

Household Paper Products - UK - February 2011

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What is this report about?

Growth in value sales of household paper products slowed at the start of the recession in 2008, as consumers became more focused on price and turned more to own-label products and special offers. Since then, market growth has continued to be sluggish, but the big brands have managed to maintain their share of sales through plenty of new product launches and strong promotional support for their brands.

What have we found out?

- Only one in ten main shoppers use moist toilet tissue and they account for just 2% of toilet tissue sales, but with personal hygiene high on the agenda and the population often on the move this sector of the market has growth potential. Consumers appear to be generally positive towards the idea of the product, although price perceptions are a barrier to purchasing.
- Since 2008 shoppers have become more focused on special offers, and when buying toilet tissue a quarter of main shoppers go for whatever is on special offer and 15% only buy a branded product such as Andrex if it is on offer. During the current incomes squeeze strong promotional support to brands that helps maximise value sales will be ever more important.
- Brands need to demonstrate the worth of paying a bit more for household paper products and trading up to value-added products. Just a quarter of main shoppers think it is worth paying more for quilted/extra layer toilet paper, while only 17% are willing to pay more for better quality kitchen roll and 15% more for better quality facial tissues.
- Much of the marketing focus for kitchen towels is on mopping up spills or messes, but the product in its existing form can be used for a range of other tasks. Modifying the product slightly to better cater for some of these other uses of kitchen roll could help an already trusted brand grow its sales (and the market) through moving into the territory occupied by other household care product suppliers.
- With incomes being squeezed during 2011, big-ticket spending on items for the home will once again come under pressure, so what luxuries people do buy are more likely to be small everyday indulgences.
- Being an environmentally-friendly product tops new product launch claims, but since 2008 fewer people have been prepared to pay a premium for such products. Only one in ten main shoppers buy toilet paper made from recycled paper, so improving a brand's 'green' credentials is about more than just the physical product.

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