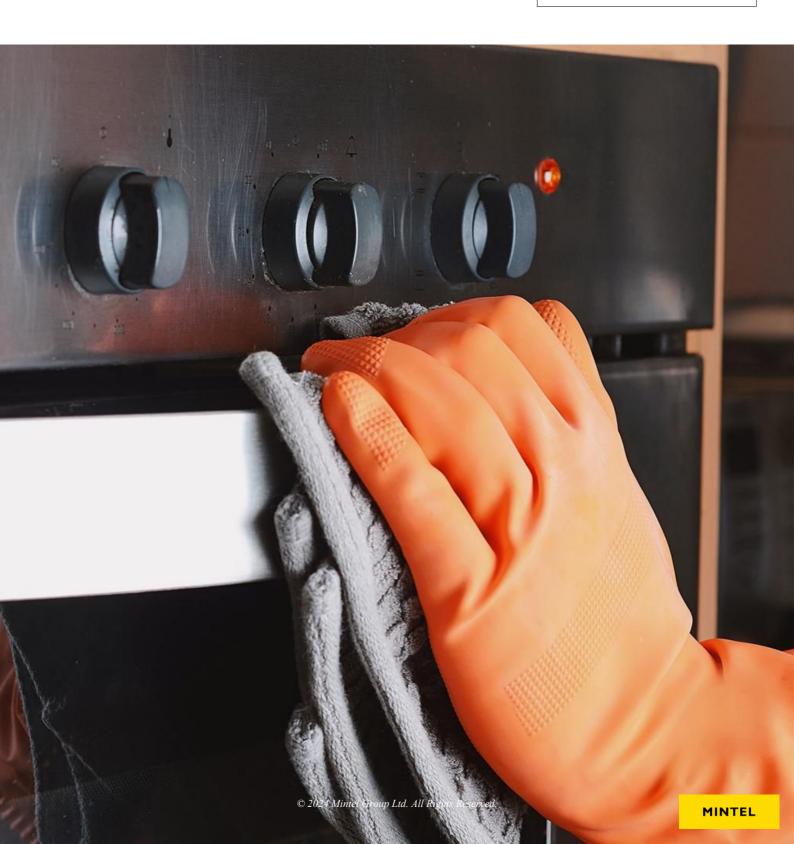
A YEAR OF INNOVATION IN HOUSEHOLD CLEANERS, 2021

Brands are addressing consumer need for antibacterial products, while natural and more sustainable cleaning products continue to grow.



Mikolaj Kaczorowski, Innovation Analyst



Report Content

- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- Innovation opportunities in hard surface cleaning

EUROPE, MIDDLE EAST & AFRICA (EMEA)

• EMEA retail market overview: household cleaners, 2021

Europe: plastics are in the spotlight

- · Consumers want to see more efficient use of packaging materials
- Packaging is on consumers' eco radars
 - Graph 1: select ethical and environmental claims as a % of NPD in hard surface care, Mar 2016-Feb 2017 vs Mar 2020-Feb 2021
- Brands are lowering their plastic footprints
- Brand renovation/innovation: Lidl launches refill tabs for its cleaning products

Europe: a more natural cleaner

- Consumers are looking for natural hard surface cleaners
- Natural and sustainable cleaners see growth
 - Graph 2: hard surface care products with select ethical & environmental and natural claims, Mar 2016-Feb 2017 vs Mar 2020-Feb 2021
- Natural and sustainable cleaners see growth
 - Graph 3: hard surface cleaners with select ethical and environmental claims by NPD, by market, Mar 2020-Feb 2021
- Brands highlight natural and plant-based compositions
- Brand renovation/innovation: circular economy household cleaner utilises waste bio-solids

Middle East & Africa (MEA)

- Antibacterial claims grow in MEA
- Natural claims are growing in MEA

ASIA PACIFIC (APAC)

- APAC retail market overview: household cleaners, 2021
- Antibacterial qualities are a must-have in Asia
- Asia sees a surge in antibacterial innovation
- Helping consumers tackle bacteria at home

• Brand renovation/innovation: South Korean Aromatica enters the home-cleaning category

Asia: product safety concerns remain high in Asia

- Naturally derived ingredients can reassure consumers over product safety
- Botanical and herbal ingredients reassure consumers of product safety
 - Graph 4: cleaning equipment, hard surface and toilet care with select claims, Mar 2020-Feb 2021
- Brands highlight natural and recognisable ingredients
- Brand renovation/innovation: PureCo celebrates the goodness of plant-based ingredients

Australia and New Zealand

- Consumers are looking for more natural and sustainable cleaning products
- Natures Organics launches new refillable cleaning range in Australia
- Antibacterial claims are in demand in Australia and New Zealand

THE AMERICAS

• Americas retail market overview: household cleaners, 2021

North America: refillable cleaning products are popular

- Interest in refillable cleaning products is high
- North America leads for refill innovation
 - Graph 5: refill/refillable claim as a % of NPD in hard surface care, Mar 2020-Feb 2021
- Tempting consumers with a variety of refill options
- Brand renovation/innovation: Reckitt Benckiser launches refillable Lysol multi-purpose cleaner

North America: consumers are looking for ingredient transparency

- Consumers look for natural hard surface cleaning products
- North America sees significant natural hard surface care NPD
 - Graph 6: hard surface care launches, by select natural claims, Mar 2020-Feb 2021
- Brands highlight plant-based and natural ingredient compositions
- Brand renovation/innovation: Aunt Fannie's launches probiotic all-purpose cleaning wipes

Latin America

- Multi-purpose cleaners are a home cleaning staple
- Antibacterial claims grow in hard surface care innovation in Latin America

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