

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.



Dr. Christina Wessels,
Category Director,
Lifestyles, Health &
Wellbeing, Household
Care & Leisure, Germany



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

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com | store@mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

email: store@mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850