

DISHWASHING PRODUCTS – GERMANY – 2020

COVID-19 will increase washing-up occasions in the short and mid-term, and has also presented a longer-term opportunity for products with a safety profile based on food-grade ingredients.



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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- COVID-19's impact on dishwashing care
- The rise in single households puts pressure on dishwasher ownership
- Saving the planet is top of mind
- Germans' inclination to cook

Mintel predicts

- Short-term boost in sales due to COVID-19
- The impact of COVID-19 on dishwashing care

What consumers want and why

- Consumers want: convenience
- Consumers want: washing-up liquid that contains food-grade ingredients
 - Graph 1: attitudes towards washing up by hand, March 2020
- Consumers want: to slow down
 - Graph 2: washing up by hands can be enjoyable, by age, March 2020

Opportunities

- Adapt to the needs of smaller households
- Target families with children
- Clear up confusion over water usage

The competitive landscape

- Own-label brands retain lion's share of market

Marketing mix

- A snapshot of the dishwashing care market
- Quick download resources

THE IMPACT OF COVID-19

- COVID-19's impact on the broader category
- Market size & forecast following COVID-19 outbreak
- What COVID-19 will mean in the short-, medium- and long-term for dishwashing care

Dishwashing Products – Germany – 2020

- Key shifts in consumer behaviours
- How COVID-19 is impacting key consumer segments
- Financial insecurity puts aside demand for eco-products in the short-term
- An opportune time to leverage localism...
- ...and experiment with new ingredients
- The impact of COVID-19 on the marketing mix
- How a COVID-19 recession will reshape the industry

MARKET DRIVERS

- Worry about being exposed to COVID-19 is declining
 - Graph 3: "How worried are you about the risk of being exposed to the coronavirus (also known as COVID-19)," March-April 2020
- Concerns about COVID's impact on Germans' lifestyles are equally waning
 - Graph 4: extent to which people are worried the outbreak might affect their lifestyle, March-April 2020
- Dishwasher ownership dependent on financial health
 - Graph 5: dishwasher ownership, by financial health*, March 2020
- Dishwasher ownership dependent on financial health
- Record number of single households in Germany
 - Graph 6: share of households by size, 1991 and 2018
- Record number of single households in Germany
- Only half of Germans own a property
- Homeowners are dishwasher owners
 - Graph 7: dishwasher ownership, by housing situation, January 2020
- Water scarcity is a global concern
- Environmental sentiment runs deep
- Stewardship over the environment
- Germans love of cooking

WHAT CONSUMERS WANT AND WHY

Usage and purchase of washing-up liquids

- Usage and purchase of washing-up liquid is high
 - Graph 8: usage of washing-up liquid in the last six months, March 2020
 - Graph 9: purchase of washing-up liquid in the last six months, March 2020
- Usage and purchase of washing-up liquid is high

Usage and purchasing of dishwasher products and dishwasher ownership

- Dishwasher ownership on the decline

Dishwashing Products – Germany – 2020

- Graph 10: dishwasher ownership, by household size*, March 2020
- Smaller appliances to keep decline in dishwasher ownership in check
- Tetra Countertop Dishwasher by Heatworks
- Seize the opportunity for designing small-machine dishwashing products
- All-in-one dishwasher tablets/capsules are most popular
 - Graph 11: usage of dishwashing products in the last six months, March 2020
- All-in-one dishwasher tablets/capsules are most popular
- Young consumers least likely to use ancillary products
 - Graph 12: usage of dishwashing products in the last six months, by age, March 2020
- Single households least likely to use non-all in-one dishwasher detergents
 - Graph 13: usage of dishwashing products in the last six months by households size, NET, March 2020
- Purchase behaviour largely mirrors usage behaviour
 - Graph 14: purchase of dishwashing products in the last six months, March 2020

Issues with the dishwasher

- One in three Germans experience stuck-on food left on items
 - Graph 15: issues experienced when using a dishwasher in the last six months, March 2020
- Focus on improving product efficacy...
- ...and increasing dishwasher performance

Dishwasher usage frequency

- Frequency of using the dishwasher remains stable
- Germans seek to reduce effort when using dishwasher more often
 - Graph 16: reasons for using the dishwasher more often, March 2020
- Saving water a top concern for using the dishwasher more...
- ...and for using the dishwasher less
 - Graph 17: reasons for using the dishwasher less often, March 2020
- ...and for using the dishwasher less
- Consumers need guidance
- Promoting understanding of water consumption
- Washing-up by hand gives better results

Attitudes towards washing-up by hand

- One in two Germans want washing-up liquids containing food-grade ingredients
 - Graph 18: attitudes towards washing up by hand, March 2020
- Washing-up liquids containing food-grade ingredients drives future growth
- Leveraging positive experiences with food-grade in APAC
- Younger consumers enjoy washing-up by hand
 - Graph 19: washing up by hands can be enjoyable, by age, March 2020

Dishwashing Products – Germany – 2020

- Turning hand dishwashing into a meditative task
- Younger consumers are more experimental
 - Graph 20: "There should be more formats for washing up liquids (eg spray, mousse)", by age, March 2020

LAUNCH ACTIVITY AND INNOVATION

- NPD in dishwashing care remains constant
 - Graph 21: NPD in dishwashing products, by subcategory, January 2015-April 2020
- NPD in dishwashing care remains constant
- Examples of hand dishwashing launches
- All-in-one dishwasher products emphasise their multifunctionality
- Examples of additive launches
- A rise in ethical claims in dishwashing care
 - Graph 22: NPD in dishwashing care, by leading claims, January 2017-April 2020
- Eco-friendly formula appeals to German consumers
 - Graph 23: most appealing on-pack claims when buying household care products, 2019
- The rise in ethical claims corresponds to what appeals to consumers
- Water-saving launches
- New packaging is accelerating in dishwashing care
 - Graph 24: share of NPD in dishwashing care, by launch type, January 2015-April 2020
- New packaging is accelerating in dishwashing care
- Handwashing foam to target younger consumers
- Range extensions dominated by citrus and green/herbal scents
 - Graph 25: NPD in hand dishwashing, by top 10 fragrance component groups, 2019
- Mood-enhancing fragrances
- Own-label is underrepresented
 - Graph 26: NPD in dishwashing products, by top 10 companies, 2019
- Example of own-label products

Advertising and marketing activity

- Henkel solely focuses on efficacy
- Procter & Gamble also claims effectiveness
- Dishwasher manufacturer Miele addressing flexible dosing
- Henkel pushes performance of its Somat Excellence all-in-one dishwasher tabs
- Reckitt Benckiser advertises additives

MARKET SHARE

- Own-label retains lion's share of dishwashing market

- Own-label brands retain lion's share of dishwashing market
- Three big players dominate the market

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- Flat growth in the dishwashing care market
- Dishwashing care market dominated by machine dishwashing detergents
- Machine dishwashing detergents spurred category growth
- Hand dishwashing sales suffered from downward price competition
- Ancillary products increased value sales
- Short-term boost in sales due to COVID-19
- Short-term growth
- Medium-term growth
- Long-term growth

APPENDIX

Note on COVID-19

- COVID-19's impact on dishwashing care and German consumer behaviour

Appendix – products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Abbreviations
- A note on language usage
- Consumer research methodology

Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value

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