This report looks at the following areas:

- 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 (i.e. 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

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