



**SO FRESH AND SO CLEAN**

Market Analysis Liquid Detergents, Caps and Laundry Sanitiser

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# GOOD PROSPECTS FOR LAUNDRY CARE



The general **outlook** for laundry care is **positive**. Consumer education will never be so high in relation to home hygiene when the covid-19 pandemic abates. This will undoubtedly push improved **hygiene cleaning practices** well into the future.

**Value sales of laundry care** in Western Europe grew in 2020 driven by consumers' increased **awareness of hygiene**. The Coronavirus pandemic should accelerate this trend and shift consumers' preferences towards **disinfection** and **sanitising of textiles**.

# CURRENT CONDITIONS IN LAUNDRY CARE – COVID-19

## Sanitising and disinfection become key in laundry care

The covid-19 pandemic experienced in 2020 has **pushed consumers** to focus their laundry chores not only in making sure their garments are clean but also, that they are **sanitised and disinfected**. Therefore, demand for laundry sanitisers and detergents that claim to sanitise and/or disinfect the garments is expected to rise in the coming years.

## Private label further on track for success

With an **economic recession** expected in many countries over the forecast period, consumers will be looking for ways to **save** and good-value private label products will be an attractive option.

## Sustainability dilemma

Proper disinfection is only reached through heat (energy) or by using chemicals that kill germs. None of these are sustainable methods. This has led to a **dilemma between hygiene and sustainability**. Leaving manufacturers with a **long-term challenge** to balance increased demand for hygiene in laundry care within the context of sustainability.



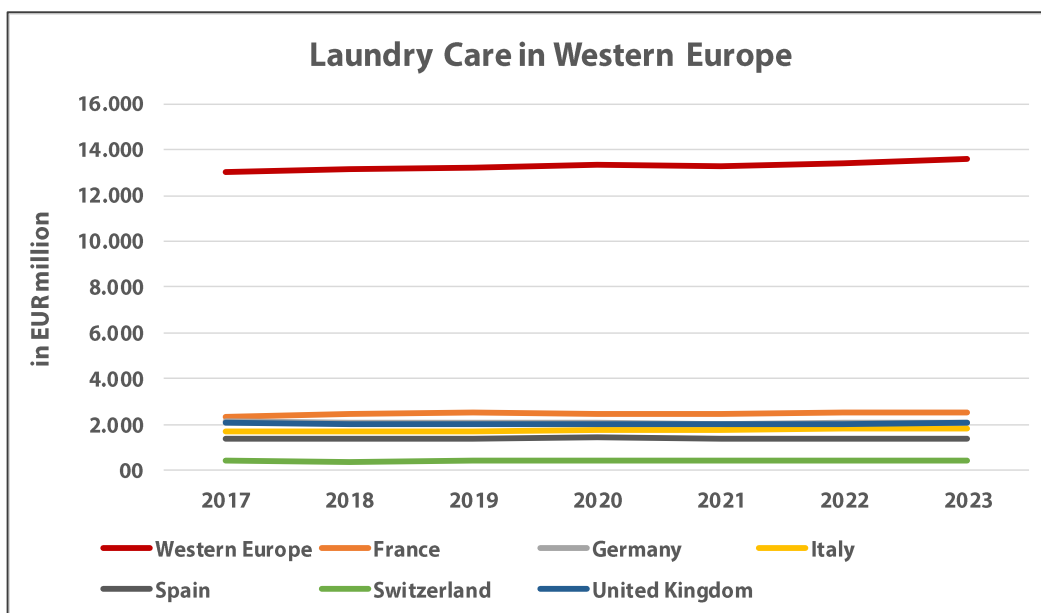
A man with a beard, wearing a white polo shirt and blue jeans, is sitting on the floor, smiling and looking at a young girl. The girl, with brown hair in pigtails and wearing a white shirt under denim overalls, is sitting cross-legged and looking back at him. They are in a laundry room with light-colored wooden walls and floors. In the background, there is a white front-loading washing machine with its door open, showing blue and white clothes inside. To the right of the machine is a white dryer. On a white shelf above the dryer, there is a white basket with a floral pattern containing laundry detergent bottles. To the left of the machine, there is a white shelf with two potted plants. In the foreground, there is a large, round, woven basket filled with various colored clothes (yellow, pink, blue, and plaid).

## REGIONAL OVERVIEW

# REGIONAL OVERVIEW – *Western Europe*

*Laundry Care in Western Europe, Market Size + Forecast in EUR million*

	2017	2018	2019	2020	2021	2022	2023
<b>Western Europe</b>	13.017	13.134	13.220	13.316	13.301	13.429	13.600
<b>France</b>	2.342	2.442	2.490	2.466	2.468	2.488	2.525
<b>Germany</b>	2.119	2.078	2.056	2.056	1.991	2.033	2.071
<b>Italy</b>	1.700	1.699	1.709	1.723	1.749	1.782	1.821
<b>Spain</b>	1.349	1.376	1.391	1.398	1.394	1.384	1.379
<b>Switzerland</b>	411	404	407	411	418	418	416
<b>United Kingdom</b>	2.041	2.020	2.013	2.019	2.012	2.021	2.040



The Laundry Care market has been largely stable in recent years and is expected to remain at a similar level in all Western European countries.

# REGIONAL OVERVIEW – *Western Europe*

*Laundry Care in Western Europe, growth in % for the different categories, 2019 - 2020*

	Laundry Care	Concentrated Powder Detergents	Concentrated Liquid Detergents	Liquid Tablet Detergents*	Laundry Sanitiser
Western Europe	<b>0.7</b>	<b>-3.6</b>	<b>0.5</b>	6.7	47.2
France	<b>-1.0</b>	<b>-8.8</b>	<b>-1.4</b>	2.8	14.5
Germany	<b>0.0</b>	<b>-1.0</b>	<b>0.6</b>	26.4	21.5
Italy	<b>0.9</b>	<b>-7.0</b>	<b>-2.4</b>	20.6	29.7
Spain	<b>0.5</b>	<b>-4.4</b>	<b>2.1</b>	2.0	11.2
Switzerland	<b>0.8</b>	<b>-0.9</b>	<b>3.6</b>	11.9	7.2
UK	<b>0.3</b>	<b>-5.6</b>	<b>0.7</b>	3.3	91.7

*\*Liquid Tablet Detergents = Capsules = Caps*



## REGIONAL OVERVIEW – *Western Europe*



Concentrated **liquid detergents** and **liquid tablet detergents (pods)** were the **most dynamic products** within laundry care in Western Europe during the review period (2019/2020). Both saw positive growth in the majority of markets. Consumers are continuing to move away from traditional powder detergents and towards concentrated liquid detergents.

Although remaining a small category within overall laundry detergents, **liquid tablet detergents (pods)** continued to gain momentum, **recording strong retail volume and current value growth** as more affluent consumers looked to this convenient format that reduces the mess, wastage and spillage factors of powder, and to some extent, liquid detergents.





## REGIONAL OVERVIEW – *Western Europe*

While still a niche area, **scent boosters** (other laundry aids) have seen **a strong growth in Germany, France and the UK** - three of the biggest markets within laundry care. Consumers appreciate having not only clean clothes, but also pleasant-smelling clothes for as long as possible. Scent boosters are seen as a **good alternative to fabric softeners**, which some consumers perceive to be damaging to the quality of some fabrics.

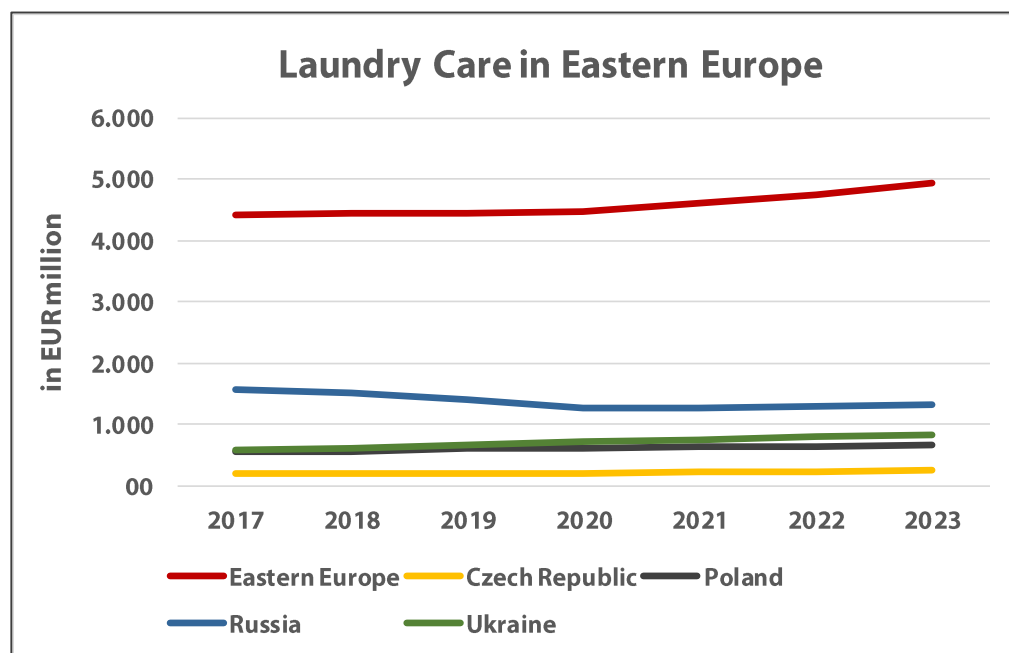
The year 2021 will still be a year severely impacted by the **COVID-19 pandemic**. This will lead to consumers **prioritising** purchases of products with a **“disinfectant” or “hygienic”** component as a way of preventing the spread of the virus.



# REGIONAL OVERVIEW – *Eastern Europe*

*Laundry Care in Eastern Europe, Market Size + Forecast in EUR million*

	2017	2018	2019	2020	2021	2022	2023
<b>Eastern Europe</b>	4.412	4.444	4.456	4.461	4.597	4.754	4.926
<b>Czech Republic</b>	209	206	208	216	225	235	246
<b>Poland</b>	552	571	604	620	644	654	663
<b>Russia</b>	1.571	1.524	1.403	1.277	1.267	1.285	1.326
<b>Ukraine</b>	587	624	680	722	762	801	833



The category laundry care is generally growing except Russia, which shows a declining trend.

However, the forecast for the next 3 years predicts growth for all countries.



# REGIONAL OVERVIEW – *Eastern Europe*

*Laundry Care in Eastern Europe, growth in % for the different categories, 2019 - 2020*

	Laundry Care	Concentrated Powder Detergents	Concentrated Liquid Detergents	Liquid Tablet* Detergents	Laundry Sanitiser
Eastern Europe	0.1	-1.0	8.5	12.5	177.9
Czech Republic	3.8	-5.2	5.0	12.7	235.0
Poland	2.6	-3.7	10.2	6.9	17.4
Russia	-9.0	1.4	-0.8	14.0	n.a.
Ukraine	6.1	3.2	6.9	12.1	n.a.

*\*Liquid Tablet Detergents = Capsules = Caps*

From 2019 to 2020, there were significant value growths in Liquid Tablet Detergents and Laundry Sanitiser.

The upward trend in the Laundry Sanitiser category is certainly due to the current pandemic. This trend will continue in the coming years.

Powder detergents are on the decline, especially in the Czech Republic and Poland. In the other countries they are showing a slight increase.



**SCENT IS THE PRIMARY PURCHASING FACTOR**



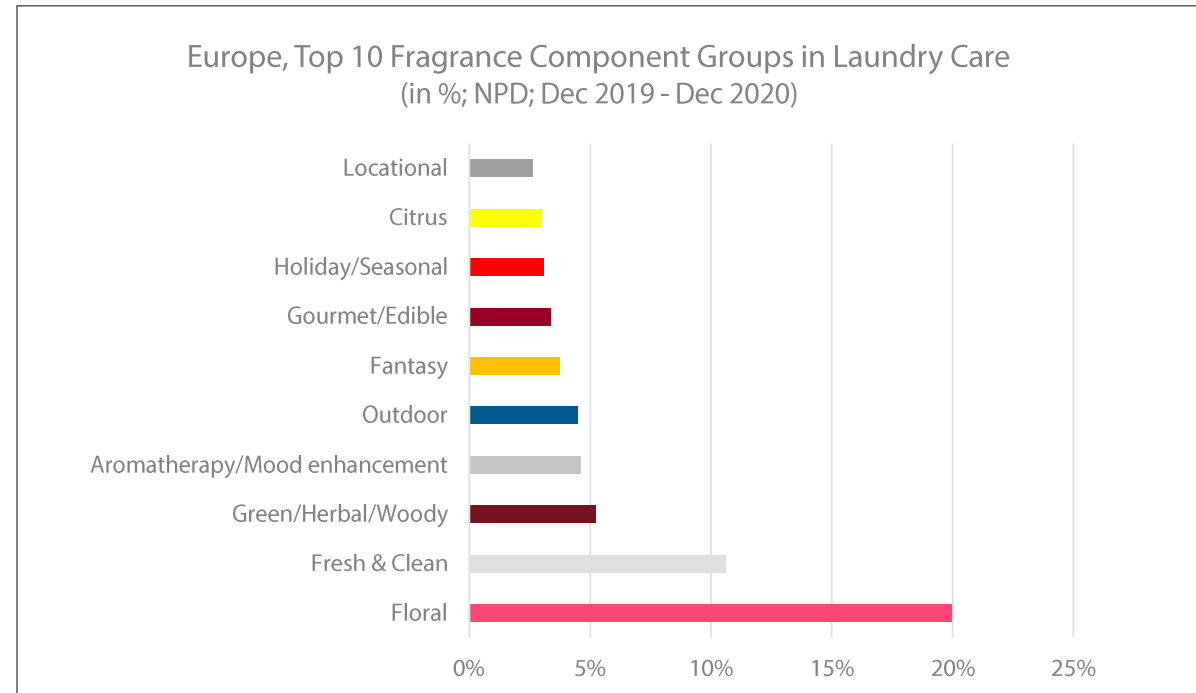
# SCENT IS THE PRIMARY PURCHASING FACTOR

As a functional and fragrance-driven category, brands need to engage consumers **with formats and formulas that work better** and are easier to use, while fragrances need **to tempt purchase at the point-of-sale while being familiar**.

**Seasonal and innovative fragrances** from personal care, such as **rhubarb**, can pique consumer interest and encourage purchases.

The **scent** of laundry care products continues to be the **leading purchase stimulus**.

The **continued interest in fragrances** indicates that innovative products with **unusual scents and innovative application possibilities** are being positively received by consumers.



In fact, about 36% of UK consumers consider scent to be their most important purchase factor when it comes to Laundry Care.





**LATEST MARKET PRODUCTS**



# LATEST MARKET PRODUCTS - LIQUID DETERGENT



Company: Natuopera  
Brand: Natuopera Clean  
Category: Liquid Detergent  
Market: France  
Fragrance: Orchard & Flower



Company: Simple Goods  
Brand: Simple Goods  
Category: Liquid Detergent  
Market: Germany  
Fragrance: Lavender & Patchouli



Company: Reckitt Benckiser  
Brand: Botanical Origin  
Category: Liquid Detergent  
Market: USA  
Fragrance: Orange Blossom & Citrus

# LATEST MARKET PRODUCTS – LAUNDRY CAPS



Company: Unilever  
Brand: Robijn Color  
Category: Capsules  
Market: Netherlands  
Fragrance: Coconut Sensation



Company: Grupa Inco  
Brand: Bio Star Cleaning Products  
Category: Capsules  
Market: Poland  
Fragrance: Lavender



Company: DM Drugstore  
Brand: DM Denkmith  
Category: Capsules  
Market: Hungary  
Fragrance: Sensual Fresh

# LATEST MARKET PRODUCTS – LAUNDRY CAPS



Company: Henkel  
Brand: Super Croix Brésil Tonifiant  
Category: Capsules  
Market: France  
Fragrance: Passion Flower & Coconut



Company: Unilever  
Brand: Robijn Color  
Category: Capsules  
Market: Netherlands  
Fragrance: Amour des Fleurs



Company: Marba International  
Brand: Cleox  
Category: Capsules  
Market: Poland  
Fragrance: Green Forest and Flowers



# LATEST MARKET PRODUCTS – LAUNDRY CAPS



Company: DM Drugstore  
Brand: DM Denkmit  
Category: 3 in 1 Capsules  
Market: Germany  
Fragrance: Summer Fresh



Company: Interdis  
Brand: Carrefour  
Category: Capsules  
Market: France  
Fragrance: Blue Lagoon



Company: Henkel  
Brand: Weißer Riese  
Category: Capsules  
Market: Germany  
Fragrance: Malaysian Orchid

# LATEST MARKET PRODUCTS – LAUNDRY HYGIENE



Company: Saponia  
Brand: Faks Helizim Deziclean  
Category: Laundry Disinfectant  
and Rinsing Liquid  
Market: Croatia



Company: Morrisons  
Brand: Morrisons  
Category: Anti-Bacterial  
Laundry Cleanser  
Market: UK  
Fragrance: Cotton Fresh



Company: Heitmann  
Brand: Impersan  
Category: Hygiene Fabric  
Softener  
Market: Germany  
Fragrance: Blossom



## **FRAGRANCE PROPOSALS FOR LIQUID DETERGENTS AND LIQUID TABLET DETERGENTS**





# 8001195 AMAZING FOREST



Top: green, rhubarb, bergamot

Heart: floral, jasmine

Base: woody, balsamic, sandalwood, vanilla

The fragrance is suitable for EU-Ecolabel products up to a concentration of 0.1%.







# 8001206 WILD GARDEN



Top: fresh green, sea water

Heart: floral, lavender, rose

Base: powdery, neroli, musk

The fragrance is suitable for EU-Ecolabel products up to a concentration of 0.6%.





# 8001192 GREEN COTTAGE



Top: fresh, green, aldehydic, watery

Heart: floral and fruity notes, rose, jasmine, freesia, peony

Base: orange blossom, sandalwood

The fragrance is suitable for EU-Ecolabel products up to a concentration of 0.1%.







# 8001209 ROMANTIC MOMENT



Top: fresh, mandarin, bergamot

Heart: floral, tulip, lily of the valley, lily

Base: spicy, amber, sandalwood, musk, caramel

The fragrance is suitable for EU-Ecolabel products up to an concentration of 1,0%.







# 8001211 LOVELY MISS



Top: fresh, aldehyds, galbanum, lavender

Heart: floral, gardenia, jasmine, rose

Base: balsamic, sweet, patchouli, musk, amber, moss

The fragrance is suitable for EU-Ecolabel products up to an concentration of 0.5%.







## FRAGRANCE PROPOSALS FOR LAUNDRY SANITISER



# 8001193 KISS OF ART



Top: green, aldehydic, rhubarb  
Heart: floral, lily of the valley, jasmine  
Base: powdery, musk







# 8001204 MIDSUMMER DREAM



Top: fresh-green, bergamot, apple

Heart: floral, rose, lily of the valley, violet

Base: woody, creamy, cedar, musk

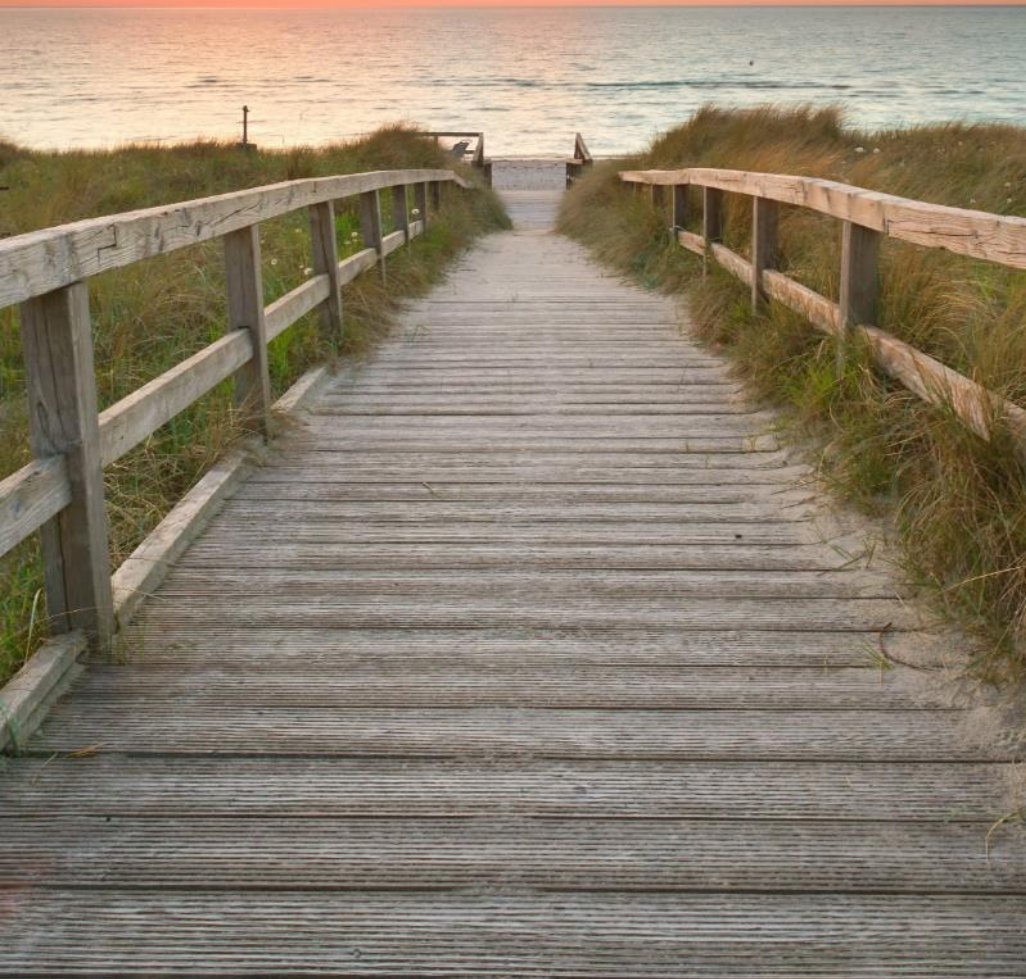
The fragrance is suitable for EU-Ecolabel products up to a concentration of 0.25%.





# 8001202

## INFINITY



Top: green, fruity, apple, violet green

Heart: floral, rose, jasmine, lily of the valley

Base: amber, musk





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Bell Flavors & Fragrances  
Schimmelstrasse 1  
04205 Leipzig, Germany  
[www.bell-europe.com](http://www.bell-europe.com)

