

Market Highlights

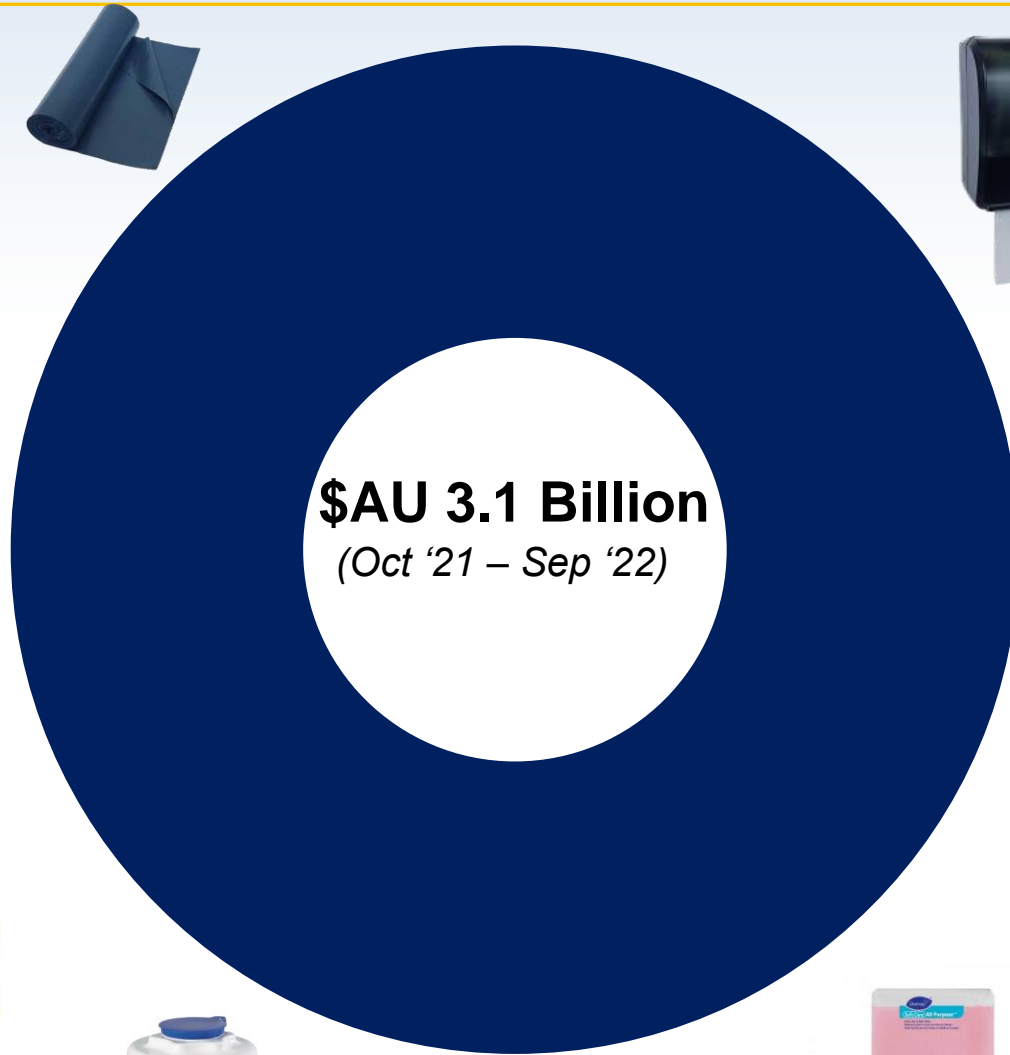
Cleaning & Hygiene Product Basket

December 2022



Market Size

Total Cleaning & Hygiene Product Basket



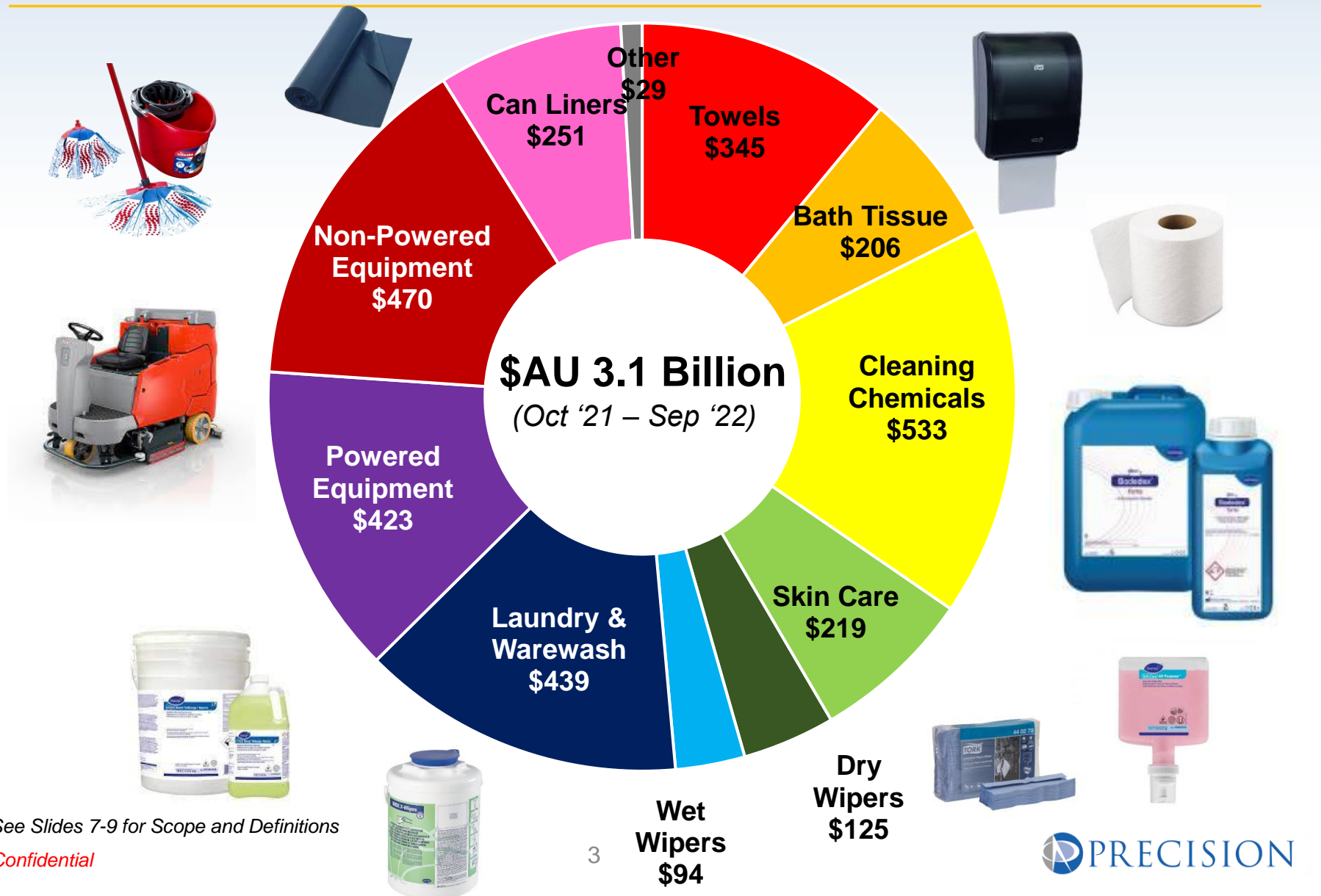
\$AU 3.1 Billion
(Oct '21 - Sep '22)

See Slides 7-9 for Scope and Definitions

Confidential

Market Size

By Product Category – millions (\$AU)

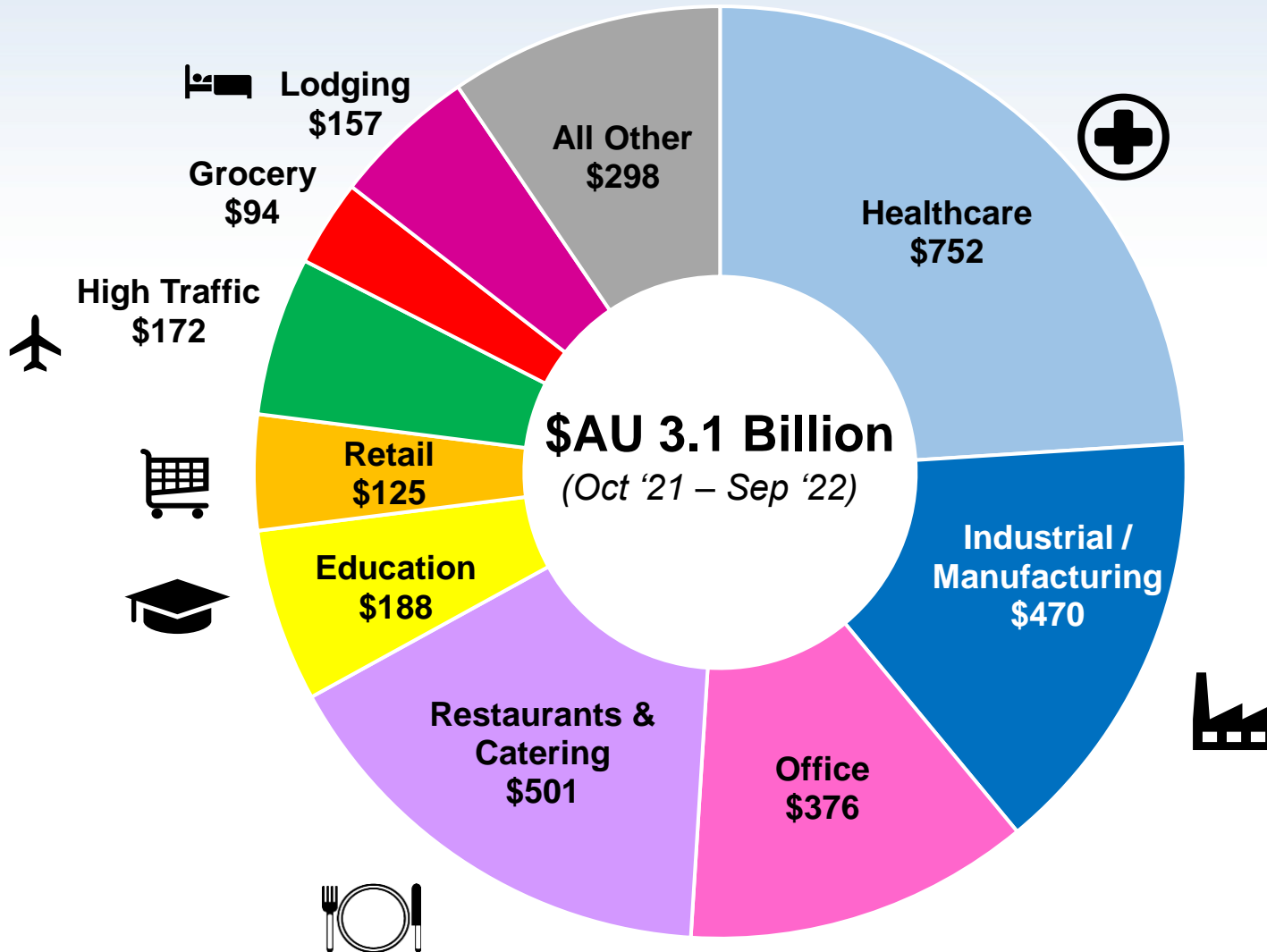


See Slides 7-9 for Scope and Definitions

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Market Size

By Customer Segment/Vertical – millions (\$AU)

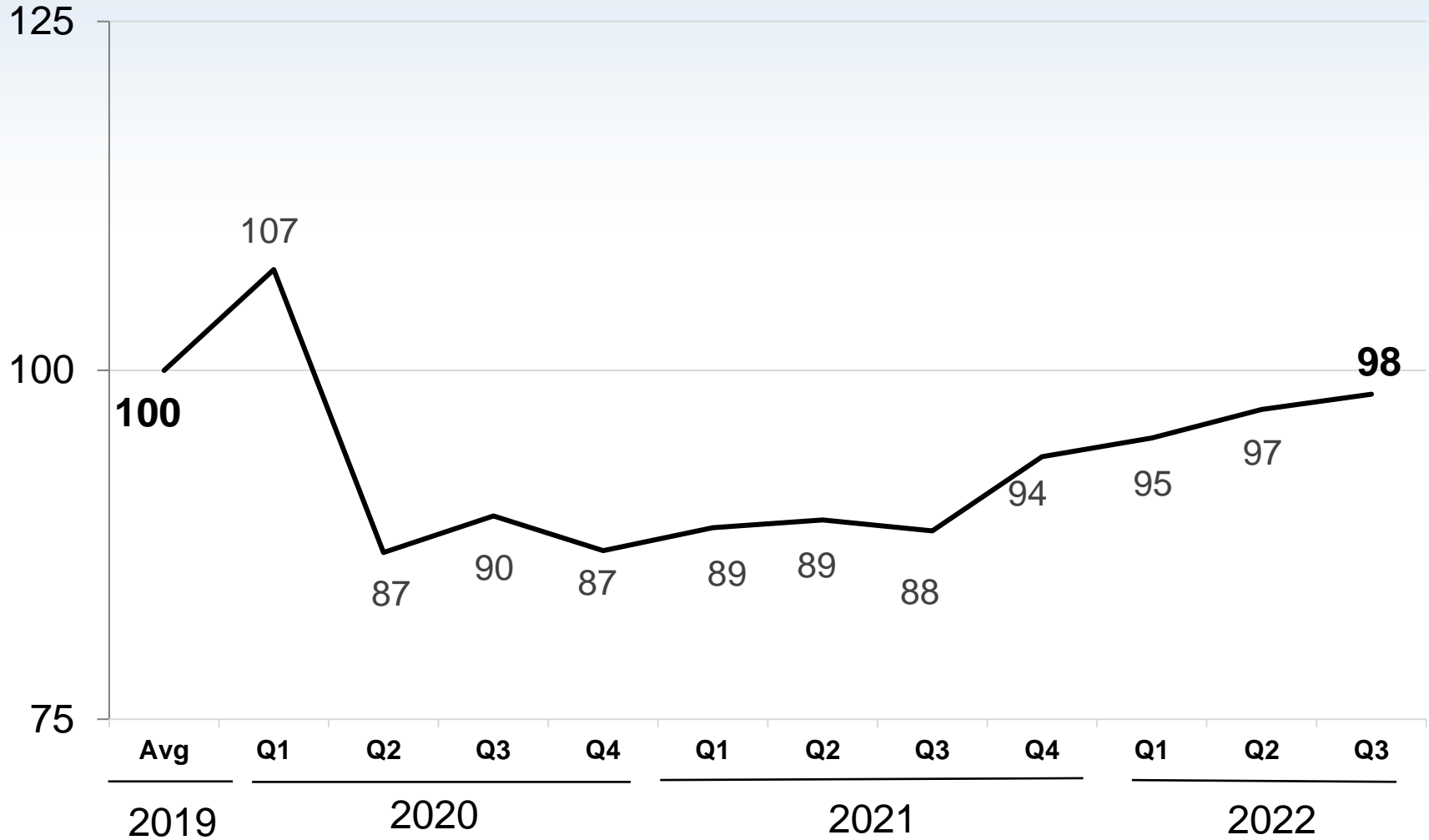


Total Cleaning & Hygiene Bundle
See Slides 7-9 for Scope and Definitions

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Net Sales (including volume & price) Total Cleaning & Hygiene Product Basket



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Other Market Insights

Available Upon Request – for example:

- By Category by quarter (slide 3)
 - Customized Categories & Subcategories
- By Customer Segment/Vertical by quarter (slide 4)
 - Customized Segments/Verticals & Subsegments/Subverticals
- Growth split between volume and price (slide 5)
 - By Category and Segment/Vertical
- Other market details as requested

Scope and Definitions

- B2B Professional Market, Away from Home (Excludes Consumer Purchases)
- All Distribution Channels, including Retail/C&C and eCommerce Pure Plays
- Customer \$AU's (from Distributor to Customer) in Millions. Includes distributor mark-up
- Market Size: October 2021 – September 2022 (12 months)
- Geography = Australia & New Zealand combined
- Excludes Exports

Category Definitions

Towels	Rolled and folded disposable paper towels. May be used with a wall-mounted dispenser or placed upright on a flat surface. Excludes Kitchen Roll Towels (KRT)
Bath Tissue	Single & jumbo rolled, folded, and coreless & centrefeed bath tissue
Cleaning Chemicals	Cleaning & disinfecting liquids, ready-to-use, concentrates, dilution control systems, hard floor care, other chemicals
Skin Care	Hand soap & sanitizer, moisturizer, industrial cleaner, and protectant
Dry Wipers	General purpose paper and general & specialized non-woven wipers Excludes rags & shop towels, couch covers, microfibers, and pre-saturated/treated wipers
Wet Wipers	Germicidal, disinfecting, general purpose, and foodservice pre-saturated wipers intended for hard surfaces. Excludes Wipers intended for use on skin.
Laundry & Warewash	Commercial & non-commercial laundry & warewash chemicals
Powered Equipment	Vacuums, carpet extractors, sweepers, scrubbers, burnishers/floor machines, electrostatic sprayers, and others
Non-Powered Equipment	Floor pads, mops, buckets, scrapers, carts, dusters, waste receptacles, mats & matting, and others
Can Liners	Garbage bags, high & low-density liners, specialty liners

Customer Segment/Vertical Definitions

Healthcare	Acute care (for example: hospitals), long-term care (for example: care homes), primary care, and all other healthcare facilities
Restaurants & Catering	Commercial restaurants, non-commercial restaurants, and managed services.
Industrial	Facilities that manufacture, transform, & process items including food processing.
Office	Office buildings in industries such as finance, Information Technology, legal, consulting, and others.
Education	All public, private, and non-traditional institutions that educate students.
Retail (not for resale)	Non-grocery retailers (not for resale)
High Traffic	High-traffic locations where patrons are present for a specific event such as airports, stadiums, theaters, churches, and others
Lodging	Includes temporary lodging and travel accommodations.
Grocery	Includes grocery (not for resale)
All Other	Includes non-office government such as prisons, oil & gas, mining, agriculture, and others

Precision Syndicated Market Insights

- B2B Data Feeds (transactional point-of-sale data)
 - 300+ unique data sources
 - \$AU 6 billion + (\$USD 4 billion+) per month
 - 380 million+ sales invoice transactions annually
 - 14 million+ ship-to locations annually
- 20+ years industry experience

<u>Europe</u>	<u>North America</u>	<u>South America</u>	<u>Asia</u>	<u>Oceania</u>	<u>Africa</u>	
Germany	Slovakia	USA	Brazil	India	Australia	South Africa
France	Switzerland	Canada	Colombia	China	New Zealand	Egypt
UK	Ireland	Mexico	Peru	Thailand		Nigeria
Italy	Belgium		Chile	UAE		Morocco
Spain	Netherlands		Argentina	Israel		Others
Portugal	Poland		Others	Saudi Arabia		
Greece	Czech Republic			South Korea		
Turkey	Others			Indonesia		
				Others		