

Dishwashing - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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



"The dishwashing products market has maintained stable growth over the past few years, with the future growth trend expected to continue at similar pace. The development of online retail channels and the expansion of modern trade have widened people's choice and enabled regional and international brands to connect with a larger consumer base."

– Jade Liu – Senior Research Analyst

This report looks at the following areas:

- What kinds of dishwashing detergent products can most effectively fill the needs gap in the market?
- Why are multi-dimensional dishwashing products important for brands to stay competitive in the market?
- How can brands leverage scents and packaging to maintain consumer interest?

As competition intensifies, multi-dimensional products focusing on effective cleaning, ease of use, and natural and chemical free ingredients will gain competitive edge. Furthermore, brands can adopt category blurring concepts to spur excitement for trial and delve into specialised dishwashing detergent products to prompt additional usage occasions.

Emotion-driven product innovations leveraging scent and package varieties satisfy consumers' experiential consumption mindset, while multi-pack bundling with bulk discount is an effective online promotional strategy to encourage trial of expensive dishwashing detergent products with premium prices.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@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 - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Table of Contents

Introduction

Definition
Report structure
Methodology
Abbreviations

Executive Summary

The market

Figure 1: Total China value sales of dishwashing products market, 2008-18

Companies and brands

Figure 2: Leading companies' market share in China's dishwashing products market, by value, 2012-13

The consumer

Dishwasher penetration

Figure 3: Dishwasher penetration, February 2014

Frequency of household dishwashing by hand

Figure 4: Frequency of household dishwashing by hand, February 2014

Roles in the household for hand dishwashing task

Figure 5: Roles in household hand dishwashing task, by gender, February 2014

Problems encountered when using hand dishwashing detergents

Figure 6: Problems encountered when using hand dishwashing detergents, February 2014

Purchase consideration factors for hand dishwashing detergents

Figure 7: Purchase consideration factor for hand dishwashing detergents, February 2014

Interest in different types of hand dishwashing detergents

Figure 8: Interest in different types of hand dishwashing detergents, February 2014

Attitudes towards dishwashing detergents

Figure 9: Attitudes towards dishwashing detergents, February 2014

Key trends

What kinds of dishwashing detergent products can most effectively filled the needs gap in the market?

Why are multi-dimensional dishwashing products important for brands to stay competitive in the market?

How can brands leverage scents and packaging to maintain consumer interest?

What we think

Issues and Insights

What kinds of dishwashing detergent products can most effectively fill the needs gap in the market?

Key points

The implications

Figure 10: Interest in different types of hand dishwashing detergents, February 2014

Why are multi-dimensional dishwashing products important for brands to stay competitive in the market?

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Dishwashing - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Key points

The implications

Figure 11: Top dishwashing product claims, 2009-13

Figure 12: Examples of multi-dimensional products from overseas markets, 2013

How can brands leverage scents and packaging to maintain consumer interest?

Key points

The implications

Figure 13: Number of new products launched, by categories and by countries, 2010-14

Figure 14: Examples of dishwashing detergent products with innovative scents and package designs from overseas markets, 2013-14

Trend Application

How can brands alleviate safety concerns in the chemical dominated dishwashing product market?

How important are mood manipulating emotional benefits in dishwashing products selection?

Market Size and Forecast

Key points

Market size and forecast

The dishwashing products market maintains stable growth

Figure 15: China total value sales of dishwashing detergent products, 2008-13

Per capita spending yet to be pushed

Figure 16: Top 8 dishwashing detergent products consumption nations and their annual per capita spending, 2012

A consistent growth rate is forecast to continue

Figure 17: Total China value sales of dishwashing products market, 2008-18

Market drivers

Government issued policy to adopt natural surfactant

Rapid urbanisation sets larger population base to grow demand

Rise in disposable income marks potential for premium products

Figure 18: China urban per capita disposable income, 2009-13

Online retailing assists regional and international brands to grow national presence

Modern trade expansion strengthens product accessibility

Market barriers

Limited product innovation restricts future growth

Figure 19: Number of new product launch, by dishwashing and fabric care categories, 2010-14

Traditional media advertising focus misses out a large potential customer base in the digital world

Idle dishwashers restrict demand for machine dishwashing detergent products

Market Segmentation

Key points

Hand dishwashing detergents

Figure 20: Hand dishwashing products market, by value, 2008-13

Figure 21: Total China value sales of hand dishwashing detergents, 2008-18

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Dishwashing - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Machine dishwashing detergents

Figure 22: Machine dishwashing products market, by value, 2008-13

Figure 23: Total China value sales of machine dishwashing detergents, 2008-18

Market Share

Key points

Brand share

Figure 24: Leading companies' market share in China's dishwashing products market, by value, 2012-13

Who's Innovating?

Key points

Ease of use and time saving products push for convenience

Figure 25: Top claims on new dishwashing product launches – Ease of use and time/speed, 2010-14

Figure 26: Top ranking for purchase consideration factors, February 2014

Figure 27: Examples of ease of use and time saving dishwashing detergent products from overseas markets, 2013

Plant-based ingredients claim on 'natural' high ground

Figure 28: Top claims on new dishwashing product launches – Botanical/Herbal, 2010-14

Figure 29: Examples of plant-based natural dishwashing detergent products from domestic market, 2012-13

'Environmentally friendly' a value proposition to declare

Figure 30: Top claims on new dishwashing product launches – Environmentally friendly products, 2010-14

Figure 31: Examples of environmentally friendly dishwashing detergent products from domestic market, 2012-13

Advanced skin protection formula incorporates moisturising ingredients for sensory appeal

Figure 32: Top claims on new dishwashing product launch – vitamin/mineral fortified and pH neutral, 2010-14

Figure 33: Examples of skin protecting dishwashing detergent products from domestic and overseas markets, 2011-13

Anti-bacterial feature boosts cleaning power

Figure 34: Top claims on new dishwashing product launch – Anti-bacterial, 2010-14

Figure 35: Examples of anti-bacterial dishwashing detergent products from domestic market, 2013-14

Fruit and vegetable detergents extend functions to cover additional usage purposes

Figure 36: Examples of specialized fruit and vegetable dishwashing detergent products from domestic market, 2012-14

Customised baby bottle wash up liquids tap specialised need

Figure 37: Examples of customised baby bottle dishwashing detergent products from domestic market, 2011-13

2-in-1 dish and hand liquid creates additional usage occasion

Figure 38: Example of cross-category dishwashing detergent products from overseas market, 2013

Multi-pack bundling a good value for money option

Figure 39: Top ranking for purchase consideration factors, February 2014

Figure 40: Examples of multi-pack dishwashing detergent products from China's online retail market, 2014

Companies and Brands

Liby Group

Nice Group

Shanghai Hutchison WhiteCat Co., Ltd.

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Dishwashing - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Zhongshan Lanju Daily Chemical Industrial Co., Ltd.
China Nafine Group International Co., Ltd.
Lonkey Industrial Co., Ltd.

The Consumer – Dishwasher Penetration

Key points

Low dishwasher ownership in China but big potential for growth

Figure 41: Dishwasher penetration, February 2014

Adults aged 30-39 are more willing to buy a dishwasher in the near future

Figure 42: Dishwasher penetration, by age, February 2014

Greater purchase intentions among higher income households

Figure 43: Dishwasher penetration, by household income, February 2014

The Consumer – Frequency of Household Dishwashing by Hand

Key points

Dishwashing by hand is mainstream among consumers

Figure 44: Frequency of household dishwashing by hand, February 2014

Higher-income households wash dishes by hand less frequently

Figure 45: Most popular frequency of household dishwashing by hand, by household income, February 2014

More households with children wash dishes by hand at a high frequency

Figure 46: Most popular frequency of household dishwashing by hand, by demographics, February 2014

The Consumer – Roles in the Household for Hand Dishwashing Task

Key points

Females are the main user of dishwashing detergents at home

Figure 47: Roles in the household hand dishwashing task, by gender, February 2014

Middle-aged females are more likely to be the only one responsible for hand dishwashing

Figure 48: Roles in the household hand dishwashing task, by gender and age group, February 2014

More tier one city residents do hand dishwashing themselves

Figure 49: Roles in the household hand dishwashing task, by city, February 2014

The Consumer – Problems Encountered When Using Hand Dishwashing Detergents

Key points

Rinsing time and skin conditions are the most common problems

Consumers concerned more about washing function and skin care features

Figure 50: Problems encountered when using hand dishwashing detergents, February 2014

Figure 51: Most popular problems encountered when using hand dishwashing detergents, by gender, February 2014

Meeting the needs of increasingly sophisticated consumers

Figure 52: Problems encountered when using hand dishwashing detergents, February 2014

The Consumer – Purchase Consideration Factors for Hand Dishwashing Detergents

Key points

Ingredients and product performance are top two purchase consideration factors

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Dishwashing - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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

Cleaning power and rinse off easily are key features consumers look for

Figure 53: Purchase consideration factors for hand dishwashing detergents, February 2014

Different purchase considerations lead to varied tactics for main users

Figure 54: Next most popular purchase consideration factors for hand dishwashing detergents – Rank 1, by age group of females, February 2014

The Consumer – Interest in Different Types of Hand Dishwashing Detergents

Key points

Residue-free products generate the highest level of interest

Understated purchase consideration factor – scent

Figure 55: Interest in different types of hand dishwashing detergents, February 2014

Males are more interested in functions while females product safety

Figure 56: Interest in different types of hand dishwashing detergents, February 2014

The Consumer – Attitudes Towards Dishwashing Detergents

Key points

Detergents made from natural ingredients worth premium price

Consumers are looking for value for money rather than price

Brands can play on scent and packaging to expand product variety

Specialised products worth premium price

Figure 57: Attitudes towards dishwashing detergents, February 2014

Increasingly positive attitudes towards dishwashers in China

Figure 58: Agreement with statement 'Washing up by hand delivers better cleaning results than using dishwasher', by city tier, February 2014

Appendix – Dishwasher Penetration

Figure 59: Dishwasher penetration, February 2014

Figure 60: Dishwasher penetration, by demographics, February 2014

Figure 61: Dishwasher penetration, by demographics, February 2014 (continued)

Appendix – Frequency of Household Dishwashing by Hand

Figure 62: Frequency of household dishwashing by hand, February 2014

Figure 63: Most popular frequency of household dishwashing by hand, by demographics, February 2014

Figure 64: Next most popular frequency of household dishwashing by hand, by demographics, February 2014

Appendix – Roles in the Household for Hand Dishwashing Task

Figure 65: Roles in the household hand dishwashing task, February 2014

Figure 66: Roles in the household hand dishwashing task, by demographics, February 2014

Appendix – Problems Encountered when Using Hand Dishwashing Detergents

Figure 67: Problems encountered when using hand dishwashing detergents, February 2014

Figure 68: Most common problems encountered when using hand dishwashing detergents, by demographics, February 2014

Figure 69: Next most common problems encountered when using hand dishwashing detergents, by demographics, February 2014

Appendix – Purchase Consideration Factors for Hand Dishwashing Detergents

Figure 70: Purchase consideration factors for hand dishwashing detergents, February 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Dishwashing - China - May 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

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

- Figure 71: Most popular purchase consideration factors for hand dishwashing detergents – Rank 1, by demographics, February 2014
- Figure 72: Next most popular purchase consideration factors for hand dishwashing detergents – Rank 1, by demographics, February 2014
- Figure 73: Other purchase consideration factors for hand dishwashing detergents – Rank 1, by demographics, February 2014
- Figure 74: Most popular purchase consideration factors for hand dishwashing detergents – Rank 2, by demographics, February 2014
- Figure 75: Next most popular purchase consideration factors for hand dishwashing detergents – Rank 2, by demographics, February 2014
- Figure 76: Other purchase consideration factor for hand dishwashing detergents – Rank 2, by demographics, February 2014
- Figure 77: Most popular purchase consideration factor for hand dishwashing detergents – Rank 3, by demographics, February 2014
- Figure 78: Next most popular purchase consideration factors for hand dishwashing detergents – Rank 3, by demographics, February 2014
- Figure 79: Other purchase consideration factor for hand dishwashing detergents – Rank 3, by demographics, February 2014
- Figure 80: Most popular purchase consideration factor for hand dishwashing detergents – Rank 4, by demographics, February 2014
- Figure 81: Next most popular purchase consideration factors for hand dishwashing detergents – Rank 4, by demographics, February 2014
- Figure 82: Other purchase consideration factor for hand dishwashing detergents – Rank 4, by demographics, February 2014
- Figure 83: Most popular purchase consideration factor for hand dishwashing detergents – Rank 5, by demographics, February 2014
- Figure 84: Next most popular purchase consideration factor for hand dishwashing detergents – Rank 5, by demographics, February 2014
- Figure 85: Other purchase consideration factors for hand dishwashing detergents – Rank 5, by demographics, February 2014

Appendix – Interest in Different Types of Hand Dishwashing Detergents

- Figure 86: Interest in different types of hand dishwashing detergents, February 2014
- Figure 87: Interest in different types of hand dishwashing detergents – Extra-strength cleaning power, by demographics, February 2014
- Figure 88: Interest in different types of hand dishwashing detergents – Anti-bacterial, by demographics, February 2014
- Figure 89: Interest in different types of hand dishwashing detergents – Biodegradable/eco-friendly, by demographics, February 2014
- Figure 90: Interest in different types of hand dishwashing detergents – Super concentrated, by demographics, February 2014
- Figure 91: Interest in different types of hand dishwashing detergents – Residue-free, by demographics, February 2014
- Figure 92: Interest in different types of hand dishwashing detergents – Phosphate and/or dye free, by demographics, February 2014
- Figure 93: Interest in different types of hand dishwashing detergents – Innovative natural ingredients, by demographics, February 2014
- Figure 94: Interest in different types of hand dishwashing detergents – With extra skincare function, by demographics, February 2014
- Figure 95: Interest in different types of hand dishwashing detergents – Refillable pack, by demographics, February 2014
- Figure 96: Interest in different types of hand dishwashing detergents – Innovative scents, by demographics, February 2014
- Figure 97: Interest in different types of hand dishwashing detergents – A multifunctional cleaner that can also be used to wash fruit/vegetables, by demographics, February 2014
- Figure 98: Interest in different types of hand dishwashing detergents – A multifunctional cleaner that can also be used to wash kitchenware, by demographics, February 2014

Appendix – Attitudes Towards Dishwashing Detergents

- Figure 99: Attitudes towards dishwashing detergents, February 2014
- Figure 100: Most popular attitudes towards dishwashing detergents, by demographics, February 2014
- Figure 101: Next most popular attitudes towards dishwashing detergents, by demographics, February 2014
- Figure 102: Other attitudes towards dishwashing detergents, by demographics, February 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com