

# From Sustainability to Purpose: Laundry & Auto Dish Detergent Brand Packaging Policies

January 2021

Table of Contents

## INTRODUCTION TO UNIT DOSE DETERGENT

### Scope

Detergent formats and what we mean by “unit dose”

Laundry PVOH tablets grow from niche (wrapped is now negligible)

Unit dose tablets (especially PVOH) are stronger in dishwashing

A series of reports look at various impacts of unit dose detergents

The focus of this report is sustainability and plastic waste policies

Our unsustainable addiction to plastic packaging...in numbers

Key findings from this series of reports

COVID-19 challenges some fundamental futurology assumptions

It is just a matter of time before new plastic waste becomes a focus

## SUSTAINABILITY AND UNIT DOSE

Global plastic production and what gets into the environment

Types of plastic, uses and their sustainability credentials

Most plastic claims to be “recyclable”; a lot less really gets recycled

Recycling varies by region, influenced by exported plastic waste

Circularity and biodegradability are arguably the critical elements

Recycling is at times a valve, releasing pressure to be “plastic-free”

One rub is that biodegradability and recycling are often in conflict

Incidences of claimed “biodegradable” plastics that don’t degrade

A cliff edge lies ahead, along with a figurative industry “leap of faith”

There is a spotlight report in the series focusing just on plastics

Law of unintended consequences; fix one issue and create another

Any packaging ideas that pull from other industries take risks

## HOME CARE SUSTAINABILITY POLICIES

Packaging and plastics are under ever greater social scrutiny

Sustainability’s role transitions from being a “cost” to mission critical

Tablet penetration shows PVOH concentrated in US and Europe

This penetration view also highlights category and company gaps

## HOME CARE SUSTAINABILITY POLICIES: PROCTER & GAMBLE

Commitments and policies for use of plastics in packaging\*

“Recyclable” is only a claim... how to then facilitate real action?

Black items cannot be identified by ultraviolet visual sorting systems

P&G view consumers moving to pods as key to saving on plastic

A view supported by the European Vice President of Fabric Care

More impactful after the planned pouches replace the current box

P&G has high-profile involvement addressing plastic waste issues

P&G solving both eco and e-commerce issues with one action

## HOME CARE SUSTAINABILITY POLICIES: UNILEVER

Commitments and policies for use of plastics in packaging\*

Unilever identifies five development areas building plastic circularity

Plastic recovery and circularity continues into the 2020 thinking

Unilever is investing to improve flexible plastic recycling feasibility

There are shorter-term wins to be had in cutting virgin plastic use

While experimenting with blue sky “No Plastic” options is ongoing

## HOME CARE SUSTAINABILITY POLICIES: HENKEL

Commitments and policies for use of plastics in packaging\*

Henkel approaches this as a 3-phase programme to plastic circularity

One project is Newcycled® packaging recovery (reused plastic)  
Henkel is working on multiple solutions to recycle black plastic  
Henkel extends Plastic Bank “social plastic” recycling platform

#### HOME CARE SUSTAINABILITY POLICIES: RECKITT BENCKISER

Commitments and policies for use of plastics in packaging\*  
Reckitt Benckiser keeps looking to expand single-dose stain action  
The partnership with Veolia targets Finish Quantum with 30% PCR

#### HOME CARE SUSTAINABILITY POLICIES: REUSE AND REFILL

Recycling and biodegradation of plastic are incomplete solutions  
Reuse and refill boomed in 2020, across retailers and categories  
Before facing recycling, refill extends the use life of plastic in-home  
This invokes the “milk bottle” returns model, with nicer packaging  
SC Johnson was the first corporate “refill” champion with Ecover  
Unilever is also now beginning refill experiments in stores  
Reuse is a core part of Unilever’s plastic reduction commitment  
Multiple Unilever categories and regions where refill is tested  
Multiple Unilever categories and regions where refill is tested  
Amazon offers D2C subscriptions for products such as Cif’s example  
Think for a moment; HDPE has many lives, but travels every time  
The Asda test Unilever joined is a “reduce, refill, reuse” platform  
Marks & Spencer expands a 2019 food refill trial to a second store  
Refill and reuse is clearly taking off rapidly now in dry food  
Refill also includes home care fluids as the second major category

#### RECOMMENDATIONS

Plastic promises and what they mean to virgin and PCR plastic use  
Expansive yet reductive?  
“Recyclable” is needed in reality and not just as a way to avoid guilt  
Getting packaging back in the loop after use is a known barrier  
Reuse offers plastic savings magnitudes better than anything else  
The rise of Conscious Consumers is visible in many 2020 attitudes  
Considerations to enter the refill/reuse trend are not insignificant  
Barriers and practicalities for building refill/reuse business models  
Concentrated PVOH tablets are (at best) a small part of a solution  
Trend leaders are deep into lifecycle assessments for materials  
It is even more critical to keep metal packaging inside the loop  
There is no single fix for an issue of this scale; we need to do it all

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world’s most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer

trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/from-sustainability-to-purpose-laundry-and-auto-dish-detergent-brand-packaging-policies/report](https://www.euromonitor.com/from-sustainability-to-purpose-laundry-and-auto-dish-detergent-brand-packaging-policies/report).