

## Dishwashing Products - UK - May 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The rise of the discounters has continued to dent the market’s value sales, despite the growing population. Going forward, an increase in small household sizes and the squeeze on consumer spending pose a challenge to the automatic dishwashing market. Meanwhile, interest in packaging that reduces plastic waste presents areas for companies to explore in order to stand out.”  
**– Alyson Parkes, Research Analyst**

This report looks at the following areas:

- Responding to demographic shifts is vital for market
- Opportunity for companies to address plastic packaging concerns
- Cost of eco-friendly dishwashing products can curb usage

Total value sales of dishwashing products fell over 2012-17. This was largely driven by falling sales in hand dishwashing products as the rise of the discounters and own-labels ramped up pressure on brands, driving down prices.

Addressing the shifting demographic backdrop of the UK is vital for the automatic dishwashing products segment to remain relevant, against shrinking household sizes and squeezed consumer incomes. Meanwhile, as the impact of plastic waste on the environment takes centre stage in the media, addressing plastic packaging waste through reduction and use of recycled materials will become increasingly important for companies.

**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 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Dishwasher category enters third year of decline

Decline in value sales expected to continue

Figure 1: Forecast of UK retail value sales of dishwashing products, 2012-22

Hand dishwashing sales fall at a faster rate than the overall market

Grocery multiples retain the lion's share of sales

Growing number of small household sizes will pose a challenge

Squeezed incomes can suppress growth for dishwashers but increase dine-in occasions

Companies and brands

P&G and Reckitt Benckiser responsible for nearly three quarters of sales

Fairy continues to dominate in hand dishwashing products

Figure 2: Leading brands' shares of value sales of hand dishwashing products, 2017/18\*

Total product launches reach four-year high

Rise in launch of baby bottle cleaners

Ecover adds bottle made from 50% recycled ocean plastic; P&G plans to launch Fairy Ocean Plastics

Adspend remains high

P&G spends heavily on Fairy

Fairy is the most trusted brand; Ecover carries the most ethical image

#### The consumer

Washing-up liquid is used and purchased universally

Figure 3: Usage and purchase of washing-up liquid, February 2018

All-in-one dishwasher tablets/capsules dominate

Figure 4: Usage of dishwasher products, February 2018

Myths surrounding dishwashing machines still prevalent among consumers

Figure 5: Attitudes towards dishwashing products, February 2018

Young ABs are most interested in allergen-free washing-up liquid

Opportunity for two-in-one multipurpose washing-up products

Figure 6: Dishwasher-related behaviours, February 2018

Fully recyclable packaging is the top preference

Figure 7: Packaging preferences for dishwasher products, February 2018

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dishwashing Products - UK - May 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Child-safe packaging is lacking in the dishwasher products market

Standard brands are the most closely associated with positive attributes

Figure 8: Correspondence analysis – Dishwashing products, February 2018

What we think

## Issues and Insights

Responding to demographic shifts is vital for market

The facts

The implications

Opportunity for companies to address plastic packaging concerns

The facts

The implications

Cost of eco-friendly dishwashing products can curb usage

The facts

The implications

## The Market – What You Need to Know

Dishwasher category enters third year of decline

Decline in value sales expected to continue

Hand dishwashing sales fall at a faster rate than the overall market

Grocery multiples retain the lion's share of sales

Growing number of small household sizes will pose a challenge

Squeezed incomes can suppress growth for dishwashers but increase dine-in occasions

## Market Size and Forecast

Dishwasher category enters third year of decline

Figure 9: UK retail value sales and forecast of dishwashing products, at current and constant prices, 2012-22

Decline in value sales expected to continue

Figure 10: Forecast of UK retail value sales of dishwashing products, 2012-22

Decline in hand dishwashing segment is expected to slow

Figure 11: Forecast of UK retail value sales of hand dishwashing products, 2012-22

Forecast methodology

## Market Segmentation

Hand dishwashing sales fall at a faster rate than the overall market

Figure 12: UK retail value sales of dishwashing products, by segment, 2016 and 2017

Downward sales trajectory continues for machine dishwashing

Figure 13: UK retail value sales of machine dishwashing products, 2016 and 2017

## Channels to Market

Grocery multiples retain the lion's share of sales

Figure 14: UK retail value sales of dishwashing products, by outlet type, 2015-17

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dishwashing Products - UK - May 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Market Drivers

Growing number of small household sizes will pose a challenge

Figure 15: UK households, by size, 2012-22

Rental market suppresses growth for dishwashers

Figure 16: Dishwasher ownership, by housing situation, February 2018

Squeezed incomes can suppress growth for dishwashers but increase dine-in occasions

Figure 17: Dishwasher ownership, by financial situation, February 2018

Reducing plastic packaging waste could boost use of refillable containers and dishwashing requirements

SC Johnson acquisition suggests growth potential for "green" dishwashing products

## Companies and Brands – What You Need to Know

P&G and Reckitt Benckiser responsible for nearly three quarters of sales

Fairy continues to dominate in hand dishwashing products

Total product launches reach four-year high

Rise in launch of baby bottle cleaners

Ecover adds bottle made from 50% recycled ocean plastic; P&G plans to launch Fairy Ocean Plastics

Adspend remains high

P&G spends heavily on Fairy

Fairy is the most trusted brand; Ecover carries the most ethical image

## Market Share

P&G and Reckitt Benckiser responsible for nearly three quarters of sales

Figure 18: Manufacturers' shares of value sales of dishwashing products, 2017/18\*

Own-label gains share in hand dishwashing products

Figure 19: Leading brands' value sales and shares of hand dishwashing products, 2016/17 and 2017/18

Downward trajectory continues for machine dishwashing market leaders

Figure 20: Leading brands' value and shares of machine dishwashing products, 2016/17 and 2017/18

## Launch Activity and Innovation

Total product launches reach four-year high

Figure 21: Share of NPD in the UK dishwashing products market, by sub-segment, January 2014-April 2018

Own-label gains share of new product launches

Significant drop in NPD from P&G

Figure 22: Share of NPD in the UK dishwashing products market, by top 10 companies (sorted by 2017), January 2014-April 2018

Rise in launch of baby bottle cleaners

Figure 23: Examples of baby bottle cleaner launches, 2017

Brands make pledges on plastic packaging

Ecover adds bottle made from 50% recycled ocean plastic

P&G plans to launch limited edition Fairy Ocean Plastics

Bottles remain a favourite among brands, but pouches gain momentum

Figure 24: NPD in the UK dishwashing products market, by package type, January 2014-April 2018

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dishwashing Products - UK - May 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Advertising and Marketing Activity

### Adspend remains high

Figure 25: Total above-the-line, online display and direct mail advertising expenditure on dishwashing products, January 2014-April 2018

### P&G spends heavily on Fairy

Figure 26: Total above-the-line, online display and direct mail advertising expenditure on dishwashing products, by top five advertisers (sorted by 2017), January 2014-April 2018

### P&G supports launch of Fairy with Lift Action with TV ad

### RB steps back on spend for second year running

Figure 27: Total above-the-line, online display and direct mail advertising expenditure on dishwashing products, by top three brands (sorted by 2017), January 2014-April 2018

### Ecover promotes its fully recycled washing-up range with outdoor activation

### Nielsen Ad Intel coverage

## Brand Research

### What you need to know

#### Brand map

Figure 28: Attitudes towards and usage of selected brands, April 2018

#### Key brand metrics

Figure 29: Key metrics for selected brands, April 2018

#### Brand attitudes: Fairy is the most trusted brand, seen to have consistently high quality

Figure 30: Attitudes, by brand, April 2018

#### Brand personality: Ecover carries the most ethical image

Figure 31: Brand personality – Macro image, April 2018

#### Fairy and Persil seen to be the most reliable and effective

Figure 32: Brand personality – Micro image, April 2018

#### Brand analysis

#### Fairy is the most positively viewed brand

Figure 33: User profile of Fairy, April 2018

#### Finish scores well on effectiveness and high performance

Figure 34: User profile of Finish, April 2018

#### Persil has a strong family image

Figure 35: User profile of Persil, April 2018

#### Method has strong ethical associations

Figure 36: User profile of Method, April 2018

#### Ecover has the most natural image

Figure 37: User profile of Ecover, April 2018

## The Consumer – What You Need to Know

Washing-up liquid is used and purchased universally

All-in-one dishwasher tablets/capsules dominate

Myths surrounding dishwashing machines still prevalent among consumers

Young ABs are most interested in allergen-free washing-up liquid

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dishwashing Products - UK - May 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

- Opportunity for two-in-one multipurpose washing-up products
- Fully recyclable packaging is the top preference
- Child-safe packaging is lacking in the dishwasher products market
- Standard brands are the most closely associated with positive attributes

## Usage and Purchasing of Dishwashing Products

- Washing-up liquid is used and purchased universally  
Figure 38: Usage and purchase of washing-up liquid, February 2018
- Less than half of consumers own a dishwasher  
Figure 39: Dishwasher machine ownership, February 2018
- All-in-one dishwasher tablets/capsules dominate  
Figure 40: Usage of dishwasher products, February 2018

## Attitudes towards Dishwashing Products

- Myths surrounding dishwashing machines still prevalent among consumers  
Figure 41: Attitudes towards dishwashing products, February 2018
- Remnants-free washing-up liquid holds appeal  
Figure 42: Examples of washing-up liquid bottles with pumps, 2017
- Fragrance of washing-up liquid is important to women and under-35s  
Figure 43: Examples of washing-up liquid fragrances from Ecover, 2017
- Packaging type can have an influence on cleaning performance perceptions
- Young ABs are most interested in allergen-free washing-up liquid  
Figure 44: Dishwashing products – CHAID – Tree output, February 2018

## Dishwasher-related Behaviours

- Opportunity for two-in-one multipurpose washing-up products  
Figure 45: Dishwasher-related behaviours, February 2018
- Strong interest in bulk buying dishwasher products online
- The eco-friendly dishwasher setting is widely used by consumers

## Packaging Preferences for Dishwasher Products

- Fully recyclable packaging is the top preference  
Figure 46: Packaging preferences for dishwasher products, February 2018
- Packaging that dissolves in the wash is an underexplored area
- Packaging made from ocean plastics interests a quarter of buyers
- Child-safe packaging is lacking in the dishwasher products market

## Qualities Associated with Different Types of Dishwasher Detergents

- Standard brands are the most closely associated with positive attributes  
Figure 47: Correspondence analysis – Dishwashing products, February 2018
- Eco-friendly brands outperform others with environmental associations  
Figure 48: Qualities associated with different types of labels in the dishwashing market, February 2018
- A fifth associate retailer own-labels with a poor cleaning performance

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Dishwashing Products - UK - May 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

CHAID methodology

Correspondence analysis methodology

## Appendix – Market Size and Forecast

Total market forecast

Figure 49: UK retail value sales of dishwashing products, best- and worst-case forecast, 2017-22

Hand dishwashing segment forecast

Figure 50: UK retail value sales and forecast of hand dishwashing products, at current and constant prices, 2012-22

Figure 51: UK retail value sales of hand dishwashing products, best- and worst-case forecast, 2017-22

Machine dishwashing segment forecast

Figure 52: UK retail value sales and forecast of machine dishwashing products, at current and constant prices, 2012-22

Figure 53: Forecast of UK retail value sales of machine dishwashing products, 2012-22

Figure 54: UK retail value sales of machine dishwashing products, best- and worst-case forecast, 2017-22

## Appendix – Market Share

Figure 55: Leading brands' value sales and shares of dishwashing products, 2016/17 and 2017/18

Figure 56: Leading manufacturers' value sales and shares of dishwashing products, 2016/17 and 2017/18

Figure 57: Leading manufacturers' value sales and shares of hand dishwashing products, 2016/17 and 2017/18

Figure 58: Leading manufacturers' value sales and shares of machine dishwashing products, 2016/17 and 2017/18

## Appendix – Launch Activity and Innovation

Figure 59: Share of NPD in the UK dishwashing products market, by launch type, January 2014-April 2018

Figure 60: NPD in the UK dishwashing products market, branded vs own-label, January 2014-April 2018

Figure 61: Share of NPD in the UK automatic dishwashing products market, by format type, January 2014-April 2018

Figure 62: Share of NPD in the UK hand dishwashing products market carrying product tested claims, January 2014-April 2018

## Appendix – Advertising and Marketing Activity

Figure 63: Total above-the-line, online display and direct mail advertising expenditure on dishwashing products, by media type, January 2014-April 2018

## Appendix – The Consumer

Figure 64: Repertoire of dishwasher detergent products bought in the last 6 months, February 2018

Figure 65: Dishwasher ownership, by age, February 2018

Figure 66: Target groups based on attitudes towards washing-up liquid – CHAID – Table output, February 2018

Figure 67: Target groups based on agreement with behavioural statements – CHAID – Table output, February 2018

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)