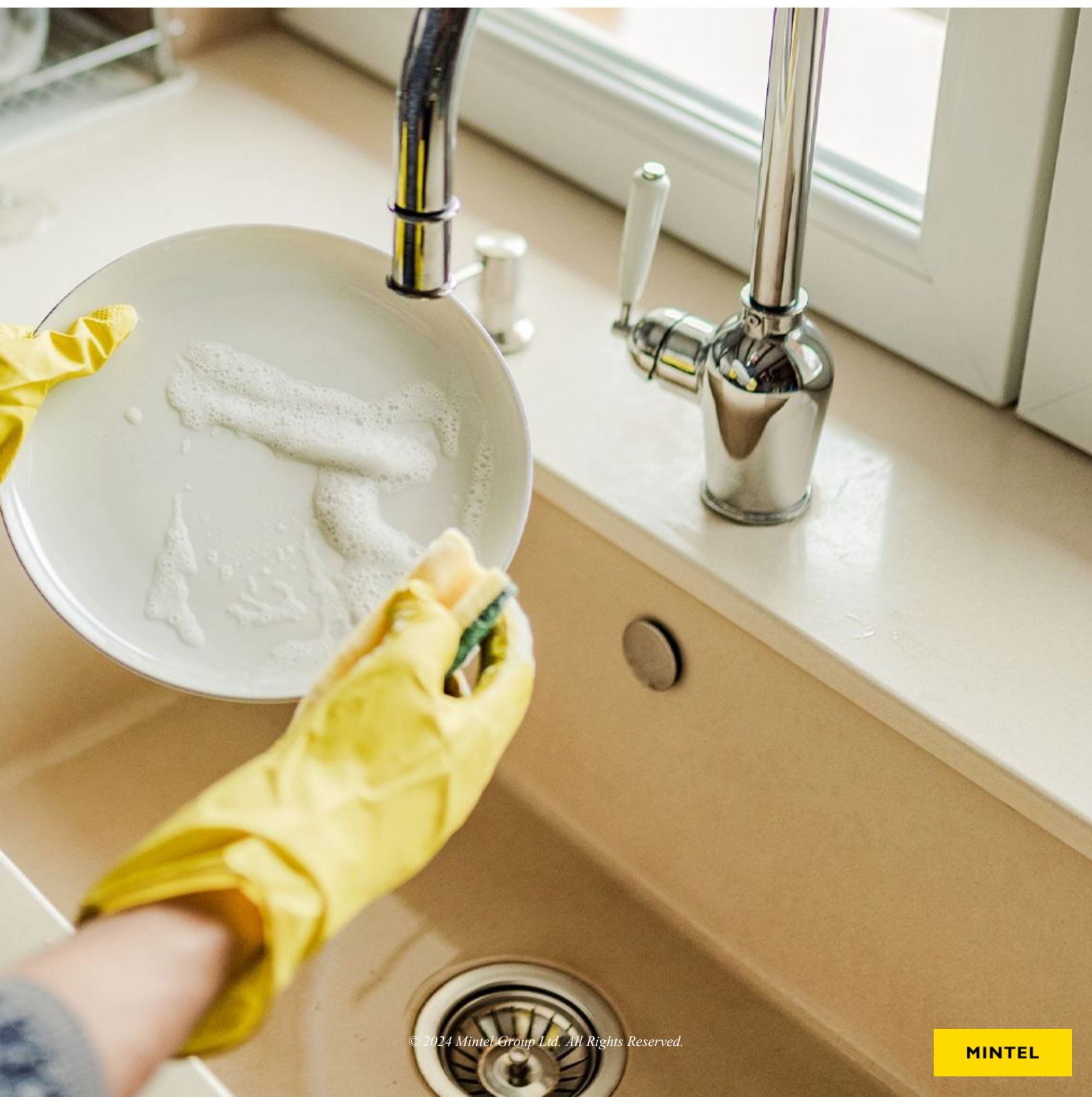


# DISHWASHING PRODUCTS – GERMANY – 2023

Hand dishwashing's crisis-proof nature and ubiquitous use give brands an opportunity to add an element of joy, playing with skincare ingredients and new textures.



Yasemin Holtemayer,  
Household Care Research  
Analyst, Germany



# Dishwashing Products – Germany – 2023

## This report looks at the following areas:

- The short-, medium- and long-term impact of the cost-of-living crisis on dishwashing products
- Usage and purchasing responsibilities of dishwashing products
- Dishwasher ownership and frequency of dishwasher usage
- Interest in innovation of dishwashing products and money-saving behaviours
- Attitudes towards hand and machine dishwashing products
- Launch activity and innovation opportunities, including reflection on brand share and market size



Hand dishwashing's crisis-proof nature and ubiquitous use give brands an opportunity to add an element of joy, playing with skincare ingredients and new textures.

## Overview

While [inflation](#) puts a strain on [Germans' wallets](#), usage of washing-up liquid ([91%](#)) stayed stable in 2023 vs 2022, proving **the category's necessity**. Since financially vulnerable Germans are less likely to own dishwashers, brands can focus on making cold hand dishwashing more enjoyable with gloves infused with skincare ingredients to help Germans save energy. Furthermore, such gloves will resonate with [32% of dishwashing product users and buyers](#) who are interested in washing-up liquid with added skincare ingredients.

In response to rising prices, German dishwasher owners and dishwashing product users used their dishwashers more efficiently, threatening volume sales. Brands can navigate this by

**BUY THIS REPORT NOW**


**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://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**



supporting consumers with best-practice advice, proving efficacy during eco settings, to help consumers save water and energy.

Despite Germans becoming even more likely to agree that additives are necessary to achieve good dishwasher cleaning performance (50% in 2023 vs 41% in 2021), usage of ancillary products fell slightly from 64% in 2022 to 62% in 2023. Brands can deliver **multifunctional products suitable for big appliances** and show how **additives increase the longevity of dishwashers**.

43% of Gen Zs are **interested in dishwashing products to remove specific stubborn stains** (vs 31% of all), since they are more likely to eat different world cuisines. Brands can address this interest with specifically formulated dishwashing products that tackle stains.

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://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**

# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five-year outlook for dishwashing products

### Market context

- Price increases for dishwashing products exceed inflation
- Sustainability adjustments are unavoidable

### Mintel predicts

- Market size and forecast for dishwashing products
- Inflation-induced growth
- Minimal growth expected in the long term after a mid-term decline

### Opportunities

- Ensure efficacy for eco settings and highlight the water- and energy-saving potential
- Bring enjoyment to washing-up liquids
- Extend the value of ancillary products beyond their main function

### The competitive landscape

- Own label grew in light of the economic crisis
- Own label grows, while brands fall behind
- Quick download resources

## MARKET DRIVERS

### The German economy

- The German economy slips into a technical recession
  - Graph 1: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Dishwashing product prices soar among inflation
  - Graph 2: consumer price index for dishwashing products, 2022-23
- The impact of the economy on the dishwashing market
- Increased cooking at home shapes how consumers interact with dishwashing

## Demographic changes

- Single households are a financially vulnerable consumer group
  - Graph 3: people living alone, by age and gender, 2022

## Sustainability

- Brace claims for the European Green Claims Directive
- Address droughts with water-saving products

## WHAT CONSUMERS WANT AND WHY

### Usage of washing-up liquid

- Elevate hand dishwashing by focusing on enjoyment
- Support financially struggling consumers with innovative solutions around saving water

### Dishwasher ownership

- Dishwasher ownership remains stable
  - Graph 4: dishwasher ownership, 2022-23
- Support singles in doing the dishes cost-effectively

### Frequency of dishwasher usage

- Dishwasher usage frequency declines slightly
- Support lower dishwasher usage frequency by showing users how to load efficiently
- Support parents' high washing-up frequency with efficacy during quick-wash cycles
  - Graph 5: frequency of dishwasher use, by presence of children in the household, 2023

### Usage of dishwasher products

- All-in-one dishwashing tablets and capsules remain popular
  - Graph 6: usage of dishwasher products in the last six months, 2020-23
- Offer all-in-one liquids to blend convenience with the demand for dosable products
- Focus on dishwasher salts' ability to maintain dishwashers
- Create versatile appliance cleaners for different machines

### Interest in innovation

- Innovation around skincare most intriguing
- Take inspiration from beauty ingredients to support skin health
- Bridge the gap between dishwashing chores and self-care
- Address Gen Zs' stain problems with specialised dishwashing products
- Collaborate with designers on refillable pump dispenser bottles
- Elevate dishwashing for parents of young children with unique textures and colours

## Money-saving behaviours

- Dishwasher owners most commonly change how they interact with their dishwashers
  - Graph 7: money-saving behaviours while doing the dishes in the past six months, 2023
- Educate consumers on dishwasher machine use
- Bind consumers to your brand with proof of efficacy
- Prove efficacy of cold-temperature washing-up liquid through sample sizes

## Attitudes towards dishwashing products

- Half of consumers agree that additives are necessary for a good cleaning performance
  - Graph 8: attitudes towards dishwashing products, 2023
- Push for deeper cooperation between dishwasher producers and dishwashing product brands
- Prove that pre-rinsing is not necessary with improved formulas
- Use digital product passports to inform about eco-friendly ingredients and their impact on health
- Dosable dishwasher tabs remain untapped

## LAUNCH ACTIVITY AND INNOVATION

- Dishwasher NPD remains stable, with hand dishwashing products seeing the most innovation
  - Graph 9: NPD in household care, by top five categories, 2020-23
  - Graph 10: NPD in dishwashing products, by sub-category, 2020-23
- Automatic dishwashing products gain momentum
- Examples of NPD in automatic dishwasher products
- New packaging remains the most common launch type
  - Graph 11: NPD in dishwashing products, by launch type, 2020-23
- Focus on relaunches to entice eco-conscious consumers
- Examples of plastic-free NPD in dishwashing products
- Claims around packaging grow
  - Graph 12: NPD in dishwashing products, by leading claims, 2020-23
- Use concentrates to advance eco-friendly packaging
- Branded product launches continue to grow
- Branded product launches continue to &nbsp;grow
- Henkel builds on its lead
  - Graph 13: NPD in dishwashing products, by leading ultimate company, 2020-23
- Examples of branded NPD in dishwashing products

## Advertising and marketing activity

- Showcasing the ease of use of refills
- Effective even with eco-settings
- Efficacy and fast-drying

- Highlighting the water-saving aspects of dishwashers

## MARKET SHARE

- Own label grew in light of the economic crisis
- Own label received a boost
- Leading brands suffer a slight decline in value share

## MARKET SIZE, SEGMENTATION AND FORECAST

- 2022 marks a record high in value sales
- Small growth in 2022 after a dip in 2021
- Automatic dishwashing detergents' share stays stable
- Inflation caused value growth across all categories
- Minimal growth expected in the long term after a mid-term decline
- Short-term growth
- Mid-term decline
- Long-term stagnation

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

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

### Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size & forecast - value
- Market forecast and prediction intervals – 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](https://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](http://www.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