

LAUNDRY DETERGENTS, FABRIC CONDITIONERS & FABRIC CARE – GERMANY – 2024

Value-led laundry behaviours will remain, and brands need to double their efforts to support consumers, with a focus on low-temperature washing or NPD that prolongs the wearability of clothes between washes.



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Laundry Detergents, Fabric Conditioners & Fabric Care – Germany – 2024

This report looks at the following areas:

- The short-, medium- and long-term impact of the economic situation and inflation on the fabric care market
- Germans' laundry responsibilities and usage, purchase of laundry & fabric care products, and laundry frequency
- Laundry temperatures used for different types of laundry
- Typical laundry routines, and attitudes towards laundry activities and laundry products
- Launch activity and innovation opportunities for laundry & fabric care products
- Market size and shares for laundry & fabric care products

Overview

60% of German laundry shoppers and users agree that washing fabrics too frequently damages them, yet laundry frequency increased in 2023.

While inflation and laundry detergent price increases are slowing, two years of the cost-of-living crisis have put significant strain on consumers' finances, leading to the adoption of value-led laundry behaviours (eg switching to own-label products).



Value-led laundry behaviours will remain, and brands need to double their efforts to support consumers, with a focus on low-temperature washing or NPD that prolongs the wearability of clothes between washes.

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Energy prices and water scarcity will continue to impact how consumers approach their laundry, and brands will have to continue to **support them in establishing cost-saving laundry habits**, such as using fabric refreshers to prolong the wearability of clothes between washes and keeping laundry fresh. Emphasising the economic advantage of washing at lower temperatures (eg 20°C) and innovating with formulas including ingredients such as baking soda will help to protect washing machines from deteriorating.

Younger consumers are less experienced at doing laundry, and **are looking to brands to learn how to take care of their clothing, presenting a sweet spot for them**. **55% of Gen Z and 56% of Millennial laundry shoppers and users** agree that laundry brands are responsible for educating people on how to take care of their laundry. With younger consumers' interest in emerging tech, brands can rely on AI solutions to connect with this target group.

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Report Content



EXECUTIVE SUMMARY

- The five-year outlook for the laundry & fabric care market

Market context

- Inflation eases, but consumers are still concerned
- EU regulatory changes will impact the laundry category

Mintel predicts

- Market size & forecast
- Inflation continues to be the main driver for growth
- Stagnation is expected to follow a slight dip in value in 2025

Opportunities

- Protect consumers' clothes with lower temperature guidance and fabric refreshers
- Support Gen Zs with wellness-oriented products, and inform their laundry routine with AI Chatbots
- Support those financially struggling with money-saving practices

The competitive landscape

- Own label wins, while branded falls behind

MARKET DRIVERS

The German economy

- Economic recovery to follow the slowdown in 2023
 - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 2: financial confidence index, 2022-23
- Consumer price index for fabric care slows after a rapid rise in 2022
 - Graph 3: consumer price index, 2021-23
- The impact of the economy on the laundry & fabric care market

Regulatory changes in the EU

- The detergent regulation is getting updated
- The Green Claims Directive and greenwashing ban to impact ethical claims of fabric care products

Water scarcity

- Water scarcity will impact machine usage

Fashion

- The quiet luxury trend informs Germans' fashion choices
- Sports clothes are a popular everyday item among German consumers

Appliances

- Self-dosing washing machines can pose a threat to current convenient formats

WHAT CONSUMERS WANT AND WHY

Laundry tasks and responsibilities

- Sole laundry responsibilities increase due to Gen Zs growing older
 - Graph 4: sole responsibilities for laundry, 2022-23
 - Graph 5: sole responsibilities for laundry among Gen Zs, 2022-23
- Cater to Gen Zs' growing laundry responsibilities

Frequency of doing laundry

- Laundry frequency picks up slightly compared to 2022
- Teach dual-parent families about the cost benefit of washing at lower temperatures
- Focus on fabric refreshers to alleviate single households' financial strain

Use of laundry detergents and fabric care products

- Use of laundry detergents remains largely the same
 - Graph 6: usage of laundry detergents in the last 12 months, 2022-23
- Address environmental issues such as water scarcity to keep popular format use high
- Show effectiveness of powder tablets' stain removal properties and time-saving benefits

Fabric care usage

- Usage of most fabric care products remains mostly consistent
 - Graph 7: usage of fabric care products in the last 12 months, 2022-23
- Highlight the value of scent for wellbeing
- Offer fabric care bundles for young consumers together with best-practice advice

Laundry temperatures

- Clothing is most commonly washed at 40°C
 - Graph 8: laundry wash temperatures, 2023
- Promote washing temperatures as cost-efficient...
- ...and reassure hygiene through antibacterial detergents

- Improve Baby Boomers' finances by teaching them how to wash whites at lower temperatures
- Collaborate with sportswear brands to help consumers take care of their sports clothes

Typical laundry routines

- Washing different colours separately is common among German consumers
 - Graph 9: typical laundry routines, 2023
- Offer whitening effect without reducing the lifespan of white textiles
- Offer products designed for delicate fabrics to those who wash them separately
- Add fast-drying technology to fabric care products

Attitudes towards laundry & fabric care

- Consumer awareness of clothing longevity is high
 - Graph 10: attitudes towards laundry and laundry products, 2023
- Support those who want to protect their clothing
- Use AI Chatbots to address younger consumers' desire for education
- Increase trust in effective low-temperature cleaning by explaining stain removal formulas
- Add machine care ingredients to fabric care products

LAUNCH ACTIVITY AND INNOVATION

- Fabric care NPD falls to its lowest in five years
 - Graph 11: NPD in household care, by top five categories, 2019-23
- Laundry detergents continue to drive NPD growth
 - Graph 12: NPD in laundry detergents, fabric conditioners & fabric care*, by sub-category, 2021-23

Laundry detergents

- Convenience NPD slows amidst inflationary pressures
 - Graph 13: NPD in automatic laundry detergents, by format, 2019-23
- Examples of powder tablet NPD
- Relaunches remain high due to changes in EU detergent regulations
 - Graph 14: NPD in laundry detergents*, by launch type, 2019-23
- Biodegradable claims remain high in 2023 in light of EU regulatory changes
 - Graph 15: laundry detergent NPD*, by top ten claims, 2019-23
- Highlight biodegradability in tandem with education around water resource protection
- Henkel remains the champion in laundry detergent NPD
 - Graph 16: laundry detergent NPD, by ultimate company, 2019-23

Fabric conditioners and fabric care

- Bleach and fabric brighteners return to relevance
- New products fill the gap to help consumers reduce their washing frequency

- Graph 17: fabric conditioner and fabric care NPD*, by launch type, 2019-23
- Examples of new products that help to reduce washing frequency
- Popular ethical claims on the decline
 - Graph 18: fabric conditioner and fabric care NPD, by leading claims, 2019-23
- Ease of use gains relevance as sustainability becomes a hygiene factor
- Increase biodegradable ingredients and seek partnerships with independent certification institutions
- Procter & Gamble continues to push the fabric care category
 - Graph 19: fabric conditioner and fabric care NPD, by ultimate company, 2019-23
- Branded products dominate NPD
 - Graph 20: fabric conditioner and fabric care NPD, private-label vs branded products, 2019-23
 - Graph 21: laundry detergent NPD*, branded vs private label, 2019-23
- Own-label NPD slows to keep products affordable
- Examples of own-label fabric care

Advertising and marketing activity

- Convenient products are mess-free
- Conditioners go beyond just scent to pique consumer interest
- Reducing washing frequency through colour protection
- Washing at 20°C
- Explaining the advantages of cold washing

MARKET SHARE

- Own label continues to benefit from consumers' cost-conscious behaviours
- Leading brands lose share due to continued financial pressure
- Own label's market share growth accelerates

MARKET SIZE, SEGMENTATION AND FORECAST

- Inflation continued to drive laundry & fabric care's value market size in 2023
- Laundry aids experience strongest growth
- Inflation continues to boost the category
- Laundry detergents' growth held back by savvy shopping
- Conditioners and softener brands need to be wary of the threat from other fabric care products
- The machine liquid category remains stagnant, despite inflation
- Hand detergents benefit from consumers' wish to extend their clothing's lifespan
- Stagnation is expected to follow a slight dip in value in 2025
- Short-term stagnation
- Mid-term stagnation

- 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

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