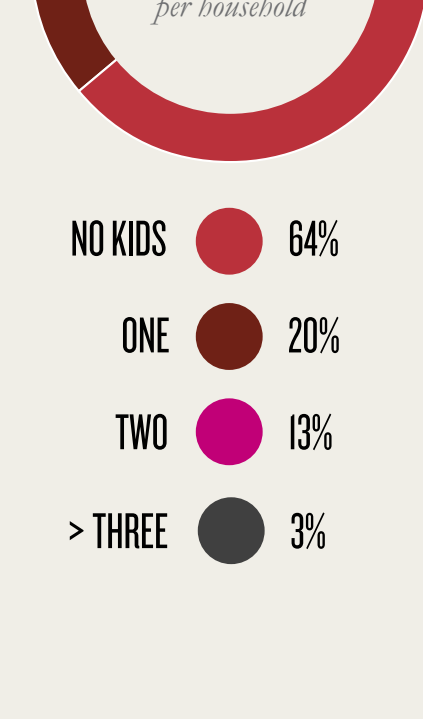
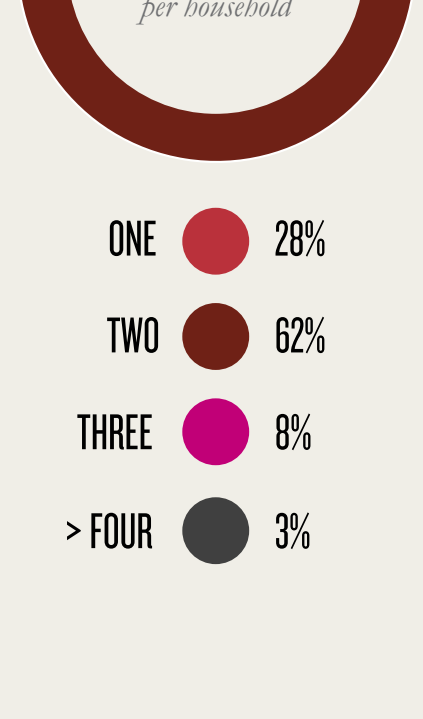
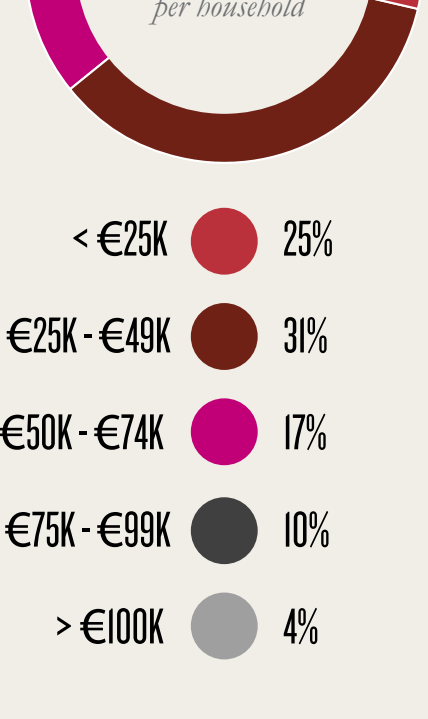


2012 GERMAN CONSUMER DISHWASHING STUDY

1 WHO IS THE GERMAN CONSUMER?

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



TYPICAL GERMAN HOUSEHOLD
TWO ADULTS, NO KIDS WITH A HOUSEHOLD INCOME OF €41K

HOW OFTEN DO THEY USE THEIR DISHWASHER?

1 in 3
USE THEIR DISHWASHER
AT LEAST
ONCE A DAY

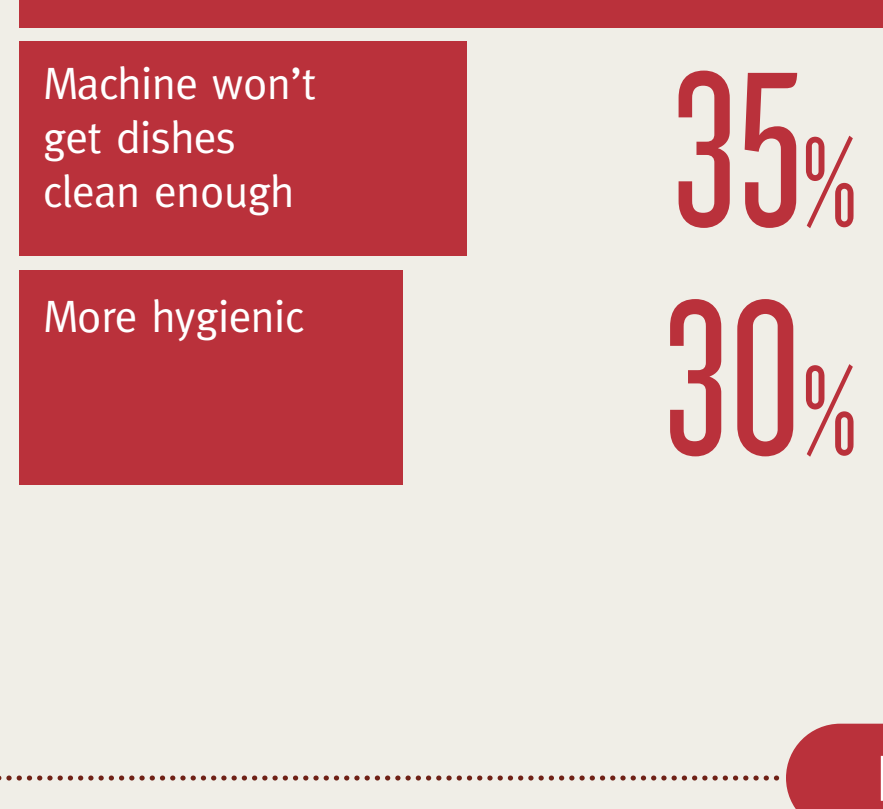


4.8 TIMES PER WEEK
ON AVERAGE

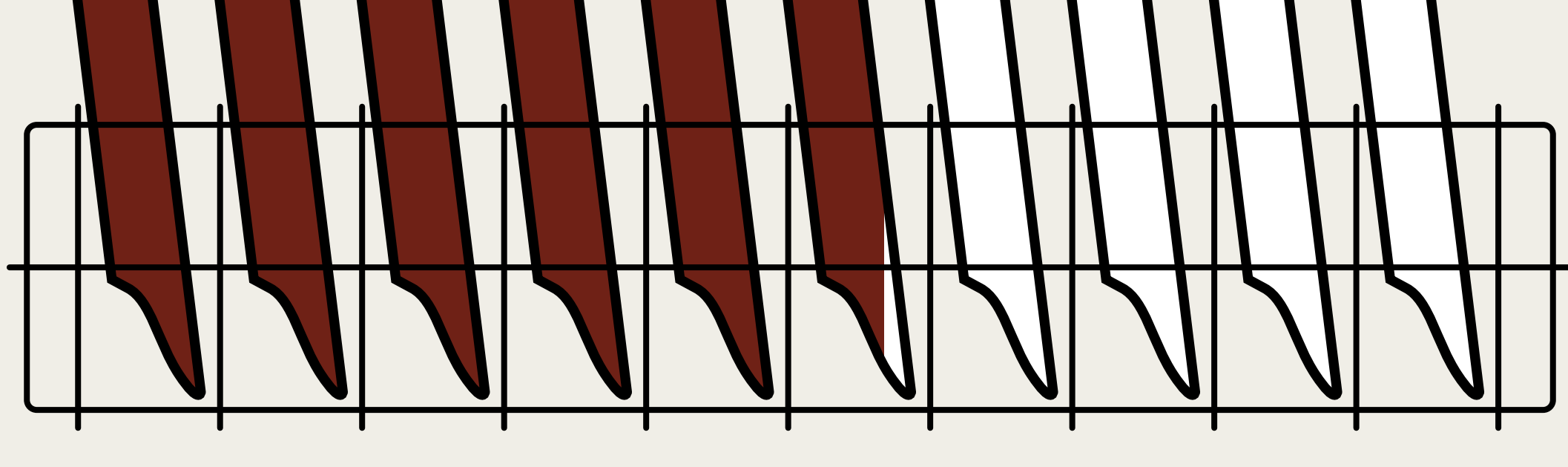
2 DISHWASHING BEHAVIORS

PRE-RINSING

TOP THREE REASONS FOR PRE-RINSING

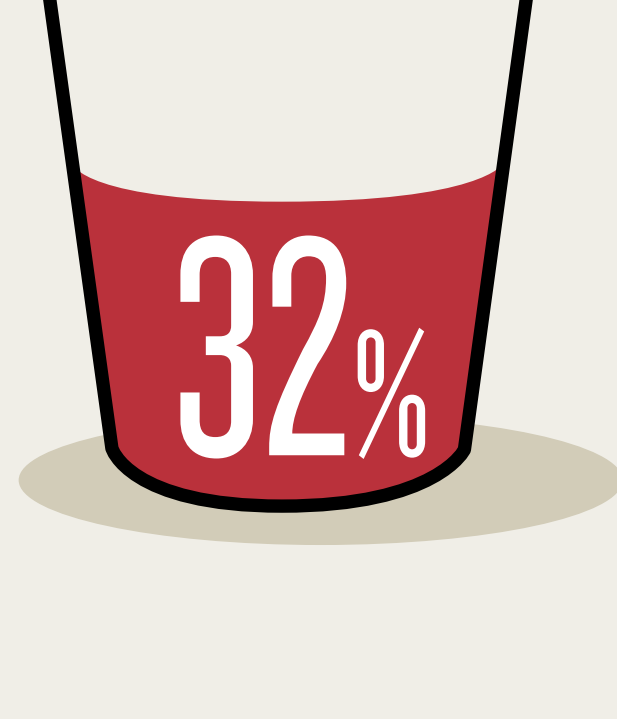


DISHWASHING PROBLEMS



59% 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



OF DISHWASHER OWNERS SAY THEY HAVE NO PROBLEMS WITH MACHINE WASHING

DISHWASHING PRODUCT USAGE

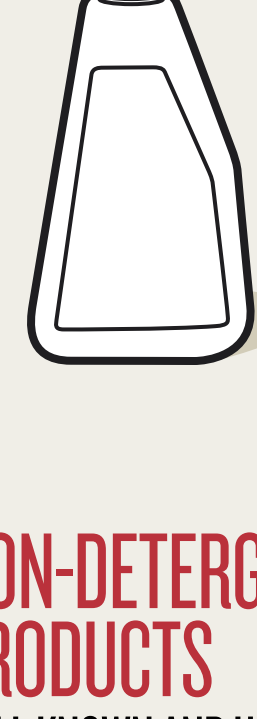
	AWARE	EVER USED	BUY AGAIN
LIQUID GEL	84%	39%	28%
POWDER	93%	62%	41%
TABLET WITH DISSOLVABLE WRAP	84%	64%	53%
TABLET TO BE UNWRAPPED	97%	95%	82%
RINSE AID	96%	88%	73%
MACHINE CLEANING	92%	81%	65%



ALL CLEANING FORMATS
HIGH AWARENESS AND USAGE OF ALL MACHINE DISHWASHING PRODUCTS INCLUDING NON-DETERGENTS



DISSOLVABLE WRAP TABLETS
HIGH AWARENESS OF THIS INNOVATIVE UNIT DOSE FORMAT, BUT AWARENESS AND BUYING SCORE OF WRAPPED TABLETS STILL HIGHER



NON-DETERGENT PRODUCTS
WELL KNOWN AND USED OFTEN, WHICH INDICATES A DEVELOPED DISHWASHING MARKET

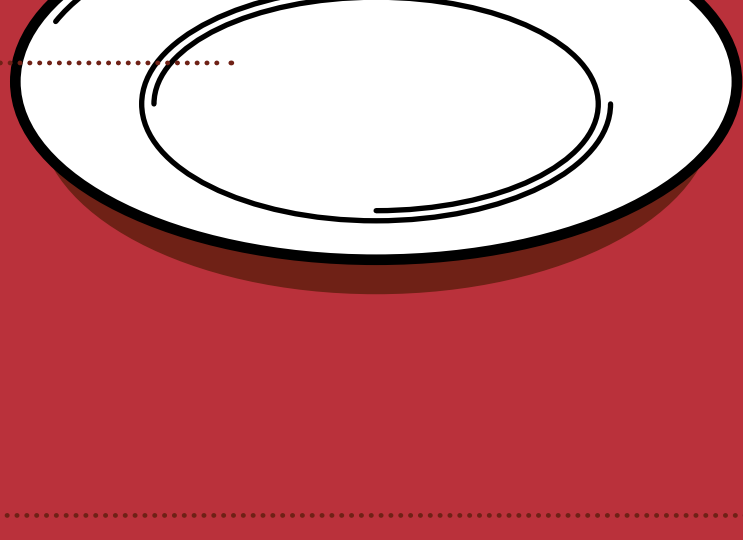
OPPORTUNITIES FOR INDUSTRY

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 items after washing, so the machine dishwashing products that help eliminate residues would be welcomed.



SPOTTING

Similarly the experience of using a washed dish can be tainted by it's look and feel. Consumers want a right first time wash that leaves their dishes in perfect condition after every cycle.

PRE-DOSED DETERGENTS

Consumers want convenience and high performance. Pre-dosed detergents mean optimum performance with minimum effort for the user.



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.