

FABRIC CARE – INDIAN CONSUMER – 2019

Be future-ready with environment-friendly innovations that are less water-intensive. Create differentiation in the hand-wash and machine-wash categories.



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Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Create distinction through format type; innovate for the future through environment-friendly products
- Global retail market overview: Fabric care, 2018
- India is predominantly a hand-wash laundry market
- Ariel #ShareTheLoad campaign yet again challenges the status quo of laundry being a woman's responsibility
- Target men to drive penetration of matic detergents
- Capitalise on liquid formats to differentiate matic detergents and drive its usage
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Everyday living conditions coupled with a densely populated country makes laundry a big business

Global trends and how they are playing out in India

- Develop environment-friendly offerings to be future-ready
- Environment-friendly product tops NPD launch claims globally and in India
 - Graph 1: NPD launch claims, 2018
 - Graph 2: NPD launch claims, 2018
- Why Dizolve packaging went plastic-free
- Looming water scarcity to drive product innovations
- Take on a world of waste with DS3
- Types of laundry detergent sheets, films and strips

CONSUMER INSIGHTS

- What you need to know

Chapter 1 – Laundry behaviour

- Involve other family members to pitch-in doing laundry
 - Graph 3: Laundry responsibility, August 2018
- Communicate everyday heroism in doing laundry in order to make it easier for men, especially husbands, to participate
 - Graph 4: Laundry responsibility (self), by marital & working status, August 2018

- Graph 5: Laundry responsibility (self), by marital & working status, August 2018
- Think convenience to make a high-usage everyday product like hand wash detergent consumer-friendly
- Tap into West region's everyday laundry behaviour
- Turn to an emerging Tier 2 machine-wash segment to expand matic detergents
 - Graph 6: Machine wash frequency, by city tiers, August 2018
- Do away with the need to pre-soak and highlight time-saving detergent
 - Graph 7: Pre-soak time of clothes, by laundry method, August 2018

Chapter 2 – Usage and attitude

- Target the high number of product users, especially men, with a bundled kit
 - Graph 8: Number of laundry products and adjuncts used in last 6 months, August 2018
- Take the bundling route to expand penetration beyond basic laundry products
 - Graph 9: [no title]
 - Graph 10: Laundry products used in past 6 months, August 2018
- Design product offerings and communication to reach highest product users
- Make post-wash fragrance a barometer of clean clothes
 - Graph 11: Select attitude towards laundry, August 2018
- Break away from limited usage by highlighting superior benefits of liquid format
 - Graph 12: Select attitude towards liquid detergents/conditioners, August 2018

MARKET APPLICATION

- Opportunity: Key areas of focus

Opportunities

- Be future-ready with low-foam detergents and less water-intensive processes
- Move on from the visual to the olfactory dimension of clean through post-wash fragrance

Who's innovating

- Herbal matic detergent powder for all types of washing machines including semi-automatic
- Environment-friendly multi-functional products
- Uni-wash detergents that work for both hand and machine wash
- Indian consumers see natural brands as being more trustworthy
- Getting specific with liquid detergent format
- The dhobi (washer-man) comes back in the form of laundromats

Global innovators

- Laundry powder featuring precious stone particles
- Promoting efficacy benefits and economy of concentrated detergents
- Environment-friendly packaging for liquid detergent

- Anti-pollution fabric care
- New fibre protection formula emphasises cold water suitability
- Reset and revive clothes in just 15 minutes

APPENDIX

- Consumer survey methodology

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