



HYGIENICALLY CLEAN

Market Analysis and Fragrance Proposals: Multi-Purpose Cleaner

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Changing Consumer Behaviour

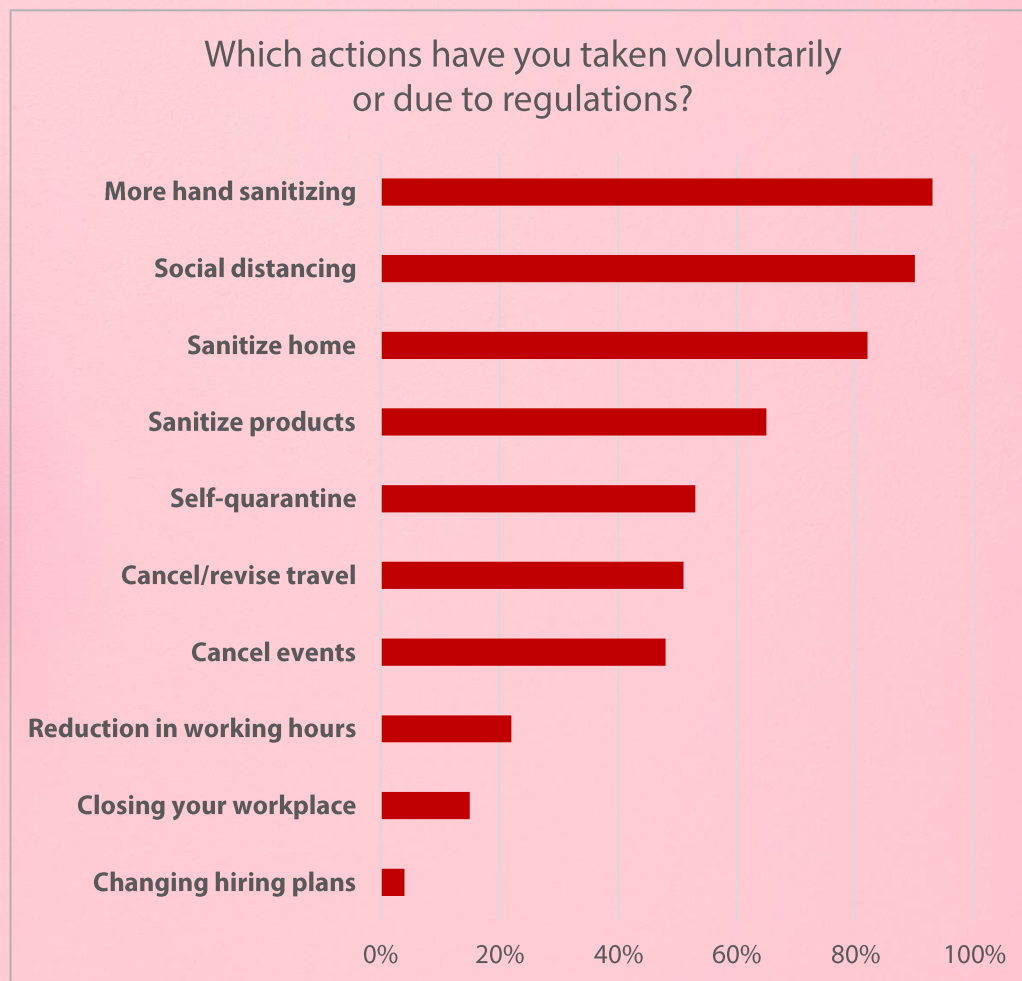
The COVID-19 pandemic is likely to **transform global consumer attitudes and behaviour**, with long-term implications for industries.

More time at home, more things to clean, more meals to cook, more pans to clean is a simple formula to predict **home care growth during the lockdown**.

Home cleaning, hygiene, and healthy living will be **top priorities**, as more consumers will focus on self-care and self-prevention in the aftermath of the pandemic.

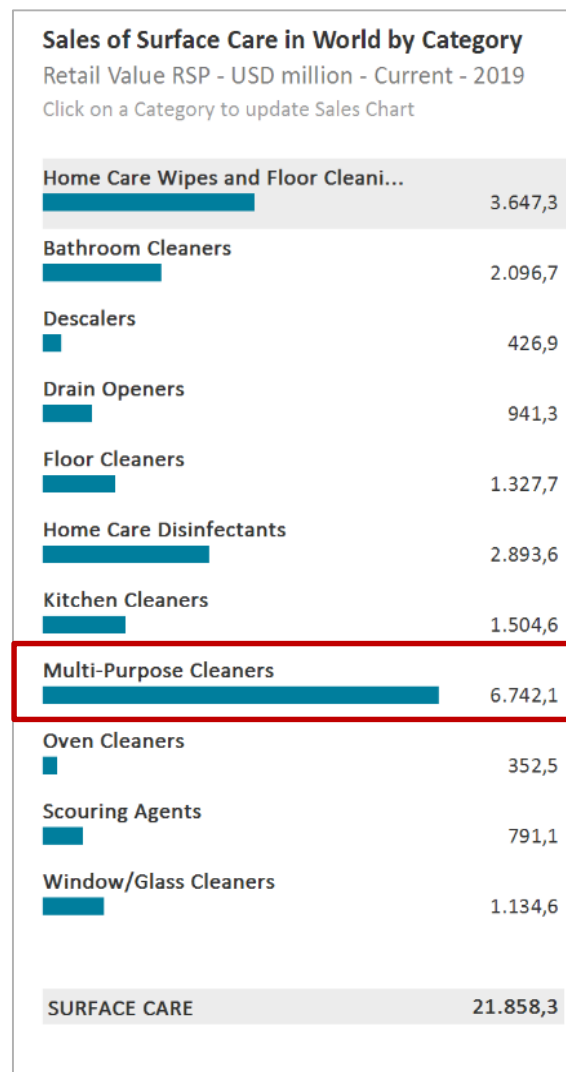
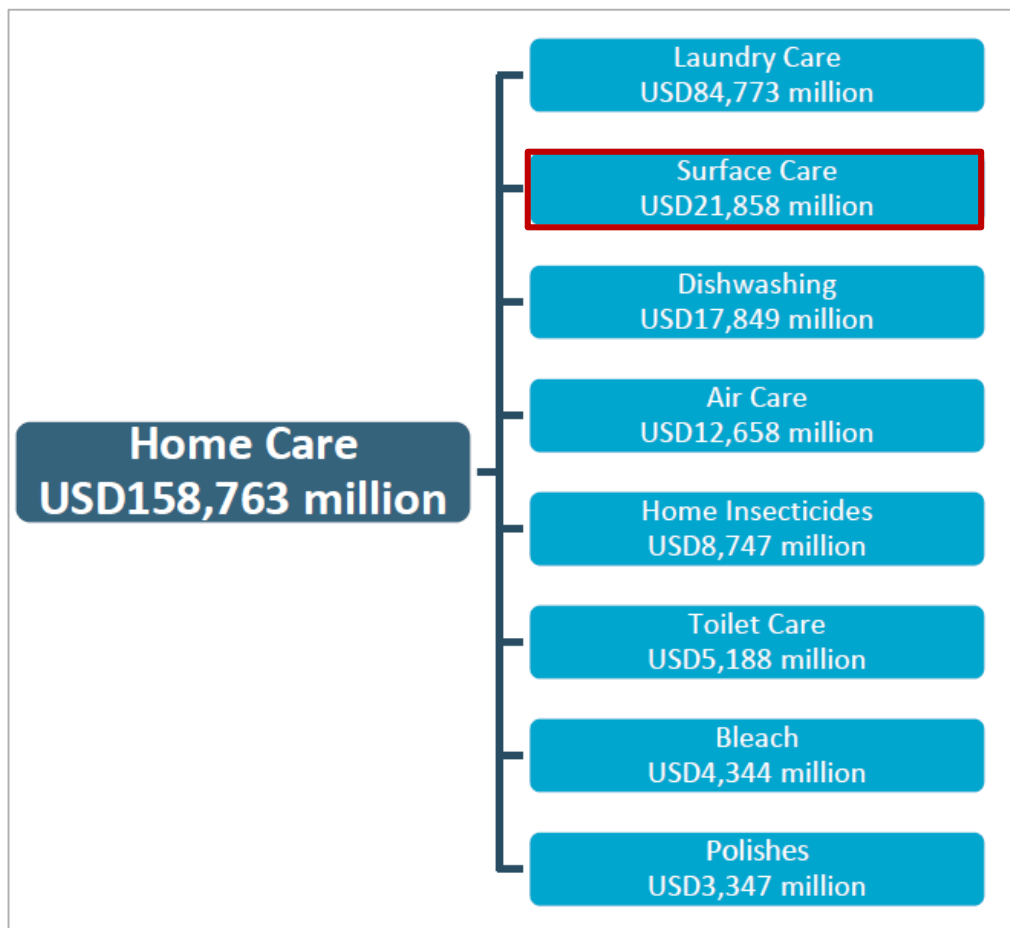
Measures to reduce the spread of COVID-19

A huge majority of consumers are already taking actions to curb the spread of COVID-19 – mostly with hand washing and hygiene, social distancing, and sanitizing the spaces around them.



Online Survey; Respondents: US Beauty Consumers, March 2020

Home Care: Situation before COVID-19 – Global Overview



Situation before COVID-19 – Market Overview // Eastern Europe

POLAND

- surface care records current value **growth of 4%**
- **ecological brands** are seeing more **widespread availability** across both traditional and modern distribution channels
- **growing awareness** of the importance of **ecological concerns** and of using environmentally-friendly products
- **Rossmann, Hebe and Superpharm** health and beauty specialist retailers are enjoying strong sales in surface care -> offer a **wide range of products** and run frequent promotional campaigns that successfully attract shoppers

RUSSIA

- surface care grows **marginally**
- consumers make **careful decisions** with regard to surface care product purchases, tend to look for the most economic options
- as a result, **multipurpose cleaners continue to outperform** the other surface care categories
- can substitute numerous task-specific cleaners, such as kitchen and bathroom cleaners
- **available from a number of brands**, from both multinationals and local manufacturers, and in various price segments, making them affordable even for those with the tightest budgets

(Exemplary Poland & Russia)

Situation before COVID-19 – Market Overview // Western Europe



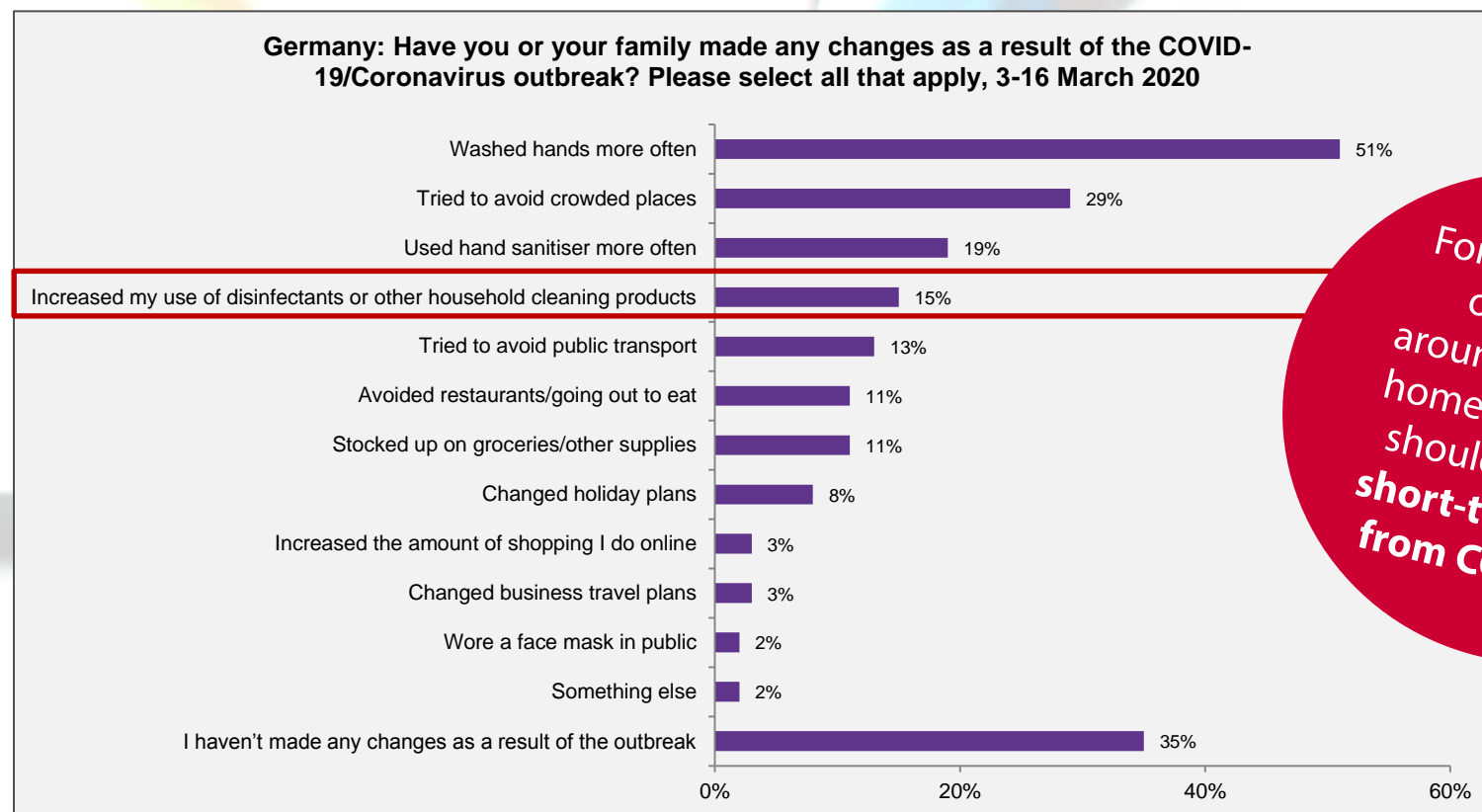
According to Mintel's Cleaning in and Around the Home – UK, December 2018 Report, 57% of adults with cleaning responsibilities in their home believe that a clean home is beneficial to health.

Multi-Purpose cleaners were the most dynamic product in surface care in Western Europe during the review period (2014-2019). They saw positive growth in the majority of markets in this region, and has become the largest category.

The universal nature of the product provides an element of convenience that is increasingly attractive to consumers. Instead of using many different bottles of task-specific products, they only need one product that fits various cleaning purposes.

Home cleanliness and hygiene are amongst the **most important means** for Western European consumers to escape the impact of busy and “unhealthy” city life.

COVID-19 Impact (exemplary Germany)



For the majority of markets around the world, home care overall should receive a **short-term boost from COVID-19.**

- *as a result of COVID-19, 65% of German consumers have taken some form of action*
- *15% of Germans increased the use of disinfectants and other household cleaners*
- *this is similar in almost all other European countries and the rest of the world*

Opportunities for Surface Cleaner Products

- the general outlook for the home care industry is **positive**
- **consumer education** about home hygiene **will never be as high** once the pandemic abates
- *this will undoubtedly **push an improved hygiene cleaning practice***
- *brands in the cleaning industry **still need to keep an eye on long-term cleaning trends** and not only consider the short-term effects of COVID-19*



Opportunities for Surface Cleaner Products

Maintain long-term cleaning focus in spite of COVID-19

Brands in the cleaning industry **need to keep an eye on long-term cleaning trends** and not only consider the short-term effects of COVID-19.

Longer-lasting products are entering the market.

In February 2020, Procter & Gamble announced the launch of Microban 24, a new range of antibacterial home sanitising cleaners that offer **24-hour surface protection against bacteria.**



Such products satisfy short-term needs.

Microban 24 will arouse the curiosity of consumers who seek longer-lasting and effective cleaning strategies, and it **offers a clear answer to anxieties associated with the recent COVID-19 outbreak.**

But eco claims reflect the long term.

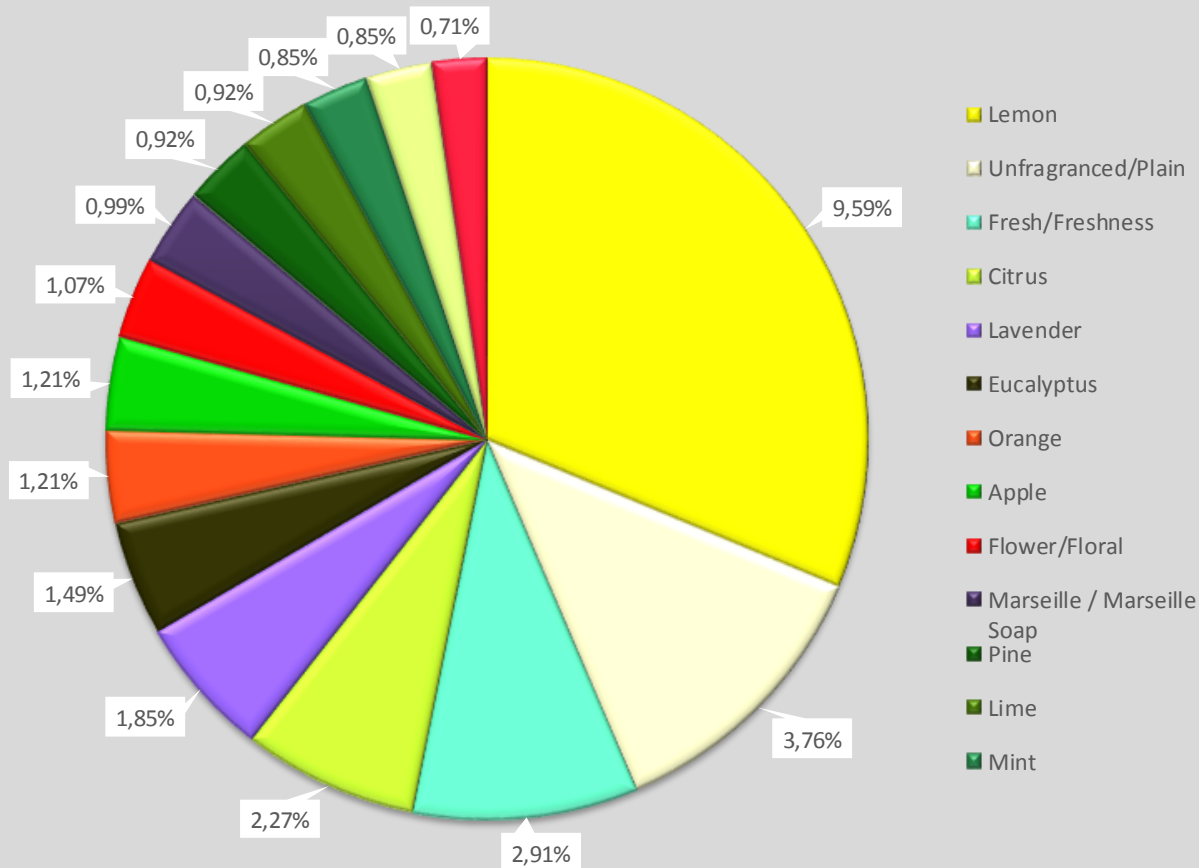
However, it is crucial that household care brands continue to take into consideration **environmental sentiments** in the development of their products **for longer-term penetration in the market.**



Top 15 Fragrances Europe

Top 15 Fragrances Multi Purpose Cleaner

(Europe / 04 | 17 - 04 | 20 / 1.408 results)



As a functional and fragrance-driven category, brands need to keep consumers engaged with formats and formulas which perform better and are easier to use.

Fragrances need to tempt purchase at point of sale while still being familiar.



Bell Fragrance Proposals for Multi-Purpose Cleaner

Fragrance direction:
Lemon/Lemongrass

0799431 Citrolo-Extra

Top: green, agrumic, lemon, lime,
orange

Heart: fresh, herbaceous, citronella

Base: slightly balsamic



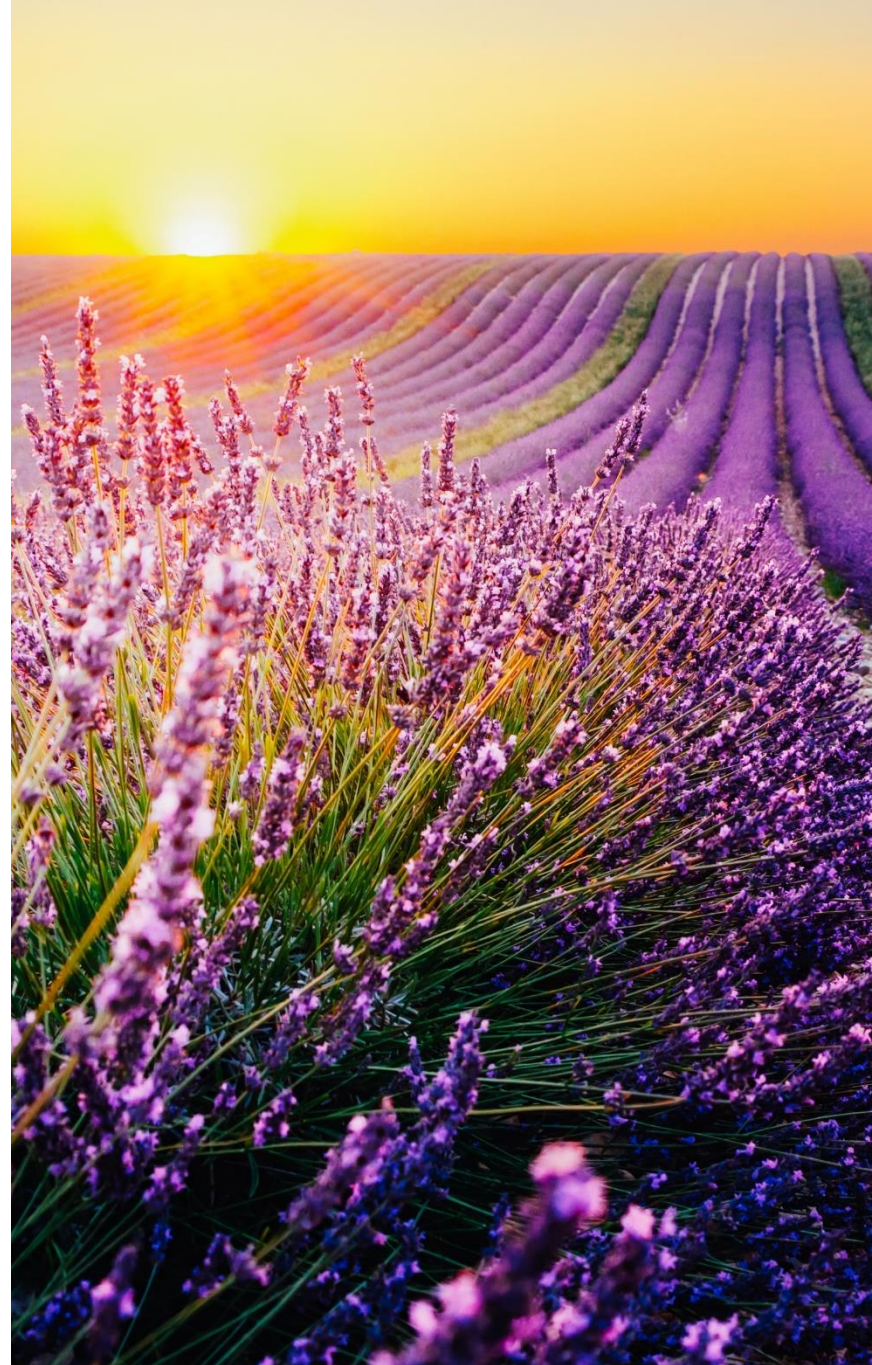
Fragrance direction
Lavender in combination

8600395 Wonder Lavender

Top: fresh, leaf green, light citrus accents

Heart: herbaceous, floral, fresh, lavender
flowers, lavandin, eucalyptus

Base: slightly sweet, aromatic, honey



Fragrance direction:
Ocean/Fresh

0789180 Seabreeze

Top: fresh, cool, aqueous, aldehydic

Heart: herbaceous, slightly floral

Base: balsamic



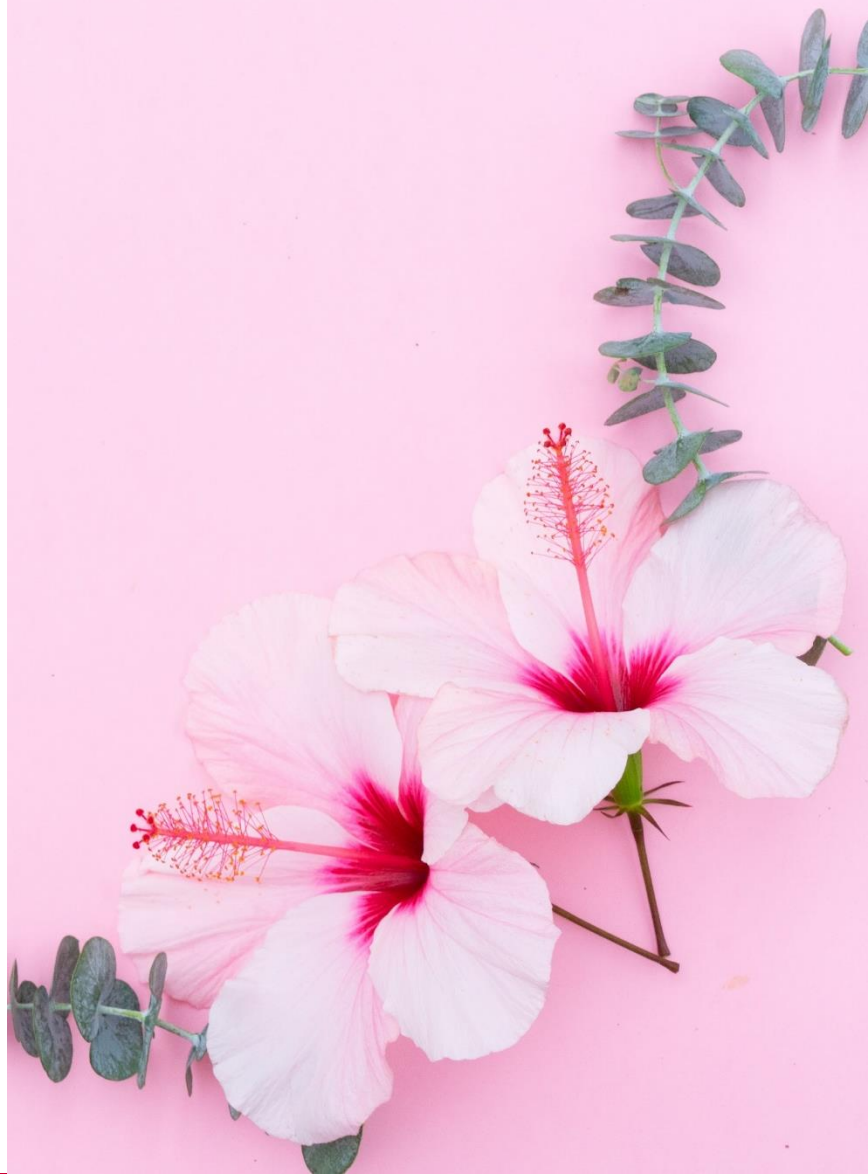
Fragrance direction:
Floral

6101201 Hibiscus Paradise GG2-19

Top: hibiscus flower, rhubarb

Heart: jasmine, coconut blossom, orange blossom

Base: shea butter, musk, sandalwood, vanilla



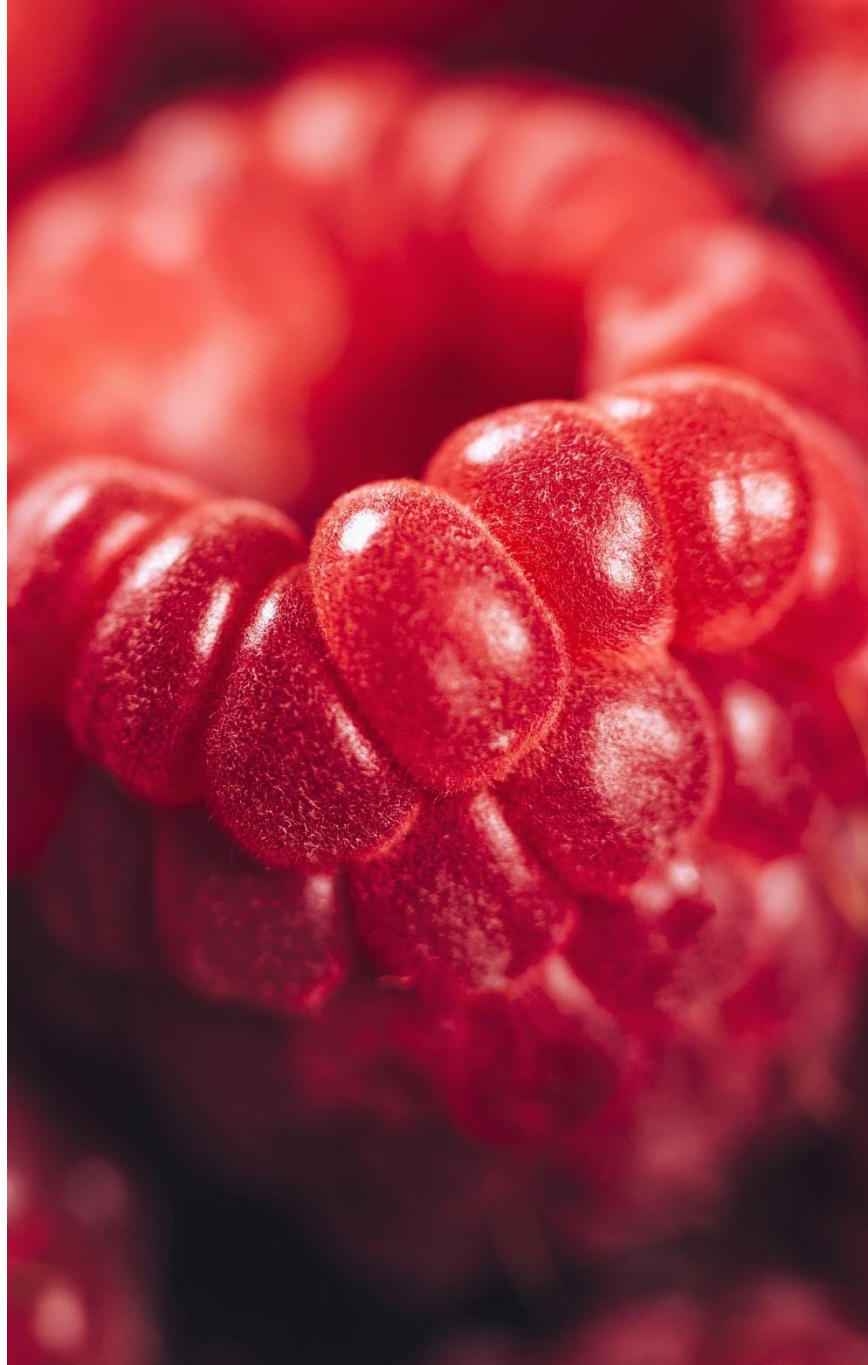
Fragrance direction:
Fruity/Berry

6100292 Raspberry & Lemongrass

Top: green, citric, fresh, fruity,
lemongrass, raspberry

Heart: herbaceous, fruity, slightly floral,
raspberry

Base: sweet, creamy, musk



Fragrance direction:
Mint in combination

8600349 Mintissimo

Top: fresh, mint, leaf green

Heart: herbaceous, mint, apple

Base: slightly woody



Contact

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