

Report Price: £3302.97 | \$4460.00 | €3717.16

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



"The Chinese dishwashing market is at a mature, steady stage, and has been facing annually easing growth. The market opportunities lie in consumers trading up to premium products after becoming more informed about available offerings."

- Anne Yin, Associate Research Analyst

# This report looks at the following areas:

As such, it is not surprising to see a remarkable number of consumers buying dishwashing products from high-end supermarkets/hypermarkets, especially young consumers. This indicates that competition will no longer be concentrated in only the mass market, but will expand to a premium one.

- Transforming dishwashing habits with the adoption of dishwashers
- Priority claims to communicate safety and cleaning power
- Hybrid online/offline channels for purchasing dishwashing products

# 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

+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



Report Price: £3302.97 | \$4460.00 | €3717.16

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

Covered in this Report

Excluded

Subgroup definitions (by monthly household income)

#### **Executive Summary**

#### The market

Figure 1: Best- and worst-case forecast of market value of dishwashing products, China, 2013-23

# Companies and brands

Figure 2: Leading manufacturers' share in value sales of dishwashing products, China, 2017 and 2018

#### The consumer

#### The majority of dishwasher owners have low usage rates

Figure 3: Dishwasher ownership and dishwashing habits, November 2018

#### Dishwasher detergents not used by all dishwasher owners

Figure 4: Dishwashing products used in the last six months, November 2018

#### Dishwasher detergent consumers need guidance

Figure 5: Dishwasher detergent used in the last six months, November 2018

#### Limited variety among consumers regarding cleaning power

Figure 6: Claims associated with strong cleaning power, November 2018

#### Informed consumers associate ingredients with product safety

Figure 7: Features associated with safety, November 2018

# Offline channels still the main competitive battlefield

Figure 8: Purchase channel of dishwashing products, November 2018

#### Safety and ingredients are the top two value-adding features

Figure 9: Factors consumers would be willing to pay extra for, November 2018

# What we think

#### **Issues and Insights**

# Transforming dishwashing habits with the adoption of dishwashers

# The facts

#### The implications

Figure 10: Example of dishwasher tablet designed for small dishwashers, 2018

# Priority claims to communicate safety and cleaning power

# The facts

# The implications

Figure 11: Examples of products with 'better ingredients' demonstrating safety, China and New Zealand, 2018

Figure 12: Examples of hand washing products with dish-caring features, France and Denmark, 2018

Figure 13: Examples of dishwashing detergent with specific tough stains removal, Spain and Germany, 2017-18

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



Report Price: £3302.97 | \$4460.00 | €3717.16

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

Hybrid online/offline channels for purchasing dishwashing products

The facts

The implications

#### The Market - What You Need to Know

Mature market with easing growth rate

Growth supported by trading up and e-commerce

#### **Market Size and Forecast**

#### Market eases into steady growth

Figure 14: Market value and annual growth of dishwashing products, China, 2016-2018

Dishwasher detergents' potential still unfulfilled

#### Online channels and product premiumisation support future growth

Figure 15: Best- and worst-case forecast of market value of dishwashing products, China, 2013-23

#### **Market Factors**

Increasing household disposable incomes and expenditures

Consumers trading up for better life quality

E-commerce expands competitive battle ground

Environmental regulations eliminating inferior products

Standardisation of food-grade dishwashing products

#### **Key Players - What You Need to Know**

Further concentrated market with intense competition

Costly competition with endorsements and cost-effective free trials

Innovation focused on formulas

#### **Market Share**

# The dishwashing market became further concentrated in 2018

Figure 16: Leading manufacturers' share in value sales of dishwashing products, China, 2017 and 2018

Online channels rejuvenate sales

Finish still leading brands in dishwasher detergents

Brand aging dragging down sales

#### **Competitive Strategies**

#### Association with cooking scenarios

Figure 17: Liby advertisement in 'Chinese restaurant' TV variety show, 2017

# Trusted domestic household care brand leverages cultural pride

Figure 18: Nice Group 50th anniversary campaign, 2018

#### Co-branding with dishwashers for awareness and trial

Figure 19: Finish and Jianjing with dishwasher brands, 2018  $\,$ 

#### Who's Innovating?

Innovation still focused on hand washing products in China

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



Report Price: £3302.97 | \$4460.00 | €3717.16

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

Figure 20: New dishwashing product launches, by sub-category, China US, and UK, 2017-18

#### Dishwasher detergents are cherished more by imported and smaller domestic brands

Figure 21: Examples of new dishwasher detergents, China, 2017-18

#### New products further enhanced on ethical, natural, and convenience

Figure 22: Top 20 claims of new dishwashing product launches, China, 2017-18

#### Leveraging natural add-ins for better associations

Figure 23: Examples of new natural add-ins, China, 2017-18

#### New formulas demonstrate superiority

Figure 24: Examples of new natural formulas, China and South Korea, 2017-18

Figure 25: Examples of amino acid and micellar formulas, China and Croatia, 2017-18

#### Kind to hands and dermatologically tested

Figure 26: Example of kind to hands dishwashing products, China and Russia, 2018

Figure 27: Examples of dermatologically tested dishwashing products, Canada and Germany, 2017-18

#### Environmentally friendly formulas with no harsh chemicals

Figure 28: Examples of products with environmentally friendly formulas and no harsh chemicals, China, UK, Australia, and New Zealand, 2018

#### Environmentally friendly packaging

Figure 29: Examples of products with environmentally friendly packaging, China, South Korea, Italy, and UK, 2017-18

# The Consumer - What You Need to Know

25% of respondents have a dishwasher at home

17% of dishwasher owners not using dishwasher detergent

All-in-one products require more market education

Cleaning power still comes down to tough stains and grease removal

Food grade feature accepted by consumers as a safety indicator

Online channels have a 70% penetration rate

Safety and ingredients are the top two value-added factors

# **Dishwasher Ownership and Dishwashing Habits**

# One quarter of respondents have a dishwasher

Figure 30: Dishwasher ownership and dishwashing habits, November 2018

#### Frequent dishwasher users skew to affluent households

Figure 31: Dishwasher ownership and Dishwashing habits, by monthly household income, November 2018

# Younger consumers use dishwashers less frequently

Figure 32: Dishwasher ownership and dishwashing habits, by age, November 2018

#### Active market in lower tier cities

Figure 33: Dishwasher ownership and dishwashing habits, by city tier, November 2018

#### **Dishwashing Product Usage**

# Not all dishwasher owners use dishwasher detergent...

Figure 34: Dishwashing products used in the last six months, November 2018

...and price is not the only barrier



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



Report Price: £3302.97 | \$4460.00 | €3717.16

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

Figure 35: Dishwasher detergent penetration rate, by monthly household income, November 2018

#### Some frequent dishwasher users not using dishwasher detergent

Figure 36: Dishwasher detergent penetration rate, by dishwashing habits, November 2018

#### **Dishwasher Detergent Usage**

#### Liquid/gel is the most used dishwasher detergent format

Figure 37: Dishwasher detergent used in the last six months, November 2018

## Product-exploring consumers

Figure 38: Dishwasher detergent used in the last six months, by dishwashing habit, November 2018

#### Young consumers are core ancillaries users

Figure 39: Dishwasher detergent used in the last six months, by age, November 2018

#### Opportunities for dishwasher cleaners

Figure 40: Dishwasher detergent used in the last six months, by repertoire, November 2018

#### **Claims Associated with Strong Cleaning Power**

#### Tough stains and grease removal associated with strong cleaning power

Figure 41: Claims associated with strong cleaning power, November 2018

Figure 42: Examples of dishwashing detergents with heavy grease removal and high efficiency formulas, China, 2017-18

#### Affluent consumers want more efficiency and stain removal power

Figure 43: Claims associated with strong cleaning power, by monthly household income, November 2018

## Cold water performance sought by lower household income consumers

Figure 44: Example of dishwashing detergent with cold water grease removal claim, China, 2018

# **Features Associated with Safety**

# Consumers fear chemicals and demand hand care

Figure 45: Features associated with safety, November 2018

Figure 46: Example of product with clear ingredients names, percentages, and explanations, Finland, 2019

#### Older consumers appreciate natural ingredients more

Figure 47: Features associated with safety, by age, November 2018  $\,$ 

#### Simple 'no harm to hands' claims not enough for affluent consumers

Figure 48: Features associated with safety, by monthly household income, November 2018

Figure 49: Example of 'fragrance-free', 'clean packaging' product, China, 2019

#### **Purchase Channel**

# Supermarkets and hypermarkets are still the top channel

Figure 50: Purchase channels of dishwashing products, November 2018

# High-end supermarkets even appeal to lower income consumers

Figure 51: Purchase channels of dishwashing products, by monthly household income, November 2018

#### Older consumers also buy online

Figure 52: Top four purchase channels of dishwashing products, by age, November 2018

## **Factors Worth Paying Extra for**

Safety comes first, ethicalness ranks higher than cleaning power  $\ensuremath{\mathsf{I}}$ 

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



Report Price: £3302.97 | \$4460.00 | €3717.16

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

Figure 53: Factors consumers would be willing to pay extra for, November 2018

# Affluent consumers appreciate advanced formats, packaging and scent

Figure 54: Factors consumers would be willing to pay extra for, by monthly household income, November 2018

#### **Meet the Mintropolitans**

## Higher usage rate of dishwashers among Mintropolitans

Figure 55: Dishwasher ownership and dishwashing habits, by consumer classification, November 2018

# Greater willingness to pay more for ingredients, eco-friendly, and concentrated products

Figure 56: Factors consumers would be willing to pay extra for, by consumer classification, November 2018

#### Higher safety requirements among Mintropolitans

Figure 57: Features associated with safety, by consumer classification, November 2018

#### Mintropolitans seek better products through more channels

Figure 58: Purchase channels of dishwashing products, by consumer classification, November 2018

#### **Appendix - Market Size and Forecast**

Figure 59: Total value sales of dishwashing market, China, 2013-23

#### Appendix - Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations