

DISHWASHING PRODUCTS – US – 2023

As dishwashing product costs rise, consumers are paying closer attention to what truly works in their routine vs what they can cut out.



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Dishwashing Products - US - 2023

This report looks at the following areas:

- Market factors impacting the dishwashing products market
- Dishwasher ownership
- Dishwashing products purchased
- Purchase factors influencing dishwashing product choice
- Shopping behavior of dishwashing products
- Changes in dishwashing routines
- Usage and interest in dishwashing product innovations



As dishwashing product costs rise, consumers are paying closer attention to what truly works in their routine vs what they can cut out.

Overview

Inflation is causing consumers to reevaluate what it means to shop for dishwashing products while many consider what they truly need versus what they want, and how many separate products they're willing to purchase.

Consumers are unwilling to compromise on efficacy in their search for the most cost-effective products.

Brands that highlight their cost to value ratio are likely to see growth as the overall market stabilizes. As time progresses, ecological safety and sustainability will become non-negotiables for consumers as they think about the future of the planet.

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Report Content

Key issues covered in this report

- Overview

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Dishwasher ownership

- Majority of people still own a dishwasher, but don't overlook those that do not
 - Graph 1: ownership of dishwasher; trended 2021-23
- Changes in traditional lifestyles influencing dishwasher ownership
- Younger Millennials use dishwasher alternatives to create a cohesive home
 - Graph 2: ownership of dishwasher, by age, 2023

Dishwashing products purchased

- Dishwashing detergents and liquids continue to be front runners in product space
 - Graph 3: dishwashing products purchased in the past six months, trended 2021-23
- "Ease of use" model of products no longer enough
- Women are gravitating towards liquid formats and tablets for usage
 - Graph 4: dishwashing products purchased in the past six months, by gender, 2023
- More people in the house means more need for dishwashing products
 - Graph 5: dishwashing product purchases in the past six months, by parental status, 2023

Purchase influencers of dishwashing products

- Consumers expect detergents to do primary functions, such as removing food and stains
 - Graph 6: attributes influencing purchase of dishwashing products – dishwasher detergent, 2023
- Satisfy Black consumers' desires for scent, while also tackling mental wellness
 - Graph 7: scent as a factor influencing purchase of dishwashing products – dishwasher detergent, by race, 2023
- Not surprisingly, consumers are expecting rinse aids to...aid in rinsing

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- Graph 8: attributes influencing purchase of dishwashing products – rinse aid for dishwashers, 2023
- Not surprisingly, consumers are expecting rinse aids to...aid in rinsing
- Packaging is important for parents, especially from a safety standpoint
 - Graph 9: attributes influencing purchase of dishwashing products – rinse aid, packaging, by parental status, 2023
- Dishwashing liquids are expected to save time with grease-cutting efficacy
 - Graph 10: attributes influencing purchase of dishwashing products – dishwashing liquid, 2023
- Dishwashing liquids are expected to save time with grease-cutting efficacy
- Women want secondary products, but don't care about aesthetics...yet
- Dishwashing brands capture consumers through fancier packaging

Shopping behavior

- Consumers feeling less attached to brands when shopping for products
 - Graph 11: shopping behavior of dishwashing products, 2023
- Consumers feeling less attached to brands when shopping products
- Disruption in buying routines highlights lost opportunity to create loyal customers
 - Graph 12: shopping behavior of dishwashing products – brand loyalty, trended 2021-23
- Black consumers want a deal but there is opportunity for loyalty
 - Graph 13: shopping behavior of dishwashing products, by race, 2023
- Black consumers want a deal but there is the opportunity for loyalty
- Older consumers prefer to stick with what they know
 - Graph 14: shopping behavior of dishwashing products – % of typically buying the same brand, by age, 2023
- Older consumers challenge newcomers by exhibiting brand loyalty

Change in dishwashing routines

- People want to lessen their negative environmental impact through dishwashing
- People want to lessen their negative environmental impact through dishwashing
 - Graph 15: changes in dishwashing routine, 2023
- Younger Millennials taking action to limit their ecological footprint
 - Graph 16: changes in dishwashing routine – younger Millennials, 2023
- Lower-income consumers are cutting back and trading down
 - Graph 17: changes in dishwashing routine, by financial situation, 2023

Attitudes and behaviors around dishwashing

- Consumers are still rinsing before dishwashing – even when concerned about water usage
 - Graph 18: attitudes and behaviors toward dishwashing, 2023
- Consumers want to use less water, but don't really believe dishwashers actually use less
- Parents are letting dishwashers do the work...
- ...but have higher standards for dishwashing product safety

Usage and interest in dishwashing innovations

- Consumers peak in interest around premium factors
- Sustainable packaging has never been more interesting to consumers
 - Graph 19: usage and interest in dishwashing innovations – by ecological innovations, 2023
- Premium ecological benefits finding interest in dishwashing space
- Younger consumers will spend money on the good stuff
 - Graph 20: usage and interest in dishwashing innovations – any interest, by age and income, 2023
- Consumers pay attention to physical benefits in dishwashing
 - Graph 21: usage and interest in dishwashing innovations – by health factors, 2023
- Consumers pay attention to physical benefits in dishwashing
- Majority of consumers want benefits of skin health when dishwashing
- Majority of consumers want benefits of skin health when dishwashing
 - Graph 22: usage and interest in dishwashing innovations – dish soap with skin care ingredients, by age, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- L'avant attempts premiumization through sensory experience
- Limit water consumption by using no water

Marketing and advertising

- Cascade Platinum Plus load challenge
- Cascade creates challenge to discourage the "pre-rinse"
- Sustainability continues to be essential for consumers
 - Graph 23: top five claims in dishwashing products, 2018-23
- Sustainability becomes one of the forefronts of care for consumers

Opportunities

- Reuse water to manage implication for water safety and scarcity
- Private labels have opportunity to promote the performance and quality of their store brands
- Address wellbeing with healthy formulas for washing dishes
- Look to beauty brand Isle of Paradise for wellbeing inspiration

THE MARKET

Market context

- Market context

Market drivers

- Water and plastic regulations could effect how consumers' needs are met
- Inflation affecting discretionary spending even though lipstick effect prominent
- Less people owning homes and instead renting, leading to impacts in dishwasher ownership
 - Graph 24: homeownership rate in the US, 2000-23
- Fewer people owning homes, leading to impacts in dishwasher ownership
 - Graph 25: rent of primary residence in US city average, 1994-2022
- Traditional milestones no longer milestones for everyone

Market size and forecast

- Market moderates with inflation
- Retail sales and forecast of dishwashing products
- Market spending continues to increase after minor dip post-pandemic
 - Graph 26: average annual household spending on dishwashing products, 2018-23

Market segmentation

- Retail sales of dishwashing products, by segment
 - Graph 27: total retail sales and forecast of dishwashing products, by segment, at current prices, 2018-23
- Retail sales of dishwashing products, by segment

Market share/brand share

- Procter and Gamble continues to be a strong force, but keep an eye on private label
- Sales of dishwashing products by company
- Liquid products continue to show importance of value
- Detergents and additives likely see growth based on lack of pre-rinse ads

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart
- Retail sales and forecast of dishwashing products
- Retail sales of dishwashing products, by segment
 - Graph 28: total retail sales and forecast of dishwashing products, by segment, at current prices, 2018-23
- Retail sales of dishwashing products, by segment
- Sales of dishwashing products by company

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- Liquid products continue to show importance of value
- Detergents and additives likely see growth based on lack of pre-rinse ads

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