

Dishwashing Detergent Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Machine Dishwashing Detergents, Hand Dishwashing Detergents, Others), By End Use (Household, Commercial), By Distribution Channel (Offline, Online), By Region & Competition, 2021-2031F

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Abstracts

The Global Dishwashing Detergent Market is projected to expand from USD 20.34 Billion in 2025 to USD 34.06 Billion by 2031, reflecting a compound annual growth rate of 8.97%. Dishwashing detergents are specialized chemical agents designed to eliminate organic soil, grease, and bacteria from tableware and cookware, utilized in both manual and automatic cleaning applications. The primary factors driving this growth include rising global hygiene standards and the rapid adoption of time-saving appliances in urbanizing regions, which necessitate the consumption of higher-value products. These fundamental economic drivers ensure consistent demand for cleaning solutions across residential and commercial sectors, maintaining market stability independent of transient trends.

However, the market faces a significant obstacle regarding environmental sustainability and consumer usage habits. A major challenge involves reducing the ecological footprint of cleaning processes while aligning user behavior with product efficiency. According to the American Cleaning Institute, 74% of Americans reported rinsing their dishes before loading the dishwasher in 2024, a practice that undermines water conservation efforts and highlights the complex difficulty of synchronizing consumer behavior with the industry's sustainable expansion goals.

Market Driver

Increasing consumer preference for eco-friendly and sustainable formulations is fundamentally reshaping the dishwashing detergent landscape, as buyers increasingly prioritize environmental stewardship alongside cleaning efficacy. Manufacturers are responding by reformulating products with biodegradable ingredients, removing phosphates, and utilizing circular packaging solutions to meet this demand. This shift is not only reputable but financially significant, as evidenced by major industry players successfully monetizing these greener portfolios; according to Reckitt Benckiser's 'Annual Report and Accounts 2023' in April 2024, the company generated 29.6% of its total net revenue from its sustainable products portfolio, highlighting the commercial viability of environmentally conscious offerings.

Simultaneously, product premiumization driven by rising global disposable incomes and technological advancements is propelling market value, particularly through the adoption of convenient, high-performance formats like auto-dishwashing pods and smart detergents. Consumers are increasingly willing to pay higher prices for value-added benefits such as superior grease removal, glass protection, and time-saving convenience, moving away from basic economy liquids. This trend toward higher-margin innovations significantly bolsters sectoral performance; for instance, Procter & Gamble reported in its August 2024 '2024 Annual Report' that the Home Care segment delivered high single-digit organic sales growth primarily due to innovation and a favorable product mix, while Henkel reported a 3.7% organic sales increase in its Consumer Brands business unit during the first nine months of 2024.

Market Challenge

The most significant impediment hampering the Global Dishwashing Detergent Market is the critical misalignment between consumer usage patterns and the industry's environmental sustainability objectives. While manufacturers increasingly engineer concentrated, high-performance detergents designed to work efficiently without pre-rinsing or high temperatures, deeply ingrained consumer habits such as manual pre-washing and running loads at excessively high heat negate these efficiency gains. This behavioral gap erodes the perceived value of premium, eco-friendly products, as consumers fail to experience the advertised water and energy savings, leading to buyer hesitancy in adopting higher-margin solutions that drive market value.

Furthermore, these suboptimal usage patterns directly constrain the recurring sales volume of automatic dishwashing detergents. When consumers rely on manual washing

for perceived better results or operate machines infrequently, the replenishment rate for detergent pods and tablets slows considerably, limiting the market's potential throughput. According to the International Association for Soaps, Detergents and Maintenance Products (A.I.S.E.), European consumers reported using their dishwashers fewer than five times a week on average in 2024, despite rising appliance ownership rates. This underutilization effectively caps the addressable daily demand for cleaning agents, impeding the revenue growth that would otherwise result from a complete household transition to automatic dishwashing routines.

Market Trends

The integration of Bio-Enzymatic and Plant-Based ingredients is accelerating as manufacturers increasingly rely on advanced biotechnology to deliver superior cleaning performance without harsh synthetic chemicals. This trend is driven by the need to formulate powerful, compact detergents that meet rigorous environmental standards while satisfying consumer demand for 'clean label' transparency. Unlike generic eco-friendly claims, this shift involves the precise engineering of enzymes and bio-surfactants to degrade complex food soils like starch and proteins at a molecular level, enabling high efficacy in milder conditions. The commercial momentum of this technological transition is evident in the supply chain; according to Novonosis, February 2025, in the 'Annual Report 2024', the company's Household Care division delivered 13% organic sales growth in 2024, significantly outperforming broader market indices due to the rapid penetration of biosolutions in cleaning formulations.

Simultaneously, the shift toward cold-water effective cleaning formulas has emerged as a critical industry response to the energy crisis and corporate decarbonization mandates. Brands are aggressively re-engineering product chemistries to ensure full hygiene and grease removal at low temperatures, directly addressing the massive carbon footprint associated with consumer hot water usage. This strategic pivot allows companies to align product efficacy with 'Scope 3' emission reduction targets, transforming the consumer use phase from a liability into a sustainability asset. Validation of this strategy's impact is visible in corporate performance metrics; according to Henkel, March 2025, in the 'Sustainability Report 2024', the company successfully reduced its total Scope 1, 2, and 3 greenhouse gas emissions by 20% by the end of 2024 compared to the 2021 baseline, a milestone largely attributed to the effectiveness of its low-energy product innovations.

Key Market Players

Procter & Gamble

Unilever

Henkel AG & Co. KGaA

Reckitt Benckiser Group PLC

Colgate-Palmolive Company

Kao Corporation

The Clorox Company

Bombril

Dropps

Blueland

Report Scope

In this report, the Global Dishwashing Detergent Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Dishwashing Detergent Market, By Type

Machine Dishwashing Detergents

Hand Dishwashing Detergents

Others

Dishwashing Detergent Market, By End Use

Household

Commercial

Dishwashing Detergent Market, By Distribution Channel

Offline

Online

Dishwashing Detergent Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Dishwashing Detergent Market.

Available Customizations:

Global Dishwashing Detergent Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL DISHWASHING DETERGENT MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Machine Dishwashing Detergents, Hand Dishwashing Detergents, Others)
 - 5.2.2. By End Use (Household, Commercial)
 - 5.2.3. By Distribution Channel (Offline, Online)

- 5.2.4. By Region
- 5.2.5. By Company (2025)
- 5.3. Market Map

6. NORTH AMERICA DISHWASHING DETERGENT MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By End Use
 - 6.2.3. By Distribution Channel
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Dishwashing Detergent Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By End Use
 - 6.3.1.2.3. By Distribution Channel
 - 6.3.2. Canada Dishwashing Detergent Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By End Use
 - 6.3.2.2.3. By Distribution Channel
 - 6.3.3. Mexico Dishwashing Detergent Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By End Use
 - 6.3.3.2.3. By Distribution Channel

7. EUROPE DISHWASHING DETERGENT MARKET OUTLOOK

- 7.1. Market Size & Forecast

- 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By End Use
 - 7.2.3. By Distribution Channel
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Dishwashing Detergent Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Type
 - 7.3.1.2.2. By End Use
 - 7.3.1.2.3. By Distribution Channel
 - 7.3.2. France Dishwashing Detergent Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Type
 - 7.3.2.2.2. By End Use
 - 7.3.2.2.3. By Distribution Channel
 - 7.3.3. United Kingdom Dishwashing Detergent Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Type
 - 7.3.3.2.2. By End Use
 - 7.3.3.2.3. By Distribution Channel
 - 7.3.4. Italy Dishwashing Detergent Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Type
 - 7.3.4.2.2. By End Use
 - 7.3.4.2.3. By Distribution Channel
 - 7.3.5. Spain Dishwashing Detergent Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast

- 7.3.5.2.1. By Type
- 7.3.5.2.2. By End Use
- 7.3.5.2.3. By Distribution Channel

8. ASIA PACIFIC DISHWASHING DETERGENT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By End Use
 - 8.2.3. By Distribution Channel
 - 8.2.4. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Dishwashing Detergent Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By End Use
 - 8.3.1.2.3. By Distribution Channel
 - 8.3.2. India Dishwashing Detergent Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By End Use
 - 8.3.2.2.3. By Distribution Channel
 - 8.3.3. Japan Dishwashing Detergent Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Type
 - 8.3.3.2.2. By End Use
 - 8.3.3.2.3. By Distribution Channel
 - 8.3.4. South Korea Dishwashing Detergent Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast

- 8.3.4.2.1. By Type
- 8.3.4.2.2. By End Use
- 8.3.4.2.3. By Distribution Channel
- 8.3.5. Australia Dishwashing Detergent Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Type
 - 8.3.5.2.2. By End Use
 - 8.3.5.2.3. By Distribution Channel

9. MIDDLE EAST & AFRICA DISHWASHING DETERGENT MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By End Use
 - 9.2.3. By Distribution Channel
 - 9.2.4. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Dishwashing Detergent Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Type
 - 9.3.1.2.2. By End Use
 - 9.3.1.2.3. By Distribution Channel
 - 9.3.2. UAE Dishwashing Detergent Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Type
 - 9.3.2.2.2. By End Use
 - 9.3.2.2.3. By Distribution Channel
 - 9.3.3. South Africa Dishwashing Detergent Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast

- 9.3.3.2.1. By Type
- 9.3.3.2.2. By End Use
- 9.3.3.2.3. By Distribution Channel

10. SOUTH AMERICA DISHWASHING DETERGENT MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Type
 - 10.2.2. By End Use
 - 10.2.3. By Distribution Channel
 - 10.2.4. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Dishwashing Detergent Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Type
 - 10.3.1.2.2. By End Use
 - 10.3.1.2.3. By Distribution Channel
 - 10.3.2. Colombia Dishwashing Detergent Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Type
 - 10.3.2.2.2. By End Use
 - 10.3.2.2.3. By Distribution Channel
 - 10.3.3. Argentina Dishwashing Detergent Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Type
 - 10.3.3.2.2. By End Use
 - 10.3.3.2.3. By Distribution Channel

11. MARKET DYNAMICS

- 11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL DISHWASHING DETERGENT MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

14.3. Power of Suppliers

14.4. Power of Customers

14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. Procter & Gamble

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

15.2. Unilever

15.3. Henkel AG & Co. KGaA

15.4. Reckitt Benckiser Group PLC

15.5. Colgate-Palmolive Company

15.6. Kao Corporation

15.7. The Clorox Company

15.8. Bombril

15.9. Dropps

15.10. Blueland

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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