The Grocer

**Focus On: Household & Paper Products by Alex Wright (apnwright@yahoo.co.uk)**

**Publishing:** 28 January
**Advertising deadline:** 12 January
**Submissions deadline:** 9 January

**The Story**

**Brits aren't letting their homes go to pot – volumes are up 8.2% as the mults drive down prices in order to compete with the likes of Aldi, Lidl and the pound stores and value has slipped with brands bearing the brunt. So, which sub-categories have been hit hardest? Are any bucking the trend? And, what can brands and retailers do to drive value back into household?**

**Key themes:**

**Paper:** Paper products are also continuing their growth, driven by own labels. Which products are driving this? How are brands such as Andrex fighting back? What the difference in performance between loo roll, kitchen roll and facial tissues?

**Laundry:** Detergents have been hit hardest in value terms with sales down and volumes are flat. Why? Fabric conditioners, meanwhile, are still in growth with value and volume sales increasing. This is being driven by brands. Which ones are cashing in and how are they doing it? Is it down to concentrated formats such as Comfort Intense? What about products such as Lenor Unstoppables? Is there an increased focus on scents in this sub-category?

**Household cleaners:** What's happening in household cleaners? There's a huge disparity in the performance of own label and branded products. Own label products are flying, thanks in part to a cut to average prices. Is this being driven by consumers switching to the discounters, which focus on predominantly own label ranges, or the mults? How are brands fighting back? Have they found any success with NPD, marketing campaigns and so on? And, how are convenience products such as disposable wipes? Campaigners have raised concerns about their impact on the environment. Has this affected their performance?

**Aircare:** In recent years aircare has been the hero of the household category, so what's caused this year's downturn in the market? Value and volume are down, but it is one of the few sub-categories which has seen an increase in average price. Why?

**Bin liners & cleaning accessories:** Brits spent an extra £28m on bin liners & cleaning accessories. What's driving this? What part has NPD played in this?

**Washing up:** Both washing up liquid and auto dish washing products are in value and volume decline. Why? How are concentrated tablets affecting this? What are brands like Fairy doing to turn this around over the coming year?

**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?

**Own label:** Branded dominates this category but own label is growing much faster this year. This is predominantly driven by aircare, accessories and paper products. How come? What strategies are retailers using to make sure their own label ranges come up shiny? Are they dedicating more shelf space to them? How have ranges changes in general over the past year? Is the sector subject to range rationalisation? Who has been cut?

**Price/promotions:** Average price in the category is down 8%. How come? Which sub-categories and retailers are driving this?

**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.

**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?