

Shopping for Household Cleaning Products - China - November 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

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



“Household cleaning products come out as one of the winning categories after COVID-19 due to growing demand for a clean and safe home living environment. But retail competition is fierce with such a functional-driven and price sensitive category.”

– Jessica Jin, Category Director

This report looks at the following areas:

- The impact of COVID-19 on the household cleaning category
- Innovations in product, marketing communications and retail experience
- Shopping channels, consideration factors and buying behaviours
- Attitudes towards different brand marketing initiatives

Household cleaning products tend to be a low spending category in shopper's basket, but as COVID-19 has driven consumer demand for household hygiene and safety, have turned out to be one of the winning categories. In China, the retail landscape is highly competitive as the category is very functional-driven, and consumers can be quite price-sensitive.

Mintel's research has identified that although online and offline channels each have dominant players, brands cannot ignore the long-tail or new emerging channels. More importantly, these channels tend to have different shopper profiles and shopping needs, suggesting that brands need to have more differentiated communication strategies for each type of channel.

**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

Shopping for Household Cleaning Products - China - November 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Key issues covered in this Report

Definitions

Figure 1: Mintel's definition of different income groups, China

Executive Summary

Impact of COVID-19 on household cleaning

Figure 2: Summary of impact of COVID-19 on shopping for household cleaning products, May 2020

The market

Great potential seen in household cleaning category

Companies and brands

The consumer

Younger families tend to share purchase responsibilities

Figure 3: Shopping responsibility, by gender and age, September, 2020

Long-tail channels are worth noticing

Figure 4: Shopping channels used, September 2020

Perceived as a highly efficacy-driven category, with expectations on ingredients

Figure 5: Purchase factor, September 2020

Shopping behaviours tend to be more habitual, conscious and prudent

Figure 6: Shopping behaviours, September 2020

Guidance and services are sought for by younger consumers

Figure 7: Attitudes towards brand marketing, by age, China, September 2020

Attitudes towards shopping for household cleaning products

Figure 8: Attitudes towards shopping for household cleaning products, September 2020

What we think

Issues and Insights

Channel diversity brings new opportunities

The facts

The implications

Figure 9: Examples of user-generated content of household cleaning products on Xiaohongshu

Figure 10: Examples of household cleaning products on Pinduoduo

Figure 11: Bayecomax Xiaohongshu official account

Ingredient's importance as a purchase consideration

The facts

The implications

Figure 12: Examples of bio-degradable and plant-based innovation, China, 2019-20

Figure 13: What's Inside by SC Johnson

**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

Shopping for Household Cleaning Products - China - November 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

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

The Market – Key Takeaways

- Market size remains small yet estimated with accelerated growth
- Smart/small household appliances boom urge attention

Market Size

- A winning category in 2020
- Figure 14: Retail sales value of household cleaners, by segment, China 2019-20

Market Factors

- Emerging channels are diverting shoppers from traditional channels
- Growing demand for natural products continued to drive product innovation
- Smart home brings both opportunities and challenges for household cleaning products

Launch Activity and Innovation

- Anti-bacterial and natural products witness steep rise after COVID-19
- Figure 15: Top claims of new household cleaning product, China, 2017-20
- Disinfectant and bleach NPD soared in 2020
- Figure 16: New household cleaning product launches, by sub-category, China, 2017-20 (Moving Annual)
- Product innovation
- Anti-bacterial + natural is now a common offer from leading players in China
- Figure 17: Botanical Hygiene Multipurpose Sanitary Wipes, China, 2020
- Figure 18: Liby Multi-Purpose Sterilisation Spray, China, 2020
- Figure 19: Liby Multi-Purpose Sterilisation Spray, China, 2020
- Format innovation engages consumers with easy solutions to boost sense of accomplishment
- Figure 20: Joya Multi-Effect Floor Cleaning Sheet, China, 2020
- Figure 21: Bref Toilet Cleaning Balls, China, 2020
- Marketing innovation
- Professional endorsement to further enhance efficacy and safety credibility
- Figure 22: Vewin household antiseptic liquid, China, 2020
- Retail innovation
- Watsons O2O cloud-based stores to refine 'round-the-clock' shopping experience
- Figure 23: Watson's cloud-based store, home care pavilion, 2020

The Consumer – Key Takeaways

- Younger families tend to have more shared responsibilities
- Online appeals to time-pressured consumers
- Category purchase largely guided by benefit
- Habitual, conscious and prudent shopping behaviour
- Younger consumers seek for tangible benefits
- Consumers expect brands to take the lead in promoting sustainability

Shopping Responsibility

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

Shopping for Household Cleaning Products - China - November 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Male and female both claim high purchase responsibility

Figure 24: Shopping responsibility, by gender, China, September 2020

Younger generations are more likely to share responsibilities

Figure 25: Shopping responsibility, by gender and age, China, September 2020

Shopping Channel

Time-pressed consumers are more likely to shop online

Figure 26: Shopping method, by demographics, China, September 2020

Offline channels are more important for males aged 30-49

Figure 27: Shopping method, by age and gender, China, September 2020

While online and offline each has a clear leader, the long-tail cannot be ignored

Figure 28: Shopping channels used, China, September 2020

Larger families leverage more channels

Figure 29: Shopping channels used, by family structure – Married with more than one kid, China, September 2020

Less price-sensitive buyers on certain channels

Figure 30: Shopping channels used, by price as a purchase factor or not, September 2020

Purchase Factor

A function-centric category

Figure 31: Purchase factor, China, September 2020

As people get more experienced in the category, their expectations also rise

Figure 32: Purchase factor, by age, September 2020

Brand-driven online shoppers and price-driven supermarket shoppers

Figure 33: Purchase factor, by shopping channel, September 2020

Ingredients and formats are key to non-price sensitive buyers

Figure 34: Purchase factor, by price as a purchase factor, September 2020

Shopping Behaviours

A routine purchase for the majority

Figure 35: Shopping behaviours, China, September 2020

New products are key attractions for shoppers who don't buy from leading channels

Figure 36: Shopping channel, by shopping behaviour, September 2020

Figure 37: Purchase factor, by shopping behaviour, September 2020

Attitudes towards Brand Marketing

Sustainability will help brands win consumer favour after COVID-19

Figure 38: Attitudes towards brand marketing, China, September 2020

Tangible benefits are expected from younger consumers more than internet buzz

Figure 39: Attitudes towards brand marketing, by age, China, September 2020

Attitudes towards Shopping for Household Cleaning Products

Consumers expect brands to take the lead in promoting sustainability

Figure 40: Attitudes towards shopping for household cleaning products, September 2020

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

Shopping for Household Cleaning Products - China - November 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Marketing gimmicks appeals to indecisive consumers

Figure 41: Purchase factor, by attitudes towards shopping for household cleaning products, September 2020

Appendix – Methodology and Abbreviations

Consumer research methodology

Abbreviations

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