



Passport

DISHWASHING AND LAUNDRY CARE UNITE BEHIND DETERGENT TABLETS

June 2013

Scope

- All values expressed in this report are in US dollar terms, using a fixed exchange rate (2012).
- All forecast data are expressed in constant terms; inflationary effects are discounted. Conversely, all historical data are expressed in current terms; inflationary effects are taken into account.



Disclaimer

Much of the information in this briefing is of a statistical nature and, while every attempt has been made to ensure accuracy and reliability, Euromonitor International cannot be held responsible for omissions or errors.

Figures in tables and analyses are calculated from unrounded data and may not sum. Analyses found in the briefings may not totally reflect the companies' opinions, reader discretion is advised.

While use of monodose has had its greatest success in automatic dishwashing, recent innovations in laundry have seen the format develop a similar footing there also. With developed markets in desperate need of innovation, it is hoped these new look products will make an impact, although there are still barriers to overcome. That said, laundry care manufacturers appear to have learnt from successes in dishwashing – a key factor for positive forecasts associated with the fledgling category.

Unbalanced?

Everywhere I travel....

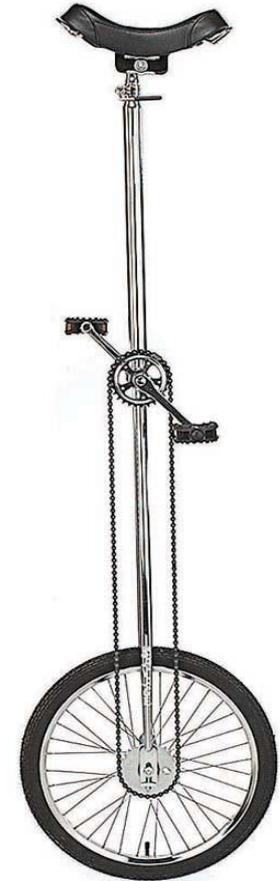
Single-serving sugar, single-serving cream, single pat of butter. The microwave Cordon Bleu hobby kit. Shampoo-conditioner combos, sample-packaged mouthwash, tiny bars of soap.

The people I meet on each flight?

They're single-serving friends... ("Fight Club", 1999)

“Mono” as an expression often suggests instability – the lack of something more substantial or supportive, unstable and temporary.

While other industries have used the idea of “mono” with varying degrees of success, it has fallen to the home care industry to demonstrate how mono can be balanced, complete and all encompassing.



MARKET IMPLICATIONS

Innovation Drivers



Watershed in innovation

- The arrival of TidePods in the US in 2012 marks a watershed for monodose in laundry. Multi-chambered PVA packaging technology allowed Procter & Gamble much more flexibility with formulation, allowing it to mix detergent, booster and colour enhancer all in one tablet without the prospect of the different elements reacting together and degrading outside the wash.
- Packaging evolution has allowed monodose in laundry to move beyond the portion control and single serving functions of packaging, and into the sphere of multifunctionality. This provides the opportunity to compete on efficacy, a tactic which has worked to great effect in European automatic dishwashing, for example.
- The technology supplied by Monosol, although seemingly simple, is a technical breakthrough. It is a PVA package which must dissolve completely in water but not break if handled with wet hands. It must also protect the ingredients during transport and storage in a wide range of conditions, from Alaska in the winter to Houston in the summer, and be aligned with the wide variety of washing conditions which exist across the US
- The packaging also forms the chief selling criterion for the brand. It must look good, stand out on the shelf. Many of the elements which have made the Finish brand so formidable in automatic dishwashing are present in this laundry offering.



INTRODUCTION

MONODOSE DEVELOPMENT

MARKET IMPLICATIONS

AUTOMATIC DISHWASHING AND MONODOSE

LAUNDRY AND MONODOSE

TIDEPODS

FUTURE PROSPECTS

MISSION CONTROL

MONODOSE AND LONGEVITY

