

## Fabric Care and Other Washing Ancillaries - UK - November 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“New product launches have created growth in value sales in fabric care, in contrast to many other household care categories including laundry detergents. While recent launches in the fabric conditioner space have focused on premium fragrances and longer-lasting freshness, there may be scope to add value through increased functionality.”

- **Richard Hopping, Brand and Household Analyst**

This report looks at the following areas:

- **Maintaining NPD momentum**
- **Using packaging to engage younger groups**

Increased investment in product development and advertising has encouraged consumers to spend more on the fabric care and washing ancillaries category. Value sales increased by 8.6% from £520 million in 2014 to £565 million in 2015, and are predicted to reach £575 million in 2016.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Fabric Care and Other Washing Ancillaries - UK - November 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

Market on an upward curve, but growth slowing  
Figure 1: Best- and worst-case forecast of UK value sales of fabric care and other washing ancillary products\*, 2011-21

Fabric conditioners and wash treatments growing  
Figure 2: Breakdown of UK retail value sales of fabric care and other washing ancillary products\*, 2015

Conditioner and softeners dominate NPD year on year  
Figure 3: New product launches in the fabric care and other washing ancillaries category\*, % by sub-category, January 2013-August 2016

Fabric conditioners seen as vital part of laundry regime  
Figure 4: Frequency of fabric care and other washing ancillary product usage in the last six months, August 2016

Sensitivity is an open goal  
Figure 5: Attitudes towards fabric care, August 2016

On-pack communication vital  
Figure 6: Fabric care product buying behaviours, August 2016

Still an opportunity for added value through function  
Figure 7: Interest in product features for fabric conditioners, August 2016

Many consumers potentially open to fragrance change  
Figure 8: Repertoire of favoured fragrances, August 2016

What we think

### Issues and Insights

Maintaining NPD momentum  
The facts  
The implications  
Using packaging to engage younger groups  
The facts  
The implications

### The Market – What You Need to Know

Growth slows but remains on an upward curve  
Fabric conditioner and wash treatments maintain growth  
Grocery multiples remain dominant  
Population set to increase wash loads  
Shifts in laundry habits have knock-on effect

### Market Size and Forecast

Growth slows but remains on an upward curve

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Fabric Care and Other Washing Ancillaries - UK - November 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 9: UK retail value sales for fabric care and other washing ancillary products\*, at current and constant prices, 2011-21

Market expected to continue growing

Figure 10: Best- and worst-case forecast of UK value sales of fabric care and other washing ancillary products\*, 2011-21

The impact of the EU referendum vote

Figure 11: Alternative market scenarios for the post-Brexit fabric care and other washing ancillary products, at current prices, 2016-21

Figure 12: Detailed post-Brexit scenarios for the fabric care and other washing ancillaries market, at current prices, 2016-21

Fabric conditioner sales unaffected by last recession

Focus on maintaining clothes may keep fabric care sales buoyant

Non-essential nature of category may boost value sales

Figure 13: Breakdown of UK retail value sales of fabric care and other washing ancillary products\*, by segment, 2014-16

Product launches assist sales growth in fabric conditioners

Figure 14: UK retail value sales of fabric conditioners, by type, 2014-16

Consumers aware of bacteria build-up

Figure 15: UK retail value sales of wash treatment products, by type, 2014-16

Compensating for lower detergent efficacy with stain removers

Ironing enhancers segment continues to decline

Figure 16: UK retail value sales of ironing enhancer products, by type, 2014-16

## Channels to Market

Grocery multiples remain dominant

Figure 17: UK retail value sales of fabric care and other washing ancillary products\*, by outlet type, 2014-16

Discounter stores increasing in number

Figure 18: Outlet numbers for selected discounter stores, 2011/12-2015/16

Latest Amazon initiatives likely to increase 'other' share of category sales

## Market Drivers

Population set to increase wash loads

Figure 19: Trends in the age structure of the UK population, 2011-21

Number of large households predicted to rise

Figure 20: UK households, by size, 2011-21

Economy improving but Brexit causes some uncertainty

Figure 21: Trends in consumer sentiment for the coming year, January 2009-September 2016

Two-in-one laundry detergents challenge fabric conditioners

Laundry habits influence fabric care use

Figure 22: Behaviours towards doing the laundry, August 2016

Changes in washing machines

Exercise and specialist clothing means a need for specialist care

Advances in online shopping could cause shift in shopping channels

## Companies and Brands – What You Need to Know

Comfort increases market share in fabric conditioners segment

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Fabric Care and Other Washing Ancillaries - UK - November 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Vanish remains dominant in wash treatments

True innovation rises due to focus on fabric conditioner fragrance

Advertising spend increases in line with sales

Comfort increases market share in fabric conditioners segment

Figure 23: Brand shares in fabric conditioners and tumble dryer enhancers, years ending August 2015 and 2016

Lenor Unstoppables unable to prevent Lenor fabric conditioners slide

Fairy and Ecover appeal to target markets

Own-label fabric conditioners lose share in wake of brand launches

Vanish remains dominant in wash treatments segment

Figure 24: Brand shares in wash treatments\*, years ending August 2015 and 2016

Advertising and laundry habits impact upon Dettol growth

Own-label ironing enhancers increase share as brands falter

Figure 25: Brand shares in ironing enhancers\*, years ending August 2015 and 2016

## Launch Activity and Innovation

Conditioner and softeners dominate NPD year on year

Figure 26: New product launches in the fabric care and other washing ancillaries\* category, % by sub-category, January 2013-August 2016

Figure 27: Examples of new launches in the bleach and fabric brighteners sub-category, 2015

Own-labels struggle

Figure 28: New product launches in the fabric care and other washing ancillaries\* category, own-label vs branded, January 2012-August 2016

Figure 29: Examples of fragranced own-label launches in the fabric care and other washing ancillaries\* category, 2015

A fragmented market

Figure 30: New product launches in the fabric care and other washing ancillaries\* category, by ultimate company, 2015

True innovation on the rise

Figure 31: New product launches in the fabric care and other washing ancillaries\* category, by launch type, January 2012-August 2016

Figure 32: New stain/spot removal product launches, 2015

AISE certification boosts environmentally friendly product claim

Figure 33: Leading claims in the fabric care and other washing ancillaries\* category, by top claims for 2015, 2014 and 2015

Odour-neutralising and antibacterial formulae benefit from interest in non-bio detergents

Figure 34: New odour-neutralising/antibacterial product launches, 2015

Floral fragrances still most popular

Figure 35: Leading fragrances in the air care products category, based on top fragrance component groups, January 2015-August 2016

Figure 36: New product launches featuring floral fragrances, 2015-16

Figure 37: Limited edition fabric conditioner launches, 2015-16

## Advertising and Marketing Activity

Advertising spend increases in line with sales

Figure 38: Total above-the-line, online display and direct mail advertising expenditure on fabric care products\*, 2011-15

Figure 39: Total above-the-line, online display and direct mail advertising expenditure on fabric care products\*, by sub-category, January 2013-August 2016

RB continues Vanish and Dettol investment

Figure 40: Total above-the-line, online display and direct mail advertising expenditure on fabric care products\*, by advertiser, January 2013-August 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Fabric Care and Other Washing Ancillaries - UK - November 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Lenor renews focus on core range in 2016

Comfort Intense takes precedence over Creations

Visual elements promote TV advertising

Figure 41: Total above-the-line, online display and direct mail advertising expenditure on fabric care products\*, by media type, January 2013-August 2016

Nielsen Ad Intel coverage

## The Consumer – What You Need to Know

Women remain responsible for purchasing

Fabric conditioners seen as vital part of laundry regime

Sensitivity is key to consumers

Expense of additional products may prove to be a barrier

Scope for development of functional attributes

Many consumers may be open to fragrance experimentation

## Buying Responsibility and Product Usage

Women most responsible for buying fabric care products

Figure 42: Fabric care buying responsibility, by gender, August 2016

Fabric conditioners seen as vital part of laundry regime

Figure 43: Frequency of usage of fabric care and other washing ancillary products in the last six months, August 2016

Men more likely to use fragrance-related products...

Figure 44: Any usage of fabric care and other washing ancillary products, by gender, August 2016

...while women more likely to take care of stains

Still a need to highlight product benefits

Figure 45: Repertoire of fabric care and other washing ancillary products used, August 2016

## Attitudes towards Fabric Care

Sensitivity is an open goal

Figure 46: Attitudes towards fabric care, August 2016

In-wash scent boosts appeal to limited audience

Brand more important in stain removers than fabric conditioners

Still some doubt over best way to attack stains

Figure 47: Attitudes towards stains ("agree" responses only), by age, August 2016

## Fabric Care Buying Behaviours

Special offers create bulk buys

Figure 48: Fabric care buying behaviours, August 2016

Adding value is vital

A third interested in attractive packaging

Advertising can target urban parents

Figure 49: CHAID – Tree output for fabric care and other washing ancillaries, August 2016

Figure 50: CHAID – Table output for fabric care and other washing ancillaries, August 2016

## Interest in Product Features for Fabric Conditioners

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Fabric Care and Other Washing Ancillaries - UK - November 2016

Report Price: £1995.00 | \$3230.80 | €2534.27

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Still opportunity for added value through function

Figure 51: Interest in product features for fabric conditioners, August 2016

Ultra-concentrates and antibacterial properties already bearing fruit

Protection for clothes holds appeal

Figure 52: Interest in 'protective' product features for fabric conditioners, August 2016

Catering for functional clothing

Figure 53: Interest in fabric conditioners for specific clothing types, August 2016

Interest in longer-lasting fragrances

Figure 54: Interest in fragrance features for fabric conditioners, August 2016

## Fabric Care Fragrance Preferences

Fragrance is key

Figure 55: Fabric care fragrance preferences, August 2016

Many consumers potentially open to change

Figure 56: Repertoire of fabric care fragrance preferences, August 2016

Fragrance could be used to widen repertoire of products used

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

CHAID methodology

Forecast methodology

## Appendix – The Market

Figure 57: Best- and worst-case forecast of UK value sales of fabric conditioners, 2011-21

Figure 58: UK retail value sales of fabric conditioners, at current and constant prices, 2011-21

Figure 59: Best- and worst-case forecast of UK value sales of wash treatments, 2011-21

Figure 60: UK retail value sales of wash treatments, at current and constant prices, 2011-21

Figure 61: Best- and worst-case forecast of UK value sales of ironing enhancers, 2011-21

Figure 62: UK retail value sales of ironing enhancers, at current and constant prices, 2011-21

## Appendix – Companies and Brands

Figure 63: New product launches in the fabric care and other washing ancillaries\* category, own-label only, by launch type, 2015

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)