

# DISHWASHING PRODUCTS – UK – 2024

Dishwashing brands can engage consumers in diverse ways. Meet performance expectations and drive spend via unique scents, and more granular eco and health claims.



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# Dishwashing Products - UK - 2024

## This report looks at the following areas:

- The impact of the cost of living on dishwashing care
- Analysis of the size of the market and forecast for the next five years
- Market share of major players, competitive strategies and advertising initiatives
- Product trends and new product development in dishwashing care
- Consumer usage of dishwashing products and frequency of dishwasher usage
- Issues experienced when using the dishwasher



Dishwashing brands can engage consumers in diverse ways. Meet performance expectations and drive spend via unique scents, and more granular eco and health claims.

## Overview

Squeezed household budgets triggered by the cost-of-living crisis have encouraged consumers to rethink dishwashing habits to save on bills and reduce overall spent on dishwashing purchases. Money-conscious consumption behaviours were reflected in terms of value sales in 2021 and 2022. **The category saw a change in trend during 2023, with the market recording the highest growth since 2020, the first year of the pandemic.**

While savviness will always influence purchases to some extent, brand names and reputation still matter to consumers. However, **loyalty towards dishwashing brands is fragile**, as consumers often link unsatisfactory cleaning performance with dishwasher detergents. In such a scenario, competition is fierce and the market open to new category players.

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In parallel to exploring aromatherapy and alluring fragrance combinations, the hand dishwashing segment is perfectly positioned to **capitalise on emerging trends such as skin health and water-saving claims**. On other hand, the machine dishwashing segment has the opportunity to **integrate water hardness into NPD and marketing strategies** more overtly. This with the final aim to **target consumers more effectively and promote penetration of machine maintenance formulas** such as rinse aids and dishwasher cleaners.

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# Report Content

## EXECUTIVE SUMMARY

### Opportunities for the dishwashing products market

- Enhance washing up rituals to allure consumers
- Talk about hard water to relaunch ancillary products
- Tier offerings based on dishwashing cycles

### Market dynamics and outlook

- Market size & forecast
- Market predictions
- Stable growth expected in the dishwashing products category
- Hand dishwashing shares grow for the third consecutive year
- All segments set to grow
- Rivalry between Fairy and Finish increases
- Fairy benefits from cross-category presence

### What consumers want and why

- Price matters, but label names still count
  - Graph 1: selected washing up liquid purchase drivers, by financial situation, 2024
- Touch on water hardness to boost usage of ancillary formulas
  - Graph 2: usage of dishwasher products, by water hardness, 2024
- Engage with consumers to solve dishwashing frustrations
  - Graph 3: issues experienced when using a dishwasher, 2024
- Acknowledge consumers' dishwashing feelings
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### Innovation and marketing

- Hand and automatic dishwashing segments inspire innovation
  - Graph 5: share of new dishwashing product launches, by sub-category, 2021-24
- Experiment with scents across segments
  - Graph 6: share of new dishwashing product launches, by fragrance component group, 2021-24

## MARKET DYNAMICS

### Market size

- The market experiences continual growth
  - Graph 7: market size for dishwashing products, 2019-23

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- Market sees highest growth since the pandemic

## Market forecast

- Stable growth expected in the dishwashing products category
- Be consumer-centric to grow and lead over rivals

## Market segmentation

- Hand dishwashing drives growth in the category
- The hand dishwashing segment grows for the third consecutive year
- Daily automatic dishwashing drives sales of dishwasher detergents
- Right moment to relaunch powder detergents

## Market share

- Finish accounts for 44% of overall market share in the machine segment
- Rivalry between Fairy and Finish increases
- Leading brands continue to grow in the hand segment
- Key players dominate the hand and machine dishwashing markets
- Private label shares rise in the dishwashing space

## Macro-economic factors

- The UK economy moved into a shallow recession in the second half of 2023
  - Graph 8: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
  - Graph 9: CPI inflation rate, 2021-23
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- Consumer sentiment: the recovery is continuing...
  - Graph 10: the financial wellbeing index, 2016-23
- ...and people feel more confident about their financial prospects
  - Graph 11: the financial confidence index, 2016-23
- Space for premium branded and own-label launches

## Behavioural and environmental factors

- Conscious spending means growth for dishwashing brands
- Balance between green and convenience
- Make water-wise dishwashing possible

## WHAT CONSUMERS WANT AND WHY

### Usage and purchase of washing up liquid

- Washing up liquid enjoys widespread market penetration

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- Graph 12: usage of washing up liquid in the last six months, by age, 2024
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- Align NPD to evolving consumer desires
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  - Graph 15: frequency of dishwasher usage, 2022-24
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- All-in-one product concepts appeal to consumers
  - Graph 18: dishwasher product usage, 2022-24
- Powder formats back into fashion
- More powder, less packaging...
- ...and less water
- Water hardness increases use of ancillary products
  - Graph 19: usage of dishwasher products, by water hardness, 2024
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- Explore natural elements to address hard water issues

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- Different dishwashing products, same issues
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- Diversify offering based on dishwashing programmes

## Innovation and marketing

- Hand and automatic dishwashing segments inspire innovation
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  - Graph 32: share of recorded above-the-line, online display and direct to mail advertising expenditure on dishwashing products, by segment, 2021-24
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- Finish Ultimate Plus vs tough dishwashing conditions

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- Major players opt for TV, smaller ones for digital
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- Smol tips for great value
- Ecover targets different consumer profiles in-store and digitally
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## BRAND RESEARCH

- Fairy outperforms across all metrics
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- Dishwashing means Fairy and Finish in consumers' minds
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- Room for Fabulosa to stand out for more than value
- INEOS expands its reach into consumers' kitchens
- INEOS invests into a B2C future

## APPENDIX

### Market forecast data and methodology

- Market forecast and prediction intervals (value)
- Forecast methodology

### Report scope and definitions

- Market definition
- Abbreviations and terms

### Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage



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