

Laundry and Fabric Care - China - 2022

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This report looks at the following areas:

- Market overview and growth of China's laundry and fabric care market.
- Competitive landscape and new product trends in China's laundry and fabric care market.
- Laundry habits and product usage.
- Features of laundry capsules/pods.
- Desired benefits of in-wash scent boosters.
- Attitudes towards formats of laundry and fabric care products.

Product upgrade in laundry and fabric care is widespread across city tiers. Compared with 2021, conditioners/softeners and capsules each gained a higher penetration (by four or five percentage points) in both tier one cities and tier two or lower cities. Additionally, more consumers (by three percentage points) from tier one cities use 2-in-1 laundry detergent and conditioner and specialised laundry products, showing a more comprehensive landscape of product upgrades. Consumers are not only willing to upgrade product formats but also refine their laundry routine, with the percentage of heavy users (who have used four or more types of laundry and fabric care products in the past six months) increasing from 65% in 2021 to 69% this year.

For an essential product category, COVID outbreaks pose a limited impact on laundry and fabric care. According to Mintel's consumer tracker data, since February 2022, 98% of surveyed consumers have spent on household care products (eg tissue paper, laundry detergents), showing a resilient consumer demand. Nevertheless, in the high-impact scenario where more consumers endure financial instability, product upgrades will be slowed down and therefore market growth.

Laundry detergents dominate the market, and laundry liquid is the leading format of laundry detergents used by 77% of surveyed consumers this year. However, the fierce competition among laundry liquids has left limited room for growth. According to Mintel's consumer data this year, anti-bacterial, gentle to



"Trading up and refining laundry routines with more products are the growth engines of the laundry and fabric care category. Capsules have great potential among laundry detergents, with an advantage in convenience. In-wash scent boosters, when combined with functional benefits (eg softening fabrics, sterilising), can open up a new prospect of fabric care."

– Tina He, Research Analyst

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the skin and long-lasting fragrance are top value-adding features of laundry liquid. And all of these features have been leveraged in the current market offerings and are likely to further drive future growth. Furthermore, the emerging format of capsules/pods also threatens the dominance of laundry liquid.

Beyond functional benefits (eg cleaning, protecting fabrics), scented laundry is a popular benefit of laundry and fabric care products, for it provides sensory delight and potentially emotional benefits (eg relaxing, energising). Long-lasting fragrance has become a valuable feature of existing product categories such as laundry liquid and conditioners, and also given rise to the emerging category of in-wash scent boosters.

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