Pure Retinol
1% RETINOL
Night Concentrate
FRAGRANCE FREE
COLLAGEN PEPTIDE

SOAP&GLORY
Call of FRUITY
Refreshing
Body WASH
SOAP&GLORY
SMOOTH Star
Body WASH
SOAP&GLORY
CLEAN ON ME
Body WASH

No7
Pure Retinol
1% RETINOL
Night Concentrate
No7
Advanced Retinol 1.5% Complex
No7
Pure Retinol
Night Cream
Fragrance Free

SOAP&GLORY
SCRUB
FAST LANE
PEEL & POLISH
SOAP&GLORY
GLOW FIT
SERUM
SOAP&GLORY
EYE CREAM
SOAP&GLORY
SUNDAY BEST
SOAP&GLORY
GLOWMINOSA

Boots

No7
Radiance+
No7
No7

No7
Pure Retinol
1% RETINOL
Night Concentrate

Boots

SOAP&GLORY
GREAT BARRIER Leaf
Body WASH
SOAP&GLORY
GREAT BARRIER Leaf
Body SCRUB
SOAP&GLORY
GREAT BARRIER Leaf
Body LOTION

SOAP&GLORY
SCRUB OF YOUR LIFE
SOAP&GLORY
PERFECT SKIN
SOAP&GLORY
SCRUB OF YOUR LIFE
SOAP&GLORY
PERFECT SKIN
SOAP&GLORY
SCRUB OF YOUR LIFE
SOAP&GLORY
SCRUB OF YOUR LIFE

Boots

SOAP&GLORY
Call of FRUITY
Hydrating
Body LOTION
SOAP&GLORY
Call of FRUITY
Body SCRUB

No7
Advanced Retinol 1.5% Complex
Night Concentrate
No7
Pure Retinol
Fat Cream
Fragrance Free

oots

SOAP&GLORY
MAGNIFI-coco
Body WASH
MAGNIFI-coco
Body BUTTER
MAGNIFI-coco
Body SCRUB

No7
Radiance+
No7
No7
No7
Radiance+
No7

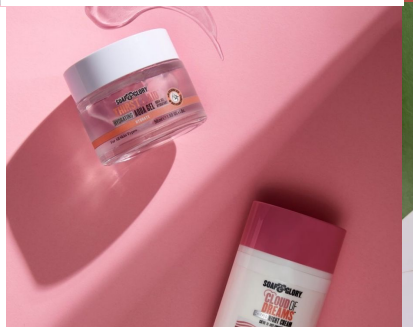
Boots

SOAP&GLORY
Call of FRUITY
Hydrating
Body LOTION
SOAP&GLORY
Call of FRUITY
Body SCRUB

SOAP&GLORY
GREAT BARRIER Leaf
Body LOTION
SOAP&GLORY
GREAT BARRIER Leaf
Body WASH
SOAP&GLORY
GREAT BARRIER Leaf
Body SCRUB

SOAP&GLORY
GLAD Hair DAY
Moisturising
SHAMPOO
SOAP&GLORY
GLAD Hair DAY
Nourishing
CONDITIONER
SOAP&GLORY
GLAD Hair DAY
TREATMENT MASK

No7
Pure Retinol
Night Cream
No7
Advanced Retinol 1.5% Complex
Night Concentrate

Boots

SOAP&GLORY
GREAT BARRIER Leaf
Body LOTION

SOAP&GLORY
PERFECT SKIN
Body BUTTER
SOAP&GLORY
Call of FRUITY
Body BUTTER
SOAP&GLORY
PERFECT SKIN
Body BUTTER
SOAP&GLORY
Call of FRUITY
Body BUTTER

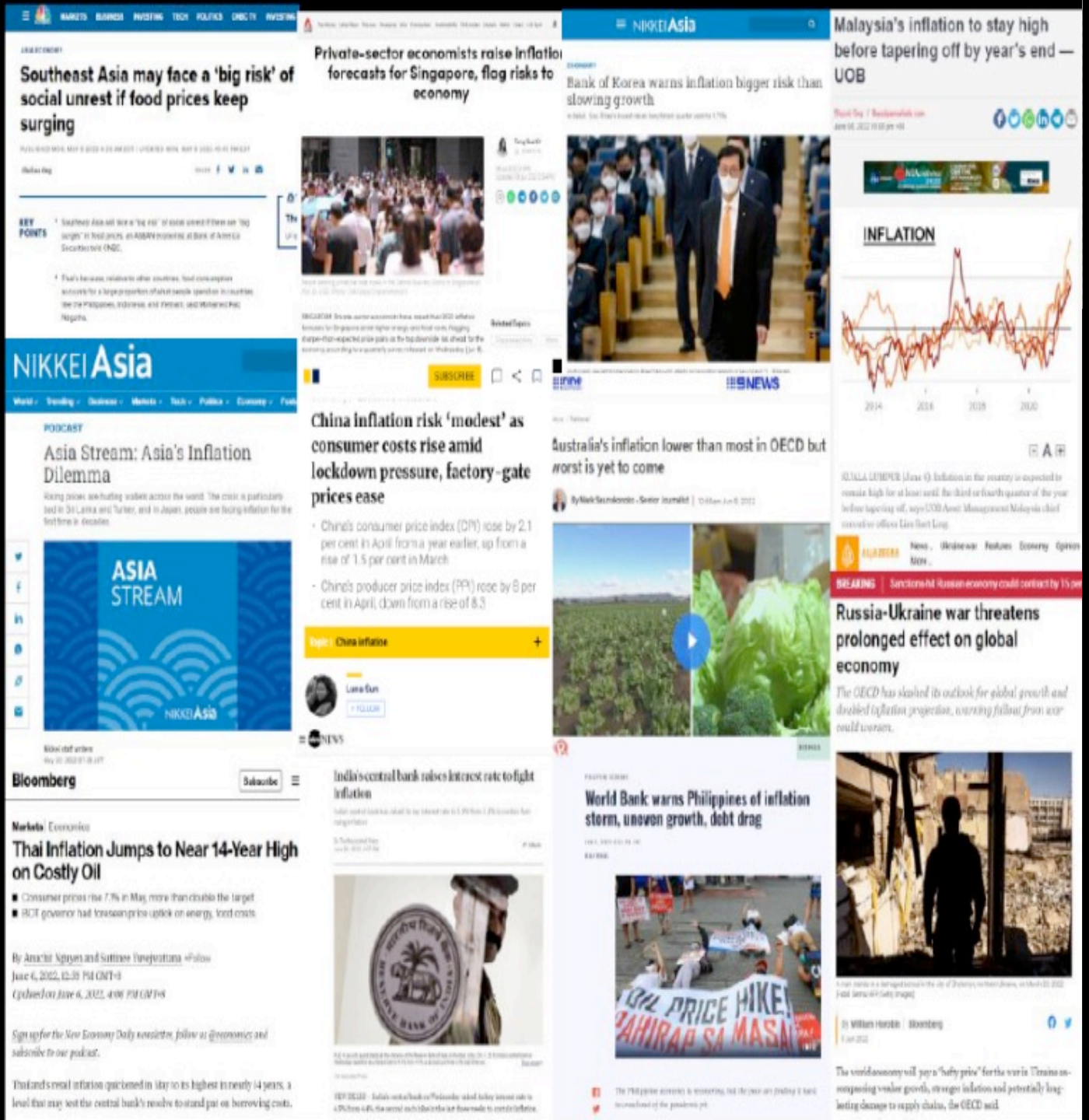
Boots

Retail Own Brands Post Covid

Alana Cartmill & Cherdchai Duanyai

Today's session

- Our Post-Covid World
- Consumer Insights
- Retail Own Brand Product Focus
- Long-Term Goals



Inflation is a worldwide problem affecting most economies and impacting on lifestyle and consumer choices

88% of consumers are watching their spend more than they did 6 months ago

Some feel financially better than COVID times

Majority are more consciously watching spend

Consumer priorities have pivoted since Covid impacting on purchase behaviours

What is more important in next 12 months?
Nett – More important minus less important

1. Saving for unforeseen
2. Planning for the future
3. Financial / job security
4. Physical wellness
5. Mental wellness

More likely to buy:
Purchase preference change over the last 2 years (More – less likely to buy)

1. Affordable / lower prices
2. Healthier options
3. Environmental/sustainable
4. Hygiene / safety claims
5. Transparency of purpose

Given the choice, consumers would prefer a larger size option to deal with rising prices:

42%
Economy size for lower cost per use

9%
Use cheaper packaging material

10%
Increased retail price

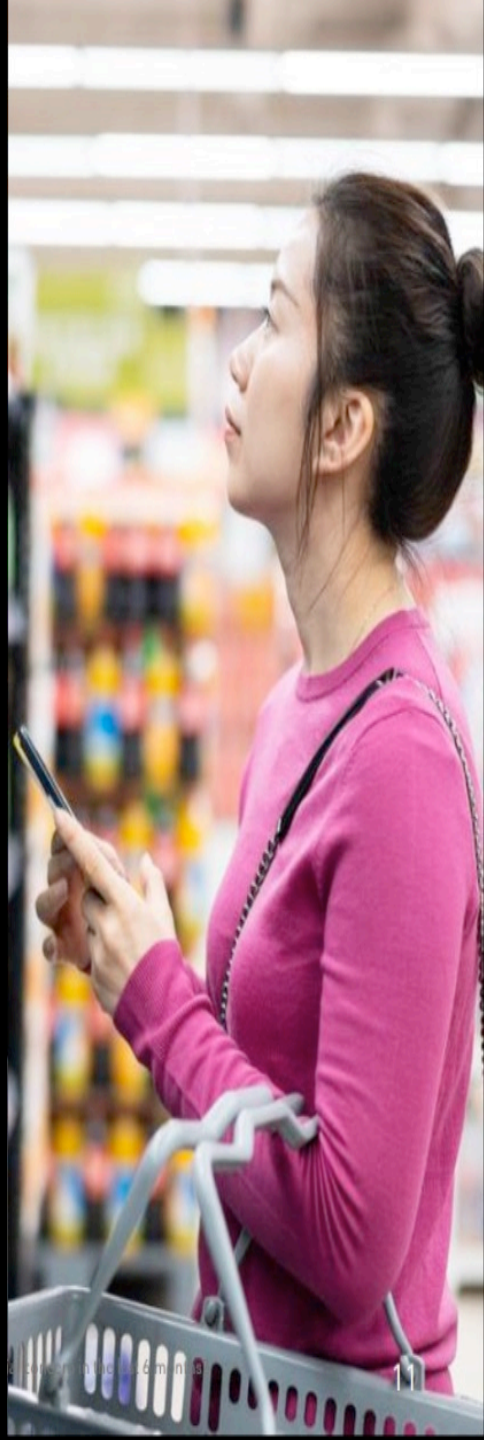
8%
Use cheaper ingredients

8%
Smaller sizes at lower price points

7%
Less frequent price promotions

9%
Smaller sizes at the same prices (downsize)

7%
Shallower promotion discounts



Perception of value for money and improving quality drive shoppers' preference of private label brands

Retail Own Brand Product Focus

Value Equation

Product Portfolio

Sourcing

Value Equation

- Review all levers of the value equation and consumer perception at a sub-category level
- Commercial evaluation of the marketing mix to drive awareness, consideration and trial

For business partners:

1. Joint Business Plans to align on targets
2. Proactive sharing of value opportunities
3. Efficiencies in ways of working to create value

Product Portfolio

- Review portfolio of pack sizes and product propositions for relevance across price spectrum

- Key benefits and USPs strongly highlighted through communications

For business partners:

1. Variety of packaging solutions offered to meet the needs of the broader portfolio
2. Outstanding designs that demonstrate leading quality and benefits
3. Claims and formulations enhanced to exceed customer expectations

Sourcing

- Diversify vendor base to help mitigate risks in the global supply chain
- Direct sourcing of International ranges where possible to shorten leadtimes and lower costs
- Increase share of sales from locally sourced items

For business partners:

1. Prepare competitive business tenders for NPD opportunities
2. Sourcing efficiencies shared for optimising leadtimes and costs
3. Local Thai development and sourcing that supports local communities

Long-Term Goals

- Healthy Communities
- Healthy and Inclusive Workplace
- Healthy Planet
- Sustainable Marketplace

Healthy Communities

Commitments:

1. Programs and campaigns to actively improve **access to affordable, quality healthcare** and raise awareness about **critical health issues**, with a specific focus on **health equity**

2. Partnerships to support **people living with cancer**, **empower young people** and **combat hygiene poverty**

Healthy Planet

Commitments:

1. **Reduce energy consumption and emissions**

2. **Reduce waste, increasing re-use and recycling** and collaborating to help create an increasingly **circular economy**

3. **Reduce the negative impacts of plastics** in our owned brand products

Sustainable Marketplace

Commitments:

1. Provide a **platform of transparency** into our owned brand products, ensuring **product safety and data security**

2. Continue to improve **traceability of ingredients & materials** of our owned brand products to reduce their environmental impact, protect healthy ecosystems and **reduce climate change impact**

3. Continue to drive **responsible sourcing practices throughout our supply chain, protecting human rights** and engaging with suppliers around ethical and environmental issues

Thank You for listening