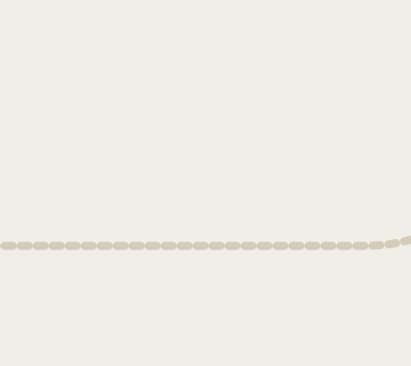
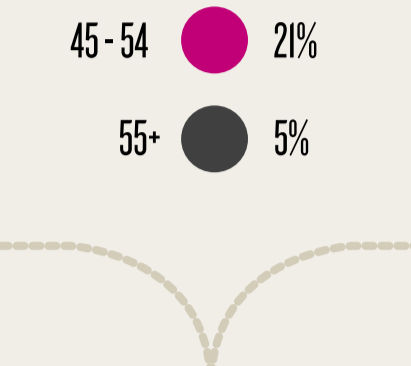
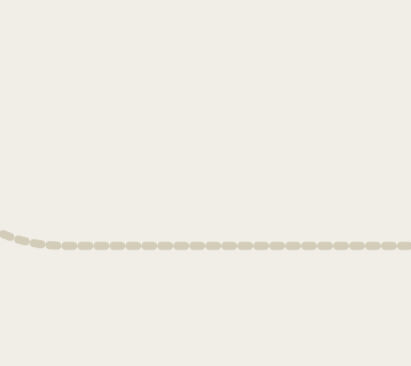
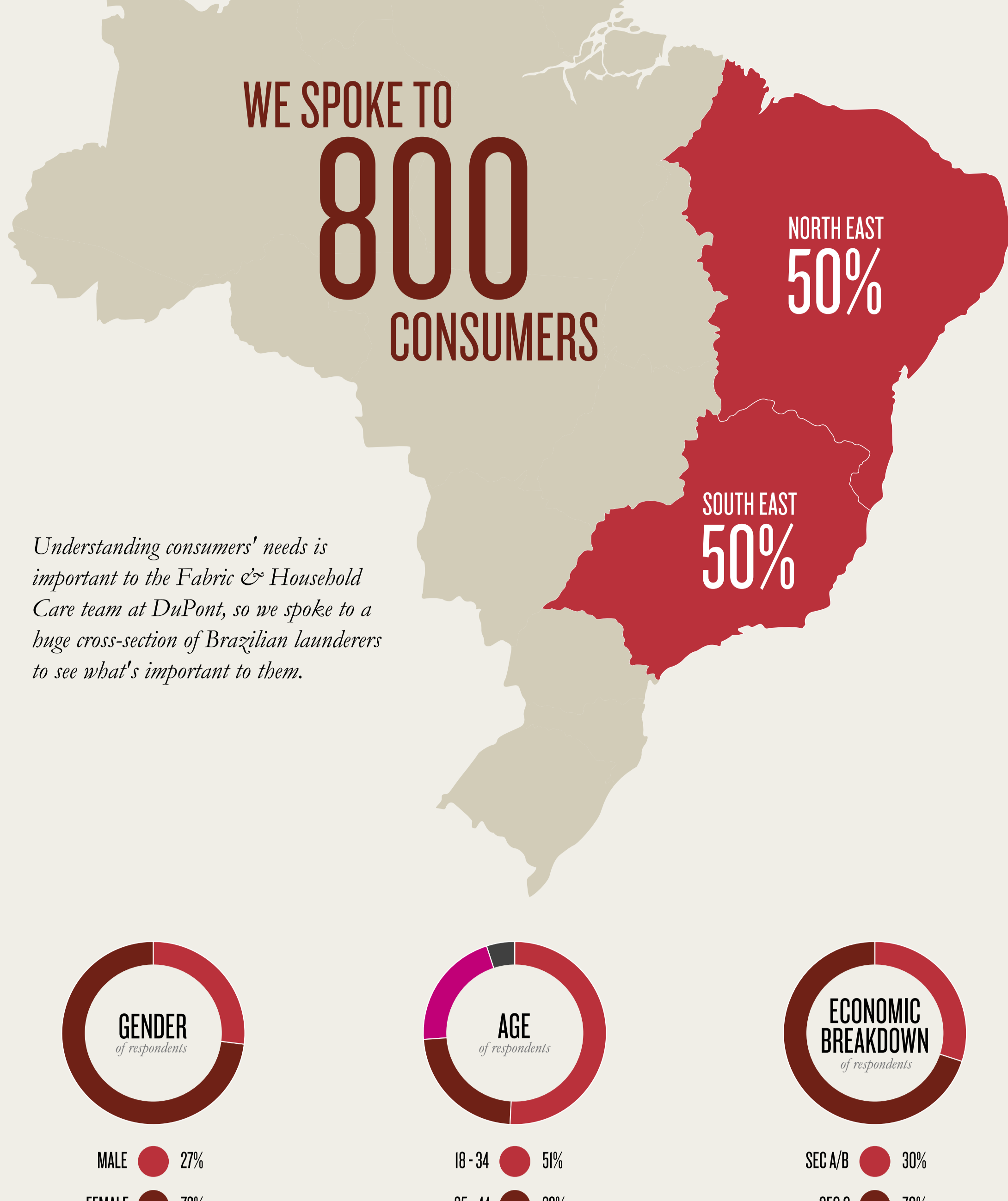


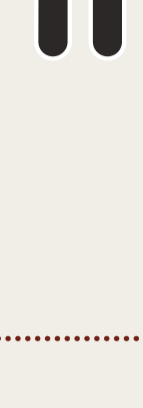
2013

# BRAZILIAN CONSUMER LAUNDRY STUDY

## 1 WHO IS THE BRAZILIAN CONSUMER?



**TYPICAL CONSUMER PROFILE**  
PRIMARY LAUNDRY-DOER, DECISION-MAKER FOR CHOOSING LAUNDRY DETERGENTS, DO THEIR LAUNDRY AT LEAST ONCE A WEEK



**BRAZILIAN WOMEN**  
RANK THE VALUE OF CONVENIENCE SIGNIFICANTLY HIGHER THAN OTHER WOMEN AROUND THE WORLD

### THE RISE OF THE 'LAUNDRY NOVICE'

**LAUNDRY NOVICES** = PEOPLE WHO HAVE BEEN DOING THEIR OWN WASHING FOR LESS THAN 2 YEARS

14.4% OF RESPONDENTS WERE LAUNDRY NOVICES

**LAUNDRY NOVICES ARE**

- YOUNG ADULTS LIVING ON THEIR OWN FOR THE FIRST TIME
- MIDDLE AGED WOMEN WHO CAN NO LONGER AFFORD A DAILY HELP
- HELPFUL HUSBAND VENTURING INTO THE LAUNDRY ROOM

**MOST TYPICAL LAUNDRY NOVICE**

MALE  
NO KIDS  
AGED 31.6 YEARS  
CURRENT HOME LESS THAN 1 YEAR  
DOES LAUNDRY ONCE A WEEK  
USES AN AUTOMATIC MACHINE



38%



28%



Novices are more likely than others to consider bulk/economy-size packs as an important convenience feature. Although their preferences are currently similar to other laundry doers, this group are worth monitoring for future trends.

## 2 STAIN IDENTIFICATION

**TOP PROBLEM STAIN TYPES**



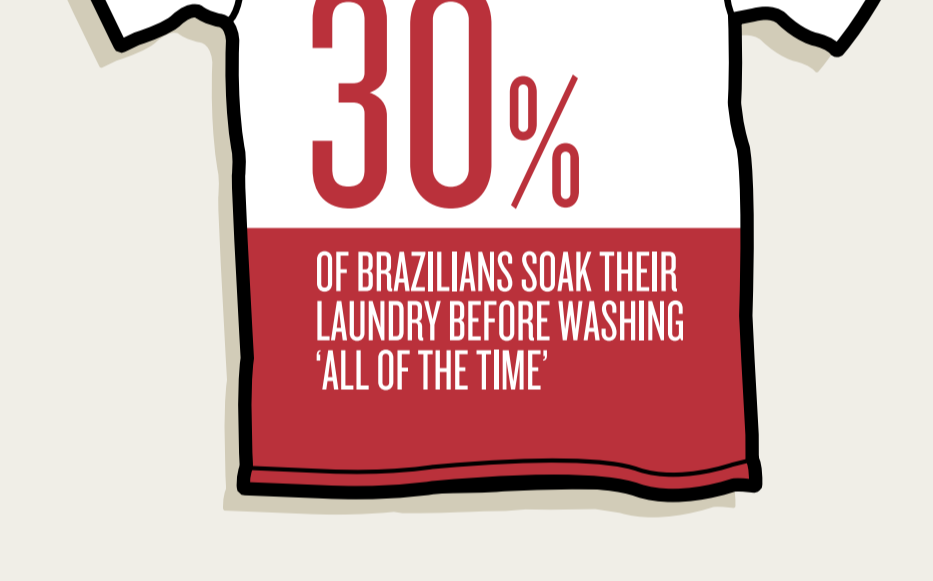
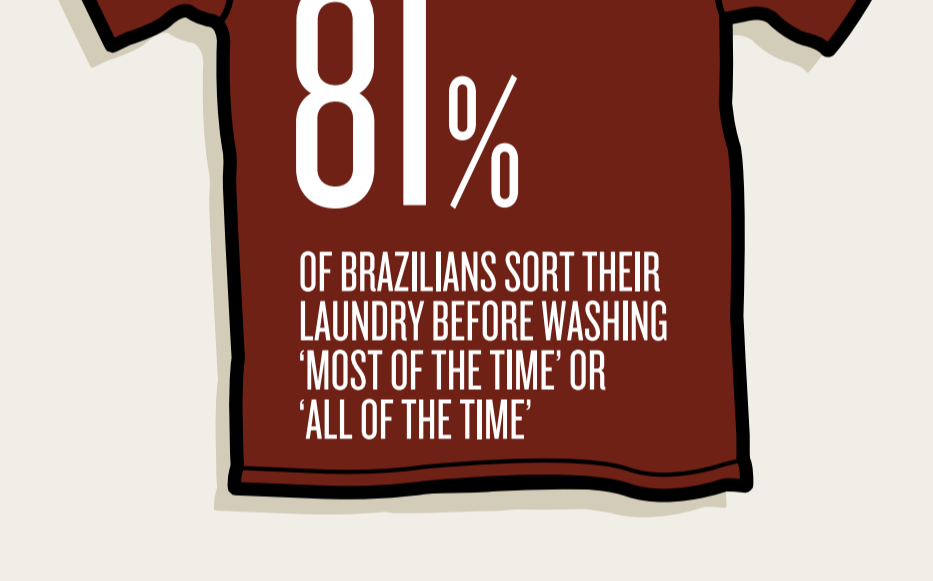
**TOP BODY STAINS**



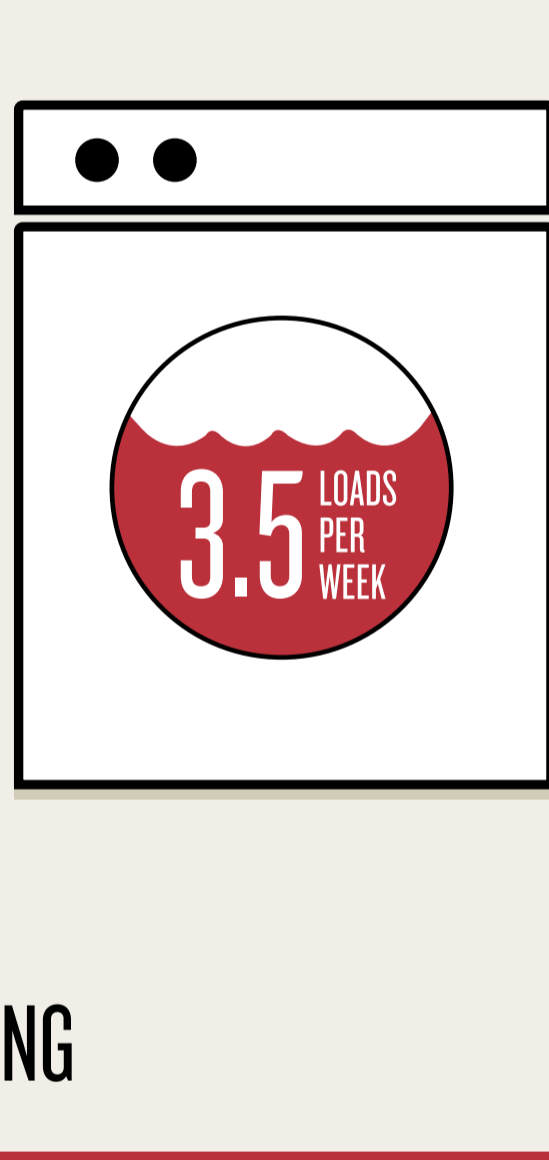
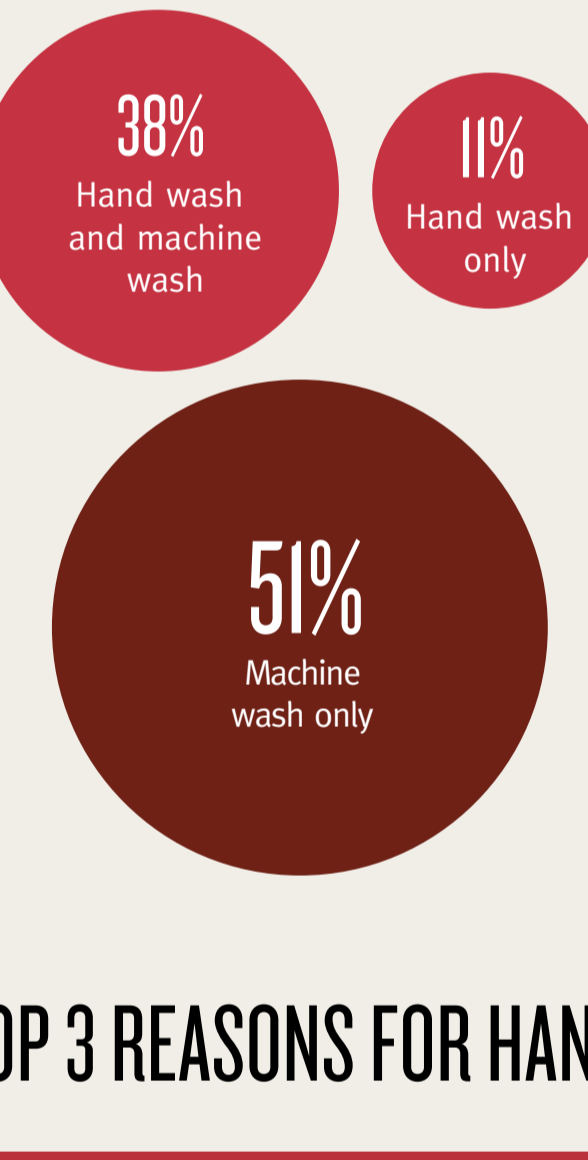
## 3 LAUNDERING BEHAVIOR

### LAUNDRY PREPARATION

On average, launderers in Brazil conduct nearly three out of four pre-main wash (pre-treat, pre-rinse, soak, pre-wash) steps at least sometimes. Soaking is the most common step for both machine and hand wash, with nearly a third who do this "all of the time"



### HAND WASHING v MACHINE WASHING



**AVERAGE WEEKLY LAUNDRY FREQUENCY**



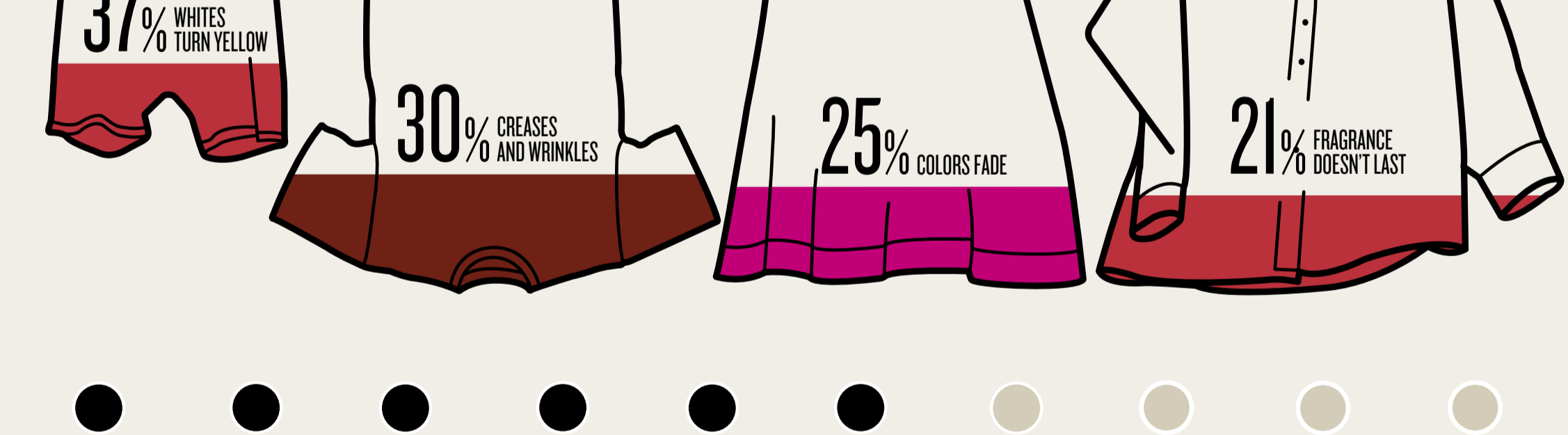
**TOP 3 REASONS FOR HAND WASHING**



## 4 WASHING ISSUES & EXPECTATIONS

### PROBLEMS ENCOUNTERED

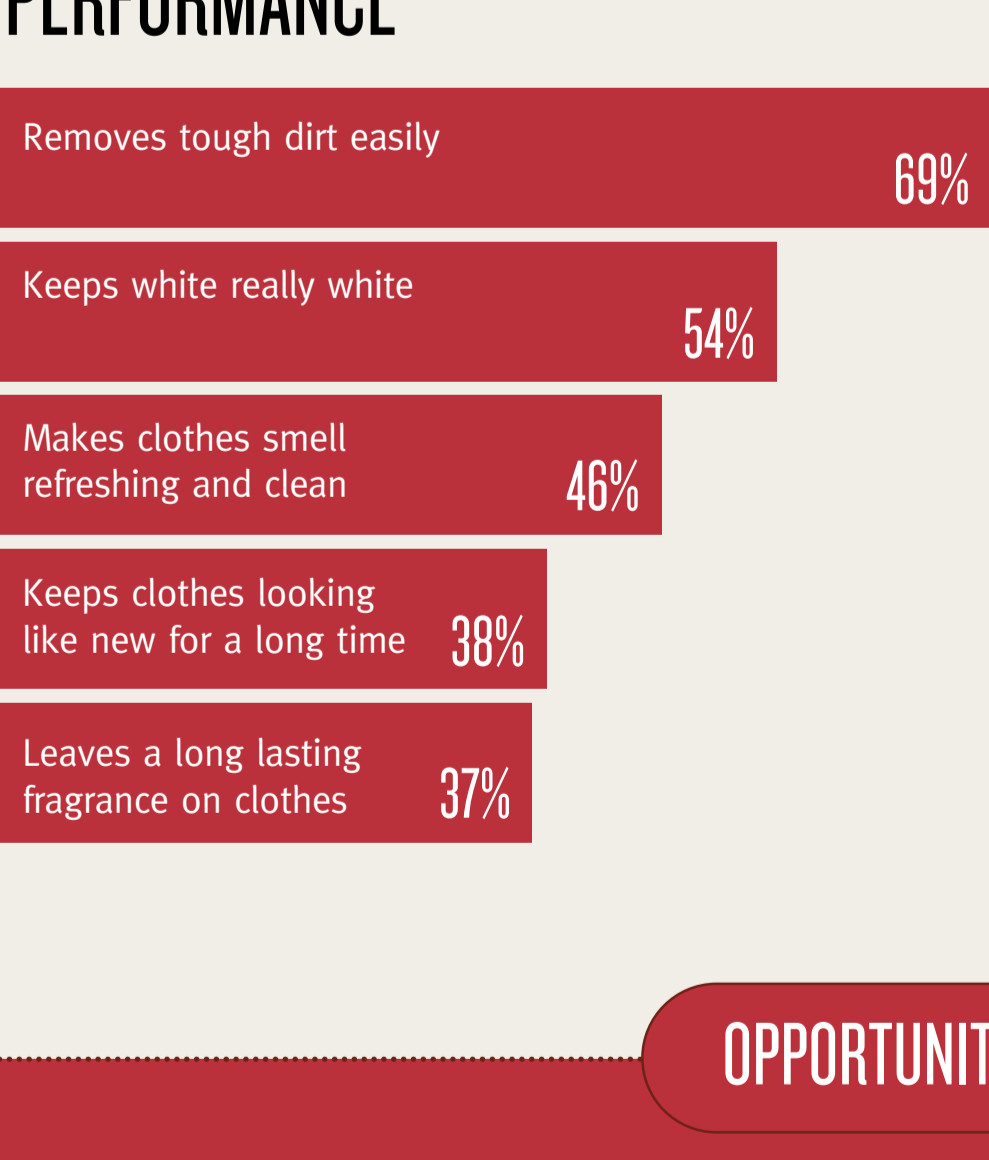
**TOP LAUNDRY - RELATED PROBLEMS**



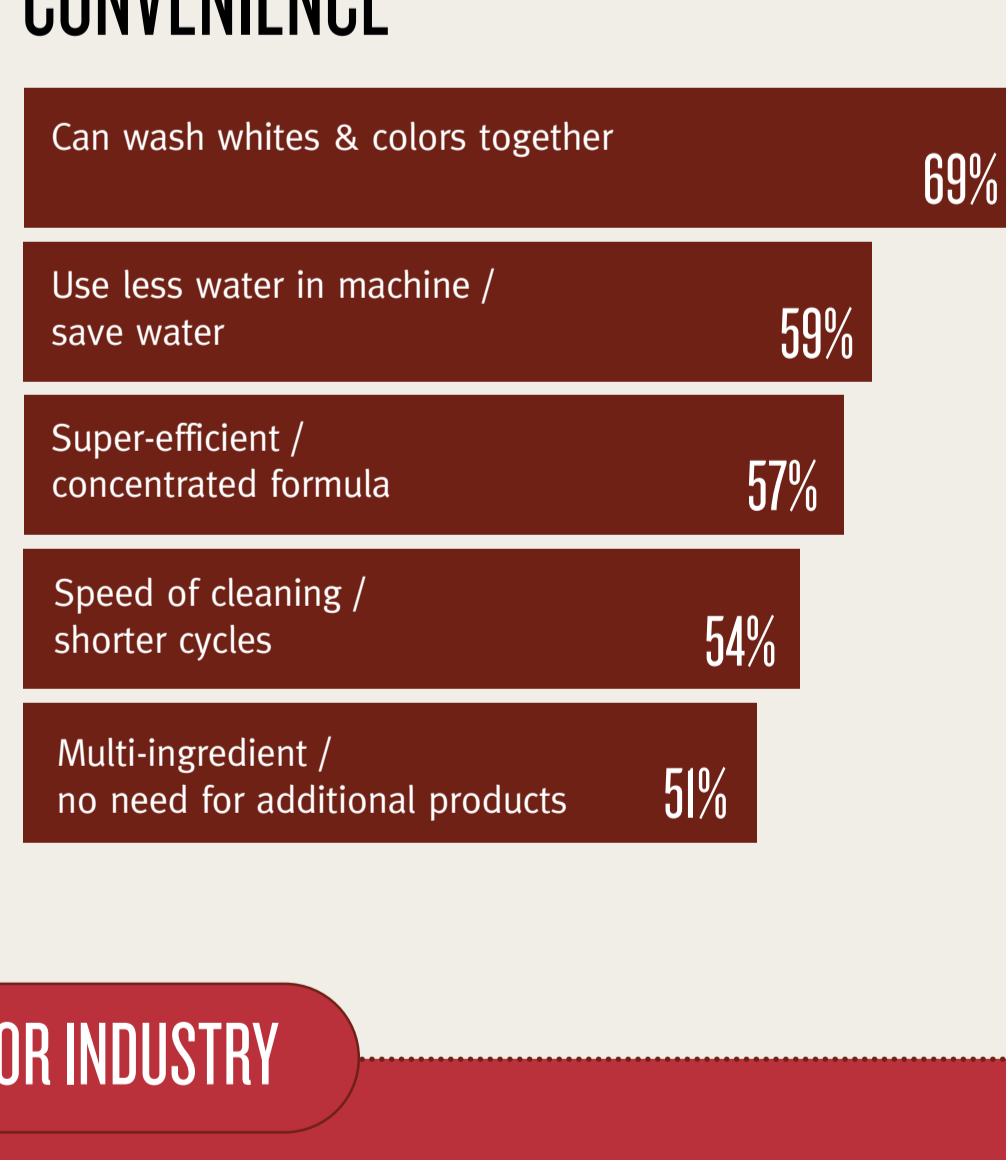
**NO MORE THAN 6 IN 10** FIND THAT AVAILABLE SOLUTIONS ADEQUATELY ADDRESS THEIR MOST FREQUENT PROBLEMS

### MOST IMPORTANT DETERGENT ATTRIBUTES

**PERFORMANCE**



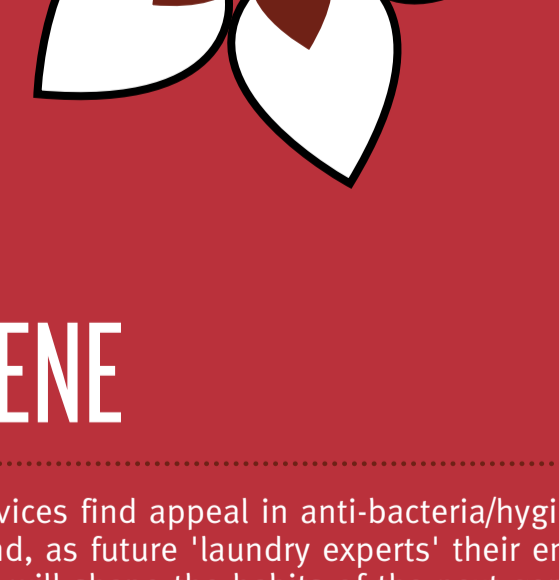
**CONVENIENCE**



### OPPORTUNITIES FOR INDUSTRY

## SO, WHAT DO THESE CONSUMERS WANT?

FOUR KEY CONSIDERATIONS FOR MEETING BRAZILIAN CONSUMER NEEDS

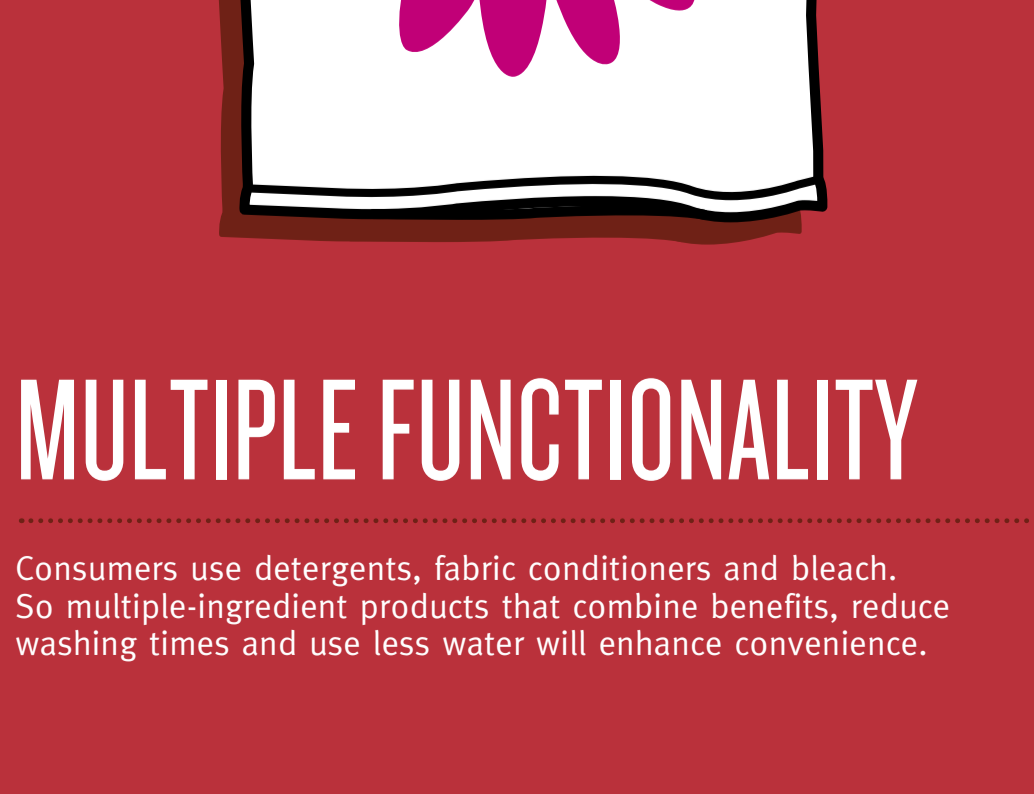


**FRAGRANCE**

Smell is a key way in which Brazilians judge how clean their laundry is, so products with longer-lasting fragrance will encourage consumers to trial.

**HYGIENE**

Laundry novices find appeal in anti-bacteria/hygienic products and, as future 'laundry experts' their emerging preferences will shape the habits of the next generation.

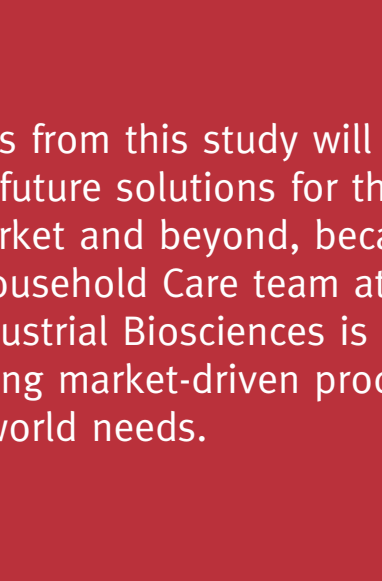


**LESS SORTING**

Formulas that allow consumers to wash whites & colors together and reduce time spent separating loads would be welcomed.

**MULTIPLE FUNCTIONALITY**

Consumers use detergents, fabric conditioners and bleach. So multiple-ingredient products that combine benefits, reduce washing times and use less water will enhance convenience.



**TOGETHER, WE CAN INSPIRE CLEANER IDEAS.**

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