

## Toilet and Hard Surface Care - UK - March 2020

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.



This report looks at the following areas:

- Water scarcity to lead innovation in toilet and hard surface care
- In-store refilling stations can boost zero-waste shopping

“As much as the category remains price-driven, savvy consumers are not willing to compromise on product quality, indicating that cleaning efficacy is an essential purchase driver and should be targeted in marketing communication.”

– **Emilia Tognacchini, Junior Research Analyst**

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://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)

### DID YOU KNOW?

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

# Toilet and Hard Surface Care - UK - March 2020

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

### Executive Summary

- The market
- Market points towards a prosperous future
  - Figure 1: Best- and worst-case scenario forecast of UK retail value sales of toilet and hard surface care products, 2014-24
- Companies and brands
- Zoflora leads overall increase
  - Figure 2: Brand shares in value sales of disinfectants, year ending December 2019
- Bleaches continue to fall
  - Figure 3: Brand shares in value sales of bleaches, year ending December 2019
- Bloo increases its value sales
  - Figure 4: Brand shares in value sales of toilet cleaning and care products, year ending December 2019
- Method focuses on multipurpose cleaners
  - Figure 5: Brand shares in multipurpose hard surface cleaning products, year ending December 2019
- Specialised cleaners see further decline
  - Figure 6: Brand shares in value sales of bath and shower cleaning products, year ending December 2019
- The consumer
- Sharing cleaning responsibilities is on the increase
  - Figure 7: Cleaning responsibilities, by gender, December 2019
- More women in charge of toilet and hard surface care shopping
  - Figure 8: Buying responsibilities, by gender, December 2019
- Kitchen surfaces require the greatest cleaning effort
  - Figure 9: Cleaning frequency, by hard surface, December 2019
- Limescale removers solve the hard water issue
  - Figure 10: Usage of toilet care and cleaning products, April 2019 VS December 2019
- Trigger spray remains the most popular choice
  - Figure 11: Usage of hard surface cleaning products, April 2019 VS December 2019
- Price and product quality drive purchasing choices
  - Figure 12: Purchase drivers in the UK toilet and hard surface care category, December 2019
- Reduced packaging material can attract consumers
  - Figure 13: Behaviours towards toilet and hard surface care products, December 2019
- Smart dispensers to prevent over-dosing of cleaning formulas
  - Figure 14: Attitudes towards toilet and hard surface care products, December 2019
- What we think

### Issues and Insights

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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)

# Toilet and Hard Surface Care - UK - March 2020

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.

Water scarcity to lead innovation in toilet and hard surface care

The facts

The implications

In-store refilling stations can boost zero-waste shopping

The facts

The implications

## The Market – What You Need to Know

The toilet and hard surface care market starts growing again

Toilet care responsible for rising sales

Working from home on the increase

Water scarcity is a rising concern

Refill initiatives boost sustainability

Zero-waste shopping is gaining popularity

## Market Size and Forecast

The toilet and hard surface care market starts growing again

Figure 15: UK retail value sales of toilet and hard surface care products, at current and constant prices, 2014-24

Market points towards a prosperous future

Figure 16: Best- and worst-case scenario forecast of UK retail value sales of toilet and hard surface care products, 2014-24

Forecast methodology

## Market Segmentation

Toilet care's value sales on the increase

Figure 17: UK retail value sales of toilet and hard surface care products, 2017-19

Disinfecting the toilet remains a top priority

Rim block toilet cleaners increase value sales

Hard surface care category declines

Multipurpose cleaners cannibalise specialised cleaners

## Channels to Market

Prices favour supermarkets and discounters

Figure 18: UK retail value sales of toilet care products, bleaches, disinfectants and hard surface care cleaners\*, by outlet type, 2017-19

Online delivery services become more sophisticated

## Market Drivers

Working from home is on the increase

Figure 19: Increase in at-home workers and people who work in different places with home as a base, Oct-Dec 2008 – Oct-Dec 2018

Figure 20: Bon Voyage by W5 Multi-surface cleaning wipes, Lidl, 2016

More people cooking from scratch

Figure 21: Percentage of people who cook meals from scratch, November 2016 - November 2019

Water scarcity is a rising concern

Figure 22: Unilever, Domestos Flush Less toilet spray, South Africa, January 2019

**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)

# Toilet and Hard Surface Care - UK - March 2020

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.

Figure 23: Reckitt Benckiser's #FinishWaterWaste campaign, 2019

Refill initiatives boost sustainability

Figure 24: New dettol and Cif launches carrying the refill/refillable claim, 2019

Zero-waste shopping is gaining popularity

Figure 25: Ecover #Refillution project, 2019

Consumers worry about their health when using cleaning products

## Companies and Brands – What You Need to Know

Zoflora leads overall increase

Method focuses on multipurpose cleaners

Shy increase in new product launches in toilet care segment

Overall launch activity rises in hard surface care

Adspend focuses on bleach & disinfectants

Alkimi creates a higher proportion of favouritism

## Market Share

Toilet cleaning and care

Zoflora leads overall increase

Figure 26: Retail value sales of disinfectants, by brand, years ending December, 2017-19

Bleaches continue to fall

Figure 27: Retail value sales of bleaches, by brand, years ending December, 2017-19

Bloo increases its value sales

Figure 28: Retail value sales of toilet care and cleaning products, by brand, years ending December, 2017-19

Hard surface care

Method focuses on multipurpose cleaners

Figure 29: Retail value sales of multipurpose hard surface cleaning products, by brand, years ending December, 2017-19

Specialised cleaners see further decline

Figure 30: Retail value sales of bath and shower cleaning products, by brand, years ending December, 2017-19

## Launch Activity and Innovation – Toilet Care

Shy increase in new product launches

Figure 31: New product development in the UK toilet care market, by product segment, January 2016 - December 2019

New varieties increase share of NPD

Figure 32: New product development in the UK toilet care market\*, by launch type, January 2016 - December 2019

Seasonal and limited-edition fragrances in toilet care

Figure 33: Examples of seasonal and/or limited-edition scented toilet care products, 2019

Henkel continues to prevail in terms of NPD

Figure 34: New product development in the UK toilet care market\*, by top ultimate companies and other, 2019

Toilet rim blocks for all tastes

Figure 35: Examples of Bloo toilet (bowl) freshener launches, 2019

Figure 36: Examples of Domestos toilet (bowl) freshener launches, 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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)

# Toilet and Hard Surface Care - UK - March 2020

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.

## Launch Activity and Innovation – Hard Surface Care

### Overall launch activity rises

Figure 37: New product development in the UK hard surface care market, by product segment, January 2016 - December 2019

### New product launches remain stable

Figure 38: New product development in the UK hard surface market, by launch type, January 2016 - December 2019

### Major companies dominate the hard surface care segment

Figure 39: New product development in the UK hard surface care market, by top ultimate companies and other, 2019

Figure 40: Examples of launches by four top companies of the hard surface care category, 2019

### Veganism pervades the hard surface care category

Figure 41: Top 15 claims in the UK hard surface care market (based on leading claims for 2019), 2018 and 2019

Figure 42: Examples of hard surface care product launches carrying the vegan/free from animal ingredients claim, 2019

### Biodegradability clarifies eco-friendly features

Figure 43: Examples of launches carrying the biodegradable claim, 2019

## Advertising and Marketing Activity

### Toilet cleaning and care

#### Adspend focuses on bleach & disinfectants

Figure 44: Total above-the-line, online display and direct mail advertising expenditure on toilet cleaning and care products, by segment, 2019

Figure 45: Recorded above-the-line, online display and direct mail total advertising expenditure on toilet cleaning and care products\*, by advertiser, 2019

#### Dettol commits to sustainability

Figure 46: Dettol's The Trigger Project advertising campaign, 2019

### Hard surface care

#### Advertising expenditure focuses on multipurpose and floor cleaners

Figure 47: Total above-the-line, online display and direct mail advertising expenditure on hard surface care products, by segment, 2019

#### Major companies cut back on adspend

Figure 48: Recorded above-the-line, online display and direct mail total advertising expenditure on hard surface care products, by advertiser, 2019

#### Dettol helps stop the spread of winter diseases

Figure 49: Dettol advert, 2019

#### Cillit Bang tackles limescale and water marks

Figure 50: Cillit Bang limescale remover advert, 2019

#### Method aims to challenge social stereotypes

Figure 51: Method DragCleans campaign, 2019

#### Nielsen Ad Intel coverage

## Brand Research

### Brand map

Figure 52: Attitudes towards and usage of selected brands, January 2020

### Key brand metrics

Figure 53: Key metrics for selected brands, January 2020

Harpic inspires trust and good value, while Alkimi is seen as worth paying more for

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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)

# Toilet and Hard Surface Care - UK - March 2020

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.

Figure 54: Attitudes, by brand, January 2020

Seventh Generation features a strong ethical profile

Figure 55: Brand personality – macro image, January 2020

Alkimi and Seventh Generation are perceived as comforting and authentic

Figure 56: Brand personality – micro image, January 2020

Brand analysis

Attitude is still little known, but highly recommended

Figure 57: User profile of Attitude, January 2020

Harpic appeals to variegated profiles of consumers

Figure 58: User profile of Harpic, January 2020

Seventh Generation is the ethical standout

Figure 59: User profile of Seventh Generation, January 2020

Alkimi creates a higher proportion of favouritism

Figure 60: User profile of Alkimi, January 2020

Frosch is perceived as basic and perfect for families

Figure 61: User profile of Frosch, January 2020

## The Consumer – What You Need to Know

Sharing cleaning responsibilities is on the increase

Toilets need to look and smell clean as long as possible

Limescale removers solve the hard water issue

Trigger spray remains the most popular choice

Price and product quality drive purchasing choices

Reduced packaging material can attract consumers

Smart dispensers to prevent over-dosing of cleaning formulas

## Cleaning and Buying Responsibilities

Sharing cleaning responsibilities is on the increase

Figure 62: Cleaning responsibilities, by gender, December 2019

More women in charge of toilet and hard surface care shopping

Figure 63: Buying responsibilities, by gender, December 2019

Opportunities for male-targeted initiatives

## Cleaning Frequency

Kitchen surfaces require the greatest cleaning effort

Figure 64: Cleaning frequency, by hard surface, December 2019

Toilets need to look and smell clean as long as possible

## Usage of Toilet Care and Cleaning Products

Bleach combines convenience and cleaning efficacy

Figure 65: Usage of toilet care and cleaning products, April 2019 VS December 2019

Limescale removers solve the hard water issue

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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)

# Toilet and Hard Surface Care - UK - March 2020

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.

Figure 66: Examples of toilet care products with limescale removing action, 2019

Removing limescale needs to be safe and eco-friendly

Figure 67: Examples of toilet care products with limescale removing action not tested on animals, 2019

## Usage of Hard Surface Cleaning Products

Trigger spray remains the most popular choice

Figure 68: Usage of hard surface cleaning products, April 2019 VS December 2019

Multipurpose cleaners remain popular...

Figure 69: Usage of hard surface cleaning formulas, April 2019 VS December 2019

...but younger consumers prefer bleach

Figure 70: Usage of selected hard surface cleaning formulas, by age, December 2019

## Purchase Drivers

Price and product quality drive purchasing choices

Figure 71: Purchase drivers in the UK toilet and hard surface care category, December 2019

Women look for products that facilitate cleaning tasks

Figure 72: Purchase drivers in the UK toilet and hard surface care category, by gender, December 2019

Figure 73: Examples of toilet and hard surface care products carrying the easy-to-use claim, 2019

## Behaviours around Toilet and Hard Surface Care Products

Reduced packaging material can attract consumers

Figure 74: Behaviours towards toilet and hard surface care products, December 2019

Younger consumers more likely to try new scents

Figure 75: Likelihood to try new scents of cleaning products, by age, December 2019

Changing fragrances to tackle over-cleaning

Consumers show interest towards waterless cleaning products...

Figure 76: Ajax Kitchen cleaner, Colgate-Palmolive, 2019

...but proving their efficacy is crucial

## Attitudes towards Toilet and Hard Surface Care

Smart dispensers to prevent over-dosing of cleaning formulas

Figure 77: Attitudes towards toilet and hard surface care products, December 2019

Older consumers question wipes' cleaning efficacy

Figure 78: Agreement with "Cleaning wipes are just as effective at cleaning as other formats", by age, December 2019

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

## Appendix – The Market

Figure 79: Best- and worst-case forecast of UK retail value sales of toilet cleaning and care products, 2014-24

Figure 80: Best- and worst-case forecast of UK retail value sales of hard surface cleaning and care products, 2014-24

Forecast methodology

**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)