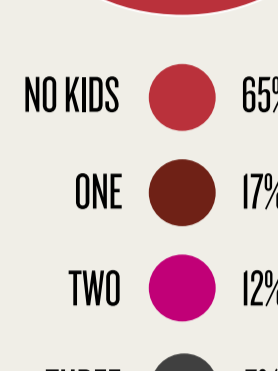
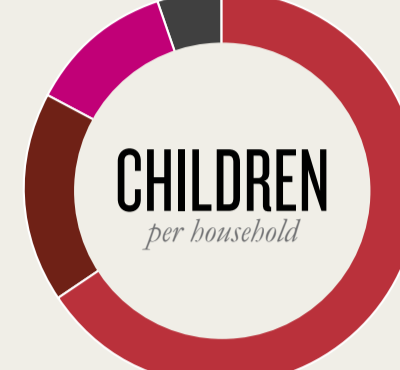
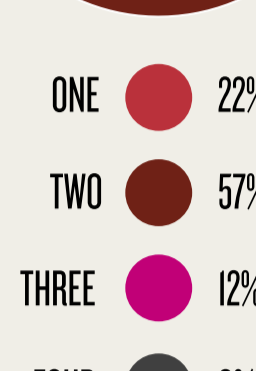
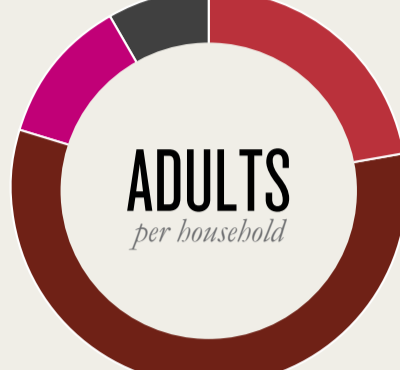
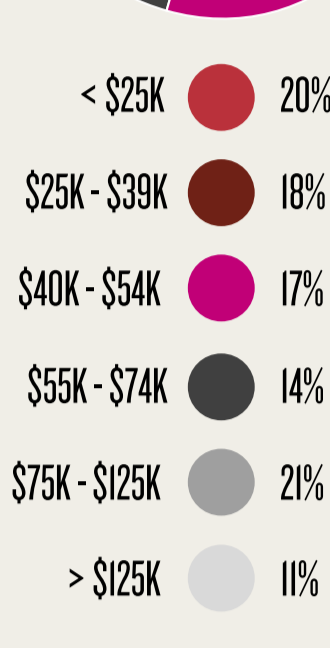
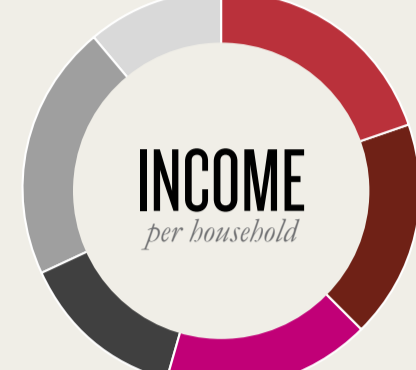


2012 US CONSUMER DISHWASHING STUDY

1 WHO IS THE US CONSUMER?

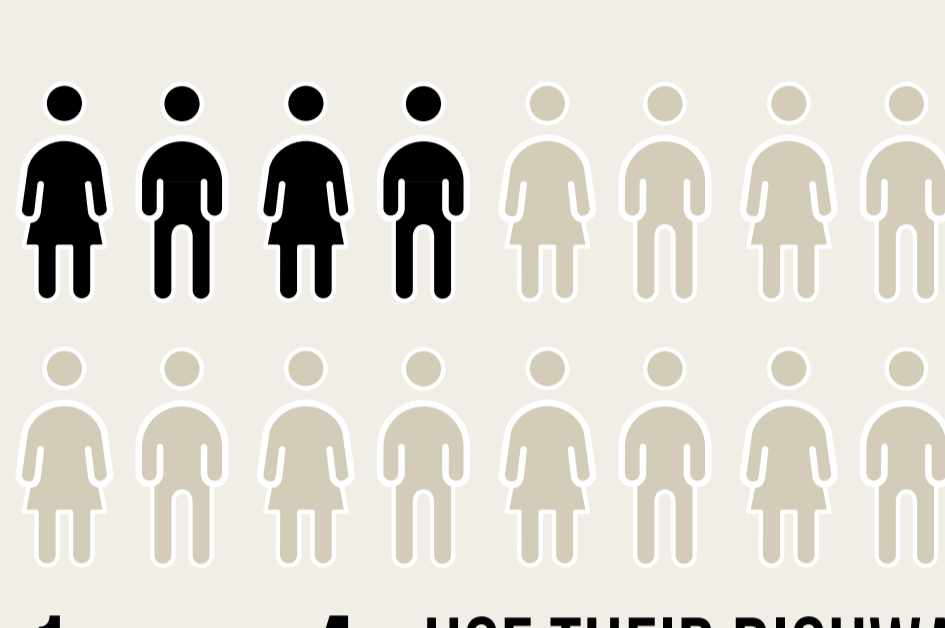


Understanding consumers' needs is important to the Fabric & Household Care team at DuPont, so we spoke to a huge cross-section of US dishwasher owners to see what's important to them.



TYPICAL US HOUSEHOLD
TWO ADULTS, NO KIDS WITH A HOUSEHOLD INCOME OF \$55K

HOW OFTEN DO THEY USE THEIR DISHWASHER?



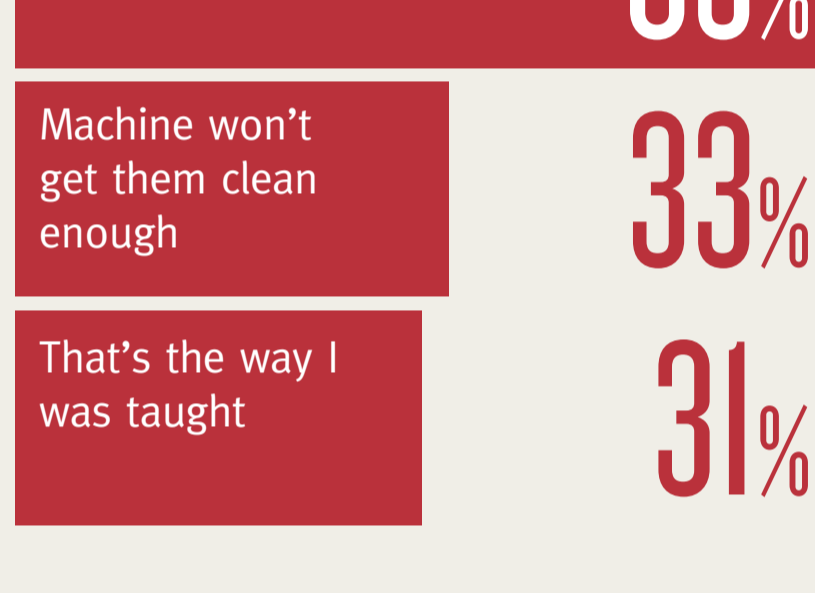
1 in 4 USE THEIR DISHWASHER AT LEAST ONCE A DAY

4.2 TIMES PER WEEK ON AVERAGE

2 DISHWASHING BEHAVIORS

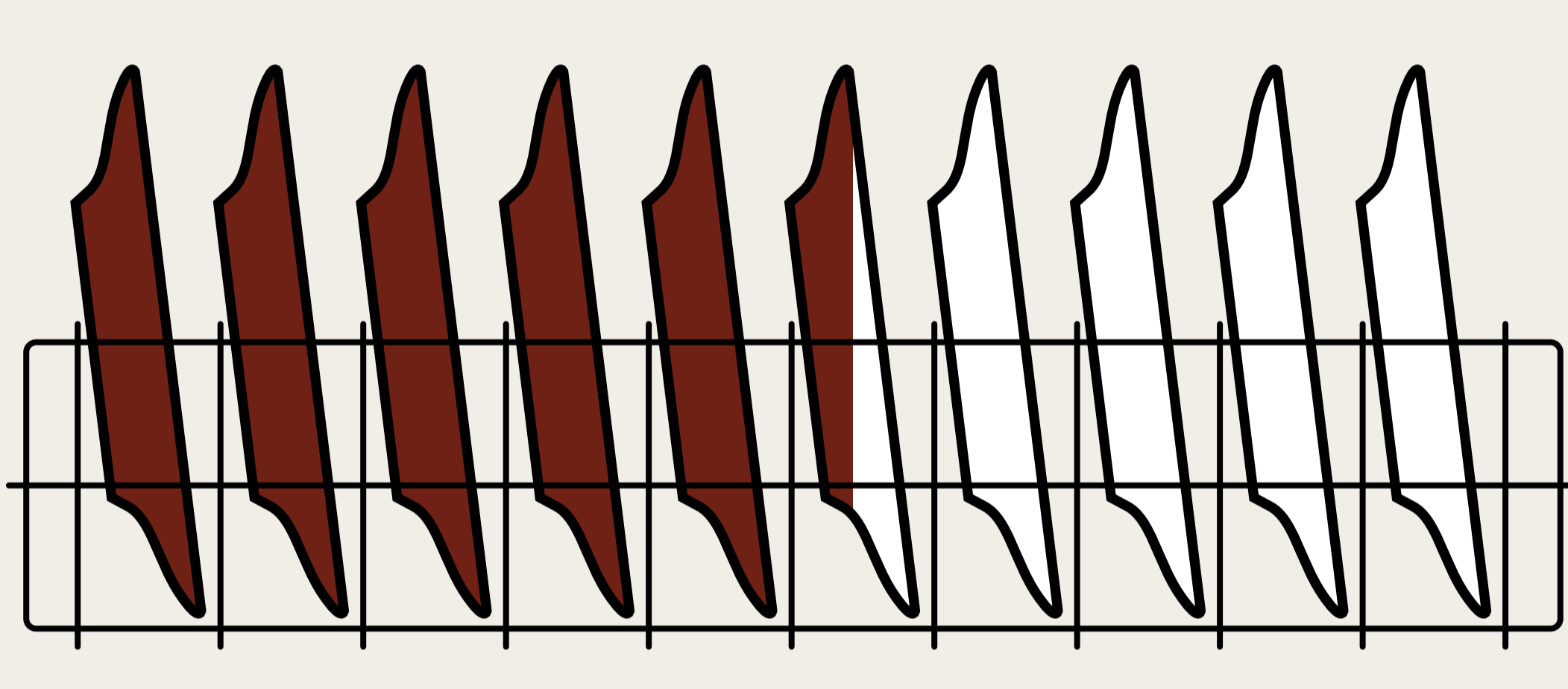
PRE-RINSING

TOP THREE REASONS FOR PRE-RINSING



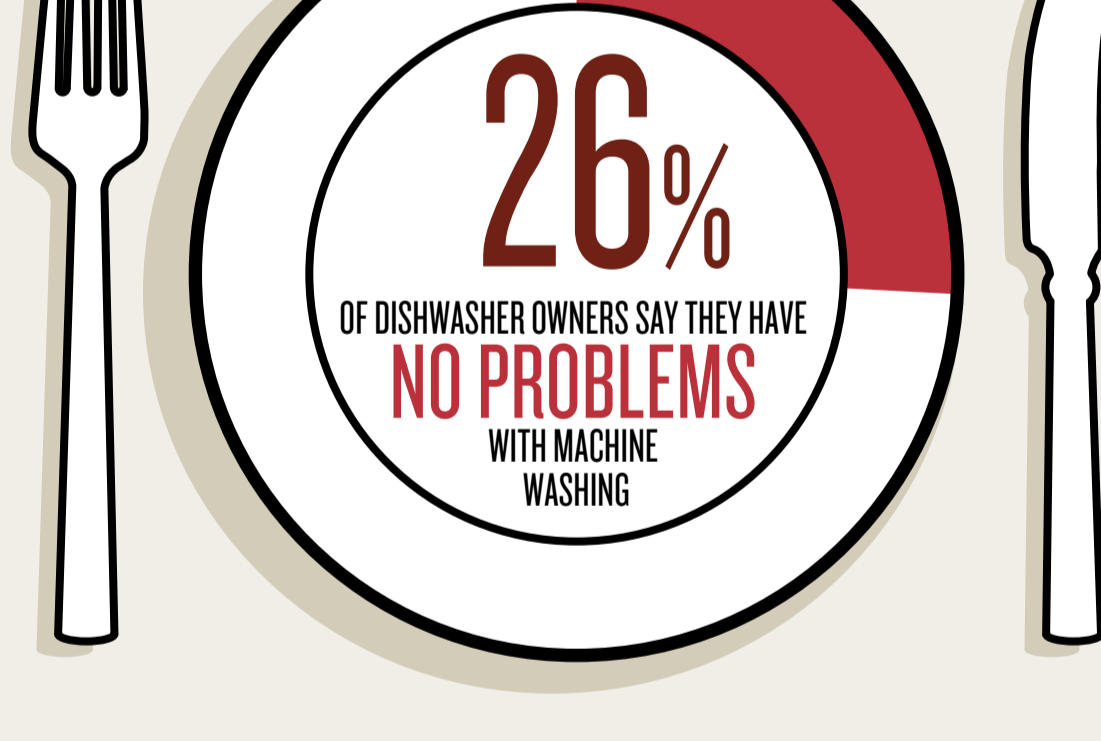
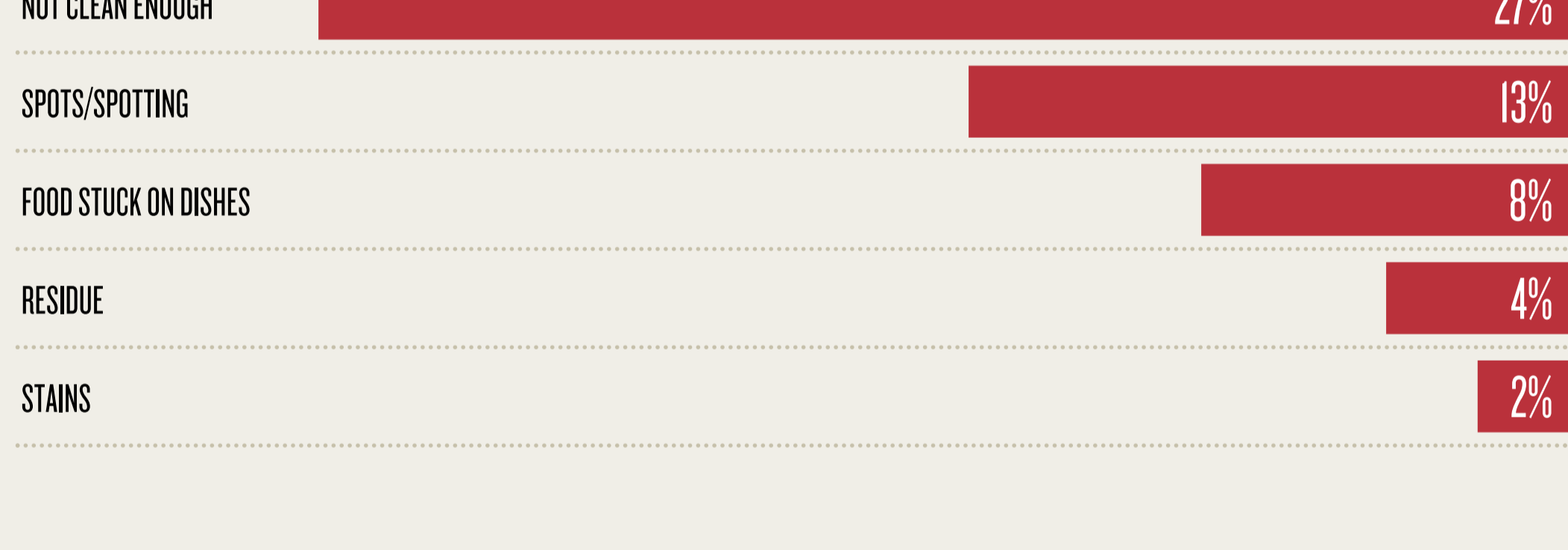
75% OF DISHWASHER OWNERS Pre-rinse their dishes before putting them in the machine

DISHWASHING PROBLEMS



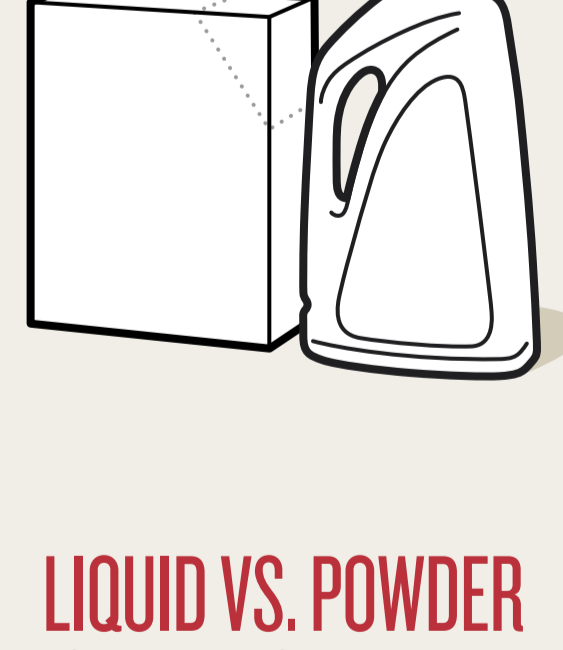
54% OF DISHWASHER OWNERS SAY THEIR MOST COMMON PROBLEM WITH MACHINE DISHWASHING IS THAT THE DISHES DON'T GET CLEAN ENOUGH

TOP DETERGENT-RELATED CLEANING PROBLEMS



DISHWASHING PRODUCT USAGE

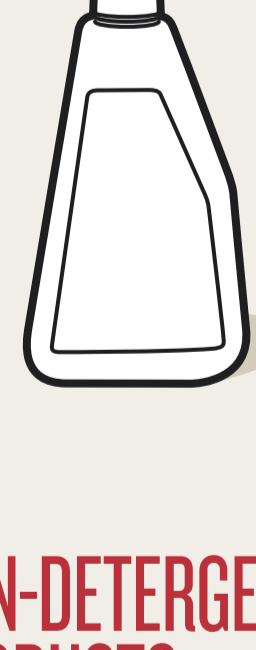
	AWARE	EVER USED	BUY AGAIN
LIQUID GEL	99%	80%	68%
POWDER	99%	82%	56%
TABLET WITH DISSOLVABLE WRAP	94%	63%	55%
TABLET TO BE UNWRAPPED	80%	44%	34%
RINSE AID	96%	72%	65%
BOOSTER	79%	33%	27%
MACHINE CLEANING	82%	36%	30%



LIQUID VS. POWDER
BOTH WELL-KNOWN AND TRIED OFTEN, BUT REPEAT PURCHASE IS HIGHER FOR LIQUIDS



TABLETS
HIGH AWARENESS BUT LOW INITIAL PURCHASE WITH A STRONG DESIRE TO BUY AGAIN



NON-DETERGENT PRODUCTS
RINSE AID HAS THE HIGHEST AWARENESS AND 'BUY AGAIN' RATE

OPPORTUNITIES FOR INDUSTRY

SO, WHAT DO THESE CONSUMERS WANT?

THE THREE MOST IMPORTANT FEATURES FOR A MACHINE DISHWASHING DETERGENT

NO RESIDUE

Consumers don't want the inconvenience of checking and rinsing dishes after washing, so the development of products that help eliminate residues would be welcomed.



NO STAINS ON DISHES

Products that could completely remove a wide range of food stains without the need for pre-rinsing would be appreciated.

ALL-IN-ONE DETERGENT

Consumers want convenience and high performance – and United States consumers place a particularly high importance on "All-In-One" detergents.



TOGETHER, WE CAN INSPIRE CLEANER IDEAS.

The findings from this study will be used to inform our future solutions for the dish market, because the Fabric & Household Care team at DuPont Industrial Biosciences is committed to developing market-driven products that meet real world needs.