

The Grocer

Focus On: Household & Paper Products by Paul Davies (Paul.artist@gmail.com)

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The Story

- **Ah, the sweet smell of success. The household category has seen value growth and volumes up thanks to a raft of heavily scented NPD from fabric conditioners to sweet-shop inspired hand wash. So, who's come up smelling of roses? What else is driving growth in the market, such as advertising and promotions? We will also look at why some sectors, such as household cleaners, are in decline. How can they recover? And what are brands doing to fight back against own label which is growing ahead of the market?**

Key themes:

Laundry: Fabric conditioners are in huge value growth but volumes are flat. How have they encouraged customers to pay so much more for products? Is it down to concentrated formats? Is there an increased focus on scents in this sub-category? Laundry detergent, meanwhile, has secured reasonable volume gains but average prices are down. How come?

Paper: Paper products are in strong volume growth with average prices are down. The value growth in this market is coming from own label. How are brands fighting back? Are they sacrificing value for volume growth? What the difference in performance between loo roll, kitchen roll and facial tissues?

Household cleaners: What's happening in household cleaners? There's a huge disparity in the performance of own label and branded products. How come? What part has NPD played in this? What about convenience products such as disposable wipes? Campaigners have raised concerns about their impact on the environment. Has this affected their performance?

Liquid soap: Liquid soap is in strong growth, driven by both branded and own label products. How has this been achieved? Carex added new flavours including Cola Bottles and Strawberry laces to its portfolio – what has this done for the brand and category?

Consumer trends and innovation: Discuss how general consumer trends are having an effect on this market. Look at health, the environment, convenience formats, packaging NPD and options that might suit time-poor consumers.

Retail share: The discounters saw the biggest growth this year. Which sub-sectors are they performing best in? It's not just about Aldi and Lidl – the likes of Wilkinson and pound shops operate in this market as well. What effect has this had on the mults? How are they fighting back? Waitrose's household sales are also growing – how is it achieving this?

Own label: Branded dominates this category but own label is growing much faster this year. This is predominantly driven by fabric conditioners, liquid soap and household cleaners. How come? What strategies are retailers using to make sure their own label ranges come up shiny?

Price/promotions: Average price in the category is down 2.6%. How come? There's a big difference between own label and branded here. Has own label been promoting hard to shift more?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth. Has there been much in the way of household advertising?

The next big thing? What do the category's experts think will be the next big thing in household and paper? This feature will investigate in detail the consumer trends that are likely to shape new products over the coming 12 months.

Innovations: We identify four new products or product ranges that have not appeared in The Grocer before including launch date, RSP, and manufacturer.

Aircare: With an increased focus on scents in other areas of household, how is aircare doing? Are Brits splashing out more on candles, reed diffusers and plug ins? Which brands are driving this?

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?