



# Passport

## Laundry Care in Hong Kong, China

Euromonitor International

January 2022

# LIST OF CONTENTS AND TABLES

KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
COVID-19's impact lingers despite move towards "new normal".....	1
Liquid tablet detergents gains further popularity to detriment of powder format .....	1
The premiumisation race .....	2
PROSPECTS AND OPPORTUNITIES.....	2
Escalating battle against waste from recyclable packaging to refill stations .....	2
Reimagining the laundry care process with innovative solutions .....	3
Changing gender roles with emergence of male-oriented laundry care.....	3
CATEGORY INDICATORS .....	4
Table 1 Household Possession of Washing Machines 2016-2021.....	4
CATEGORY DATA.....	4
Table 2 Sales of Laundry Care by Category: Value 2016-2021 .....	4
Table 3 Sales of Laundry Care by Category: % Value Growth 2016-2021 .....	4
Table 4 Sales of Laundry Aids by Category: Value 2016-2021 .....	4
Table 5 Sales of Laundry Aids by Category: % Value Growth 2016-2021 .....	5
Table 6 Sales of Laundry Detergents by Category: Value 2016-2021 .....	5
Table 7 Sales of Laundry Detergents by Category: % Value Growth 2016-2021 .....	6
Table 8 NBO Company Shares of Laundry Care: % Value 2017-2021 .....	6
Table 9 LBN Brand Shares of Laundry Care: % Value 2018-2021 .....	7
Table 10 NBO Company Shares of Laundry Aids: % Value 2017-2021.....	8
Table 11 LBN Brand Shares of Laundry Aids: % Value 2018-2021 .....	8
Table 12 NBO Company Shares of Laundry Detergents: % Value 2017-2021 .....	9
Table 13 LBN Brand Shares of Laundry Detergents: % Value 2018-2021.....	9
Table 14 Forecast Sales of Laundry Care by Category: Value 2021-2026 .....	10
Table 15 Forecast Sales of Laundry Care by Category: % Value Growth 2021-2026 .....	11

# LAUNDRY CARE IN HONG KONG, CHINA

## KEY DATA FINDINGS

- Retail value sales rise by 6% in current terms in 2021 to HKD1.0 billion
- Laundry detergents is the best performing category in 2021, with retail value sales increasing by 7% in current terms to HKD683 million
- Procter & Gamble HK Ltd is the leading player in 2021, with a retail value share of 28%
- Retail sales are set to rise at a current value CAGR of 6% (2021 constant value CAGR of 4%) over the forecast period to HKD1.3 billion

## 2021 DEVELOPMENTS

### COVID-19's impact lingers despite move towards "new normal"

Laundry care witnessed dramatic changes in 2020 within an otherwise mature home care category in Hong Kong due to the impact of COVID-19. Spiking hygiene concerns and prolonged home seclusion contributed to the rapid growth of liquid tablet detergents while reducing the need for stain-removing and fabric-softening products. Heading into 2021, life in Hong Kong has gradually returned to greater levels of normalisation due to the successful measures taken by the government to contain the virus. However, overall demand for many laundry care products continues to decline, a trend already emerging prior to the pandemic.

Nevertheless, the impact of COVID-19 continues to influence consumer behaviour and purchasing decisions, as they retain habits formed over the past 18 months. Therefore, even though the main growth drivers have already weakened considerably in 2021, growth or declines in respective categories remain, although at less drastic rates. For example, fabric fresheners only emerged in Hong Kong in 2019, but continues to record impressive double-digit volume growth in 2021, boosted by home seclusion and regular laundry routines.

Brands are also taking the opportunity to further educate local consumers on the diverse usage of this product, including Febreze which markets its line of fabric fresheners such as disinfecting fabric sprays, expanding its territory into the hygiene market. On the other hand, leader LAVONS, a Japanese brand, targets the scented market by positioning its fabric fresheners as replacements for perfumes. At the other end of the scale is the further decline of powder detergents. COVID-19 has largely accelerated its decline since 2020 as most powder detergents did not carry disinfectant functionality, while liquid formats, including liquid tablet detergents, are appreciated for their convenience.

### Liquid tablet detergents gains further popularity to detriment of powder format

Despite the overall declines recorded by laundry care in 2021, there have been notable performances from several areas of the category, including liquid tablet detergents which is set to record another year of double-digit retail volume and current value growth. More importantly, the popularity of this format of laundry detergents potentially heralds the future of laundry care that is more convenient, releases accurate dosing, and is multifunctional.

Although fuelled by heightened hygiene awareness which emerged in line with the pandemic in 2020, the popularity of the tablet format was already increasing in Hong Kong. Within home

care, convenience was a key emerging trend for which great effort was invested by consumers into reducing time and effort to simplify the laundry process. Liquid tablet detergents, however, has managed to reduce the already straightforward process of measuring the correct dose into a single package. In addition to a simplified process, the accurate dosage is another factor that continues to drive purchases, as it reduces wastage. When dealing with measuring cups or spoons, consumers lack confidence regarding whether they have applied the precise amount, whereas tablets offer a pre-measured quantity.

Another factor which has made liquid tablet detergents more competitive than other laundry care products is their potential to combine different functions. The flexibility of its design has enabled producers to include several different properties in one small tablet. For example, leading brand Ariel's 3-in-1 laundry pod is a combination of antioxidants, stain removers, disinfectants, and of course laundry detergent. Rising brand, Ar Fum, has added fabric softener and scent booster to its laundry capsules to achieve a soft finish and lasting fragrance on the fabric. These add-ons have placed liquid tablet detergents at a much more advantageous position in a post-pandemic laundry care space.

### The premiumisation race

In addition to the lingering impact of COVID-19 on local consumers, 2021 has also witnessed increasing numbers of premium products enter the category, each with their own definitions of "better laundry care experience". Brands are taking three main directions to convert consumers; better-looking products with premium packaging designs, better-smelling products with perfume-quality fragrances, and better-feeling products with eco-friendly concepts.

Although premium packaging design is not a new concept in Hong Kong, the impact of COVID-19 introduced new importance and interpretations for this trend. After extended periods of home seclusion in 2020, the way local consumers perceive their homes has evolved, enriched by gathering, working, cooking, and relaxing. Therefore, greater consideration has been taken to invest in the overall look of their living environment. While laundry care is a necessity for general hygiene, consumers are increasingly attracted to packaging that blends with their interiors that house their home laundry appliances, instead of having to be hidden away. For instance, the New Zealand brand Ecostore has been able to successfully differentiate from competitors on store shelves with its modern and simplistic packaging design.

Olfactory sense has also been a territory to conquer for brands wishing to enter the premium space. Filling the gap between unscented and primary fragrances such as floral, Japanese brands LAVONS and Laundrin have incorporated perfume-quality scents into their laundry care products such as Champagne Moon and French Macaron. Both brands have reported notable growth as a result. While these brands appeal to consumers through scent and attractive packaging, others are taking the sustainable route. Eco-friendly and socially responsible have already become synonyms for premium laundry care, as green brands such as Ecostore and ECOVER increasingly gain shelf space in high-end grocery retailers.

## PROSPECTS AND OPPORTUNITIES

### Escalating battle against waste from recyclable packaging to refill stations

Over the forecast period, sustainability will continue to be one of the most significant trends in home care. Since laundry care has long been a source of heavy plastic waste because of its packaging, this would prelude an escalating reform on packaging design. Furthermore, Hong Kong has recently passed a waste-charging scheme that will require residents to dispose of

their rubbish in special bags priced according to their size. Although this scheme will be rolled out over a period of 18 months, it will undoubtedly serve as another accelerator to packaging reforms.

Many brands have already adopted recyclable packaging. Ecostore uses sugar plastic bottles that can be 100% recycled, while Seventh Generation launched smaller recyclable bottles made from post-consumer recycled plastic over the review period. Even more established names such as Kao have stated their intention to introduce recyclable packaging for some product lines.

In addition to recycling packaging, Ecostore has taken a step further by creating refill stations in more upmarket areas in Hong Kong. Nevertheless, this has presented several challenges for this form of packaging. Firstly, it is linked to greater costs in terms of manning the refill stations, while it will be difficult and time-consuming to measure the weight if consumers use different containers. In addition, low price differences between refilled and new bottles would provide little incentive for consumers to switch. However, local consumers are becoming increasingly aware of environmental issues, and combined with pressure from government waste-control schemes, there is further potential for refill stations to thrive. Brands will also likely take measures to push the trend, such as initiating standardised containers and adding perks to encourage the switch.

### Reimagining the laundry care process with innovative solutions

The ongoing popularity of liquid tablet detergents will likely unleash potential for further innovations within laundry care, as consumers grow less sceptical of non-traditional formats. Therefore, further resources are likely to be invested into new product development and innovation, in addition to more diverse product types in Hong Kong.

High-end grocery retailers such as City Super have already been allocating greater shelf space to a wider range of non-traditional laundry care products, including Ecoegg, which originated in the UK and entered Hong Kong in 2018. Its most popular product - the laundry egg - claims to last up to 720 washes, offering an alternative solution to other detergents. The average cost per wash is stated to be under HKD0.6. Even though the penetration rate of this product remained relatively low in 2021, its high value for money and notable convenience offers stronger prospects for growth over the forecast period.

Meanwhile, several home care giants have launched innovative products in other markets, which are likely to be gradually introduced to Hong Kong as the category matures. For example, Kao released a revolutionary liquid detergent that is super concentrated and features a convenient "one-hand push" bottle for easy dispensing in Japan in 2019. Such unconventional products are likely to become available on local retailers' shelves in the short-term.

### Changing gender roles with emergence of male-oriented laundry care

According to the 2021 annual reports of several leading home care players, the increasing importance of women in the workforce has already been reshaping housework norms. As women devote greater time and energy to their careers, their male partners, on the other hand, are becoming increasingly involved in household chores. This trend is particularly notable in Hong Kong, where the female labour force participation rate continues to increase.

On a product level, this could translate into evolving designs that appeal to male consumers. In terms of laundry care, even though the formula itself is unlikely to change, there will be greater diversity in terms of packaging, and possibly scent. For instance, Kao has started to use blue on the packaging of some laundry care products to appeal to male consumers in Japan. Even though these product changes were not observed in Hong Kong at the end of the review period, other brands will likely follow suit as local consumer trends tend to be heavily influenced by Japan.

## CATEGORY INDICATORS

Table 1 Household Possession of Washing Machines 2016-2021

% possession of washing machine	2016	2017	2018	2019	2020	2021
Washing Machine	90.4	91.0	91.5	92.1	92.6	93.1

Source: Euromonitor International from official statistics, trade associations, trade interviews

## CATEGORY DATA

Table 2 Sales of Laundry Care by Category: Value 2016-2021

HKD million	2016	2017	2018	2019	2020	2021
Carpet Cleaners	-	-	-	-	-	-
Fabric Softeners	195.0	199.0	201.6	201.2	194.2	200.1
Laundry Aids	113.3	113.5	113.7	121.5	121.4	125.4
Laundry Detergents	591.5	596.2	600.0	603.7	639.3	683.2
Laundry Care	899.8	908.7	915.3	926.4	954.8	1,008.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Laundry Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Carpet Cleaners	-	-	-
Fabric Softeners	3.1	0.5	2.6
Laundry Aids	3.3	2.1	10.7
Laundry Detergents	6.9	2.9	15.5
Laundry Care	5.6	2.3	12.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Laundry Aids by Category: Value 2016-2021

HKD million	2016	2017	2018	2019	2020	2021
- Colour Safe Laundry Bleach	21.2	21.6	22.0	21.8	21.7	20.5
- Fabric Fresheners	-	-	-	7.2	10.4	14.2
- Spot and Stain Removers	48.5	48.7	49.3	50.2	49.1	50.9
-- In-Wash Spot and Stain Removers	17.2	16.7	16.3	15.9	15.3	15.2
-- Pre-Wash Spot and Stain Removers	31.3	32.0	33.0	34.2	33.8	35.7

- Starch/Ironing Aids	43.6	43.2	42.4	41.0	38.7	38.3
- Water Softeners	-	-	-	1.3	1.4	1.4
- Other Laundry Aids	-	-	-	-	-	-
Laundry Aids	113.3	113.5	113.7	121.5	121.4	125.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Sales of Laundry Aids by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Colour Safe Laundry Bleach	-5.5	-0.6	-2.9
- Fabric Fresheners	36.0	-	-
- Spot and Stain Removers	3.6	1.0	5.0
-- In-Wash Spot and Stain Removers	-0.9	-2.4	-11.4
-- Pre-Wash Spot and Stain Removers	5.6	2.7	14.0
- Starch/Ironing Aids	-0.9	-2.6	-12.1
- Water Softeners	3.3	-	-
- Other Laundry Aids	-	-	-
Laundry Aids	3.3	2.1	10.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 Sales of Laundry Detergents by Category: Value 2016-2021**

HKD million	2016	2017	2018	2019	2020	2021
- Automatic Detergents	574.6	579.8	584.2	588.7	624.8	669.3
-- Powder Detergents	320.3	305.4	285.7	251.3	220.9	199.3
--- Standard Powder Detergents	107.2	99.8	88.0	67.4	50.1	41.2
--- Concentrated Powder Detergents	213.1	205.6	197.6	183.9	170.9	158.1
-- Detergent Tablets	105.9	117.9	134.1	153.3	186.4	224.7
--- Compact Powder Tablet Detergents	-	-	-	-	-	-
--- Liquid Tablet Detergents	105.9	117.9	134.1	153.3	186.4	224.7
-- Liquid Detergents	148.4	156.6	164.4	184.1	217.5	245.3
--- Standard Liquid Detergents	-	-	-	-	-	-
--- Concentrated Liquid Detergents	148.4	156.6	164.4	184.1	217.5	245.3
- Standard Detergents	107.2	99.8	88.0	67.4	50.1	41.2
-- Standard Powder Detergents	107.2	99.8	88.0	67.4	50.1	41.2
-- Standard Liquid Detergents	-	-	-	-	-	-
- Concentrated Detergents	467.4	480.0	496.1	521.3	574.8	628.1
-- Concentrated Powder Detergents	213.1	205.6	197.6	183.9	170.9	158.1
-- Concentrated Liquid Detergents	148.4	156.6	164.4	184.1	217.5	245.3
-- Compact Powder Tablet Detergents	-	-	-	-	-	-

-- Liquid Tablet Detergents	105.9	117.9	134.1	153.3	186.4	224.7
- Other Detergents	16.9	16.4	15.8	15.0	14.4	13.9
-- Bar Detergents	-	-	-	-	-	-
-- Hand Wash Detergents	10.5	9.9	9.1	8.3	7.7	6.9
-- Fine Fabric Detergents	6.4	6.5	6.6	6.7	6.8	6.9
Laundry Detergents	591.5	596.2	600.0	603.7	639.3	683.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 Sales of Laundry Detergents by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Automatic Detergents	7.1	3.1	16.5
-- Powder Detergents	-9.8	-9.1	-37.8
--- Standard Powder Detergents	-17.8	-17.4	-61.6
--- Concentrated Powder Detergents	-7.5	-5.8	-25.8
-- Detergent Tablets	20.6	16.2	112.2
--- Compact Powder Tablet Detergents	-	-	-
--- Liquid Tablet Detergents	20.6	16.2	112.2
-- Liquid Detergents	12.8	10.6	65.3
--- Standard Liquid Detergents	-	-	-
--- Concentrated Liquid Detergents	12.8	10.6	65.3
- Standard Detergents	-17.8	-17.4	-61.6
-- Standard Powder Detergents	-17.8	-17.4	-61.6
-- Standard Liquid Detergents	-	-	-
- Concentrated Detergents	9.3	6.1	34.4
-- Concentrated Powder Detergents	-7.5	-5.8	-25.8
-- Concentrated Liquid Detergents	12.8	10.6	65.3
-- Compact Powder Tablet Detergents	-	-	-
-- Liquid Tablet Detergents	20.6	16.2	112.2
- Other Detergents	-4.0	-3.9	-18.0
-- Bar Detergents	-	-	-
-- Hand Wash Detergents	-10.0	-8.0	-34.1
-- Fine Fabric Detergents	2.8	1.7	8.6
Laundry Detergents	6.9	2.9	15.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 NBO Company Shares of Laundry Care: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
Procter & Gamble HK Ltd	21.7	23.1	24.7	26.9	28.2
Kao (HK) Ltd	14.3	14.3	14.1	15.3	15.3
Unilever Hong Kong Ltd	16.4	16.2	16.2	14.3	13.1
Lion Home Product (International) Ltd	7.5	7.6	8.7	9.2	9.2
Colgate-Palmolive HK Ltd	7.3	7.4	7.4	7.2	7.2
Whealthfields Lohmann (HK) Ltd	3.1	3.2	3.5	3.5	4.4
Reckitt Benckiser HK Ltd	6.3	6.3	5.5	4.8	4.3
Wipro Unza Holdings Ltd	4.6	4.4	4.0	3.7	3.3
NatureLab Co Ltd	-	0.5	0.9	1.8	2.2



Swipe (HK) Ltd	1.1	1.1	1.2	1.3	1.4
Yick Fung Hong Cosmetic & Detergent Co Ltd	1.6	1.6	1.5	1.4	1.3
Lam Soon (HK) Ltd	3.9	3.6	1.1	0.9	0.8
Acdoco Ltd	0.4	0.4	0.5	0.5	0.5
Clorox Hong Kong Ltd	0.9	0.9	0.8	0.6	0.5
Dairy Farm International Holdings Ltd	1.2	1.1	1.0	0.5	0.4
AS Watson Group	0.6	0.5	0.5	0.4	0.3
SC Johnson (HK) Ltd	-	-	-	-	-
Others	9.0	7.9	8.5	7.8	7.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9** LBN Brand Shares of Laundry Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Ariel (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	14.6	16.4	19.0	21.2
Attack (Kao Corp)	Kao (HK) Ltd	12.1	11.9	13.1	13.2
Comfort (Unilever Group)	Unilever Hong Kong Ltd	12.0	11.3	9.3	8.3
Softlan (Colgate-Palmolive Co)	Colgate-Palmolive HK Ltd	7.4	7.4	7.2	7.2
Lion Top (Lion Corp)	Lion Home Product (International) Ltd	7.6	7.4	7.2	6.8
Fab (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	7.1	6.7	6.3	5.3
Vanish (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser HK Ltd	3.8	3.9	3.7	3.6
Vigor (Wipro Ltd)	Wipro Unza Holdings Ltd	4.4	4.0	3.7	3.3
Niagara (Unilever Group)	Unilever Hong Kong Ltd	1.1	2.2	2.7	2.9
Nanox (Lion Corp)	Lion Home Product (International) Ltd	-	1.3	2.0	2.3
LAVONS	NatureLab Co Ltd	0.5	0.9	1.8	2.2
Walex (Whealthfields Group Inc)	Whealthfields Lohmann (HK) Ltd	2.5	1.4	1.4	2.1
Kao (Kao Corp)	Kao (HK) Ltd	2.0	2.0	2.1	2.0
Persil (Unilever Group)	Unilever Hong Kong Ltd	3.2	2.7	2.2	1.9
Fresh HY (Whealthfields Group Inc)	Whealthfields Lohmann (HK) Ltd	0.8	0.9	1.2	1.6
Swipe	Swipe (HK) Ltd	1.1	1.2	1.3	1.4
Way Way (Way Way Daily Necessities (Dongguan) Ltd)	Yick Fung Hong Cosmetic & Detergent Co Ltd	1.6	1.5	1.4	1.3
AXE (Lam Soon Group)	Lam Soon (HK) Ltd	3.6	1.1	0.9	0.8
Tide (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	1.0	0.9	0.8	0.8
Walch (Whealthfields)	Whealthfields Lohmann (HK) Ltd	-	1.2	0.9	0.7

Group Inc)					
Febreze (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	-	0.3	0.5	0.6
Woolite (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser HK Ltd	0.5	0.5	0.5	0.5
Dr Beckmann (Delta Pronatura Dr Krauss & Dr Beckmann KG)	Acdoco Ltd	0.4	0.5	0.5	0.5
Clorox (Clorox Co, The)	Clorox Hong Kong Ltd	0.9	0.8	0.6	0.5
First Choice (Private Label)	Dairy Farm International Holdings Ltd	0.5	0.4	0.4	0.3
Downy (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	0.4	0.3	0.3	0.3
Best Buy (Private Label)	AS Watson Group	0.4	0.3	0.3	0.2
Fabulon (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser HK Ltd	1.9	1.1	0.6	0.2
Wonderful (Kao Corp)	Kao (HK) Ltd	0.2	0.2	0.1	0.1
Select (Private Label)	AS Watson Group	0.1	0.1	0.1	0.1
Others	Others	8.6	9.1	8.0	7.9
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10 NBO Company Shares of Laundry Aids: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
Reckitt Benckiser HK Ltd	46.0	46.0	38.0	33.2	30.1
Unilever Hong Kong Ltd	19.7	19.4	22.2	24.0	24.9
Kao (HK) Ltd	16.0	16.3	15.5	16.5	15.8
Procter & Gamble HK Ltd	2.7	2.8	5.2	6.2	7.6
NatureLab Co Ltd	-	-	1.8	3.7	5.1
Acdoco Ltd	2.9	3.0	3.5	4.0	4.1
Clorox Hong Kong Ltd	6.8	7.0	6.3	4.6	3.7
ST Corp	-	-	0.3	0.4	0.4
SC Johnson (HK) Ltd	-	-	-	-	-
Others	5.8	5.5	7.2	7.5	8.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 11 LBN Brand Shares of Laundry Aids: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Vanish (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser HK Ltd	30.9	29.4	28.8	28.7
Niagara (Unilever Group)	Unilever Hong Kong Ltd	8.5	16.5	21.4	23.6

Kao (Kao Corp)	Kao (HK) Ltd	16.3	15.5	16.5	15.8
LAVONS	NatureLab Co Ltd	-	1.8	3.7	5.1
Febreze (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	-	2.5	3.5	4.9
Dr Beckmann (Delta Pronatura Dr Krauss & Dr Beckmann KG)	Acdoco Ltd	3.0	3.5	4.0	4.1
Clorox (Clorox Co, The)	Clorox Hong Kong Ltd	7.0	6.3	4.6	3.7
Tide (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	2.8	2.7	2.7	2.7
Fabulon (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser HK Ltd	15.1	8.6	4.4	1.4
Comfort (Unilever Group)	Unilever Hong Kong Ltd	10.9	5.7	2.6	1.3
Senjoriki	ST Corp	-	0.3	0.4	0.4
Kiwi (SC Johnson & Son Inc)	SC Johnson (HK) Ltd	-	-	-	-
Others	Others	5.5	7.2	7.5	8.1
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 12 NBO Company Shares of Laundry Detergents: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
Procter & Gamble HK Ltd	32.0	34.1	36.3	38.5	39.8
Kao (HK) Ltd	18.8	18.7	18.5	19.7	19.7
Lion Home Product (International) Ltd	11.4	11.6	13.4	13.8	13.5
Whealthfields Lohmann (HK) Ltd	3.8	3.9	4.5	4.8	6.2
Wipro Unza Holdings Ltd	7.0	6.7	6.1	5.5	4.8
Unilever Hong Kong Ltd	5.2	4.8	4.2	3.3	2.7
Swipe (HK) Ltd	1.7	1.7	1.8	1.9	2.0
Yick Fung Hong Cosmetic & Detergent Co Ltd	2.5	2.4	2.2	2.1	1.9
Lam Soon (HK) Ltd	5.5	5.0	1.7	1.3	1.2
Reckitt Benckiser HK Ltd	0.8	0.8	0.8	0.8	0.8
Dairy Farm International Holdings Ltd	1.6	1.4	1.3	0.7	0.5
AS Watson Group	0.7	0.6	0.5	0.4	0.3
Others	9.0	8.1	8.7	7.1	6.5
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13 LBN Brand Shares of Laundry Detergents: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Ariel (Procter &	Procter & Gamble HK Ltd	22.3	25.1	28.4	31.3

Gamble Co, The)					
Attack (Kao Corp)	Kao (HK) Ltd	18.5	18.2	19.5	19.5
Lion Top (Lion Corp)	Lion Home Product (International) Ltd	11.6	11.4	10.8	10.1
Fab (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	10.8	10.3	9.4	7.9
Vigor (Wipro Ltd)	Wipro Unza Holdings Ltd	6.7	6.1	5.5	4.8
Nanox (Lion Corp)	Lion Home Product (International) Ltd	-	2.0	3.0	3.5
Walex (Whealthfields Group Inc)	Whealthfields Lohmann (HK) Ltd	2.8	1.2	1.6	2.8
Persil (Unilever Group)	Unilever Hong Kong Ltd	4.8	4.2	3.3	2.7
Fresh HY (Whealthfields Group Inc)	Whealthfields Lohmann (HK) Ltd	1.2	1.4	1.8	2.3
Swipe	Swipe (HK) Ltd	1.7	1.8	1.9	2.0
Way Way (Way Way Daily Necessities (Dongguan) Ltd)	Yick Fung Hong Cosmetic & Detergent Co Ltd	2.4	2.2	2.1	1.9
AXE (Lam Soon Group)	Lam Soon (HK) Ltd	5.0	1.7	1.3	1.2
Walch (Whealthfields Group Inc)	Whealthfields Lohmann (HK) Ltd	-	1.9	1.3	1.0
Woolite (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser HK Ltd	0.8	0.8	0.8	0.8
Tide (Procter & Gamble Co, The)	Procter & Gamble HK Ltd	1.1	0.8	0.7	0.6
First Choice (Private Label)	Dairy Farm International Holdings Ltd	0.7	0.6	0.5	0.5
Best Buy (Private Label)	AS Watson Group	0.6	0.5	0.4	0.3
Wonderful (Kao Corp)	Kao (HK) Ltd	0.3	0.2	0.2	0.2
Nano Power (Private Label)	Dairy Farm International Holdings Ltd	0.7	0.6	0.2	0.1
Limn (Whealthfields Group Inc)	Whealthfields Lohmann (HK) Ltd	-	-	-	-
Others	Others	8.1	8.7	7.1	6.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 14 Forecast Sales of Laundry Care by Category: Value 2021-2026**

HKD million	2021	2022	2023	2024	2025	2026
Carpet Cleaners	-	-	-	-	-	-
Fabric Softeners	200.1	200.2	197.7	194.0	192.5	191.4
Laundry Aids	125.4	127.1	128.7	130.6	134.0	139.2
Laundry Detergents	683.2	722.3	758.2	795.6	833.7	873.6
Laundry Care	1,008.7	1,049.6	1,084.7	1,120.2	1,160.2	1,204.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Sales of Laundry Care by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Carpet Cleaners	-	-	-
Fabric Softeners	0.0	-0.9	-4.3
Laundry Aids	1.4	2.1	11.0
Laundry Detergents	5.7	5.0	27.9
Laundry Care	4.1	3.6	19.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources