



BY APPOINTMENT TO HER MAJESTY QUEEN ELIZABETH II
TEA & COFFEE MERCHANTS R. TWINING AND COMPANY LIMITED, LONDON

4.2.13

TWININGS

WHOLE LEAF SILKY PYRAMIDS

Category

**4.2
Branded packaging
Drink**

Client Company

Twinings

Design Consultancy

BrandOpus

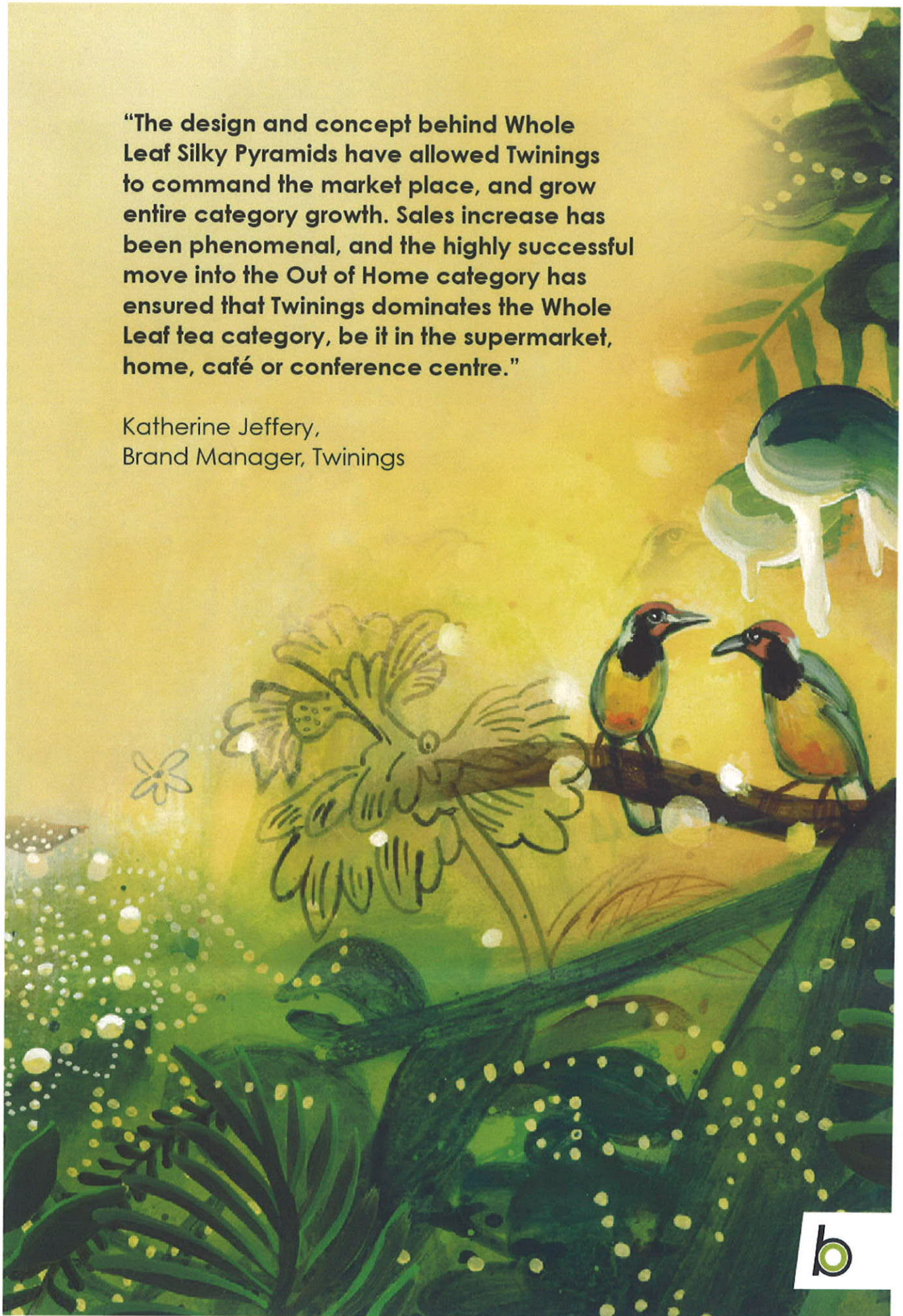
Date

June 2013



“The design and concept behind Whole Leaf Silky Pyramids have allowed Twinings to command the market place, and grow entire category growth. Sales increase has been phenomenal, and the highly successful move into the Out of Home category has ensured that Twinings dominates the Whole Leaf tea category, be it in the supermarket, home, café or conference centre.”

Katherine Jeffery,
Brand Manager, Twinings



executive summary

This range, the pinnacle of the Twinings portfolio, helps consumers delve into the worlds finest whole leaf teas. Facing strong market competition, Twinings were keen to retain their position as a market leader in loose-leaf tea, driving and innovating to stay at the forefront of the premium tea category.

It was decided to scrap the existing 'Tea Deli' range, which had suffered delistings and was selling only a single pack per week. BrandOpus were appointed to carve out a new role for the 'best tier' in the Twinings portfolio.

In response to the brief BrandOpus created a range of confident, modern and aspirational designs for Whole Leaf Silky Pyramids, which are both quirky and visually intriguing to capture attention on shelf. The project reestablishes Twinings' top tier of tea blends and acts as a visionary beacon for the wider portfolio, with exceptional results.

11,000%

sales increase versus
when the range was
retailed as Tea Deli

£471,000

value of the range after
36 weeks in stores



executive summary

A blend for sales success

Twinnings Silky Pyramids are worth **£471,000** after only 36 weeks in stores.¹ Where the brand was previously selling 1 product per week nationally when retailed as Tea Deli, following the redesign and name change, sales were up by **11,000%**.²

Driving the category

In the seven months since Silky Pyramids launched Twinnings have gone from no presence in the Premium Mesh Tea-bag market to being its **2nd largest presence**, with **23% market share**.³ Twinnings have helped to shift the category into accelerated growth: accounting for **51% of category value sales**.⁴

Expanding out

The new design and concept behind Silky Pyramids has allowed the brand to **increase distribution 30.3%**, whilst design and concept allowed the product to enter the out of home market for the first time, and gain **distribution in over 2500 high street outlets, hotels and catering end users**.

51%

of the entire category value sales accounted to Twinnings.

2nd largest brand
in the premium Mesh Tea-bag market.

30.3%

increase distribution following the redesign

2500

out of home distributor contracts won following the redesign.



project overview

Description

Twinnings Whole Leaf Silky Pyramids are a range of premium blends in biodegradable, silky mesh tea bags, designed to make loose leaf tea drinking simple. The range comprises of innovative blends, including Liquorice Allsorts Earl Grey, English Breakfast, Jasmine Pearls, Honeycomb Camomile, Mint Humbug and Gingersnap Peach. The range is sold in packs of 15 at a price point of £4.29.

Twinnings Whole Leaf Silky Pyramids replaced 'Tea Deli', a range of loose leaf black teas established as the most premium offering in the Twinnings portfolio, and positioned as a way for the consumer to discover the world's finest loose teas.

However, the range had dramatically lost popularity over the years as challenger brand Tea Pigs successfully poached over 50% of the market share. The situation eventually reached the point where Twinnings Tea Deli had been delisted from the majority of stores. Furthermore, Waitrose, the single retailer Tea Deli was still available in, was selling only 1 pack a week.



project overview contd.

Overview of Market

Twining's 'best tier' of tea blends was previously known as Tea Deli sold in Tesco and Waitrose.

Specifically the brief was to:
Reframe and redesign the 'best' range of Twining's loose teas through exploring the specific nature of the teas that make them premium.

BrandOpus were briefed to explore designs that are simple, elegant and luxurious, and that feel confident, modern and aspirational.

Prior to 2006 Twining's Tea Deli had very little or no competition in the retail environment. But then Tea Pigs entered the market, and over time had successfully poached over 50% of the market share. In addition, there was nervousness that Tea Pig's success would encourage other niche premium brands to enter the market as the trend for loose tea popularized. This proved to be true, with Charbrew amongst others further chipping away at Twining's share of the market.

Project Launch Date
September 2012

Size of Design Budget
£15,782



project overview contd.

Outline of Design Solution

BrandOpus created a range of quirky, visually intriguing designs for Whole Leaf Silky Pyramids, created to capture attention on shelf.

To aid navigation the range is divided into three distinct blend-types, Speciality, Infusions and Green Teas, each with a graphic design style reflective of the flavour notes consumers can expect to savour from the leaves contained within the pack.

With delicious, intriguing and unique new blends including Mint Humbug, Honeycomb Camomile, Liquorice Allsorts Earl Grey, Gingersnap Peach and Jasmine Pearls, BrandOpus was mindful of how important it was that each blend has

an individual personality reflective of the flavour notes within the blends, and that each blend-type had its own unique graphic style reflective of the shared attributes of the teas, but also that the overall Silky Pyramids visual appearance was one, unified, elegant and luxurious range.

The pack design in the Speciality range takes on a visual representation of the flavours of the blends: Turkish Delight and English Breakfast take on culture references from their country of inspiration, featuring geometric patterns and giraffes respectively, whereas Liquorice Allsorts Earl Grey makes a visual reference to the consumer experience, with liquorice wheels and bootlaces.



project overview contd.

The focus within the Infusions design is communicating the intense flavours. The pack design gives a literal feeling of the infusion process and sense of refreshment through the use of vibrant watercolour expression. Graphic forms, which interrupt the design, are shaped to echo the ingredients. The overall effect creates depth reflective of the superior taste and drinking experience.



project overview contd.

The Green Teas within the range use a rich foliage pattern, suggestive of the magical world that the flavours exist in. The pack designs take on a storybook approach that features natural and organic themes and symbols that continues all the way around the pack, drawing the drinker deeper into a lush and magical world as they interact and turn the pack.



results

Increases in Sales

🍵 Twinings Silky Pyramids are worth **£471,000 after only 36 weeks in stores.**⁵

🍵 Twinings were previously selling 1 product per week in retailers in the whole leaf tea category when the range was retailed as Tea Deli. Following the redesign and name change, sales were up to 111 products per week.⁶

🍵 That's equivalent to **a growth of 11,111%** in only 36 weeks since launch!⁷

🍵 Silky Pyramids had the **2nd highest unit rate of sale** amongst the NPD in the Twinings portfolio after only 4 months since launch.

🍵 The **cumulative growth** path has been steady, and continues to grow at a constant pace, forecasting constant growth, and not just the product of an initial buzz.⁸

🍵 Furthermore, five months after the launch of Silky Pyramids when most NPD loses its buzz and appeal, **Twinings did not need to leverage the range with excessive price promotions**, with only 10% of sales being on deal.⁹

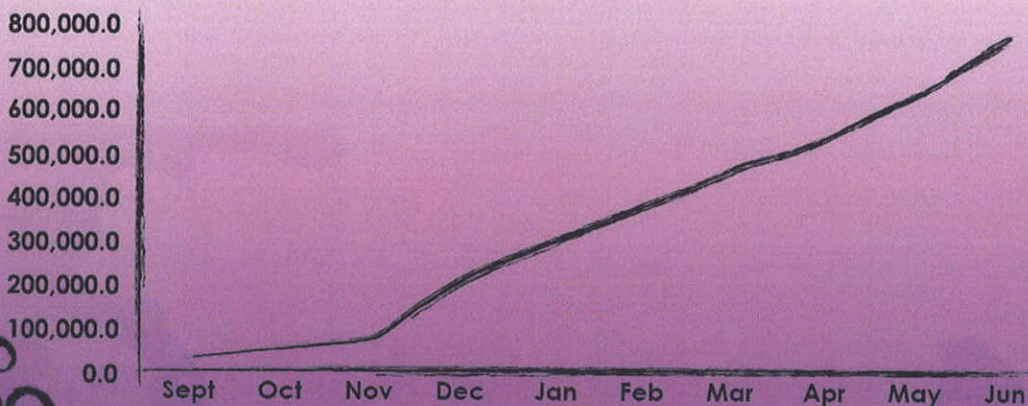
Increases in Market Share

🍵 In the seven months since Silky Pyramids launched, Twinings have gone from no presence in the Premium Mesh Tea-bag market to being its **second largest presence**, with 23% market share.¹⁰

🍵 Silky Pyramids is now the **2nd largest brand** by value share.

🍵 **Poaching 16% of Tea Pigs market share**, and hot on its tails to become the market leader.¹¹

cumulative sales



results contd.

Driving the category

🍵 Twinings have helped to shift the category into accelerated growth. Silky Pyramids **account for 51% of category value sales.**¹²

🍵 Without Twinings' Silky Pyramids contribution the Premium Mesh Tea- bag market would only have grown by 38% as opposed to the realised market growth of 79.7%.¹³

Increases in Market Distribution & Listings

🍵 The new design and concept behind Silky Pyramids has allowed the brand to **increase distribution 30.3%**, versus when the range was retailed as Tea Deli.¹⁴

🍵 The success of Silky Pyramids in Waitrose allowed Twinings to achieve coveted distribution into selected Tesco stores too, allowing the range **exposure to a much wider demographic.**

Silky
Pyramids
have also
secured
listings on
Ocado



results contd.

Entering the Out of Home category

Silky Pyramids has allowed Twinings to shift perceptions of the brand in Out of Home (OOH) environment.

The range is now available through leading food service company Brakes, allowing the range unprecedented exposure to tens of thousands of food service customers across the UK.

Since the the launch of Silky Pyramids Twinings are **now the only tea brand available at Costa Coffee**. This exclusive distribution contract allows the range a **huge exposure to consumers in the 'out of home' environment** that was previously unthinkable.

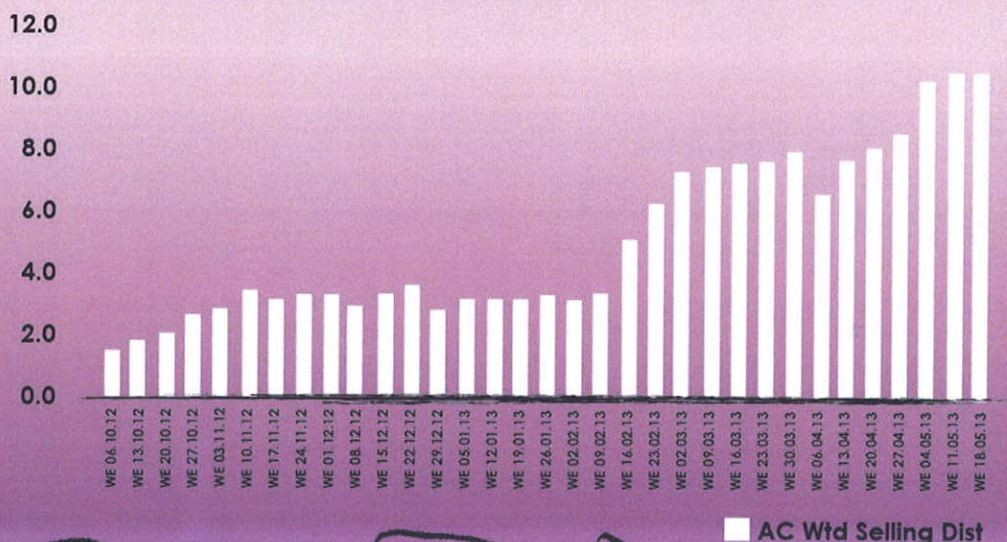
The design is **singlehandedly responsible** for the range being stocked in **high level corporate environments**, including executive lounges of City and Canary Wharf financial institutions such as **Goldman Sachs**, and **conference centres such as Hilton**.

The result is distribution in over **2500 high street outlets**, hotels and catering end users: a number which is growing rapidly.

Growing Globally

As a result of the success of the Whole Leaf Silky Pyramids UK range, there is now a view to expanding this insight out into other markets such as **Australia and France**.

Twinings Silky Pyramids - Big 5 Major Multiples



results contd.

Changes in Consumer Attitudes & Behaviour

The launch of Silky Pyramids has encouraged consumers to engage with the Twinings brand Facebook page, showing off their brews and collections of teas.

Increase in Price Point

☞ The design of Twinings Silky Pyramids has **allowed the brand to command a price premium** over Tea Pigs, despite this brand having been established longer.

☞ Twinings Silky Pyramids were able to **up the average retail price by 20%** due to the concept and design

☞ Benchmarked, this is an average of £5 per kilo more than Tea Pigs were able to command, and significantly more than Charbrew, whose average price per kilo plummeted and remained unstable over the period since Twinings launched Silky Pyramids.



results contd.



other influencing factors

Twinnings conducted some price promotion during the period following the relaunch, but in line with the majority of other brands in the market.



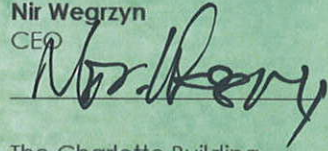
research resources

01. Nielsen Scantrack data to 52w/e 02.03.2013
02. Volume sales average, Nielsen Scantrack data to 52w/e 25.05.2013
03. Nielsen Scantrack data to w/e 06.04.2013
04. Nielsen Scantrack data to w/e 06.04.2013
05. Nielsen Scantrack data to 52w/e 02.03.2013
06. Volume sales average, Nielsen Scantrack data to 52w/e 25.05.2013
07. Data to w/e 06.04.2013
08. Nielsen Scantrack data to w/e 06.04.2013
09. Data to w/e 06.04.2013
10. Nielsen Scantrack data to w/e 06.04.2013
11. Nielsen Scantrack data to w/e 06.04.2013
12. Nielsen Scantrack data to w/e 06.04.2013
13. Nielsen Scantrack data to w/e 06.04.2013
14. Nielsen Scantrack data to 52w/e 25.05.2013

declaration

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