

绿色和可持续发展重塑洗涤行业  
**Sustainability and Diversity,  
Reshaping Detergent Industry**

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# 中国洗涤剂行业的变迁和消费者洞察

## The changing of China and Consumer insight



WeChat is more than a social communication platform.

Talking on line and replace long-distance phone call

Generation gap/ conflict was covered/relieved by WeChat

The largest social media, the largest channel of reading news.



Group talking is a virtual society for people at middle age

Provides a convenient platform for city life

Traditional manufactory industry made closer communication with consumer by WeChat official account



QQ 浏览器  
我要的现在就要

Consumer becomes more and more impatient and turns into the model of “IWWIWWIWI”

Consumers are often impulse shopping, and the desire for fast shopping satisfaction. And they hope they can communicate with the real brand visa real time on line platform.

Convenience is the King.

Fast logistics distribution system wins consumer, JD



HIVE BOX system penetrates into the community and provides self-pickup and drop-off service.

Seven-day return policy.

亲 您还在担心 买到的宝贝不喜欢怎么办?

**7天**  
**无理由退换货**  
买贵了、不值了、后悔了.....7天无理由退换货!



Ms Huang, 73,  
From shy little woman to Grandma Harley

Mr. Wang, 80, an actor and DJ,  
with perfect body and muscle.



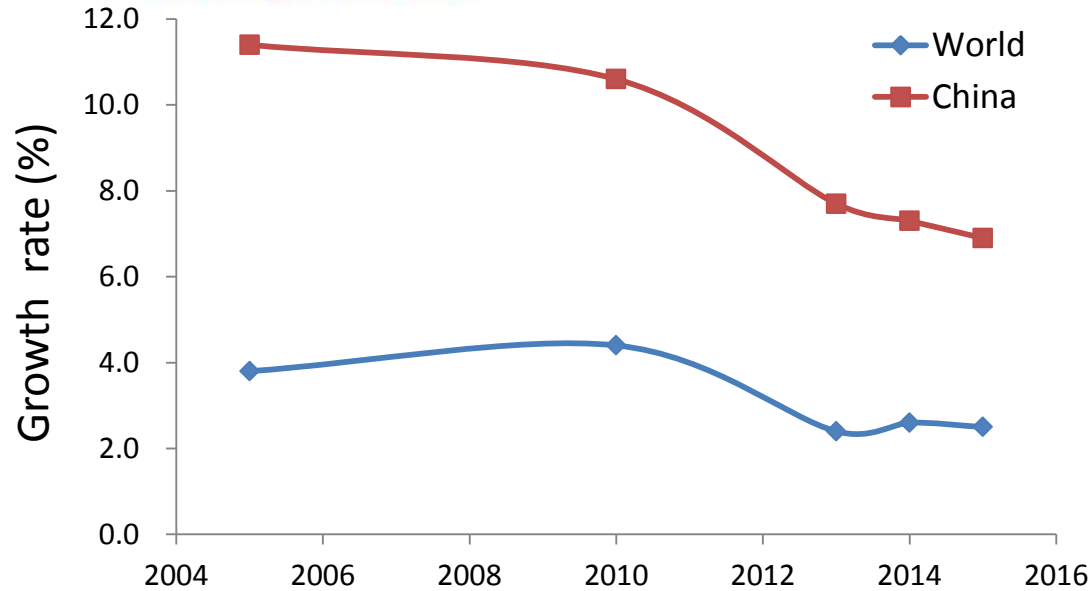
# 个人主义的觉醒 The awakening of self-consciousness

马拉松运动在中国的快速发展 Rapid expansion of Marathon in China

	Marathon games	The number of runners in the marathon
2014	51	0.9 million
2015	134	1.3 million
2016	328	2.8 million



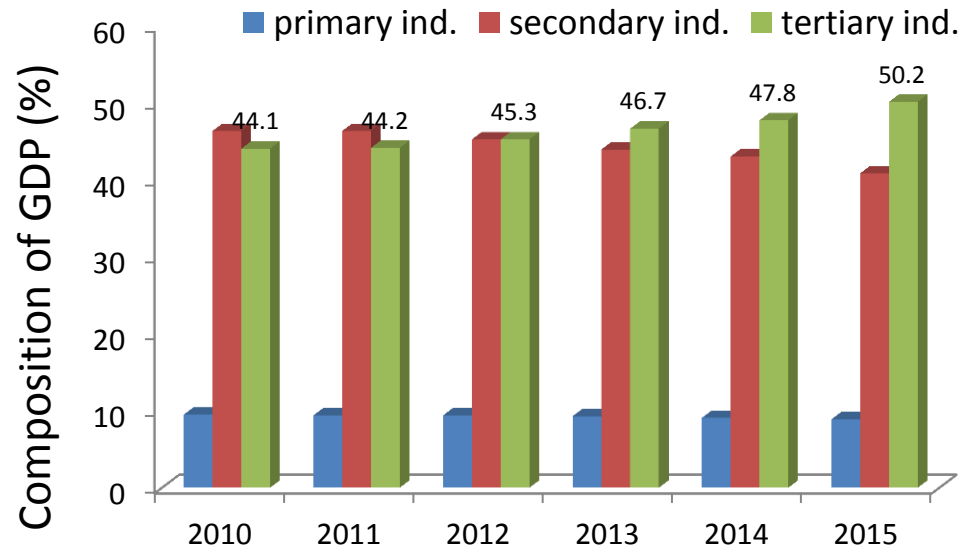
People at middle age (34-53) are the main runners in the marathon games, accounting for 57% of the total number of participants. 21.1% of participant runs for keeping health, 13.3% of people runs for release pressure, 18.3% of people runs for social communication, 15.8% of people runs for self-expression. 67.4% of people runs for tasting/experience freedom.



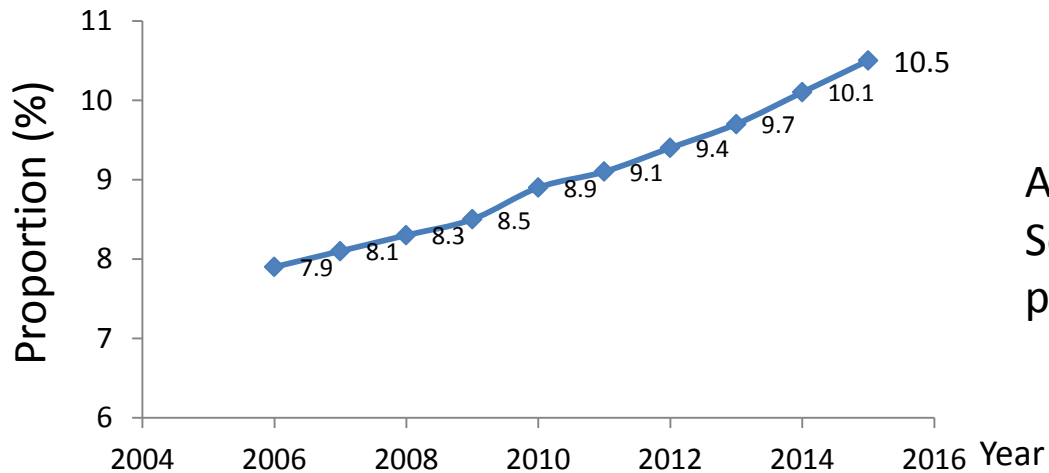
GDP of China was USD 74 trillion in 2016 and it took 14.8% of GDP of the world.

Gross Domestic Production and it's Growth Rate

In 2015, the contribution of the tertiary industries to GDP exceeded the sum of the primary industry and the secondary industry for the first time.



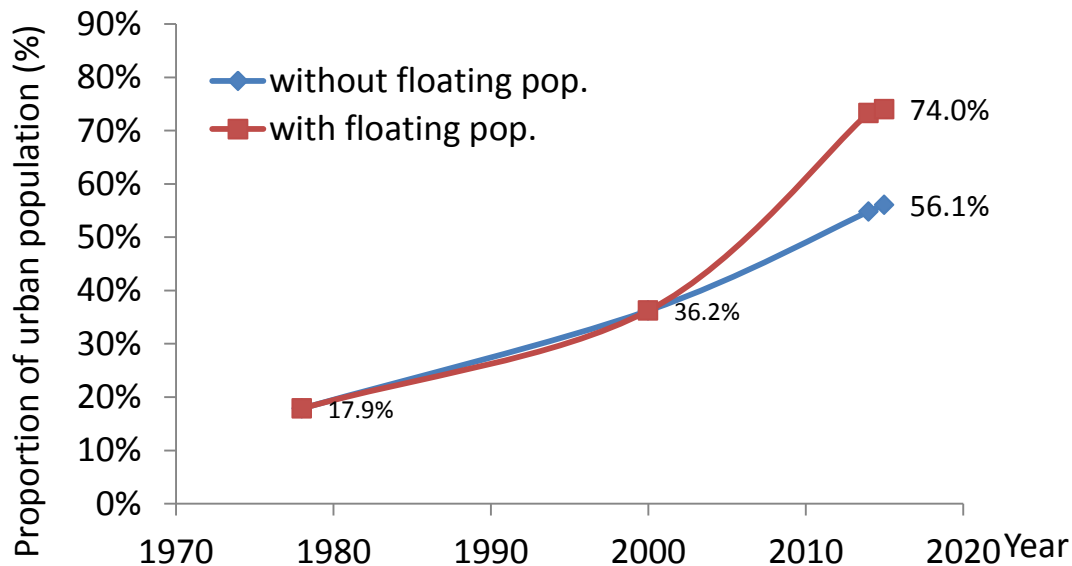
Composition of Gross Domestic Production



Aging is a big trend in China. Second baby policy is a way to prevent it from rapid developing.

**proportion of aged 65 and over**

The population in urban area accounts 56.1% of the total population without considering floating population. Actually, 74% of population lived in urban area.



**Urbanization with/without considering floating population**



# 中国大数据--- 生活水平 Big data of China ----- people's living condition

## General information

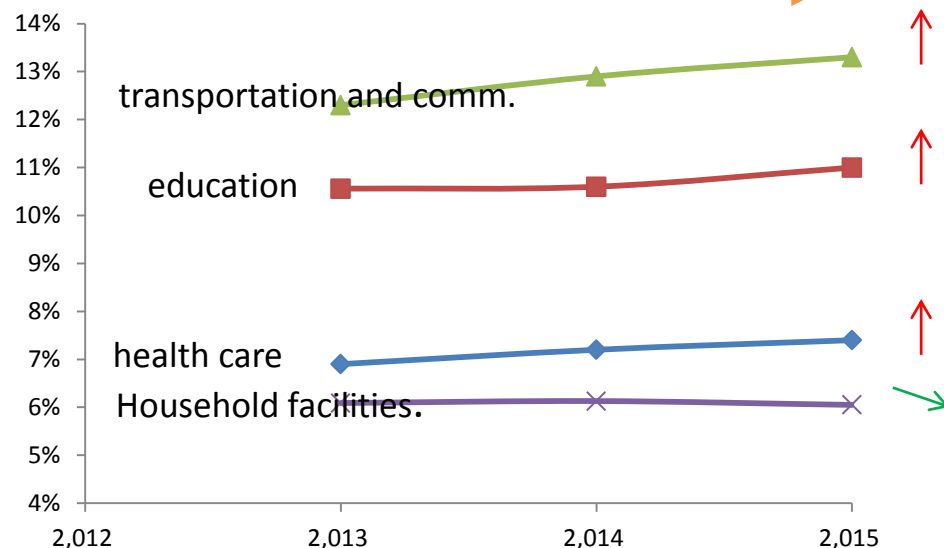
Average family size: 3.1 persons/household  
 Annual per capita disposal income  
 Nationwide: 21,916 yuan;  
 in urban: 31,800 yuan;  
 In rural : 11,420 yuan;  
 Washing machine: 86.4% total,  
 92.3% in urban,  
 78.8% in rural.

Average per capita expenditure: 15,712yuan  
 In urban: 21,392 yuan;  
 In rural : 9,222 yuan;  
 Automobile: Nationwide: 22.7%,  
 urban 30.0% ,  
 rural 13.3%.

**Over 30% of income was saved.**

## Consumption expenditure in 2015 nationwide

Food, tobacco and liquor	30.6%
Clothing	7.4%
Residence	21.8%
Household facilities, articles and services	6.1%
Transport and communication	13.3%
Education, culture and recreation	11.0%
Health care and medical services	7.4%
Miscellaneous goods and services	2.5%



Expense on Health care, education, transportation, and household facilities

# 中国洗涤行业的发展 Detergent industry in China

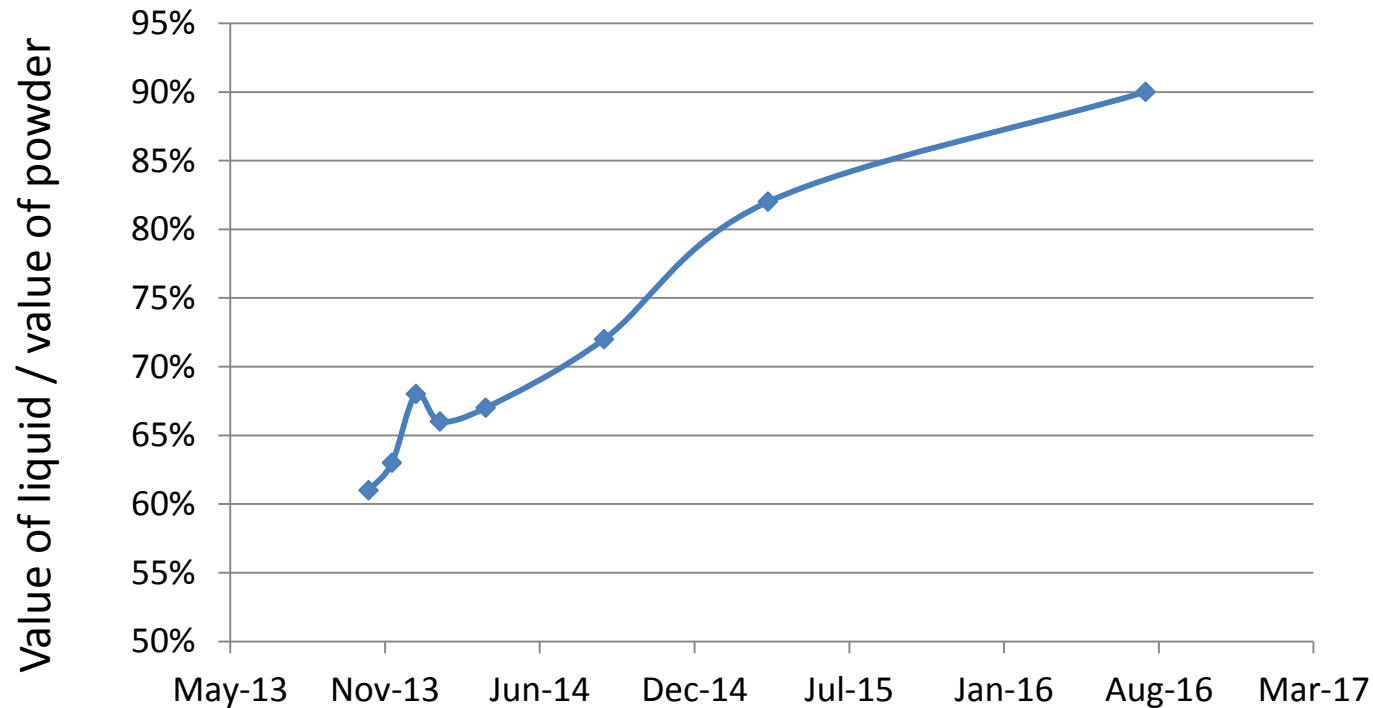
Category	Volume (million tons)	Growth rate 2016 vs 2015 (%)
Synthetic detergent	10.99	1.94
Soap	0.8	- 2.4
Synthetic powder detergent	4.46	- 5.7
Liquid detergent (including dishwashing and liquid laundry detergent etc.)	6.53	7.16
liquid laundry detergent	2.64	8.6
dishwashing	2.32	4.1
Hard surface cleaner	0.5	12

The total main business income of detergent industry was ¥183.2 billion in 2016, with 6.33% of annual growth in value vs 2015.

Source from CCIA, the statistic data of 2017.3.

## 织物洗涤剂Development of laundry detergent: powder and liquid

Liquid made a continuous growth in last 4 years. In urban area, the ratio in value of liquid to powder is over 90%, which means it became the alternative of powder and consumers accepted it as commonly used laundry product.



The ratio of retail price of liquid to powder was 1.38 by the end of last November. It decreased to 1.25 in first half in 2016 due to the big promotion of Nice, Liby, Blue Moon, Unilever and P&G.

from A C Nilsson retail audit, from Nov 2013 to Aug 2016.

# 环境保护和经济发展并行

# Environment Protection VS Economy development



国务院 新闻 专题 政策 服务 问政 数据 国情

索引号: 00014345/2015-0042 主题分类: 城乡建设、环境保护/环境监测、保护与治理  
发文机关: 国务院 成文日期: 2015年04月02日  
标题: 国务院关于印发水污染防治行动计划的通知  
发文字号: 国发〔2015〕17号 发布日期: 2015年04月16日  
主 题 词:

### 国务院关于印发水污染防治行动计划的通知

国发〔2015〕17号

各省、自治区、直辖市人民政府，国务院各部委，各直属机构，  
现将《水污染防治行动计划》印发给你们，请认真贯彻执行。

国务院  
2015年4月2日

(此件公开发布)

### 水污染防治行动计划

水环境保护事关人民群众切身利益，事关全面建成小康社会，事关实现中华民族伟大复兴中国梦。当前，我国一些地区水环境质量差、水生态受损害、环境隐患多等问题十分突出，影响和损害群众健康，不利于经济社会持续发展。为切实加大水污染防治力度，保障国家水安全，制定本行动计划。

总体要求：全面贯彻党的十八大和十八届二中、三中、四中全会精神，大力推进生态文明建设，以改善水环境质量为核心，按照“节水优先、空间均衡、系统治理、两手发力”原则，贯彻“安全、清洁、健康”方针，强化源头控制、水陆统筹、河海兼顾，对江河湖海实施流域、分区域、分阶段科学治理，系统推进水污染防治、水生态保护和水资源节约、空

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### 国务院发布《大气污染防治行动计划》十条措施

中央新闻门户网站 www.gov.cn 2013年09月12日 08时50分 来源: 国务院办公厅

【字体: 大 中 小】 【E-mail订阅】 【打印本页】 【关闭窗口】

#### 国务院发布《大气污染防治行动计划》十条措施助力空气质量改善

日前，国务院发布《大气污染防治行动计划》（以下简称《行动计划》）。这是当前和今后一个时期全国大气污染防治工作的行动指南。

党中央、国务院高度重视大气污染防治工作。新一届政府成立伊始，就将其作为改善民生的重要着力点，作为生态文明建设的具体行动，作为统筹稳增长、调结构、促改革，打造中国经济升级版的重要抓手，作出全面部署。《行动计划》在深入研究、反复论证的基础上发布实施，体现了中央科学严谨、实事求是，对人民群众高度负责的态度和坚持以人为本、着力改善环境、保障公众健康权益的坚定决心。

我国大气污染问题是长期积累形成的。治理好大气污染任务重、难度大，必须付出长期艰苦的努力，必须坚持防治大气污染人人有责，在全社会树立“同呼吸、共奋斗”的行为准则，必须坚持在保护中发展、在发展中保护，实现环境效益、经济效益和社会效益多赢。

《行动计划》按照政府调控与市场调节相结合、全面推进与重点突破相配合、区域协作与属地管理相协调、总量减排与质量改善相同步的总体要求，提出要加快形成政府统领、企业施治、市场驱动、公众参与的大气污染防治新机制，本着“谁污染、谁负责，多排放、多负担，节能减排得收益、获补偿”的原则，实施分区域、分阶段治理。

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首页 > 新闻发布 > 国务院新闻办发布《意见》

### 《中共中央 国务院关于加快推进生态文明建设的意见》

国务院新闻办公室网站 www.sic.gov.cn 2015-08-02 来源: 中国新闻网

中共中央 国务院 关于加快推进生态文明建设的意见

(2015年4月26日)

生态文明建设是中国特色社会主义事业的重要内容，关系人民福祉，关乎民族未来，事关“两个一百年”奋斗目标和中华民族伟大复兴中国梦的实现。党中央、国务院高度重视生态文明建设，先后出台了一系列重大决策部署，推动生态文明建设取得了重大进展和积极成效。但总体上看我国生态文明建设水平仍滞后于经济社会发展，资源约束趋紧，环境污染严重，生态系统退化，发展与人口资源环境之间的矛盾日益突出，已成为经济社会可持续发展的重大瓶颈制约。

加快推进生态文明建设是加快转变经济发展方式、提高发展质量和效益的内在要求，是坚持以人为本、促进社会和谐和必然选择，是全面建成小康社会、实现中华民族伟大复兴中国梦的时代抉择，是积极应对气候变化、维护全球生态安全的重大举措。要充分认识加快推进生态文明建设的极端重要性和紧迫性，切实增强责任感和使命感，牢固树立尊重自然、顺应自然、保护自然的理念，坚持绿水青山就是金山银山，动员全党、全社会积极行动、深入持久地推进生态文明建设，加快形成人与自然和谐发展的现代化建设新格局，开创社会主义生态文明新时代。

#### 一、总体要求

(一)指导思想：以邓小平理论、“三个代表”重要思想、科学发展观为指导，全面贯彻党的十八大和十八届二中、三中、四中全会精神，深入贯彻落实习近平总书记系列重要讲话精神，认真落实党中央、国务院的决策部署，坚持以人为本、依法推进，坚持节约资源和保护环境的基本国策，把生态

## Construction of ecological civilization

## Regulation of water pollution control

## Regulation of air pollution control

# 环境保护和经济发展并行

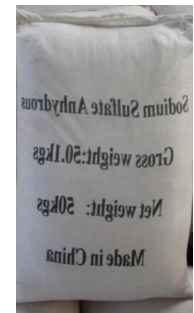
## Environment Protection VS Economy development

- The target of air pollution control: The concentration of inhalable particles in cities at and above prefecture level is expected to less than 10% compare with that in 2012.
- The target of water pollution control : by the end of 2017, the black and odorous water bodies should be eliminated in all provincial capital city.

## Cost rising of chemicals and packaging



资源中国网  
www.lansey.com



Carton:  
Price: 40%  
more

Plastic  
Price: 10%  
more

Surfactant  
Price: 20%  
more

Builder  
Price: 20%  
more

Filler  
Price: 30%  
more

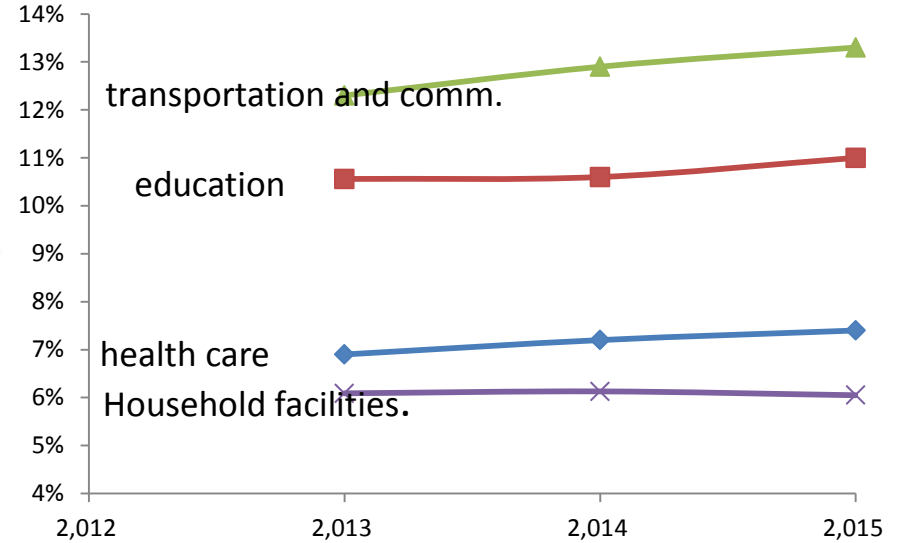


# 如何在当前经济形势下获得新的增长点

## How can we get new growth in tough economic situation?

Mom got lots of work to do.

- Job
- Baby care
- Shopping
- Cooking
- Housekeeping



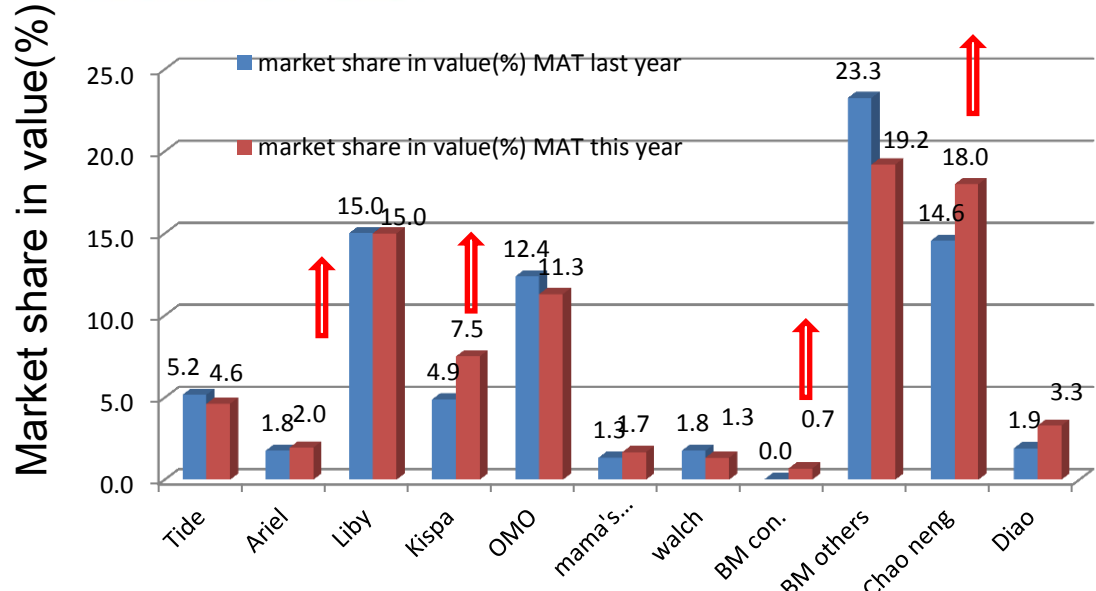
Flat expenditure on detergent

Detergent get less attention. Housewife needs products with **high performance** and **good to health**.



# 洗衣液过去2年的分析

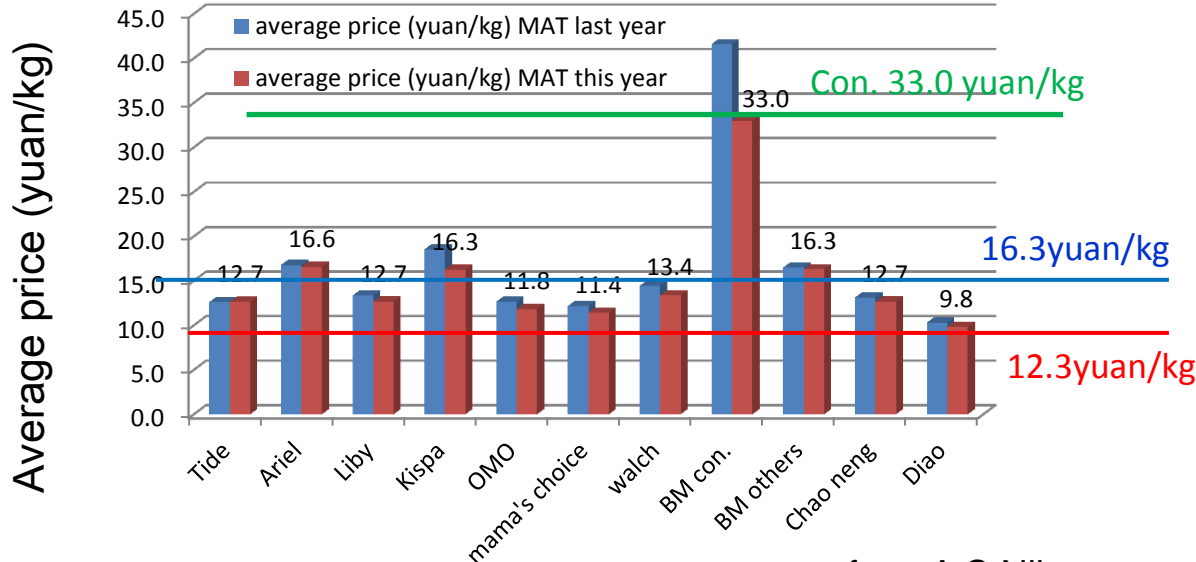
# Liquid laundry detergent



There was a strong price competition in last two years.

The high end products increased 6.9% in market share and got 47.4% of market share .

More and more consumers are expecting high performance products.



from A C Nilsson retail audit, from May 2015 to Apr 2017.

# 高端产品获得新的增长

## High end products achieved new growth

Sustainability and convince



Liby soap liquid  
Natural ing.  
stain remove  
Easy rinse



Kispa  
Mild to skin  
Stain remove



Chaoneng  
Natural ingredients  
Easy rinse

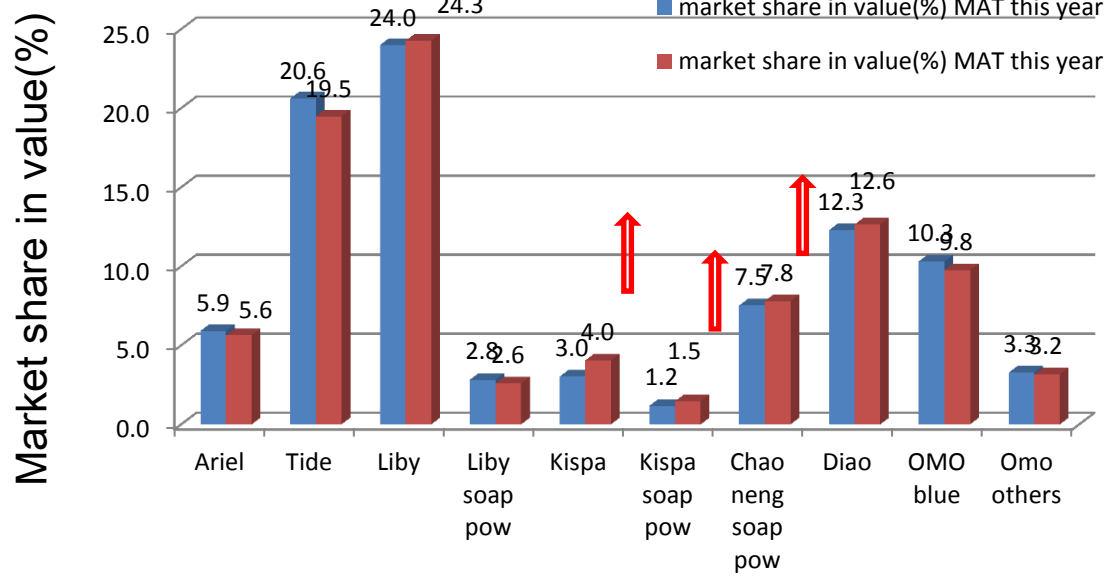


Blue Moon  
Easy handle,  
3 X concentrated

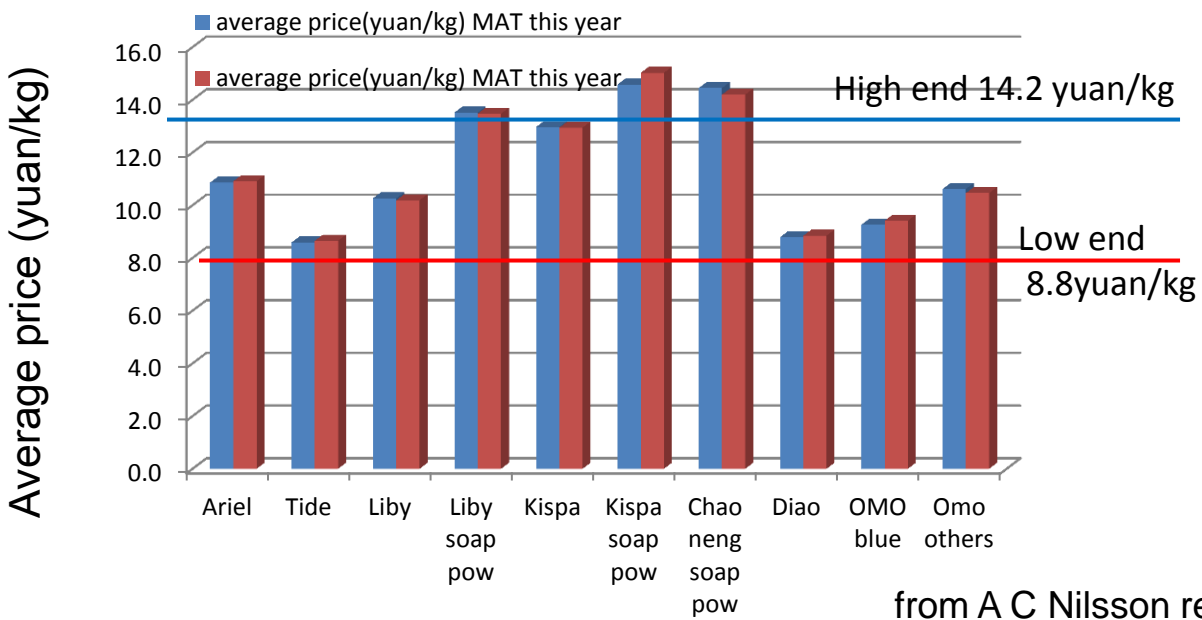


Ariel  
Easy rinse,  
quick washing

# 洗衣粉过去2年的分析 Powder laundry detergent



The market share of high end products was over 24.3%. Average price of soap powder was 14.2 yuan/kg, 61% higher than that of conventional powder (8.8 yuan/kg).



from A C Nilsson retail audit, from May 2015 to Apr 2017.



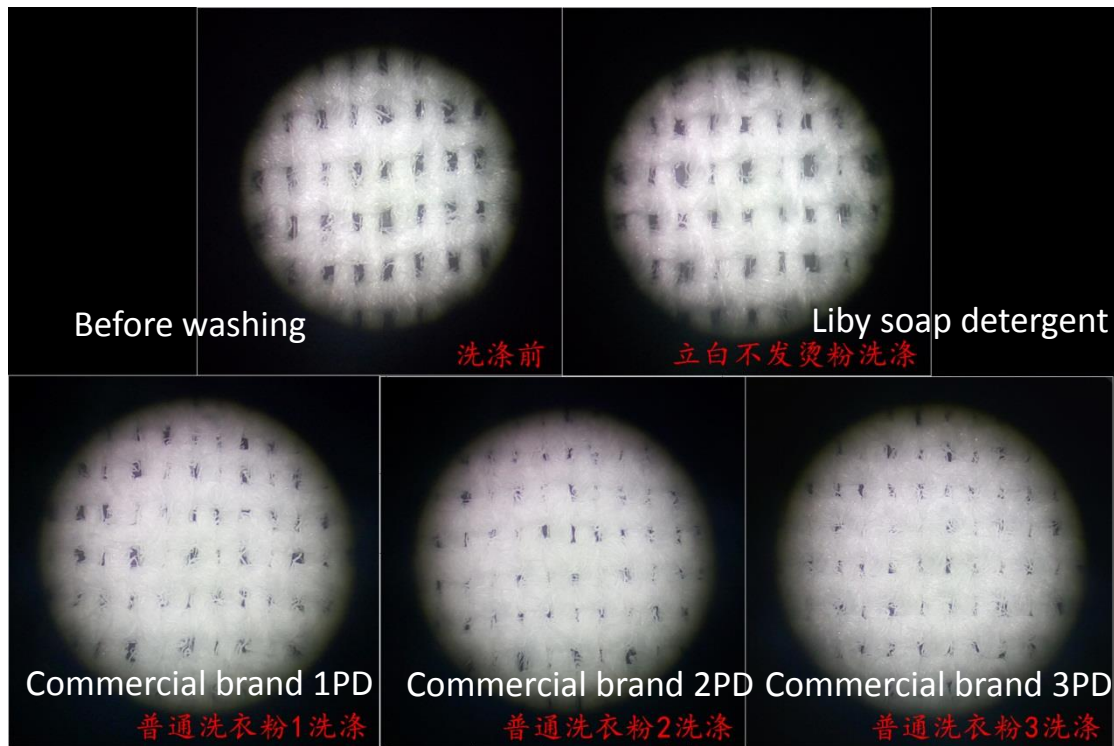
# 高端产品获得新的增长

## High end products achieved new growth

Sustainability and healthy



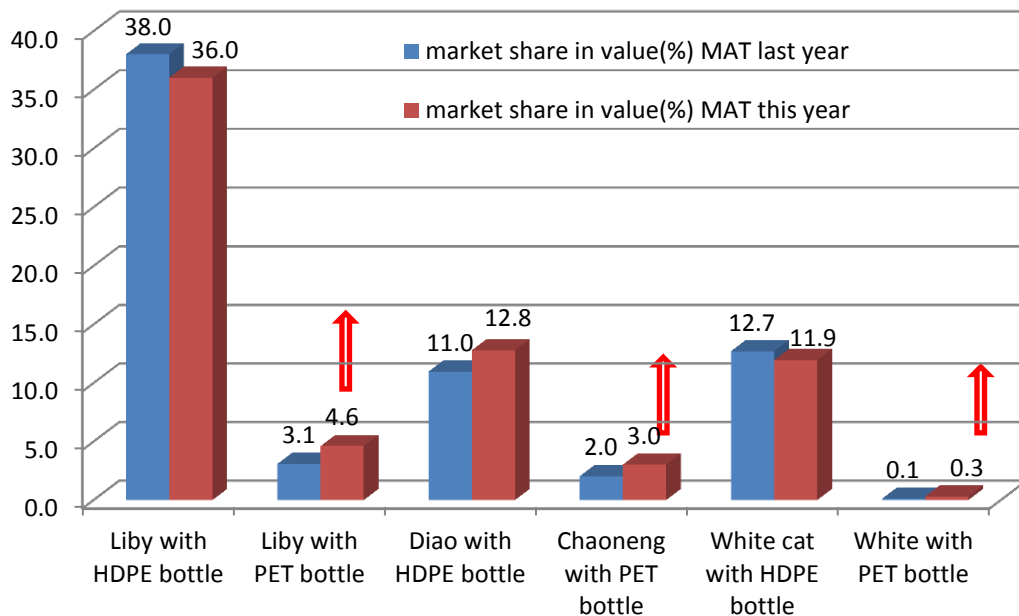
Soda ash free,  
 Natural ingredient  
 No heat emission when  
 dissolve in water,  
 Better performance in  
 detergency,  
 Less CaCO3 scale on fabric.



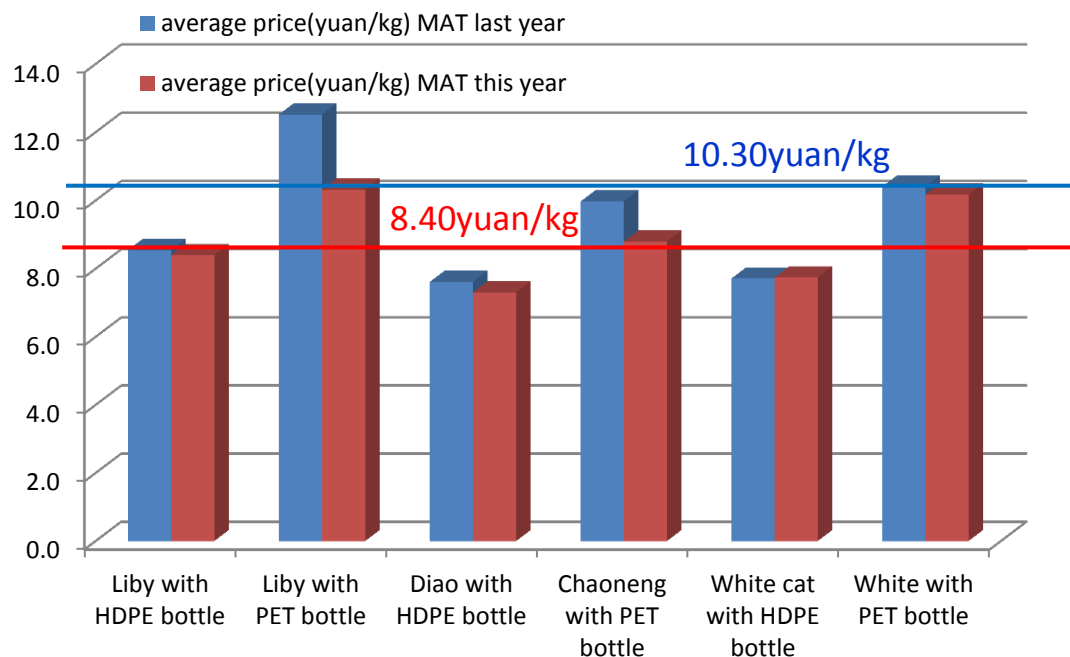
Microscope image of fabric after washing for 20 cycles.

# 洗洁精过去2年的增长 Development of dishwashing detergent

Market share in value (%)



Average price (yuan/kg)



High end products with PET bottle are on the rising tide. Liby increased 1.5%, Chaoneng increased 1.0%, White cat increased 0.2%.

The average price of the category decreased from 8.40 yuan/kg to 8.30yuan /kg within 2 years.

High end products gained more share.

from A C Nilsson retail audit, from May 2015 to Apr 2017.

# High end products achieved new growth



Dish washing detergent with natural ingredient  
——get rid of the chemical residue

Sustainability  
and healthy

消费者从此放心无忧

01:15/01:21

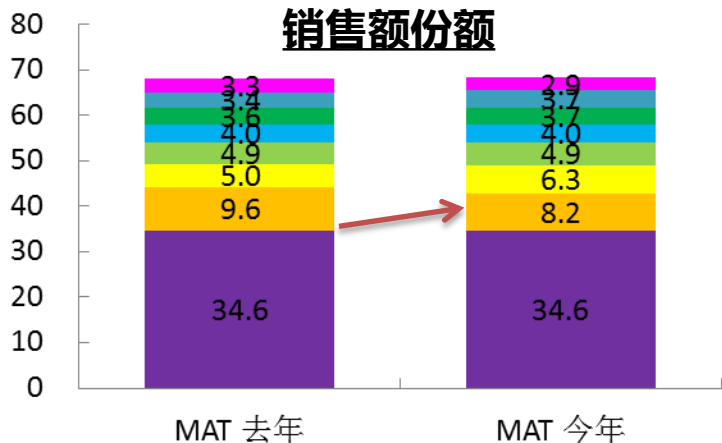
# 硬表面产品的快速发展Rapid development of hard surface cleaner



健康幸福每一家

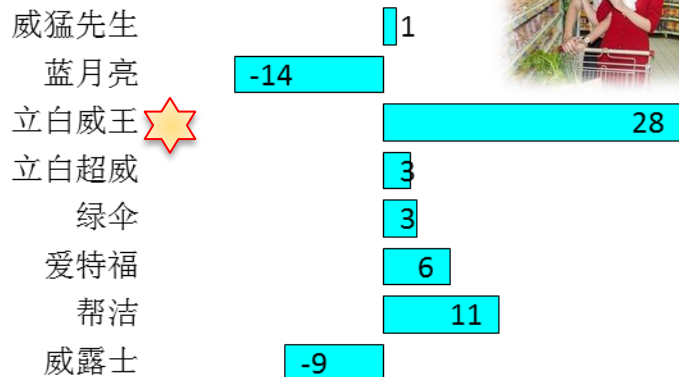
## Growth rate of sales value

### 销售额份额



- 威猛先生
- 蓝月亮
- 立白威王
- 立白超威
- 绿伞
- 爱特福
- 帮洁
- 威露士

### 销售额增幅



■ MAT 今年



healthy + convince + happy



Natural ingredient



Convenient and powerful



Malodor control

from A C Nilsson retail audit, from May 2015 to Apr 2017.



# 对研发的持续投入 Sustainable investment in R&D

## General information in 2015

Promotion rate from senior secondary school to higher education: 92.5%

Proportion of R&D expenditure of GDP: 2.05%

Composition of Expenditure of R&D:

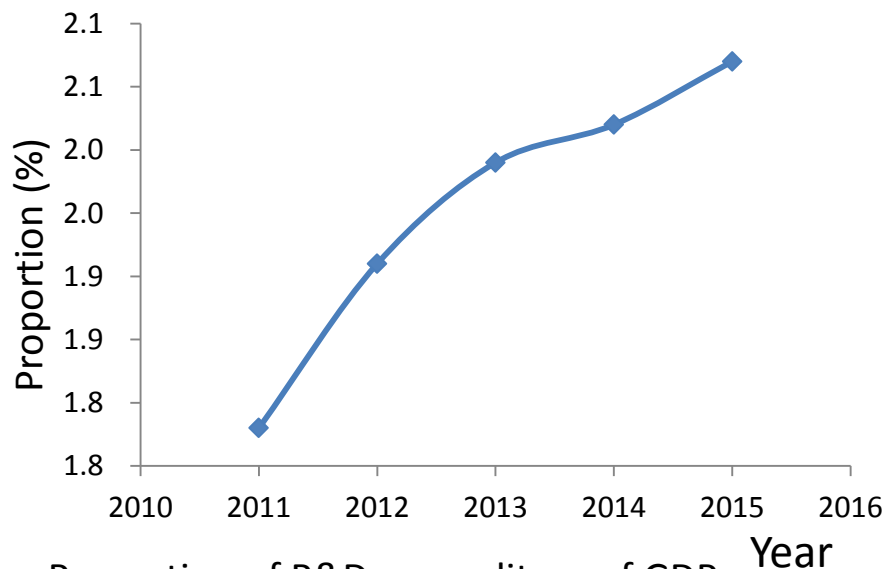
basic research: 5.05%;

applied research: 10.79%

experimental development: 84.16% industry

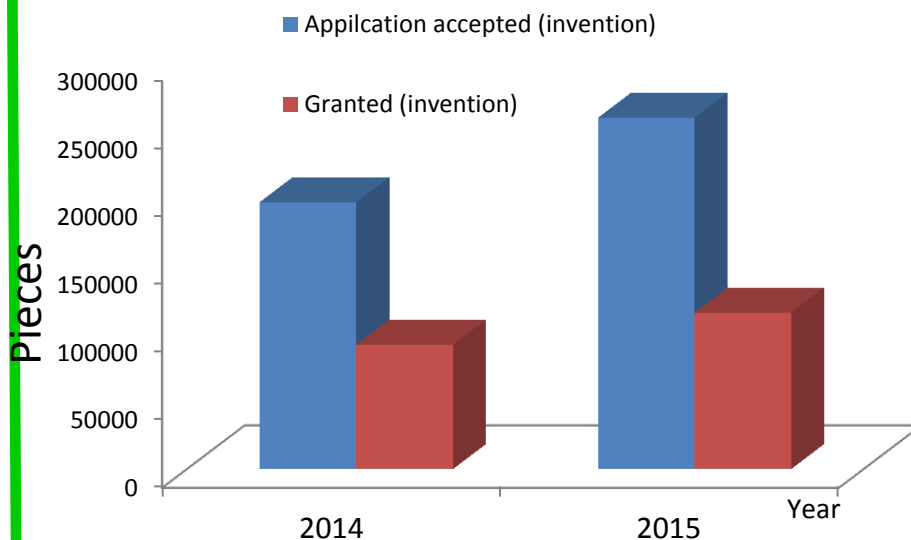
High education in 2015: 44.2% of postgraduates work in the science and engineering.

item	Graduates	Entrants	Enrolment
Postgraduates	551522	645055	1911406
Doctor's degree	53778	74416	326687
Master's degree	497744	570639	1584719
Undergraduates	6808866	7378495	26252968



Proportion of R&D expenditure of GDP

patent granted (invention): 359316 pieces, annual growth rate: 54%. Domestic: 73.3%, foreign: 26.7%.



Granted Patent in section C and section D

Source from China Statistical Yearbook 2016.



# 加速创新 Speed up innovation

A large number of graduates with PhD.

Rising investment in R&D

More than 35% of annual growth in granted invention patents.

Rapid development of computer science, information technology and analytical science.



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# 消费者体验是新产品开发的核心

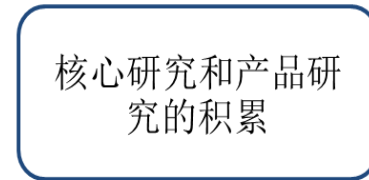
## Consumer experience is the core of the new product design

Consumer insight



消费者调研

Combines core technology research and products research



核心研究和产品研究的积累

Differentiation

Consumers' needs

消费者需要的性能

差异化所在

Performance not achievable in the industry

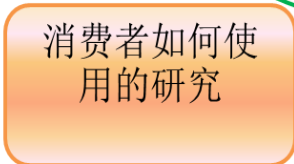
目前的产品不能做到的地方

Collaborate with innovation net

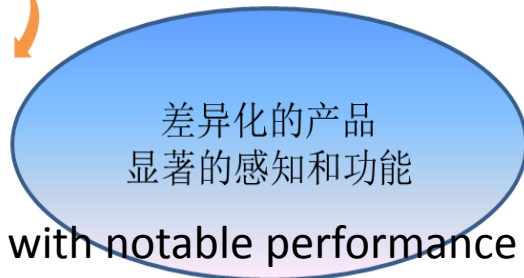


与相关产业合作

U& A study



消费者如何使用研究



差异化的产品  
显著的感知和功能

Differentiated product with notable performance and satisfaction

# 小结Summary

- 1. Great changes in China:  
awakening of self-consciousness and rising of middle class.**
- 2. High end of detergent is getting more market sharing.  
Products with green and sustainability claim are popular.**
- 3. More R&D investment speeds up innovation in detergent industry.**



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THANK YOU!

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