



Trends and consumer behaviour from 2020

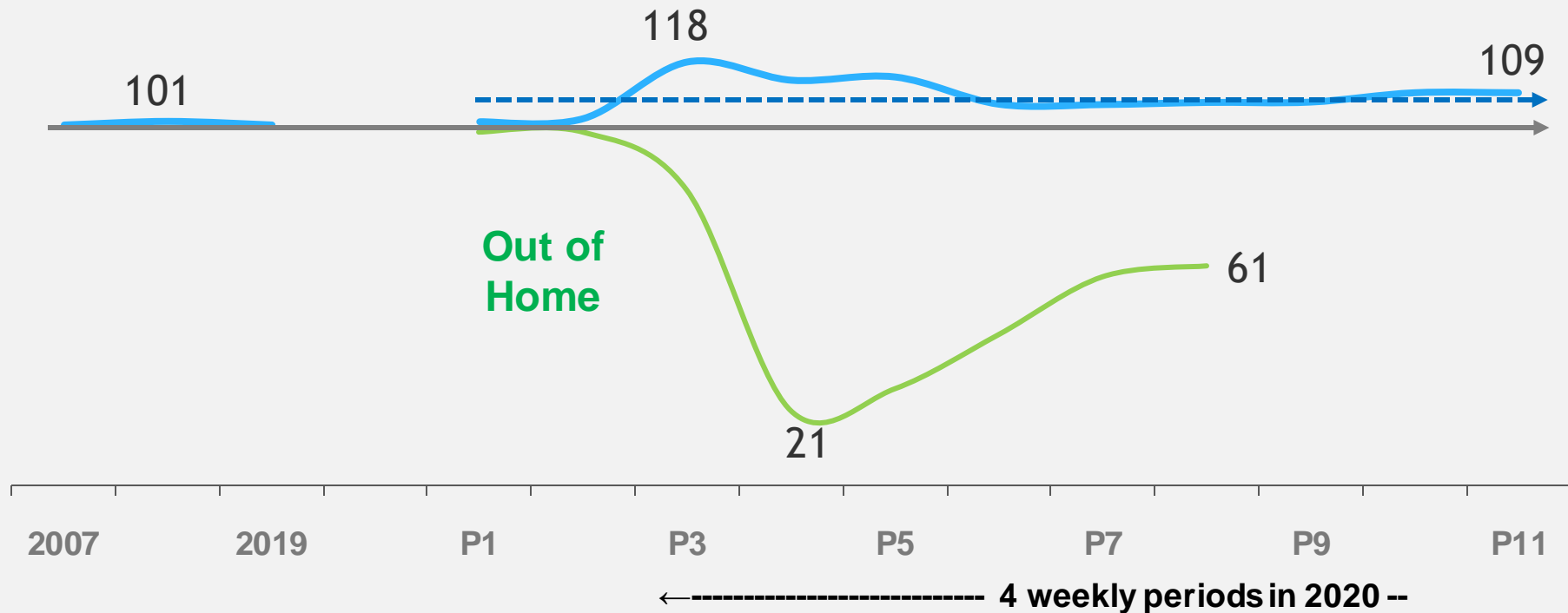
Grocery - Foods, Drinks, Household & Personal Care products

Grocery includes foods, drinks, household care products such as cleaners and detergents and personal care such as shampoo, deodorants.

Compared with long term stability In-home has benefitted significantly this year

As expected out-of-home has suffered and households have spent less as a result

W.Europe Grocery In Home vs Out of Home Market Volume Trends



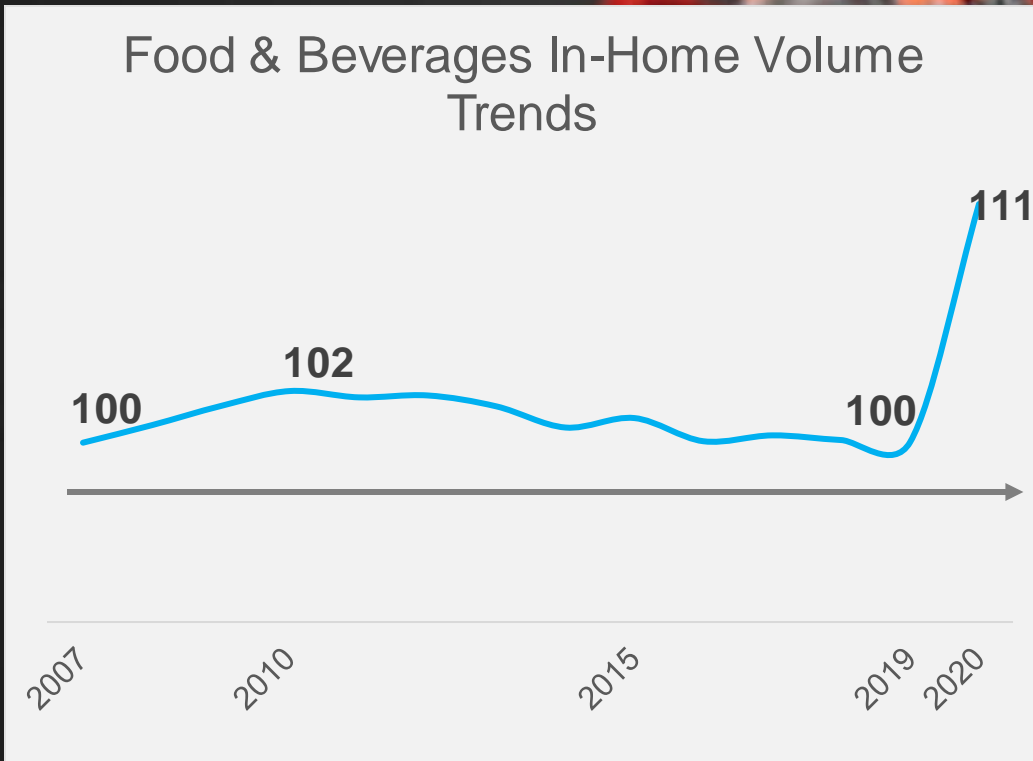
Add Out of Home

Out of Home 2020	Household spend on grocery 2020
- 25 to - 40% dependent on country	Circa - 16%

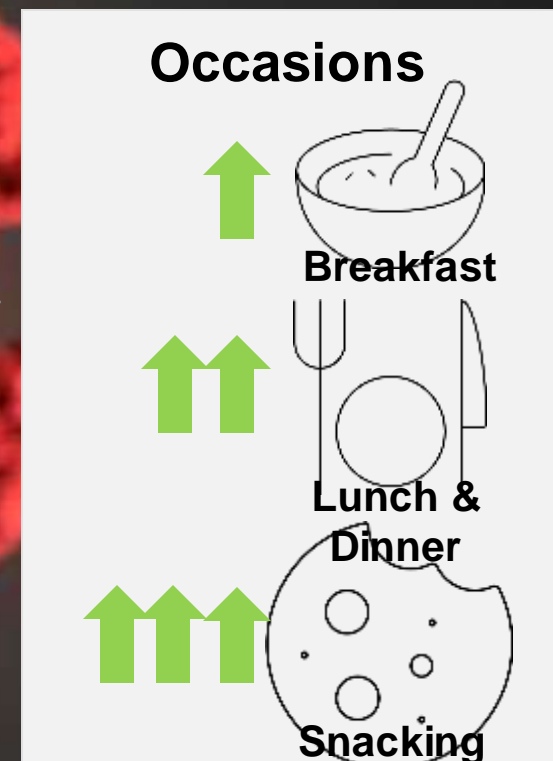
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‘At home’ Grocery categories have done well this year but ‘social’ categories less so

Precise categories vary by country dependent on culture and lockdown rules



+		Cleansing eg. Soaps, HH Cleaners, Dishwash
+		Cooking eg. Meals and ingredients
+		Baking eg. Butter, flour, eggs...
+		Snacks and beverages
+		At home care eg. Hand care, Home perms, Colourants
-		Socialising eg. Shampoo, Deo, Clothes care, Shaving



Despite Covid, environmental concern and action has increased and will remain critical to choice

But it is clear that consumers need environmental options that make the decision and choice easy

Vs 16% in 2019 Eco-Actives are now 20% of shoppers - and 1 in 4 in W.Europe

Eco-Actives are twice as likely to buy sustainable brand options

41% of shoppers have stopped buying a product because of its environmental impacts

60% of shoppers try to buy from companies that show a genuine concern for the environment

46% of shoppers list plastic waste and climate change in their top 3 global concerns

52% of shoppers want 100% recyclable packaging



BUT there is a gap between desire and action – such as confusion on recycling and ability to make the right buying choices. One example on making it easy:

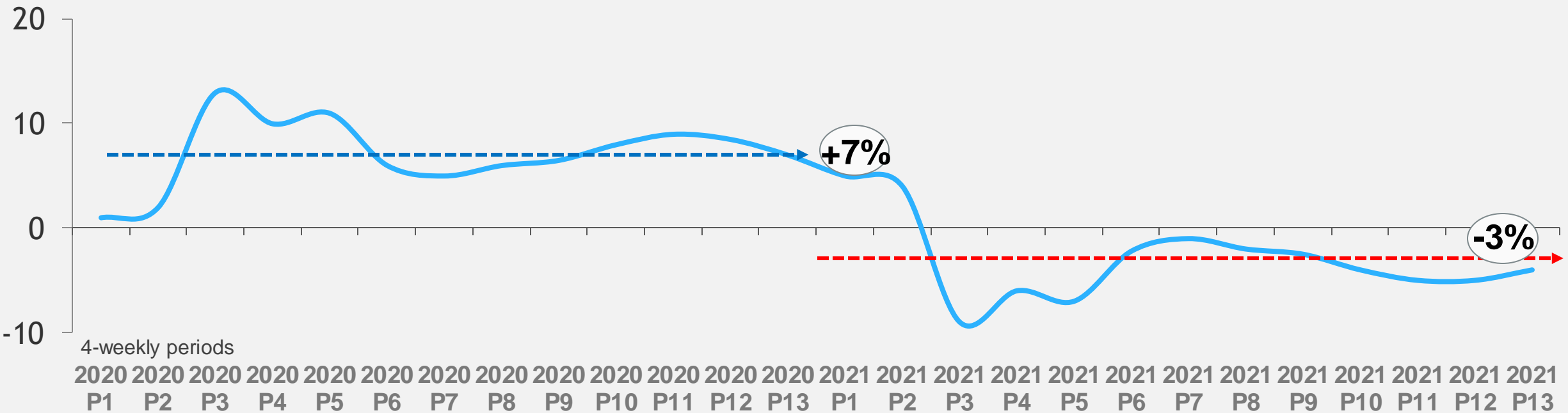
Solutions required - % of shoppers

Effort-full → **Effort-less**

deposit systems for empty packages	refill systems	100% recyclable packaging

2020 will be about 7% above 2019 and 2021 about 3% below 2020
Upsides for 2021 – more lockdowns; and/or recession could add 1-2%
For 2022 and beyond, 3-4% higher than 2019 with a 1-2% upside for any period of recession
Category benefits will continue from 2020 – eg in-home snacking

W.Europe Grocery In Home Forecast Year ago % Volume Trends



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