

A New Appreciation for Cold Wash

March 2024

Table of Contents

INTRODUCTION

Scope

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

Consumer barriers to broader low temperature adoption

A step into the right direction

The changing consumer sentiment on energy saving in laundry

Success in changing consumer temperature choices needs better motivation efforts

Consumer enablers of low-temperature adoption

APPLIANCES MOTIVES AND BARRIERS

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

Procter & Gamble and Novozymes develop biobased cold wash enzyme for European market

P&G introduces new laundry additive combatting malodour in active wear

Unilever's newest laundry capsules are cold wash compatible

Balancing Sinner's Circle: Detergency

APPAREL MOTIVES AND BARRIERS

Fabric care instructions and cold water washing

With Scope 3 care labels are coming into focus for the apparel industry

Extended Producer Responsibility for textile companies is being discussed by the EU

Synthetic materials dominate garment composition

Fashion trends that make cold washing more difficult: Fast fashion

Fashion trends that make cold washing more difficult: The rise of sportswear

Mixed loads are one of the main challenges for hygiene and performance

Digital fabric labels using RFID can hold permanent care records

Inditex and BASF develop low-temperature detergent aimed at tackling microfibre shedding

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

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

