

Dishwashing Products - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Maintaining sales of \$3.1 billion in 2018, the maturity of the dishwashing products market is evident in its unchanging sales since 2013. Strong habitual shopping behavior among category users, with little motivation to change, provides the impetus for a static market."

Rebecca Cullen,
Household Care Analyst

This report looks at the following areas:

- Little growth for the mature dishwashing products market
- Strong brand loyalty promotes an apathetic approach to category
- Adults unwilling to increase spend

This creates a challenging landscape for newcomers and explains why growth has limited potential. Indeed, Mintel projects a slight downturn in sales of dishwashing products from 2018-23.

**BUY THIS
REPORT NOW**

VISIT:
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

DID YOU KNOW?

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

Dishwashing Products - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Definition

Executive Summary

Overview

Figure 1: Usage of dishwashing products, March 2019

The issues

Little growth for the mature dishwashing products market

Figure 2: Total US sales and fan chart forecast of dishwashing products, at current prices, 2013-23

Strong brand loyalty promotes an apathetic approach to category

Figure 3: Shopping behaviors, March 2019

Adults unwilling to increase spend

Figure 4: Interest and willingness to pay for dishwashing product innovations, March 2019

The opportunities

Co-branding can help players expand their reach

Figure 5: Influence of brand on purchase of dishwasher products, March 2019

Natural products tout brand equities that go beyond eco-friendly

Figure 6: MULO sales of dishwashing products, by select natural brands, rolling 52 weeks 2018 and 2019

What it means

The Market – What You Need to Know

Static market with little change expected

Dishwasher detergent/additives exhibits growth

Dishwashing products need to address shift to urban living

Homeownership rates decline

Cooking more at home creates more demand

Shifts in population by age impact market

Market Size and Forecast

Mature market sees little change in sales

Figure 7: Total US sales and fan chart forecast of dishwashing products, at current prices, 2013-23

Figure 8: Total US retail sales and forecast of dishwashing products, at current prices, 2013-23

Market Breakdown

Dishwasher detergent gains offset losses in dishwashing liquid

Figure 9: Total US retail sales of dishwashing products, by segment, at current prices, 2016 and 2018

Dishwashing liquid launches strong, yet more focus being given to detergent

Figure 10: Share of dishwashing product launches, by subcategory, 2016-19

Other retailers continue to widen the share gap

**BUY THIS
REPORT NOW**

VISIT: 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

Dishwashing Products - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 11: Total US retail sales of dishwashing products, by channel, at current prices, 2016 and 2018

Market Perspective

Majority of adults' own dishwashers

Figure 12: Dishwasher ownership, March 2019

Urban living fuels need for packaging or products suitable for compact models

Figure 13: US Households by metropolitan status, 2000 and 2018

Market Factors

Decline in homeownership impacts market

Figure 14: Homeownership rate, by age of householder, 2007 and 2017

Growth in at-home food sales encouraging for market

Figure 15: BEA food sales at home and away from home, January 2010-January 2019

Population growth favorable; age impacts category engagement

Figure 16: Usage of dishwashing products, March 2019

Figure 17: Population aged 18 or older, by age, 2013-23

Key Players – What You Need to Know

Procter and Gamble is the lone market leader

Co-branding success

Private label outpaces market growth

Value-oriented brands yield to competitive pressures

Enhancing the eco-friendly, natural brand position

Company and Brand Sales of Dishwashing Products

P&G accounts for majority of market sales

Sales of dishwashing products by company

Figure 18: MULO sales of dishwashing products, by leading companies, rolling 52 weeks 2018 and 2019

What's Working?

Co-branding success for Cascade

Figure 19: Influence of brand on purchase of dishwasher products, March 2019

Figure 20: MULO sales of dishwasher detergent/additives, by select Cascade brands, rolling 52 weeks 2018 and 2019

Private label dishwashing liquid gaining momentum

Figure 21: MULO sales of dishwashing products, by private label brands, rolling 52 weeks 2018 and 2019

Alignment as ethically responsible helps drive success of private label

What's Struggling?

Ajax sales continue to decline

Figure 22: MULO sales of Ajax dishwashing products, rolling 52 weeks 2018 and 2019

Gain dishwashing liquid misses mark with fragrance-focus

Figure 23: MULO sales of dishwashing products, by Gain brand, rolling 52 weeks 2018 and 2019

What's Next?

**BUY THIS
REPORT NOW**

VISIT: 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

Dishwashing Products - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Eco-friendly, natural brands broaden brand identity

Figure 24: Share of dishwashing product launches, by top five claim categories, 2016-19*

Figure 25: MULO sales of dishwashing products, by select natural brands, rolling 52 weeks 2018 and 2019

Seventh Generation promotes ingredient transparency

Toughness and functional fragrance are hallmarks of Mrs. Meyers Clean Day

Method taps design and trend-forward image

The Consumer – What You Need to Know

Dishwashing liquid meets a variety of needs

Table/capsule dishwasher detergent has strongest usage

Rinse aids have moderate reach

Brand loyalty is strong for dishwashing products

Dishwasher owners rinse before loading

Safety and environmentally friendly are key natural attributes

Strong interest in innovations, lack of willingness to pay more

Usage and Attributes of Dishwashing Liquid

Dishwashing liquid purchased by most adults

Figure 26: Usage of dishwashing liquid, March 2019

Dishwashing liquid purchases highest among adults aged 55+

Figure 27: Usage of dishwashing liquid, by age, March 2019

Renters more likely to purchase dishwashing liquid

Figure 28: Usage of dishwashing liquid, by housing situation, March 2019

Cutting through grease is vital for dishwashing liquids

Figure 29: Important attributes of dishwashing liquid, March 2019

Brand and eco-friendly emerge as impacting reach

Figure 30: TURF Analysis – Purchase influencer – Dishwashing liquid, March 2019

Methodology

Usage and Attributes of Dishwasher Detergent

Dishwasher detergent tablets/capsules most used

Figure 31: Usage of dishwasher detergent, March 2019

Younger adults more likely to purchase liquid and powder detergents

Figure 32: Usage of dishwasher detergent, by age, March 2019

Performance attributes are topmost influencers

Figure 33: Important attributes of dishwasher detergent, March 2019

Performance attributes, underscored by brand, influences purchase

Figure 34: TURF Analysis – Purchase influencer – Dishwashing detergent, March 2019

Methodology

Usage and Attributes of Rinse Aid and Cleaner

One third of dishwasher owners purchase rinse aids

BUY THIS
REPORT NOW

VISIT: 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

Dishwashing Products - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 35: Usage of rinse aid and dishwasher cleaner, March 2019

Younger age groups more likely to purchase dishwasher cleaners

Figure 36: Usage of rinse aid and dishwasher cleaner, by age, March 2019

Efficacy in rinse aids is important

Figure 37: Important attributes of rinse aid, March 2019

Layering product attributes adds value to rinse aids

Figure 38: TURF Analysis – Purchase influencer – Rinse aid for dishwasher, March 2019

Methodology

Shopping Behaviors

Dishwashing product purchasers are loyal to their brands

Figure 39: Shopping behaviors, March 2019

Older consumers are more brand loyal

Figure 40: Shopping behaviors, by age, March 2019

Hispanics read labels before buying

Figure 41: Shopping behaviors – Read ingredient labels, by Hispanic origin, March 2019

Attitudes toward Washing Dishes

Dishwasher owners still rinse items before loading

Figure 42: Attitudes toward washing dishes, March 2019

Older adults most likely to rinse before loading

Figure 43: Select attitudes toward washing dishes, by age, March 2019

Hispanics more involved in maintenance

Figure 44: Attitudes toward washing dishes, by Hispanic origin, March 2019

Important Natural Attributes

Safety and eco-friendly are most important natural attributes

Figure 45: Important natural attributes – Any rank (net), March 2019

Skin safety, cruelty-free, free-from bleach are hot buttons for 18-24s

Figure 46: Important natural attributes – Any rank (net), by age, March 2019

Less-affluent more likely to rank a variety of natural attributes important

Figure 47: Important natural attributes – Any rank (net), by income, March 2019

Interest in Innovations

Strong interest in dishwashing product innovations...

Figure 48: Any interest (net) in dishwashing product innovations, March 2019

...but not willing to pay more for these features

Figure 49: Interest and willingness to pay for dishwashing product innovations, March 2019

The promise of convenience, health could increase spend

Figure 50: Interest and willingness to pay for select dishwashing product innovations, by age, March 2019

Appendix – Data Sources and Abbreviations

Data sources

**BUY THIS
REPORT NOW**

VISIT: 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

Dishwashing Products - US - May 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 51: Total US sales and forecast of dishwashing market, at inflation-adjusted prices, 2013-23

Figure 52: Total US retail sales and forecast of dishwashing products, by segment, at current prices, 2013-23

Figure 53: Total US retail sales of dishwashing products, by channel, at current prices, 2013-18

Appendix – Key Players

Figure 54: Multi-outlet sales of liquid dishwashing products, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 55: Multi-outlet sales of dishwasher detergent/additives, by leading companies and brands, rolling 52 weeks 2018 and 2019

Appendix – The Consumer

Figure 56: Table - TURF Analysis – Purchase influencer – Dishwashing liquid, March 2019

Figure 57: Table - TURF Analysis – Purchase influencer – Dishwashing detergent, March 2019

Figure 58: Table - TURF Analysis – Purchase influencer – Rinse aid for dishwasher, March 2019

BUY THIS
REPORT NOW

VISIT: 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