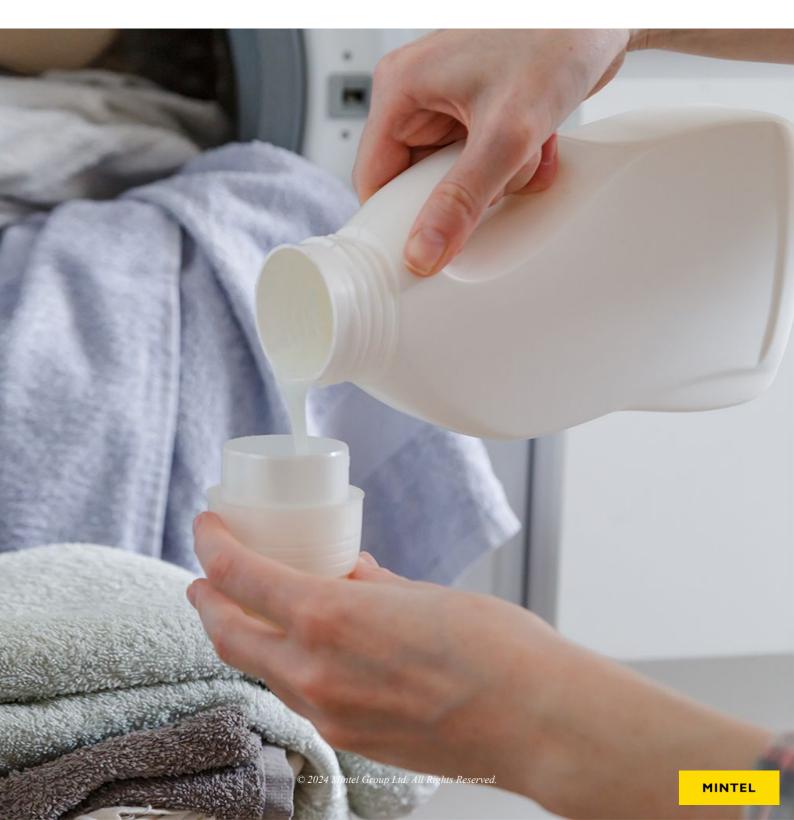
A YEAR OF INNOVATION IN FABRIC AND DISH CARE, 2021

Environmentally friendly and sustainable fabric and dish care is growing in importance. Consumers are increasingly expecting safe and clean ingredients.





Report Content

- · What we have seen
- · Innovation opportunities in fabric and dish care
- · Our pick of the most innovative launches in this review
- · Other interesting launches

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: fabric care, 2021
- EMEA retail market overview: dishwashing, 2021

Europe: sustainability is high on consumer radars

- · Consumers expect sustainable and eco-friendly fabric and dish care
- · Environmental claims continue to grow in Europe
 - Graph 1: fabric and dish care launches with select ethical and environmental claims, 2016-17 vs 2020-21
- · Brands take a multi-pronged approach to sustainability
- Brand innovation/renovation: Softlan launches fabric softener which contains unsold jasmine flowers

Europe: consumers expect fabric and dish care product to be safe

- · Consumers are looking for safe fabric and dish care products
- Product testing reassures consumers of products are safe for the skin
 - Graph 2: fabric and dish care NPD with select claims, 2016-17 vs 2020-21
- · Tested and natural ingredients reassure consumers of product safety
- · Brand innovation/renovation: You uses blockchain technology to track and test ingredients

The Middle East and Africa (MEA)

Brands are tapping into the demand for sustainable and safe fabric and dish care products

ASIA PACIFIC (APAC)

- APAC retail market overview: fabric care, 2021
- APAC retail market overview: dishwashing, 2021

Asia: antibacterial momentum continues

- · Antibacterial properties are in demand
- · Explosion of antibacterial claims are largely driven by the fabric care category
 - Graph 3: fabric and dish care launches with antibacterial claims, 2016-21
- · Helping consumers tackle bacteria

Asia: brands look to botanicals and simple ingredients to communicate "clean"

- · Consumers are prepared to pay a premium for natural cleaning products
- Botanical ingredients and toxin-free claims dominate product safety claims
 - Graph 4: dish and fabric care product launches with select ethical and natural claims, 2020-21
- · Brands highlight botanical and plant-based ingredients
- Brand innovation/renovation: Wonderhome Naturals launches refillable and sustainable plant-based fabric care products

Australia and New Zealand

- · Australia and New Zealand have seen a flurry of planet-friendly fabric and dish care products
- Brand innovation/renovation: Undo this Mess empowers consumers to be part of the climate crisis solution

THE AMERICAS

- Americas retail market overview: fabric care, 2021
- · Americas retail market overview: dishwashing, 2021

North America: fabric and dish care products must appeal on the basics

- · Consumers crave new and interesting fragrances
- Fresh & amp; clean scents are most popular in fabric care, citrus scents dominates dish care
 - Graph 5: top five fragrance component groups on fabric care launches, 2020-21
 - Graph 6: top five fragrance component group on dish care launches, 2020-21
- · Innovative fragrances keep consumers engaged
- Brand renovation/innovation: Procter & Gamble launches fabric refresher spray with touch-activated scent

North America: consumers want recognisable ingredients

- · Ingredients concerns weigh on consumers' minds
- · Brands shun additives, preservatives and fragrances in favour of more botanical formulations
 - Graph 7: fabric and dish care product launches with select claims, 2016-17 vs 2020-21
- · Brands highlight plant-based and simple ingredient composition
- Brand innovation/renovation: Cleancult launches refills in eco-friendly cartons

LATIN AMERICA

- · Antibacterial claims have grown in importance to consumers
- · Antibacterial claims grow in Latin America
 - Graph 8: dish and fabric care NPD with the antibacterial claim, 2016-21
- · Brands are launching new antibacterial fabric and dish care products to meet consumer demand

Latin America: consumers are seeking out more sustainable fabric and dish care products

- Environmental concerns are on consumers' radars
- Brands need to do more to address consumer demand for more sustainable fabric and dish care products
 - Graph 9: select ethical and environmental claims by category. 2020-21
- Brands are addressing plastic packaging concerns

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