant-powered product has been developed in the UK with proprietary technology. The range of 16 SKUs has been put together after intensive research, relentless optimisation, and the input of thousands of shoppers. "We innovate on the key drivers of every category" says CEO Rory Tait. "We make each aspect of the product 10% better than what's already on offer. All those 10 per cents really add up, delivering unbeatable cleaning that redefines value for the customer."

Putting science and sustainability at its heart, Ineos used its UK R&D centre to make the new ranges. "Plant-based is the norm, not the exception. And naturally, our packaging is both 100% recyclable and made from recycled plastic," says Reynolds. "We also plan to provide refills for every pack sold."

The ranges are made with plant-powered cleansers, without compromising on performance, she adds. The surface spray and wipes are designed to kill 99.9% of bacteria and viruses², while wiping out the heaviest grease, limescale and watermarks –



“The UK’s fastest-growing hand wash brand¹ is bringing its innovative, science-driven approach to the cleaning aisles, an area that has been mired by stagnant sales in recent years”

so they can be used in any room of the house.

The non-bio concentrated laundry liquid delivers amazing stain-removing results at temperatures as low as 20°C without using animal enzymes, which are known to irritate skin and damage clothes. And the washing up liquid is actually a two-in-one hand and dish wash, meaning customers only need one bottle next to the sink, while protecting their hands from products with skin-drying properties.

For Ineos, it was essential that high performance didn't come at the cost of fragrance either, reveals Reynolds. In fact, the ranges introduce the first-to-market concept of cross-category scents. The new fragrances – including Rhubarb + Pomegranate and Pink Grapefruit + Tangelo – are designed to work across the whole range, meaning shoppers can pick up their favourite ones in everything from wipes to washing up liquid.

"All of our products are scientifically designed to help you perform at your best," explains Reynolds. "Even our fragrances are chosen for their mood-enhancing benefits – whether that's helping you sleep better when used on bedsheets or boosting concentration at work. We take the concept of marginal gains in sport, and apply it to household cleaning products, optimising performance in every way: efficacy, fragrance, sustainability and usage."



Source

¹ Kantar, Volume (000 packs), 52 w/e 19.03.23

² Virucidal activity against enveloped viruses

INEOS

Science + Performance

G
The Grocer
Gold Awards
2023
FINALIST
Household Goods
Brand of the Year



New from INEOS,
the fastest growing
hand hygiene brand*

Unbeatable
cleaning
from a next
generation
household +
laundry range



Now available at

ASDA

Available to wider trade post 25th August



KILLS 99.9% OF
BACTERIA + VIRUSES**



MULTI-ROOM



INEOS ACTIVE
FRAGRANCE TECHNOLOGY



PLANT POWERED

*Kantar - Volume (000 packs) - 52 w/e - 19th March '23. **Virucidal activity against enveloped viruses.

Libman Brands UK

Waving the cleaning wand

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KEY BRANDS

Dishmatic
Bathmatic
Libman Floorcare

➔ Dishmatic has always been synonymous with its famous fillable dish wand and refills, holding over 90% market share¹ and selling across the world, as far away as Australia, says Laura Allen, head of sales & marketing at Libman Brands UK. “However, this year has been pivotal for the fun, bubbly brand as we widen our product portfolio and extend even further to our strong customer base,” she says. “UK manufacturing is at the heart of everything we do and we’re so excited to launch Dishmatic Wonder Wand and Refills – our new standing, trade-up dish wand with XL flexi-fibre head and flow control liquid release. As a true challenger brand, we’ve spent 25 years establishing brand loyalty to deliver the highest refill ratio in the market². By creating our new Wonder Refills, compatible with all Dishmatic dish wands, we want to give consumers newness and continue to drive category growth.”

Ongoing innovation

With three new launches over the last year and four totally new products launching in July alone, it’s safe to say that continued innovation is one of the company’s key objectives for Dishmatic for the rest of 2023, adds Allen. The new members of the Dishmatic Wonder Range include Wonder Wand and Refills and Wonder Stars Combo using Flexi-Fibre scourer technology, which is firm in cold water and soft in warm water for all non-scratch washing up needs. Other new product launches



“By creating our new Wonder Refills, compatible with all Dishmatic dish wands, we want to give consumers newness and continue to drive category growth”

include Dishmatic Microfibre Tear N Wipe Cloths, created to offer a reusable value proposition for the consumer; they can just tear a pink cloth off the roll, use with or without cleaning liquid in your kitchen or bathroom and the cloths can be washed in the washing machine, ready to be used again.

Genuine value

After a successful TV campaign last year the bubbly brand has ‘gone back to basics’ for 2023 leaning into the challenging retail landscape, reveals Allen. “Our focus is on delivering market-leading standout on-shelf with prescriptive usage messages, delivering high-quality innovation and genuine value for the consumer – we want to inject some fun and try to make mundane tasks that bit easier without charging a fortune.”

“Our focus is to constantly evolve our UK manufacturing, so we can be dynamic and respond to market trends and customer demands quickly while managing costs in a challenging market and delivering a strong NPD pipeline that offers real innovation and consumer benefit,” explains Gavin Braine, CEO. “We’ve built a fantastic brand and have exciting social media, influencer and partnerships lined up to support our new launches – we love our ongoing support from Mrs Hinch and Stacy Solomon and now we’re casting our net wider in 2023; at the end of the day everyone has to clean.”

Source
^{1,2} IRI, 52 w/e 18.03.23

Dishmatic®

The
UK's #1
Dish Wand



Made in the UK

90%
market share of dish wand category

Driving ongoing growth in declining category

#1
refill ratio in category

Meet the new members of the

Dishmatic family



Grow your sales with Dishmatic,
the UK's #1 Dish Wand



Dishmatic is part of the family owned by Libman Group of companies

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*IRI, Scouring Data, 52 w/e 19 March 23

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 the cost-of-living crisis has made value for money more important than ever before and has led to consumers seeking the reassurance of well-known and trusted brands, with products that are efficient, long-lasting and affordable.

As consumers remain engaged with cleaning, retaining many of the habits formed during the pandemic, they continue to actively seek out the best products for the job. In a challenging context, the total cleaning tools & gloves category value is declining by -1.3%; however, brands remain strong making up 51% of total category value². Spontex continues to outperform the market and is gaining share as a result, up 0.7% pts vs two years ago to 23.2%, which is greater than the next five brands combined³. This growth has been driven by an influx of new shoppers, and the brand is now bought by over one in four UK households⁴.

More than 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 market-leading products with added value features to make cleaning better, quicker and easier, it says. The brand 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 has discovered a spectrum of cleaners from less to more houseproud 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.

Jo Evans, marketing manager says: "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. The exceptional rates of sale of our products vs other brands clearly demonstrate the success of this approach."

Spontex believes it can no longer design a new product unless it considers its environmental footprint,



“Spontex’s growth has been driven by an influx of new shoppers, and the brand is now bought by over one in four UK households⁴”

so the company is committed to building a sustainable range. New Spontex Unwrapped, its very first packaging-free bulk products, suitable for supermarkets, embodies this ethos. Several of its best-selling lines and its full reusable gloves range in 2023 have been relaunched in 100% plastic-free packaging, now using recyclable cardboard sleeves. Spontex is proud of its progress in removing single-use plastic and non-recyclable packaging and, when it launches disposable products, believes in giving them a second life; through its partnership with TerraCycle®, it has recycled more than 3 million disposable gloves.

Shelf shout

As a category-focused approach is essential to stand out from the crowd and drive sales, Spontex has relaunched its range with an impactful design that clearly communicates specific product benefits. To further engage shoppers, strong promotions, activations and communication are important – and the company has plenty of exciting initiatives planned. This, it says, means it will continue to be the right branded partner in the cleaning tools category with a must-have range to drive growth.



Source
^{1,3} Circana InfoScan, Value Sales, 52 w/e 13.05.23, Total Wiping, Scouring & Gloves Market
⁴ Kantar FMCG Purchase Panel 52 w/e 25.12.22

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

* Circana InfoScan, Value Sales, 52 w/e 13/05/2023, Total Market.

Ordo

Fresh thinking on oral care

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KEY BRANDS

Sonic+ Toothbrushes
Sonic+ Brush Heads
Sonic Lite Toothbrush
Hydro Sonic Water Flosser
Oral Care – Toothpaste, Mouthwash Concentrate
Inderdental Brushes

Ordo has become the third-largest toothbrush brand in the UK, following its launch to the market in 2019, as per IRI data¹. Since its introduction, the company has seen a really positive performance, retaining the same 100% year-on-year revenue growth, while also achieving net profitability for the last three years, and continues to grow its retail accounts by 155% YoY², it says. All of the revenue generated to date has been from one SKU and it overindexes in repeat purchases, at a level of 28%³, despite less than 20% of its product being sold on deal.

The company has ambitious plans for growth in international markets, with 2023 year-end earnings expected to double vs 2022. However, the brand recognises that times are going to be tough for consumers, so is committed to keeping affordability at the forefront of its objectives. “We believe that less is more. Market difficulties present us with an opportunity to solve a problem, and, during tough times, consumers crave solutions,” it says. “This is why Ordo works; we keep it simple, staying true to our values and making oral care more affordable.

“Information is key, but information overload can be detrimental, so Ordo aims to educate, stripping back the fuss and communicating without the frills,” it adds. “We’re confident in our products, and the benefits speak for themselves: sustainable, high quality and affordable. We’re committed to finding the most effective ways to ensure our consumers are educated both online and in-store, developing best-in-class displays, POS and packaging, which both inform and inspire. We also stay close to trends,



“We’re confident in our products and the benefits speak for themselves: sustainable, high quality and affordable”

being proactive to new consumer needs and wants. We’re also committed to offering the market the best products, at an always affordable price.”

Ordo says it is buzzing, quite literally, about its latest NPD. “Our Sonic Lite offers an even more affordable solution to oral healthcare, accessing more people,” it says. “With the same great benefits as our hero product, the Sonic+, the Sonic Lite will deliver a dentist-approved clean at a price to really smile about. For those on-the-go, we’re introducing our most requested product – our charging travel case. With an easy clean, stylish design and a USB C charging port for added convenience, we’re making it even easier for our consumers to stick to their routine while on the move.”

2023 will also see the launch of the brand’s highly anticipated Water Flosser, designed to complement the everyday oral routine, it adds. “Studies show that water flossers remove 29% more plaque than flossing alone, providing a deeper clean that is also more gentle for those with gum sensitivity, and we know this will be a big hit with our consumers. Looking forward, 2024 will see toothpaste innovation and a range of children’s toothbrushes. So, watch this space.”



Source
¹ IRI, 52 w/e 20.12.22
^{2,3} Internal company data

THE
UK'S 3RD
LARGEST
DENTAL
BRAND*

ORDO



Palmer's

First brand campaign released

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KEY BRANDS

Palmer's

Palmer's, the family-owned brand, whose iconic Cocoa Butter Formula has been – and still is – handed down through the generations, is launching a new campaign entitled 'Show Yourself Love'. This new initiative aims to empower and encourage individuals to prioritise self-care as an expression of self-love – pausing to take a moment for themselves, says Zahira Beddou, marketing director at Palmer's.

"The campaign is firmly linked to Palmer's timeless brand philosophy that it is important to look after your skin, to nourish and nurture it, to help you feel your most confident," she says. "It's about taking the time to use the best ethical and sustainable natural ingredients that moisturise, hydrate, and leave skin looking its best – this is what Palmer's is known for and why it has been handed down through the generations, like a secret family recipe that gets passed along, like a baton to the next family member."

The 'Show Yourself Love' campaign seeks to promote self-acceptance and the practice of self-care as essential components of overall wellbeing, adds Beddou. "Whatever way you perform your ceremony of self-love, Palmer's is the beauty hero to help you do so," she notes. "Self-love does not discriminate and neither does Palmer's as the products are loved and nurtured by everyone, regardless of age, gender, background, skin or hair type. Self-care does not have to be a grand ceremony and it can be in the lotion you apply at night or the conditioner you soak in during the morning."



“The campaign is firmly linked to Palmer's brand philosophy – that it is important to nourish and nurture your skin, to help you feel your most confident”

"Palmer's believes that everyone, no matter what walk of life, can take part in a self-love routine and take time for themselves, every day," she adds.

The 'Show Yourself Love' campaign will be woven throughout all areas of Palmer's marketing, from a TV ad campaign to PR, and will feature across digital and social platforms. It will also extend out to a project Palmer's is working on with a group of young women from London to promote self-care and self-love from a young age.

"While the campaign is about self-empowerment, iconic Palmer's Cocoa Butter Formula products are featured throughout," explains Beddou. "These showcase: how moments of self-care can be had by rubbing the No.1 Cocoa Butter Body Lotion¹ on your arms and legs to keep them moisturised; how the upturned iconic Cocoa Butter Original Solid Jar can be rubbed on elbows to soften hard knobby skin; how the Moisturizes Softens Body Oil is fabulous to rub on damp skin straight after a shower; while the Cocoa Butter Massage Lotion For Stretch Marks is perfect for a moment to bond with your baby bump."

"Every bottle, every stick, and every jar is made with intention, helping everyone to care for every piece of themselves, from the tips of their toes to the ends of their hair."



Source
¹ IRI, Total Bodycare, Units & Value, 18 March 2023



Reveal beautiful, healthy-looking skin

Formulated with ethical and sustainable cocoa butter together with vitamin E, Palmer's® Cocoa Butter Formula® is your daily solution for rough, dry skin. Rich in anti-oxidants, this creamy yet fast absorbing, velvety lotion will provide intensive moisture for up to 48 hours whilst protecting and softening dry and sensitive skin.

Suitable for eczema-prone skin
Clinically tested and dermatologist approved

UK's No 1
cocoa butter
brand*



Sofidel

Partners for 10 years

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KEY BRANDS

Nicky

➔ Sofidel is a world leader in the manufacture of paper for hygienic and domestic use. The group focuses on providing quality paper, while looking at methods that can help benefit local and global sustainability – whether that is reducing its carbon footprint or investing in local environmental projects. Nicky, one of the many brands of the group, has grown within the UK market.

Its products range from traditional toilet tissue, such as Nicky Elite for everyday use, to innovating unique brands such as Nicky Jumbo – a new SKU that offers the equivalent of 10 rolls of toilet tissue within a 4-roll pack, saving space, lasting longer and proving more cost-efficient. “Not only does Nicky meet consumer requirements, but also considers the bigger picture of providing sustainable products,” says the company.

Investing in local communities is key for the Nicky brand, which has partnered with the Woodland Trust since 2013. The initial partnership started out by donating profits from the sales of Nicky’s key lines to support the Woodland Trust’s free tree pack scheme for schools and communities – a project that offers everyone in the UK the opportunity to plant a tree, and create green spaces in communities where they are needed the most.

On-pack branding helped raise awareness of the work of the Woodland Trust, allowing customers to feel they were helping make a contribution to the environment through this partnership. Further support from Nicky and Sofidel over the past decade has contributed to the Woodland Trust’s Emergency Tree Fund and its MOREwoods schemes. “As the partnership has grown, we are now supporting the charity to protect and

Sofidel and the Woodland Trust celebrate their partnership



Karl Mitchell, Woodland Trust Director of Fundraising, and Luca Lolli, Sofidel Line of Business Director, celebrate 10 years of partnership. Woodland Trust has dedicated an acre grove in Martinshaw Wood (Leicestershire) as a thank you to Nicky and Sofidel for their support

“Nicky and the Woodland Trust have planted over 250,000 trees together, with Nicky donating £1m to help fund local WT projects”

restore more woodlands across the UK, expanding the purpose and importance of the collaboration,” it says.

As sustainability became more of a key factor for Nicky, Sofidel trialled the brand’s first paper packs in the UK in 2020. The Nicky Elite 9 pack of toilet tissue was presented in a new Kraft paper pack, offering consumers the choice to purchase more environmentally friendly products. This was later expanded to other key products, including Nicky Elite 4, Nicky Soft Touch and Nicky Super Shine. Sofidel has also introduced elements of post-consumer recycle into its packs, with the aim of reducing the impact of waste on the environment.

Luca Lolli, Sofidel line of business director, adds: “I am delighted to see how much the Nicky brand has developed as we celebrate 10 years of partnership with the Woodland Trust. Together we have achieved exceptional results in the UK. I feel extremely positive that we will achieve a lot more in the future, thanks to everyone who has supported the Nicky brand.”



Smart Paper



WOODLAND TRUST





Smart Paper



Celebrating 10 years of partnership

Together we have planted over 250,000 trees.
Let's continue to create, protect and restore
more trees within the UK.



Nicktissue UK   

Photo credit: Michael Heffernan/WTML

*Nicky is a Sofidel Group brand

Thornton & Ross

Innovation driving growth

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KEY BRANDS

Zoflora



In a market seeing volume decline as consumers face higher costs of living, it has been a strong year for the top 10-ranked Zoflora brand, says the company. “Our indulgently fragranced cleaning brand is soaring, with an 8.6% value outperformance and a 9.2% volume outperformance vs other brands¹ and is the only brand growing through penetration, driven by successful innovation and media support. Zoflora’s value growth (+6.1%) is driven by a 2.7% increase in buyers².”

Annualising the 2021 launch of disinfectant mist and disinfectant cleaners has contributed not just to Zoflora’s growth but also their respective categories. “68% of Zoflora Multipurpose Cleaner sales growth has been incremental to the multipurpose trigger category³, while 77% of Zoflora Disinfectant Mist sales growth has been incremental to disinfectants⁴,” it says. “Meanwhile 2022 launches have also been strong with Floor Wipes, Multipurpose Wipes and Bathroom Cleaner having delivered almost £6m⁵ to Zoflora’s value sales.”

With £3m media investment in 2023, including TV and VOD, alongside a highly disruptive and emotionally engaging creative, inspired by the fine fragrance sector, Zoflora is committed to driving brand awareness and footfall. “To engage shoppers, strong promotions, activations and communication are important,” it says. “Research shows 83% of shoppers purchase the same product they normally do when shopping⁶, so it is key to ensure availability and great visibility to stand out in the busy retail environment⁷, especially as 38% of decisions are made at shelf⁷, it reveals.

NPD continues to be a major focus



“As newness, quality and long-lasting fragrance are key purchase drivers, Zoflora is launching into a new task-specific area from July”

for Zoflora. The brand’s Biodegradable Antibacterial Cleaning Wipes for convenient cleaners has literally “cleaned up” in the category and achieved No.2 brand position⁸ after just over 12 months on the market, it says.

Power Bathroom Cleaner, launched in September, was Zoflora’s first entry into a task-specific category, leveraging insight that the bathroom is the most hated room to clean⁹ due to difficult-to-reach areas and toxic-smelling cleaning products. Zoflora’s mission was to bring beautiful scents to this cleaning chore and, in less than 12 months, it has achieved a 6.8% value share in bathroom cleaners¹⁰, it adds.

In November, the introduction of Biodegradable Floor Wipes for homes with pets recognised that category growth had been driven by own-label. “This launch gave shoppers the option of a fragranced branded offering at a competitive price and a trade-up from own-label,” it says. “With 45% of pet owners looking for products to remove mess and odour, this was a natural fit for the brand, and it has since gained a 6.9% value share¹¹ in the sector.”

Zoflora is launching into a new task-specific area from July with Carpet Fresh and Care. “This blends effective carpet cleaning with odour elimination and fragrance, offering consumers a new way to refresh their carpets, rugs and upholstery without the need for expensive professional cleaning,” it says.

“With newness, quality and long-lasting fragrance the key drivers for purchase, Zoflora continues to bring excitement throughout the year.”



Source

¹⁻² Kantar 52 weeks to 13.05.23
³⁻⁴ Kantar, 52w/e 14.04.23
⁵ Kantar 52 weeks to 13.05.23
⁶⁻⁷ Zoflora Household Cleaning Shopper Research 2021
⁸⁻¹¹ Kantar, 12 weeks to 13.05.23

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BRAND***

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**ZOFLORA
OUTPERFORMING
TOTAL CLEANING
CATEGORY IN 2023*****

Zoflora **CLEANS HOMES** *Beautifully*

*BRAND GROWING YOY +10.4% VS MARKET -0.3%, EXCLUDES PL BOTH GREATEST E AND %, KANTAR, 14TH APRIL 2023
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 ***12W ROLLING, KANTAR, 14TH APRIL 2023
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