

# Laundry and Fabric Care - China - 2023

Report Price: £3695 | \$4995 | €4400

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:

- Market overview and segment performance of China's laundry and fabric care market.
- Competitive landscape of China's laundry and fabric care market and analysis of market winners/disruptors.
- Product usage and user profile changes of winning product types from 2022-23.
- Preferred fragrance types by product.
- Mapping of ancillaries based on usage and purchasing interest.
- Separate washing among family members.

A widespread usage decrease of laundry and fabric care products was unexpected (only excepting single-pouch capsules, in-wash scent booster and soap), especially considering that social activities have boomed in the post-pandemic period. But with injured spending powder and confidence, consumers have adopted a conservative attitude, which has led to simplified laundry routines involving fewer types of laundry and fabric care products.

Faced with value-conscious consumers, brands are leveraging discounts and promotions to snatch market share, which also accounts for the popularity of Douyin and the winning of single-pouch capsules over multi-pouch ones. But market players risk entering into price wars and losing margins, which is the greatest threat to the laundry and fabric care market, especially for small-scale players who cannot afford the costs of price wars.

Consumers are anticipated to remain value-conscious in the near future but their interests in simple and yet highly effective solutions remain as long as they come at affordable prices. This directs brands to pay attention to the small yet potential segment of laundry aids (ie ancillaries, such as collar cleaner, colour brightener) to invigorate the market and identify new growth opportunities.



"To retain a place in consumers' laundry routine among post-pandemic conservatism, laundry and fabric care products need to prioritise ease of use, strong effectiveness and value for money."

– Tina He, Research Analyst

## Buy this report now

Visit	store.mintel.com
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

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
- Covered in this Report
- Subgroup definitions (by monthly household income):

### EXECUTIVE SUMMARY

- **The market**  
Figure 1: Best- and worst-case forecast of retail value of laundry and fabric care market, China, 2018-28
- **Companies and brands**
- **The consumer**
- **Among post-pandemic spending conservatism, only single-pouch capsules/pods and in-wash scent boosters gained usage increases**

Figure 2: Product usage, 2022 vs 2023

- **Light fragrance with odour-neutralisation is a prominent preference for laundry and fabric care products**

Figure 3: Preferred fragrance types of products, 2023

- **Laundry frustrations lie in thorough cleaning, form and colour protection**

Figure 4: Laundry frustrations, 2023

- **Collar cleaner, colour brightener, washing machine cleaner and bleach are high-potential ancillaries**

Figure 5: Usage and purchasing interest of ancillaries, 2023

Figure 6: Mapping of ancillaries, by trial and repeat, 2023

- **Separate washing is most common for babies' and children's clothing, and the idea is embraced by young consumers aged 18-29**

Figure 7: Separate washing in the household, 2023

- **Consumers are balancing between trial aspirations and budgets**

Figure 8: Laundry behaviours and attitudes – New trial and spending change, 2023

- **What we think**

### ISSUES AND INSIGHTS

- **Coordinate fragrances among laundry products to facilitate diverse product usage**
- **Match fragrance types among the brand's product portfolio**

Figure 9: Example of a brand offering different laundry and fabric care products with the same fragrances, China, 2023

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

- **Grade fragrance strengths suiting diverse routines and demographics**
- **Address odour issues for seniors' laundry with effective solutions**  
 Figure 10: Examples of social media discussions around 'old person smell', China, 2022 and 2023  
 Figure 11: Examples of laundry and bodycare products that remove 'old person smell' through eliminating nonenal, South Korea and Japan, 2023
- **Laundry and fabric care products suiting indoor drying and rainy seasons call for attention**  
 Figure 12: Examples of laundry detergents suiting indoor drying, China, 2022  
 Figure 13: Example of promoting anti-odour products during the rainy season, China, 2023

**MARKET SIZE AND FORECAST**

- **Tepid market growth due to conservative spending**  
 Figure 14: Best- and worst-case forecast of retail value of laundry and fabric care market, China, 2018-28

**MARKET FACTORS**

- **Simplified laundry routine in the post-pandemic era**
- **Trials are willing but the budget is weak**
- **Ancillaries show resilience for their high functionality**
- **The rise of Douyin as an emerging online purchase channel**

**MARKET SEGMENTATION**

- **Laundry detergents and conditioners & softeners saw moderate growth**  
 Figure 15: Value sales of total laundry and fabric care market, by segment, China, 2018-23  
 Figure 16: Growth rates of total laundry and fabric care market, by segment, China, 2019-23
- **Laundry aids accelerated in 2023**

**MARKET SHARE**

- **Market players leading in format upgrades gained better performance**  
 Figure 17: Leading manufacturers' share in value sales of laundry and fabric care market, China, 2021 and 2022
- **The rise of Douyin empowered market disruptors like SukGarden**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

- **Fierce competition posed pressure on the product innovation of long-standing domestic brands**

**MARKETING ACTIVITIES**

- **Promote value for money of laundry capsules from concentration and multifunctionality**  
Figure 18: Examples of promoting value for money of laundry capsules, China, 2023
- **Shed light on laundry fragrances in relation to personal fragrances**  
Figure 19: Example of a fragrance KOL promoting scented laundry products, China, 2023  
Figure 20: Example of comparing the fragrances of in-wash scent boosters and fragrances, China, 2023
- **Normalise laundry sanitisation post-pandemic**  
Figure 21: Example of promoting laundry sanitisation post-pandemic, China, 2022 and 2023

**NEW PRODUCT TRENDS**

- **Hand detergents fulfil Chinese consumers’ habits, and gaps exist in fabric fresheners and stain removal products**  
Figure 22: New product launches in laundry and fabric care market, by subcategory, China, Japan, South Korea, US and UK, 2023 (Jan-July)
- **Hand detergents and conditioners & softeners saw moderate increases post-pandemic**  
Figure 23: New product launches in laundry and fabric care market, by subcategory, China, 2019-23
- **For liquid automatic detergents, odour-neutralising and pH-neutral are growing claims**  
Figure 24: Top formats of new automatic detergent launches, China, 2019-23  
Figure 25: Top claims of new automatic detergent launches in the liquid format, China, 2019-23  
Figure 26: Examples of automatic liquid detergents with pH-neutral claim and with skin-caring ingredients, China, 2023
- **Automatic detergents in the capsule format grew fast and advanced in benefits**  
Figure 27: Top claims of new automatic detergent launches in the capsule format, China, 2019-23  
Figure 28: Examples of new multi-pouch capsule launches, China, 2023

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

- **Hand detergents prioritise natural formula, highlighting odour-neutralising function**

Figure 29: Top claims of new hand detergent/shampoo launches, China, 2019-23

- **Conditioners & softeners kept up with antibacterial and odour-neutralising claims**

Figure 30: Top claims of new conditioner & softener launches, China, 2019-23

- **Green fragrances gained overall popularity, while underwear detergents went unscented**

Figure 31: Top fragrance component groups of new laundry and fabric care launches, China, 2019-23

Figure 32: Examples of new laundry and fabric care launches with green/herbal/woody fragrances, China, 2023

Figure 33: Example of an unscented hand detergent/shampoo product, China, 2023

- **Odour-removal spray features delicate fragrances**

Figure 34: Example of a fabric spray product leveraging fragrance concepts to recruit audience, China, 2023

**PRODUCT USAGE**

- **With overall stagnancy, only single-pouch capsules/pods and in-wash scent boosters gained growth from 2022-23**

Figure 35: Product usage, 2022 vs 2023

Figure 36: Repertoire analysis of product usage, 2022 vs 2023

Figure 37: Example of an in-wash scent booster product with fabric care benefits, 2022

- **Capsule/pod users expanded to older consumers, low-income families and tier 1 and 2 city consumers**

Figure 38: User profile of single-pouch capsules/pods, 2022 vs 2023

- **In-wash scent boosters recruited broader audiences with more affordable offerings**

Figure 39: User profile of in-wash scent boosters, 2022 vs 2023

Figure 40: Percentage of in-wash scent booster sales volume, by price range per unit, 2022 vs 2023 (Jan-July)

**PREFERRED FRAGRANCE TYPES BY PRODUCT**

- **Light fragrance is the dominant preference, while preferences for strong fragrance and no fragrance differ with product types**

**What's included**

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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

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

Figure 41: Preferred fragrance types of products, 2023

- **Males show a stronger preference for unscented products**
- **For general gel/liquid, soap bar and powder, younger consumers prefer scented while older consumers prefer non-scented**

Figure 42: Preferred fragrance types of select products, by age, 2023

- **Users of in-wash scent boosters have stronger preferences for no or light fragrances of other laundry and fabric products**

Figure 43: Preferred fragrance types of select products, users vs non-users of in-wash scent boosters, 2023

**LAUNDRY FRUSTRATIONS**

- **Thorough cleaning is the major frustration, followed by fabric protection in both forms and colours**

Figure 44: Laundry frustrations, 2023

- **Consumers aged 25-29 have the most laundry frustrations**

Figure 45: Laundry frustrations, by age, 2023

- **Females concerned about wrinkling, and males worried about musty smells**
- **Children in the household bring concerns regarding safety and smells**

Figure 46: Laundry frustrations, by age of children in household, 2023

**USAGE AND PURCHASING INTEREST OF ANCILLARIES**

- **Collar cleaner and bleach are most popular ancillaries, and consumers show broad interest in ancillaries not tried before**

Figure 47: Usage and purchasing interest of ancillaries, 2023

Figure 48: Mapping of ancillaries, by trial and repeat, 2023

- **Females and consumers with mid and high household income are avid adopters of ancillaries**

Figure 49: Usage and purchasing interest of ancillaries – Have used and will buy again, by monthly household income, 2023

**SEPARATE WASHING IN THE HOUSEHOLD**

- **Separate washing is widely adopted, most common for babies and children**

Figure 50: Separate washing in the household, 2023

- **Young consumers aged 18-29 are more open to the idea of separate washing**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

Figure 51: Select separate washing in the household, by age, 2023

## LAUNDRY BEHAVIOURS AND ATTITUDES

- **High willingness to try new product types with limited budget**

Figure 52: Laundry behaviours and attitudes – new trial and spending change, 2023

- **Long-lasting fragrance matters, and similar fragrances among different products are desired**

Figure 53: Laundry behaviours and attitudes – long-lasting fragrance, 2023

Figure 54: Laundry behaviours and attitudes – fragrance types, 2023

- **Odour removal for seniors has received attention, especially among young consumers aged 25-29**

Figure 55: Laundry behaviours and attitudes – product differentiation for different family members, 2023

Figure 56: Laundry behaviours and attitudes – functional needs for seniors' laundry, 2023

## APPENDIX – MARKET SIZE AND FORECAST

Figure 57: Total value sales and forecast of laundry and fabric care market, China, 2018-28

## APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.