

A YEAR OF INNOVATION IN PAPER PRODUCTS, 2023

The cost-of living crisis has made brands and consumers change their approach, while private label has been a beneficiary of the value focus.



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Report Content

- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- The Future of Paper Products

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: contextualise ethical and environmental claims

- The prominence of environmental claims are making them lose impact
 - Graph 1: paper product launches carrying select environmental claims, 2018-23
- Consumers look for brands that reflect them
- Clear ethical pledges will carry more weight
- The UK's most sustainable toilet roll

Europe: financial pressures are causing behavioural changes

- A shift in purchase and usage patterns
- Match the consumer shift towards economisation

The Middle East & Africa (MEA)

- Brands use certifications to validate eco credentials

ASIA PACIFIC (APAC)

Asia: a lack of environmental claims despite consumer interest

- APAC consumers are conscious of their impact on the environment
- Low presence of selected environmentally friendly claims in APAC
 - Graph 2: select ethical and environmental claims per region, 2022-23
- Brands that are bridging the gap between interest and execution

Asia: price barriers to eco-consciousness

- Eco-friendly products come at a cost
- The economy claim does not reflect current financial crisis
- Environmental and economy claims

Australia & New Zealand

- ANZ vs Asia: the presence of environmental claims
 - Graph 3: share of paper product launches carrying select ethical and environmental claims, 2022-23

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- Brands meet consumer desire with eco-friendly products

THE AMERICAS

North America: private label engagement is on the up

- Private label paper products have thrived during the cost-of-living crisis
- Private label launches catch up to branded ones
 - Graph 4: share of private label and brand household paper products launches, 2020-23
- Private label launches in the last 12 months
- The economy claim is more prominent among private label launches
 - Graph 5: share of private label and branded household paper product launches carrying economy claim, 2022-23
- Field Day's value priced items

North America: brand strategies to keep prices low as consumer become more observant

- Adapting to the impacts of inflation
- Shrinkflation helps to keep prices down
- The strongest Brawny ever

Latin America: the potential for alternative fibres

- Protect the lungs of the Earth
- Quick-growing bamboo is native to the region

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