

## Household Paper Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Purchasing household paper products tends to be a habitual process, meaning that brands need to work to break habits to increase sales. There are consumer concerns about the environment, suggesting that there may be scope to increase interest in recycled or alternative fibres. However, brands need to clearly indicate how these products can add value that transcends price.”

– **Richard Hopping, Brand and Household Analyst**

This report looks at the following areas:

- **Making advertising count**
- **The future of online shopping in household paper**

Although value sales for household paper products once again declined during 2016, the pace of the decline has slowed when compared to previous years. The market has been strongly influenced by discounting; however there is evidence to suggest that this influence may be waning.

2016 has seen a number of big name brands relaunch product lines, perhaps in response to declining sales, but true innovation is few and far between. There may be scope to create new products featuring more vibrant colours or alternative fibres, but brands will need to work hard in order to break ingrained purchasing habits.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Household Paper Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

The market  
Value sales decline of household paper products slows  
Figure 1: Best- and worst-case forecast of UK retail value sales of household paper products\*, 2011-21

Companies and brands  
Andrex extends lead over competitor toilet tissue brands  
Figure 2: Brand shares in value sales of toilet tissue, year ending November 2016

Regina experiences marked increase in share of kitchen roll  
Figure 3: Brand shares in value sales of kitchen roll, year ending October 2016

Kleenex continues to thrive in facial tissues segment  
Figure 4: Brand shares in value sales of facial tissues, year ending October 2016

True innovation falls  
Figure 5: Launches of household paper products\*, by launch type, 2013-16

The consumer  
Penetration of household paper products stays consistent  
Figure 6: Usage of household paper products in the last month, October 2015 and October 2016

Most buy on a monthly basis  
Figure 7: Buying frequency of household paper products in the last 6 months, October 2016

Shopping alongside groceries offers convenience  
Figure 8: Shopping channels used for buying household paper products in the last 6 months, October 2016

Consumers most interested in functional advertising  
Figure 9: Appealing advertising features for toilet paper/tissue and kitchen roll, October 2016

Kitchen roll a vital part of cleaning regime  
Figure 10: Uses of kitchen roll, October 2016

Brands need to break habits  
Figure 11: Attitudes towards household paper products, October 2016

What we think

### Issues and Insights

Making advertising count  
The facts  
The implications  
The future of online shopping in household paper  
The facts

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Household Paper Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

## The Market – What You Need to Know

Value sales decline of household paper products slows  
Biggest decline in facial tissues, while kitchen roll grows  
Grocery multiples dominate as discounters lose ground  
Market set to benefit from population growth

## Market Size and Forecast

Value sales decline of household paper products slows  
Figure 12: UK retail value sales and forecast of household paper products\*, at current and constant prices, 2011-21

Further decline set to transform into growth  
Figure 13: Best- and worst-case forecast of UK retail value sales of household paper products\*, 2011-21

Forecast methodology  
The impact of the EU referendum vote  
Household paper thrived through last recession  
Figure 14: Alternative market scenarios for the post-Brexit household paper products\* market, at current prices, 2016-21  
Figure 15: Detailed post-Brexit scenarios for the household paper products\* market, at current prices, 2016-21

Demand for household paper remains during downturns  
Change in shopping habits mean lower growth rates

## Market Segmentation

Facial tissues still impacted by rise of discounters  
Figure 16: UK retail value sales of household paper products\*, by segment, 2014-16

Toilet tissue experiences slight decline  
Kitchen rolls bounces back

## Channels to Market

Grocery multiples dominate  
Figure 17: Retail value sales of household paper products\*, by outlet type, 2014-16

Signs that discount grocers are plateauing  
Online-only set for boost

## Market Drivers

Number of households set to increase  
Figure 18: UK households, by size, 2011-21

Increase in the number of bathrooms  
Figure 19: Number of bathrooms/toilets in the home, May 2016

Ageing population potentially increases demand for paper products  
Figure 20: Trends in the age structure of the UK population, 2011-21

Proportion of people able spend on luxuries increases  
Figure 21: Trends in how respondents would describe their financial situation, February 2009-January 2017

Broadband investment could mean more people work at home

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Household Paper Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Cooking at home influences kitchen roll usage

Figure 22: Frequency of cooking in the home, by type of meal, February 2016

Cleaning behaviours have knock-on effect on paper usage

## Companies and Brands – What You Need to Know

Kimberly-Clark increases market share in toilet and facial tissue

Regina sees fastest growth

Andrex and Kleenex's dominance based on image

More launches than in 2015, but lower proportion are brand new products

SCA the main driver of adspend

## Market Share

Andrex extends lead over competitor toilet tissue brands

Figure 23: Brand shares in value sales of toilet tissue, years ending November, 2015 and 2016

Regina experiences marked increase in share of kitchen roll

Figure 24: Brand shares in value sales of kitchen roll, years ending October, 2015 and 2016

Kleenex continues to thrive in facial tissues segment

Figure 25: Brand shares in value sales of facial tissues, years ending October, 2015 and 2016

## Launch Activity and Innovation

Launches up on 2015

Figure 26: Launches of household paper products\*, by sub-category, 2013-16

Proportion of true innovation falls

Figure 27: Launches of household paper products\*, by launch type, 2013-16

Figure 28: Examples of new packaging launches in the household paper products market, 2016

Brands increase share of launches

Figure 29: Proportion of new household paper products\* launches, by own-label vs branded, 2013-16

Figure 30: Waitrose ECOlogical sub-brand launches, 2016

Toilet tissue responsible for increase in branded launches

Figure 31: Proportion of new toilet tissue launches, by own-label vs branded, 2013-16

Kimberly-Clark the most active company

Figure 32: New product launches in the household paper products market\*, % share by ultimate parent company (top 12 and other), 2016

Environmental claims still strongest

Figure 33: Leading claims on launches of household paper products\* (based on 2016), 2015-16

Seasonal launches grow

Figure 34: Examples of seasonal launches in the household paper products category, 2016

## Advertising and Marketing Activity

Advertising spend stays consistent

Figure 35: Total above-the line, online display and direct mail advertising expenditure on household paper products\*, by segment, 2015-16

Kitchen towels increase share of adspend

SCA Hygiene the main driver of adspend

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Household Paper Products - UK - February 2017

**Report Price:** £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 36: Recorded above-the-line, online display and direct mail total advertising expenditure on household paper products\*, by top advertisers for 2016, 2015-16

Kimberly-Clark reduces adspend but increases market share

TV still remains dominant format

Figure 37: Recorded above-the-line, online display and direct mail total advertising expenditure on household paper products\*, by media type, 2015-16

Nielsen Ad Intel coverage

## Brand Research

Brand map

Figure 38: Attitudes towards and usage of selected brands, November 2016

Key brand metrics

Figure 39: Key metrics for selected brands, November 2016

Regina most likely to be associated with value

Figure 40: Attitudes, by brand, November 2016

Andrex advertising creates fun image

Figure 41: Brand personality – Macro image, November 2016

Plenty's focus on strength creates innovative image

Figure 42: Brand personality – Micro image, November 2016

Brand analysis

Andrex's image matches market share lead

Figure 43: User profile of Andrex, November 2016

Plenty noted for innovation and high-performance

Figure 44: User profile of Plenty, November 2016

Kleenex shares similar strengths to Andrex

Figure 45: User profile of Kleenex, November 2016

Cushelle noted for fun image

Figure 46: User profile of Cushelle, November 2016

Velvet lacks same upbeat personality as Cushelle

Figure 47: User profile of Velvet, November 2016

Regina's image yet to match strong sales growth

Figure 48: User profile of Regina, November 2016

## The Consumer – What You Need to Know

No increase in product penetration

Most buy on a monthly basis

Shopping alongside groceries

Consumers prefer functional advertising

Kitchen roll a vital part of cleaning process

Brands need to break habits

## Usage and Purchase of Household Paper Products

Penetration of household paper products stays consistent

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Household Paper Products - UK - February 2017

**Report Price:** £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 49: Usage of household paper products in the last month, October 2015 and October 2016

Most buy on a monthly basis

Figure 50: Buying frequency of household paper products in the last 6 months, October 2016

Gender split for some products

Figure 51: Any purchase of household paper products in the last 6 months, by gender, October 2016

## Shopping Channels for Household Paper Products

Shopping alongside groceries offers convenience

Figure 52: Shopping channels used for buying household paper products in the last 6 months, October 2016

Facial tissues and napkins less likely to be bought in supermarkets

Online-only retailers have low usage but could be set for growth

Shopping likely to be a pre-planned event

Figure 53: Repertoire of shopping channels used for buying selected household paper products in the last 6 months, October 2016

## Appealing Advertising for Household Paper Products

Consumers most interested in functional advertising

Figure 54: Appealing advertising features for toilet paper/tissue and kitchen roll, October 2016

Kitchen roll based on versatility

## Kitchen Roll Uses

Kitchen roll a vital part of cleaning regime

Figure 55: Uses of kitchen roll, October 2016

Interchangeable uses between household paper products

Figure 56: Repertoire of kitchen roll uses, October 2016

## Attitudes towards Household Paper Products

Consumers understand environmental issues

Figure 57: Attitudes towards household paper products and the environment, October 2016

Consumers still need encouragement to use recycled paper

Own-label vs brands

Figure 58: Attitudes towards own-label and special offers in household paper products, October 2016

Vibrant colours may help to drive standout

Potential for exploration of alternative fibres

Figure 59: Attitudes towards alternative household paper product products/services, October 2016

Subscription services hold interest

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast Methodology

## Appendix – The Market

Figure 60: UK retail value sales and forecast of toilet tissue, at current and constant prices, 2011-21

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Household Paper Products - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 61: UK retail value sales and forecast of kitchen roll, at current and constant prices, 2011-21

Figure 62: UK retail value sales and forecast of facial tissues, at current and constant prices, 2011-21

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)