



## THE MARKET

The household cleaning market has consistently experienced value and volume growth year by year. This growth is indicative of the changes in the dynamics of the market over the last several years with consumers demanding more convenient, innovative and effective products that help reduce the time spent cleaning at home.

Ten years ago, the category had only a limited number of products. Since then it has boomed and fragmented with segments such as daily shower cleaners, multipurpose trigger sprays, electrostatic cloths and multi-purpose disposable cleaning wipes all meeting these consumer demands. Cleaning products are available as liquids, gels and cremes; with delivery mechanisms like trigger packs, pour packs, disposable cloth wipes and aerosols; there are products suited for all types of cleaning duties and all regions of the home.

Australians spend over \$200 million per year in the household cleaning market and over \$30 million per year on Pine O Clean products alone.

## ACHIEVEMENTS

Pine O Clean Disinfectant Liquid was the first disinfectant available in Australia, and has been available continuously for over 50 years. Since its introduction in the 1950s, Pine O Clean Disinfectant Liquid has become the most widely used and trusted disinfectant preparation in Australia. Originally sold only as a single pine fragrance and in a single size refillable glass bottle it is now available in five different sizes and in six different fragrances.

For decades, Pine O Clean has been the brand name synonymous with household disinfectants, with market share holding firmly at 50 per cent. Recent consumer research indicated that the Pine O Clean brand is so popular that 73 per cent of respondents have used it and 93 per cent are aware of it.

Leveraging the equity of the Pine O Clean brand name, the company chose to launch a range of superior, consumer preferred cleaning products in 1997. The first wave of products launched, precisely met consumer demand for cleaners that were



Basin and Tile cleaner combines effective cleaning for soap scum and dirt on bathroom surfaces and antibacterial action. The third product launched was Pine O Clean Floors with strong antibacterial action.

In 1998, once again in response to consumer demand for time saving cleaning solutions, Pine O Clean was launched as a once daily shower cleaner with the “you’ll never have to clean your shower again” theme.

The launches rapidly gained several percentage

points of the surface cleaners market for the brand. This trend has continued with the launch of more innovative cleaning products such as Pine O Clean Quick Clean Ups, Multi-Purpose Spray and Multi-Purpose Gel. A key achievement was the fact that the Quick Clean Ups were first to market and hence have played the key role in establishing an entirely new segment in the cleaning category.

Pine O Clean Kitchen cleaner is a unique formula that combines effective cleaning for grease and grime on kitchen surfaces and antibacterial action effective against bacteria commonly found in food preparation areas. Pine O Clean Bathroom,

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These innovations helped to further drive the growth of the Pine O Clean brand, from its heritage as a disinfectant to an entry level player and then to a strong presence in the crowded household cleaning market, with an ever increasing market share that recently reached 15.1 per cent.



## HISTORY

The discovery of detergents was driven by the need for a cleaning agent that, unlike soap, would not combine with the mineral salts in water to form “soap curd” or

“soap scum”. The first detergents were used chiefly for hand dishwashing and fine fabric laundering.

The breakthrough in the development of detergents for all-purpose cleaning uses came in 1946, when the first “built” detergent (containing a surfactant/builder combination) was introduced in the US. The surfactant is a detergent product’s

basic cleaning ingredient, while the builder helps the surfactant to work more efficiently.

Since those early achievements in detergent and builder chemistry, new product activity has continued to focus on developing cleaning products that are efficient and easy to use, as well as safe for consumers and for the environment. Similarly, advances in packaging material development meant that the market evolved from the use of cardboard cartons and glass bottles to polyethylene and PVC materials and in the 1970s, more environmentally friendly materials such as PET and the introduction of plastic triggers for easy, time-saving application.

Pine O Clean is a product born in wartime. The many US troops stationed in Melbourne were unable to get the kind of pine disinfectant to which they were accustomed at home, and pine oil was a restricted material. Len Hunter, who owned the Oxford Polish Company, prevailed upon the US authorities to have pine oil imported. This enabled him to make Pine O Clean disinfectant liquid, which received an enthusiastic response not only from the Americans but also from Australian consumers. After a period of sustained growth, Pine O Clean became part of Reckitt & Coleman in 1958.

The next two decades brought great changes to this essentially Australian product. During the 1960s and 1970s the original pine fragrance was supplemented by several more including Eucalyptus, Lavender, Lemon and Mountain Fresh. These added consumer appeal – fragrance is important for disinfectants. Unlike cleaning products, which remove the dirt visibly, you can't see disinfectants do their work.

### THE PRODUCT

Pine O Clean disinfectant is offered in a choice of six scents and a range of sizes. The active germ-killing ingredient is Benzalkonium Chloride. Its antibacterial action has been thoroughly researched and proven to be highly effective in killing household germs like Staphylococcus, E. coli. and Salmonella.

The disinfectant can be used in the household wherever germs are thought to live. Undiluted or diluted it is useful in toilets, sinks, drains, rubbish bins, toilet brushes, buckets, dishcloths, toys, walls, benches and even in the wash. When diluted in water, Pine O Clean disinfectant 'breaks' i.e. turns milky, providing a visual clue to performance.

During the 1990s the product range expanded dramatically, and now the company also offers a comprehensive range of anti-bacterial cleaners (containing the same active ingredient) including

Pine O Clean Floors, Kitchen, Shower, and Basin, Bath & Tile. The introduction of these cleaners meant that new packaging forms (opaque HDPE trigger packs and opaque HDPE pour bottles) and a variety of formulas were needed. These formulas are unique to each product, that is Kitchen has been formulated to cut through kitchen grease and grime, whilst Basin, Bath & Tile targets soap scum and grime commonly found in bathrooms.



### RECENT DEVELOPMENTS

The acquisition of Glen 20 products has allowed the company to add disinfectant surface sprays to its Pine O Clean range. Glen20 also has high brand awareness and, because of its surface disinfectant heritage, is a good fit for the brand.

Pine O Clean Quick Clean Ups, the first antibacterial cloth disposable cleaning wipes in Australia, and Multi-Purpose Gel are also recent innovations. Pine O Clean can now offer a full range of products specifically formulated to meet every challenge in cleaning around the Australian home.

### PROMOTION

Pine O Clean advertising and promotions have long reflected the core values of family protection, integrity and expertise that have now become synonymous with the brand. In the early years of TV advertising, the disinfectant liquid was closely associated with the notion of family protection, with advertisements featuring Pine O

Clean being used diluted in a hot bath for a soothing wash and even to treat minor grazes directly on the skin. Over time however, this close association with personal protection has shifted toward the use of the product on household surfaces only, although 'family protection' has remained as a core value and is still reflected in all communications.

Since the launch of the Pine O Clean cleaners range in 1997 there has been a great emphasis upon building and strengthening an already strong brand. To this end the company, through TV advertising, has achieved a consistently higher share of voice relative to the key competitors in the marketplace.

Advertising has been supplemented by large scale sampling campaigns of new products and Australia-wide consumer promotions. These encompass the entire cleaning range and have offered prize pools of up to \$125,000. They succeeded in driving market share, achieved above average redemption rates and resulted in up to 85,000 entries from consumers.



The powerful disinfectant capability of Pine O Clean disinfectant liquid and the strong heritage of the brand means that the brand continues to enjoy a unique point of difference -- household cleaners with both germ-killing and cleaning efficacy. These key attributes are part of the brand, hence the phrase "It's not clean unless it's Pine O Clean".

### BRAND VALUES

Pine O Clean's core values are about putting science in the service of the home. Since the product's inception it has been synonymous with protecting the health of the family. With its heritage and such a consistent and long period of performance and expertise it is considered by consumers to be a brand they can trust.

### THINGS YOU DIDN'T KNOW ABOUT PINE O CLEAN

- Pine O Clean cleaner and disinfectant products are rated as either 'household grade' or 'hospital grade' disinfectant – both product claims require stringent approval from the Therapeutic Goods Administration.
- There are 35 different Pine O Clean products available.
- Over 5.9 million litres of Pine O Clean products are sold each year.
- Up to 1,000 bottles of Pine O Clean can be manufactured per hour.