

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, lets 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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