

# THE FUTURE OF FABRIC & DISH CARE: 2019

Global annual review: what's now and what's next for dishwashing and fabric care products.



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# Report Content

- What's in this report
- Mintel's synopsis

## IMMEDIATE FUTURE: THE NEXT 2 YEARS

### 1. The issue of plastic usage and waste is of great concern

- Mintel recommends
- Packaging generates most plastic waste
- Usage of plastic packaging in fabric and dishwashing care products
- Recyclability of household plastic packaging
  - Graph 1: fabric and dish care launches by recyclability of plastic packaging, by sector, Oct 2017-Sep 2018
- Plastic packaging recycling
- Collecting ocean plastic
- Plastic use in fabric and dish care
- A gift can encourage consumers to dismantle a bag-in-box
- Ocean plastic bottles
- Paper bottles
- Fabric and dish care have plastic-free opportunities
- Consumer attitudes towards packaging waste
- Super concentrates and refill systems
- Refills move from surface care to dishwashing

### 2. From trade secret to public knowledge

- Mintel recommends
- Transparency becomes a competitive necessity
- Retailers launch their own information technologies
- Instant access to product information
- Consumers look for on-pack ingredient information
- SmartLabel adds blockchain technology
- Unilever is also actively involved in blockchain initiatives
- Fabric and dish care products with QR codes
- QR codes used on fabric and dish products
  - Graph 2: launches of fabric and dish care products with QR codes on-pack, Nov 2013-Oct 2018
- Fabric care products with QR codes
- Dishwashing products with QR codes

- Consumers want to know what's in the products they buy
- Fabric care ingredient disclosure in South Korea
- Dishwashing ingredient disclosure in South Korea
- Companies need to be less secretive

### 3. Anti-pollution has many facets

- Mintel recommends
- Consumers need pollution-proof fabric care
- Brands can exploit the anti-pollution trend
- Protecting fabrics against environmental aggressors
- Anti-pollution is a growing fabric care niche
  - Graph 3: fabric care launches (indexed) that claim to repel or prevent dust attachment, Oct 2013-Sep 2018
- Washing clean clothing is wasteful
- Consumers are interested in laundry products that prolong the lifetime of fabrics
- Preserve resources by extending the lifetime of clothing
- Consumers express interest in cold water washing
- Repositioning cold water detergents
- Cold water laundry detergents tend to be liquid formats
- Cold water efficiency that prolongs the lifetime of fabrics
- Extending the lifetime of fabrics by washing less often
- New opportunity for laundry aids
- Smart textiles need different types of care
- Smart textiles: wearable displays

## PLANNING AHEAD, NEXT 5 YEARS

### 4. Digitalisation drives future fabric and dish care sales

- Mintel recommends
- The growing influence of e-commerce
- Growing potential for online sales of non-food groceries
- Packaging needs to be suitable for home delivery
- Seventh Generation offers shipping efficiency and supreme convenience
- P&G takes inspiration from wine boxes
- Tide and Seventh Generation designed for e-commerce
- Online changes the way we buy
- Amazon Dash Wand

### 5. Health and lifestyle-supporting fabric and dish care

- Mintel recommends

# The Future of Fabric & Dish Care: 2019

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- Health and wellbeing are essential for a happy life
- Antibacterial fabric care NPD
  - Graph 4: fabric care NPD with antibacterial claims, by selected sectors, Oct 2014-Sep 2018
- Better hygiene improves health and wellbeing
- Aesthetic properties are also important in dishwashing products
- Aesthetic properties trump hygiene when selecting home laundry products
- Antibacterial dishwashing product NPD
  - Graph 5: dishwashing NPD with antibacterial claims by selected sectors, Oct 2014-Sep 2018
- Rising importance of good mental health
- Mood changing fabric and dish care
- Fabric and dish care NPD with aromatherapeutic benefits remains niche
  - Graph 6: fabric care and dishwashing NPD with aromatherapy claim, Oct 2014-Sep 2018
- Global market players add aromatherapy to fabric care
- Washing-up liquids with aromatherapeutic properties
- Consumers are interested in aromatherapeutic benefits
- Hyper-cleanliness may negatively affect health
- The benefits of probiotics in fabric and dish care
- Fabric care products made with microorganisms
- Dishwashing products made with microorganisms
- Consumer interest in probiotic laundry products
- Prevention vs troubleshooting
- Odour prevention is a real consumer issue
- Machine care products with microorganisms

## 6. Game-changing automation hits fabric and dish

- Mintel recommends
- Rising automation of fabric care
- Miele FragranceDos for tumble dryers
- Bosch i-DOS simplifies fabric care
- Sensor technology helps take the hassle out of the laundry process
- Auto-dishwashing becomes truly automated
- Miele PowerDisk
- Consumers look for automated appliances
- The future is fully integrated and automated solutions

## MARKET OVERVIEW

- Global fabric care retail sales
- Global retail sales of fabric care products

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- Largest fabric care markets
- Fabric care markets to watch
- Fabric care spending
- Fast and slow growth in fabric care markets
- Products focus on functionality claims
- Top 10 fabric care claims
- Global dishwashing product retail sales
- Global retail sales of dishwashing products
- Leading dishwashing product markets
- Dishwashing product markets to watch
- Dishwashing per capita spend
- Fastest- and slowest-growing dishwashing markets
- Natural and gentle dishwashing product claims are on the rise
- Top 3 dishwashing claims
- Top 10 dishwashing claims

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