

Dishwashing Products - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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



“Competitive pricing across the dishwashing category has dented value sales. While a low level of dishwasher ownership remains a limiting factor, boosting usage of dishwasher ancillaries is an area of potential growth. Meanwhile, interest in ultra-concentration and non-drip caps suggests areas to explore to invigorate the hand dishwashing market.”

– Anita Winther, Research Analyst

This report looks at the following areas:

- **Disrupting savvy shopping habits**
- **Balancing the all-in-one positioning with ancillary use**

Following growth over 2011-13, value sales of dishwashing products have been in decline since 2015. The growth of discounters and the impact of the supermarket price wars across the sector have taken their toll on value sales, while a shift towards larger economy packs has also seen consumers buy washing-up liquid and dishwasher detergents less often.

Increasing usage of dishwasher ancillaries remains an area of potential growth. While many recognise the benefit of ancillaries, the popularity of all-in-one tablets has limited consumer uptake of these. Meanwhile, consumer interest in ultra-concentration and non-drip caps suggests areas to explore to invigorate the hand dishwashing 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

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 - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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
 Hand dishwashing detergents
 Dishwasher detergents
 Excluded

Executive Summary

The market

Value decline for dishwashing category

Inflation expected to support value sales

Figure 1: Forecast of UK retail value sales of dishwashing products, 2011-21

Hand dishwashing sees steepest fall

Dishwasher tablets dominated segment

Supermarkets remain the strongest channel

UK dishwasher ownership lags behind other countries

Companies and brands

Fairy and Finish continue to dominate market

Figure 2: Manufacturers' shares of value sales of dishwashing products, 2016/17

Dishwashing innovation declines

Green launches from Waitrose and Seventh Generation

Adspend hits four-year high

Fairy enjoys strong brand image, Finish scores well on performance

Figure 3: Attitudes towards and usage of selected brands, March 2017

The consumer

Washing-up liquid is universally used and purchased

Figure 4: Usage and purchase of washing-up liquid, March 2017

Dishwasher tablets and capsules dominate

Figure 5: Usage and purchase of dishwasher products, March 2017

High level of loyalty in dishwashing category

Figure 6: Purchase habits for washing-up liquid, March 2017

Figure 7: Purchase habits for dishwasher detergents, March 2017

Free samples are key to encouraging switching

Figure 8: Prompts that would encourage people to buy a different type/brand of washing-up liquid, March 2017

Figure 9: Prompts that would encourage people to buy a different type/brand of dishwasher detergent, March 2017

Price is key factor for those shopping around

Figure 10: Most important factors influencing choice when buying one type/brand of washing-up liquid over another, March 2017

Figure 11: Most important factors influencing choice when buying one type/brand of dishwasher detergent over another, March 2017

**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 - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Ultra-concentrated washing-up liquids and no-drip caps garner interest

Figure 12: Purchase behaviours for dishwashing products, March 2017

Confidence is high in dishwasher care knowledge

Figure 13: Attitudes towards dishwasher products, March 2017

What we think

Issues and Insights

Disrupting savvy shopping habits

The facts

The implications

Balancing the all-in-one positioning with ancillary use

The facts

The implications

The Market – What You Need to Know

Value decline for dishwashing category

Inflation expected to support value sales

Hand dishwashing sees steepest fall

Dishwasher tablets dominated segment

Supermarkets remain the strongest channel

UK dishwasher ownership lags behind other countries

Market Size and Forecast

Value decline continues for dishwashing category

Figure 14: UK retail value sales and forecast of dishwashing products, at current and constant prices, 2011-21

Inflation expected to support value sales

Figure 15: Forecast of UK retail value sales of dishwashing products, 2011-21

Forecast methodology

Market Segmentation

Fall in hand dishwashing sales

Figure 16: UK retail value sales of dishwashing products, by segment, 2015 and 2016

Machine dishwashing sees sales dip

Figure 17: UK retail value sales of machine dishwashing products, by sub-segment, 2015 and 2016

Channels to Market

Supermarkets remain the strongest channel

Figure 18: UK retail value sales of dishwashing products, by outlet type, 2014-16

Amazon Dash launches for Fairy and Finish

Market Drivers

UK dishwasher ownership lags behind other countries

Figure 19: Ownership of dishwashers in selected European countries and the US, UK – March 2017, France, Germany, Italy and Spain – July 2016, and the US – November 2016

**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 - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Population growth should underpin demand for dishwashing products...

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

...but shrinking household size will put pressure on dishwasher market

Figure 21: Dishwasher ownership, by household size, March 2017

Rental market suppresses growth potential for dishwashers

Figure 22: Dishwasher ownership, by housing situation, March 2017

Brexit spells end of deflation and growing real consumer incomes

Dented consumer confidence could increase dine-in occasions

Figure 23: Dishwasher ownership, by financial situation, March 2017

EU phosphate ban comes into action

Figure 24: Share of automatic dishwasher detergent launches in the UK market containing phosphorus compounds, 2012-16

2017 deadline for CLP regulation compliancy looms

Implications of Brexit on product regulations

Companies and Brands – What You Need to Know

Fairy and Finish continue to dominate market

Dishwashing innovation declines

Green launches from Waitrose and Seventh Generation

Adspend hits four-year high

Fairy enjoys strong brand image, Finish scores well on performance

Market Share

Dominance of P&G and RB continues

Figure 25: Manufacturers' shares of value sales of dishwashing products, 2016/17*

Finish sees market share slip in machine dishwashing

Figure 26: Leading brands' value sales and shares of machine dishwashing products, 2015/16 and 2016/17

Fairy extends lead in hand dishwashing

Figure 27: Leading brands' value sales and shares of hand dishwashing products, 2015/16 and 2016/17

Launch Activity and Innovation

Dishwashing product launches decline

Figure 28: Share of new product launches in the UK dishwashing products market, by sub-segment, 2013-17

P&G strengthens lead in NPD

Reckitt Benckiser relaunches Finish as Super Charged

Figure 29: Share of new product launches in the UK dishwashing products market, by top 10 companies (sorted by 2016), 2013-17

Spontex crosses over into dishwashing

Ethical claims are becoming the norm

Waitrose launches Waitrose ECOlogical range

Figure 30: Leading claims in the UK dishwashing products market, by top 10 claims (sorted by 2016), 2013-17

Method unveils colourful packaging collaborations

Lemon continues to lead in fragrances

**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 - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 31: Leading fragrances in the UK dishwashing products market, by top 10 fragrances (sorted by 2016), 2013-17

Advertising and Marketing Activity

Adspend hits four-year high

Figure 32: Total above-the-line, online display and direct mail advertising expenditure on dishwashing products, 2013-17

Top advertiser P&G ups spend

Figure 33: Total above-the-line, online display and direct mail advertising expenditure on dishwashing products, by top five advertisers (sorted by 2016), 2013-17

RB steps back on adspend

Two new Finish adverts in 2017

Discounters highlight value

Ecover continues ocean plastic campaign

Method launches colourful #themethodway campaign

Nielsen Ad Intel coverage

Brand Research

What you need to know

Brand map

Figure 34: Attitudes towards and usage of selected brands, March 2017

Key brand metrics

Figure 35: Key metrics for selected brands, March 2017

Brand attitudes: Fairy excels on trust, quality and reputation

Figure 36: Attitudes, by brand, March 2017

Brand personality: Ecover leads on ethics

Figure 37: Brand personality – Macro image, March 2017

Fairy and Finish are viewed as reliable and effective

Figure 38: Brand personality – Micro image, March 2017

Brand analysis

Fairy enjoys advantage across most metrics

Figure 39: User profile of Fairy, March 2017

Finish scores well on performance

Figure 40: User profile of Finish, March 2017

Persil's presence in laundry gives it strong brand image

Figure 41: User profile of Persil, March 2017

Aldi's Magnum scores high on value

Figure 42: User profile of Aldi Magnum, March 2017

Ecover's ethical credentials are widely recognised

Figure 43: User profile of Ecover, March 2017

The Consumer – What You Need to Know

Washing-up liquid is universally used and purchased

Dishwasher tablets and capsules dominate

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 - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

- High level of loyalty in dishwashing category
- Free samples are key to encouraging switching
- Price is key factor for those shopping around
- Ultra-concentrated washing-up liquids and no-drip caps garner interest
- Confidence is high in dishwasher care knowledge

Usage and Purchasing of Dishwashing Products

- Washing-up liquid is universally used and purchased
Figure 44: Usage and purchase of washing-up liquid, March 2017
- Extensive crossover across washing-up liquid and dishwasher products
Figure 45: Crossover in usage and purchase of washing-up liquid and dishwasher products, March 2017
- Dishwasher tablets and capsules dominate
Figure 46: Usage and purchase of dishwasher products, March 2017
- Under-45s are less likely to use ancillaries

Purchase Habits for Dishwashing Products

- The majority are brand-loyal when buying washing-up liquid
Figure 47: Purchase habits for washing-up liquid, March 2017
- Half of dishwasher detergent buyers are brand-loyal
Figure 48: Purchase habits for dishwasher detergents, March 2017
- Family lifestage prompts shopping around

Prompts for Switching Dishwashing Products

- Free samples are key to encouraging switching
- Trial-sized packs should reduce risk of experimentation
Figure 49: Prompts that would encourage people to buy a different type/brand of washing-up liquid, March 2017
Figure 50: Prompts that would encourage people to buy a different type/brand of dishwasher detergent, March 2017
- Promotions provide prompt to many
- Recommendations from friends and family important
Figure 51: Screenshot from the Savvy Circle subsection on supersavvyme.co.uk, April 2016

Factors Influencing Choice of Dishwashing Products

- Savvy shopping habits are well established in category
Figure 52: Most important factors influencing choice when buying one type/brand of washing-up liquid over another, March 2017
Figure 53: Most important factors influencing choice when buying one type/brand of dishwasher detergent over another, March 2017
- All-in-one and added benefits are ingrained in dishwasher products
- Antibacterial and skin-friendly properties hold sway in washing-up liquid
- Fragrance innovations can encourage experimentation

Purchase Behaviours for Dishwashing Products

- Demand for ultra-concentrated washing-up liquids
- No-drip caps garner interest
Figure 54: Purchase behaviours for dishwashing products, March 2017

**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 - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Consumers are encouraged by quality awards
 Scope for household care brands to expand into dishwashing
 The young and affluent are more likely to look for eco-friendly products

Attitudes towards Dishwasher Products

Confidence is high in dishwasher care knowledge
 Figure 55: Attitudes towards dishwasher products, March 2017

Pre-rinsing habits persist
 Performance issues remain

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations
 Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology
 Total market forecast
 Figure 56: UK retail value sales of dishwashing products, best- and worst-case forecast, 2016-21

Hand dishwashing segment forecast
 Figure 57: UK retail value sales and forecast of hand dishwashing products, at current and constant prices, 2011-21
 Figure 58: Forecast of UK retail value sales of hand dishwashing products, 2011-21
 Figure 59: UK retail value sales of hand dishwashing products, best- and worst-case forecast, 2016-21

Machine dishwashing segment forecast
 Figure 60: UK retail value sales and forecast of machine dishwashing products, at current and constant prices, 2011-21
 Figure 61: Forecast of UK retail value sales of machine dishwashing products, 2011-21
 Figure 62: UK retail value sales of machine dishwashing products, best- and worst-case forecast, 2016-21

Appendix – Market Share

Figure 63: Leading manufacturers' value sales and shares of machine dishwashing products, 2015/16 and 2016/17
 Figure 64: Leading manufacturers' value sales and shares of hand dishwashing products, 2015/16 and 2016/17

Appendix – Launch Activity and Innovation

Figure 65: Share of new product launches in the UK dishwashing products market, by launch type, 2013-17
 Figure 66: Share of new product launches in the UK dishwashing products market, by branded and private label, 2013-17
 Figure 67: Share of new product launches in the UK automatic dishwashing segment, by format, 2013-17
 Figure 68: Use of 'dermatologically tested' and 'antibacterial' claims in the UK hand dishwashing products market, 2013-17

**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