

Are Unit Dose Tablet Detergents Still Fit for Purpose in Laundry Care and Automatic Dishwashing?

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INTRODUCTION

Scope

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

Unit dose tablets (especially PVOH) are stronger in dishwashing

The focus of this report is the impact on dosing levels and guidance

Can unit dose still work for wash results and consumer experience?

The big question

Abrogating responsibility for dosing is a large part of tablet appeal

There is a spotlight report in the series focusing on Urbanisation

Are unit dose detergent tablets fit for purpose?

Key findings from this series of reports

Coronavirus challenges some fundamental futurology assumptions

INDUSTRY DRIVERS POLARISING CAPACITY

Laundry front loaders have “standardisation” in recurring sizes

Big space and small space optimisation defines laundry capacity

Dishwashers also come in standard sizes and capacity groups

Polarisation of capacity is visible in dishwasher sales too

Miniature appliances in novel installation locations keep emerging

Space-saving products even target the US (largest living area)

IFA tends to show a limited range of such models for Europe

The micro product trend is improving and adding new technology

Fitting a dishwasher “anywhere”, the brands are getting inventive

Including increasing incidences of “combination” kitchen devices

A concurrent trend is mega capacities inside standard cabinet sizes

This aspect is true for washing machines as well as dishwashers

CONSUMER AND REGULATORY FACTORS

Consumer and regulatory laundry trends contribute to this topic

Some consumers avoid sorting, and create fabric wash overloads

Time limits in the working week drive both large and small loads

Household real wash load sizes and life stages are closely related

Consumers can wash bedding at home instead of using laundrettes

Capacity now forms one of the major sell-up strategies in stores

Detergent faces low water levels for small loads, even in big drums

European micro load importance increases from 2021

The degree of kg sensitivity appliances will need leaps out visually

Anti-viral hygiene has become a laundry brand selection factor

For dishwashing, it is more about changes to cooking behaviours

Evolving attitudes to mealtimes give rise to more multi-dish cooking

The multi-dish trend is an ongoing “norm” for Mediterranean meals

Seven items typically make up an average pot and pan set

Most hobs can support four to six pots and pans at one time

Multi-dish cooking trends are reflected in appliance basket designs

Multi-dish cooking creates extra pressures for detergent results

We should see in future more dishwasher-safe pots and pans

Dishwasher usage, appeal and penetration gained ground in 2020

CURRENT DOSING RECOMMENDATIONS

Testing 1-2-3: The Home Care team's product tests in 2019-2020

Retail stores in the UK and France were visited to obtain test samples

Figuring out detergent dose guides in both grams and millilitres

Dishwashing introduced more powder tablets to be ground down

Recurring pack issue: Declared doses not matching actual contents

CURRENT DOSING RECOMMENDATIONS: LAUNDRY

A mix of leading laundry detergents on test from UK retail shelves

Henkel boost of sampling (purchases from France)

CURRENT DOSING RECOMMENDATIONS: LAUNDRY - POWDERS

Laundry powder dose guidelines from P&G (Ariel and Fairy brands)

Laundry powder dose guidelines* from Unilever (Persil) and Tesco

Laundry powder dose guidelines from Henkel (Le Chat, France)

There are redeemable measuring devices (that collect user data)

Downside of redemption... the extra plastic scoops get wrapped in

Detergent drawers do not make measuring doses easier for users

Balancing evils; add more plastic every time, or rely on redemption

CURRENT DOSING RECOMMENDATIONS: LAUNDRY - LIQUIDS

Laundry liquid dose guidelines from P&G (Ariel and Fairy brands)

Laundry liquid dose guidelines from Unilever, Ecover and Tesco

Laundry liquid dose guidelines from Henkel (Le Chat, France)

Some liquids include the dosing device in the product as standard

CURRENT DOSING RECOMMENDATIONS: LAUNDRY - TABLETS

Laundry tablet dose guidelines from P&G, Unilever and Tesco

Laundry tablet dose guidelines from Henkel (Le Chat, France)

One key appeal of tablets is avoiding the whole “measuring” issue

CURRENT DOSING RECOMMENDATIONS: LAUNDRY - LAUNDRY DOSE GUIDE OVERVIEW

Dosing recommendations across detergents in the study

To examine dosing magnitudes, let's look at this another way...

Price per wash variations by brand and by type of detergent bought

This pattern is clearer if we go one further step to price per millilitre

Examining water specifications for standard wash cycles

Concentration and dose guide issues are clear, varying up to x2

Brands have capacity gaps in their dosing logic at the extremes

What goes wrong on maximum capacity loads being under-dosed?

What goes wrong on micro capacity loads being over-dosed?

CURRENT DOSING RECOMMENDATIONS: DISHWASHERS

A mix of leading dishwasher detergents from UK shop shelves

Unilever boost of sampling (purchases from France)

CURRENT DOSING RECOMMENDATIONS: DISHWASHERS - POWDERS

Dishwashing powder dose guidelines

40ml (and 45ml for heavy soiling)...what does that look like?

Dishwashers provide inconsistent and limited dose guidance

45ml is more than most dispensers can physically fit inside

CURRENT DOSING RECOMMENDATIONS: DISHWASHERS - LIQUIDS

Dishwashing liquid gel dose guidelines from RB (Finish brand)

Dishwashing liquid dose guidelines from Unilever (Sun brand)

CURRENT DOSING RECOMMENDATIONS: DISHWASHERS - TABLETS

Dishwashing tablet dose guidelines from RB (Finish and Quantum)

Dishwashing tablet dose guidelines from P&G (Fairy brand)

Dishwashing tablet dose guidelines from Unilever (Sun brand)

Dishwashing tablet dose guidelines from Ecover and Tesco

CURRENT DOSING RECOMMENDATIONS: DISHWASHERS - DISHWASHING DOSE GUIDE OVERVIEW

Dosing recommendations across different types of detergent

Price per wash variations by brand and by type of detergent bought

The price per ml pattern is just as interesting in dishwashing

Dishwashing has more extreme concentration gaps than laundry

One size fits all; possibly that worked in the past, but not anymore

What goes wrong with largest capacity loads being under-dosed?

What goes wrong on micro capacity small loads being over-dosed?

RECOMMENDATIONS

There is substantial profit in converting homes to use PVOH tablets

Our living space really is getting smaller per person over time

Are single dose tablets fit for purpose today: Appliance capacity

Diluted concentration variance in washing machines is not too bad

Dishwashing dilution gaps are more serious; tabs are only part of it

Key takeaways for detergent packaging teams

Please keep in mind how appliances guide dosing (or fail to guide)

Key takeaways for detergent innovation and disruption teams

Key takeaways for washing machine or dishwasher design teams

This illustrates the auto-dosing value case; make it an AI problem

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