

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

- Behaviour towards dishwashing
- Usage and dishwashing habits/dishwasher products penetration
- Features associated with safety in dishwashing products
- · Factors consumers are willing to pay more for
- · Consumers' attitudes and behaviours towards dishwashing

The dishwashing products market in China saw strong growth under the shadow of the COVID-19 outbreak, as consumers are doing more at-home cooking and have become increasingly concerned about hygiene and cleanliness at home. The market's growth rate in 2020 has reached 8.4% and Mintel forecasts the market is going to continue to grow at a value CAGR (compound annual growth rate) of 6.2% over 2020-25. The future growth drivers are mainly based on the safety habits among consumers bred by the pandemic. Safety related features such as food grade products, anti-bacterial benefits and no harsh ingredients are worth premiumising as consumers are willing to trade up for safety. Looking ahead, environmentally friendly and sustainability will also become future trends in product innovation.



"The dishwashing market saw strong growth during the pandemic and safety related features are the key focus to upgrade as consumers have become increasingly aware of hygiene habits and wellbeing in daily life post the COVID-19 outbreak."

- Amy Jin, Research Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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



### **Table of Contents**

## **OVERVIEW**

- Key issues covered in this report
- Definitions

#### **EXECUTIVE SUMMARY**

- The market
- Dishwashing products gain strong growth under pandemic
   Figure 1: Best- and worst-case forecast of total value sales of dishwashing market, China, 2015-25
- Companies and brands
- Domestic brands dominating the market

Figure 2: Leading manufacturers' share of value sales of dishwashing products, China, 2019–20

- The consumer
- About one third of respondents have a dishwasher now
   Figure 3: Dishwasher ownership and dishwashing behaviours,
   2019 vs 2020
- Dishwashing liquid remains the top used product
   Figure 4: Dishwashing products used in the last six months, by dishwasher ownership, November 2020
- Liby obtained more usage than Finish in dishwasher detergent sector

Figure 5: Dishwasher detergent brands used, November 2020

- Anti-bacterial benefits become a key safety measure
   Figure 6: Features associated with safe dishwashing products,
   2018 vs 2020
- Safety related features are key to premiumisation
   Figure 7: Dishwashing product features consumers are willing to pay more for, November 2020
- Sustainability matters to consumers
   Figure 8: Attitudes towards dishwashing, November 2020
- What we think

#### **ISSUES AND INSIGHTS**

- It's time to think of environmentally friendly products in China
- The facts
- The implications

Figure 9: Common Good refillable bottles

- Anti-bacterial becomes a main safety measure for post-COVID-19 era
- The facts

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

## Report Price: £3695 | \$4995 | €4400

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



The implications

Figure 10: Liby's anti-bacterial dishwashing gel

#### THE MARKET - KEY TAKEAWAYS

- Dishwashing market shows strong growth amid the pandemic
- Dishwasher ownership continues to grow

## MARKET SIZE AND FORECAST

COVID-19 outbreak has facilitated strong growth

Figure 11: Best- and worst-case forecast of total value sales of dishwashing market, China, 2015-25

#### **MARKET FACTORS**

- Increased at-home cooking boosted the usage of dishwashing products
- Economic development facilitated increased ownership of dishwashers
- More products launched with safer image to justify the premiumisation trend

#### **MARKET SEGMENTATION**

Machine dishwashing detergent continues to grow

Figure 12: Market value of dishwashing products, by segment, China, 2018-20

#### **COMPANIES AND BRANDS - KEY TAKEAWAYS**

- · Domestic brands dominate dishwashing market
- Newly launched products show trends of premiumisation

#### **MARKET SHARE**

· Liby maintained top position in dishwashing market

Figure 13: Leading manufacturers' share of value sales of dishwashing products, China, 2019–20
Figure 14: Liby vinegar dishwashing liquid

Brands continue to upgrade for premiumisation
 Figure 15: White Cat logo upgrade

Build product range for dishwashers to capture the next momentum

Figure 16: Kupoh's dishwasher salt and Seaways dishwasher tablet

## **COMPETITIVE STRATEGIES**

Food grade centre of attention

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

## Report Price: £3695 | \$4995 | €4400

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



Figure 17: Dishwashing products claiming to be edible, China

Building up premium brand image

Figure 18: Zhang Ziyi for Liby

White Cat x KuSpace to launch product set

Figure 19: White Cat x KuSpace set

#### LAUNCH ACTIVITY AND INNOVATION

 Aloe Vera and pomegranate become newly favoured fragrances

Figure 20: Top 10 fragrances claims in dishwashing products launches, China, 2019-20

Figure 21: Dishwashing products with aloe and pomegranate fragrances, China, 2020

Food grade and anti-bacterial claims are on the rise

Figure 22: Top 10 ingredient claims in dishwashing products launches, China, 2019-20

Anti-bacterial products

Figure 23: Dishwashing products with anti-bacteria feature, Japan and South Korea, 2020

Odour neutralising and added fragrance products

Figure 24: Odour removing products, New Zealand and Australia, 2020

Formulas that protect the hand

Figure 25: Dishwashing products with skin moisturising feature, China, 2020

· Washing up liquid in foam and spray format

Figure 26: Charmy foam dishwashing liquid, China

Figure 27: Liby's dishwashing spray, China

#### THE CONSUMER - KEY TAKEAWAYS

- Dishwasher ownership saw a rise in the last year
- Dishwashing liquid remains the most popular product format
- Liby is the top used dishwasher detergent brand
- Anti-bacterial is closely associated with safety
- Safety related features are worth paying extra for
- Consumers are looking for sustainable products

## **DISHWASHER OWNERSHIP AND DISHWASHING HABITS**

More than half of consumers still wash plates by hands
 Figure 28: Dishwasher ownership and dishwashing behaviours,
 2019 vs 2020

Older consumers tend to do more household works

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

## Report Price: £3695 | \$4995 | €4400

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



Figure 29: Dishwasher ownership and dishwashing behaviours

- 'wash dishes by hand', by age, November 2020
- Dishwasher ownership is still influenced by income level

Figure 30: Dishwasher ownership and dishwashing behaviours

– 'wash dishes by hand', by monthly household income,

November 2020

#### **PRODUCT USAGE**

Product usage

Figure 31: Dishwashing products used in the last six months, by dishwasher ownership, November 2020

Dishwasher liquid remains the top used product

Figure 32: Dishwashing products usage, dishwashing owner, 2019 vs 2020

Mature consumers prefer baking soda

Figure 33: Dishwashing products usage, by age, November 2020

#### **DISHWASHER DETERGENT BRANDS USED**

 Liby is the top sought-after brand of dishwasher detergent, prior to Finish

Figure 34: Dishwasher detergent brands used, November 2020

Figure 35: The balance by Liby, China

Finish is the top choice for 25-29 year old dishwasher owners

Figure 36: Dishwasher detergent top brands used, by age,

November 2020

Figure 37: White Cat SODA product range, China, 2019

#### FEATURES ASSOCIATED WITH SAFETY

 Anti-bacterial feature sees a rising importance post COVID-19

Figure 38: Features associated with safe dishwashing products, 2018 vs 2020

Natural ingredients matter more to mature consumers

Figure 39: Features associated with safe dishwashing products, by age, November 2020

## **FACTORS WILLING TO PAY MORE FOR**

 Safety image helps justify the premiumisation trend most Figure 40: Dishwashing product features consumers are willing to pay more for, November 2020

Younger consumers are looking for convenient solutions

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	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

## Report Price: £3695 | \$4995 | €4400

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



Figure 41: Selected dishwashing product features consumers are willing to pay more for, by age, November 2020

#### ATTITUDES TOWARDS DISHWASHING

Sustainability is worth attention now
 Figure 42: Attitudes towards dishwashing, November 2020

 Young consumers don't spend as much time on product selection as other age groups

Figure 43: Selected attitudes towards dishwashing, by age, November 2020

Lifestyle brands appeal more to high earners and mature consumers

Figure 44: Attitudes towards dishwashing – 'I prefer to buy dishwashing products from lifestyle brands (eg MUJI)', November 2020

Domestic brands demonstrate their appeal among high earners

Figure 45: Attitudes towards dishwashing - 'I'm willing to try newly launched domestic brands of dishwashing products', November 2020

### APPENDIX - MARKET SIZE AND FORECAST

Figure 46: Total value sales of dishwashing products market, China, 2015-25

### APPENDIX - METHODOLOGY AND ABBREVIATIONS

- Methodology
- Abbreviations

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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



# **About Mintel**

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.