



Euromonitor
International

A New Appreciation for Cold Wash

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Key findings

What is cold washing?

Rising energy prices have put cold wash back on the agenda as a strategic topic

Sinner's Circle and its central role in making cold wash a reality

Reducing temperature demands a boost in chemical and mechanical action

The Paris Agreement on global GHG emission reduction is driving energy-efficiency

What happens if we fail to crack cold wash in laundry?

In-use phase revealed as biggest contributor to GHG emissions from laundry care

All laundry stakeholders' sustainability promises for 2030 mean influencing in-home use

There are four main perspectives driving cold wash

CONSUMER MOTIVES AND BARRIERS

There remains a lack of knowledge amongst consumers regarding cold water washing

Old habits die hard, and laundry is no exception

Real and perceived performance limitations of cold wash remain major hurdle

The hypocrisy surrounding eco-consciousness

Immediacy and "quick wash" abuse magnify hygiene issues related to cold wash

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Success in changing consumer temperature choices needs better motivation efforts

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The need to break our addiction to trying to achieve hygiene through heat

Solutions must also serve the hundreds of millions of households that already wash in cold

Cost of energy is a major factor limiting automatic laundry in developing markets

EU energy labels and its implications for cold wash

Evolving technologies in washing machines boost cold and quick washing

Samsung Quick Drive technology has reinvented the laundry wheel

AEG's soft water technology combines powerful quick wash and low temperature claims

Ultra-violet radiation and ionisation are emerging hygiene technologies

Panasonic with breakthrough in UV hygiene technology for clothes sanitisation

GE introduces Eco Cold washing machine and advertises its money-saving attributes

Beko EnergySpin launched at IFA in 2023

Haier WashPass launches smart laundry subscription with superior cold wash performance

The link between cold wash and drug-resistant bacteria development inside the machine

Anti-biofilm technologies are present in newer washing machine models

Life energy consumption monitoring incentivises sales through energy "cost of use" data

Samsung's SmartThings uses AI technology to help consumers control their footprint

Balancing Sinner's Circle: Appliances

DETERGENCY MOTIVES AND BARRIERS

Much has happened since Procter & Gamble started cold wash two decades ago

Ambitious emission targets have set the stage for cold wash in detergency

Chemistry needs to improve to prevent overcompensating behaviour in cold wash

For cold wash to work effectively laundry chemistry will have to do much of the heavy lifting

Cold wash as an industry priority is driving investment in cold-active ingredients

Ingredients that impact cold wash performance: Surfactants

Ingredients that impact cold wash performance: Enzymes

Ingredients that impact cold wash performance: Other ingredients

Ingredients that impact cold wash performance: Bleach
Micro-encapsulation is one way bleach can be added to formulation
A maximum cold wash hygiene cycle with disaggregated ingredient release
Examples of how Procter & Gamble is pushing cold wash into the mainstream
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Fabric care instructions and cold water washing
With Scope 3 care labels are coming into focus for the apparel industry
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Fashion trends that make cold washing more difficult: Fast fashion
Fashion trends that make cold washing more difficult: The rise of sportswear
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Digital fabric labels using RFID can hold permanent care records
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Procter & Gamble partners with apparel retail chain in support of cold wash
Balancing Sinner's Circle: Apparel

CONCLUSIONS

The future is here: One launch and one experiment at a time
In the short term, advocates need to educate the hygiene debate
The need for cross-industry solutions: This is one repeating theme
Technological advancements encourage out-of-silo thinking
Haier's Internet of Clothing (IoC): When out-of-silo thinking is put into practice
Cold wash will proliferate with advanced mixing-in-the-moment
Superior performance from ingredient disaggregation is eroding industry silos
Combining soft water technology with mixing-in-the-moment will be groundbreaking
The use of nudge theory pushes all stakeholders towards lower wash temperatures
Nudge theory in cold wash: A chain reaction of stakeholders doing the right thing
Cold wash will enable sustainability, democratise access to auto-washing and grow profits

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