

HOME LAUNDRY PRODUCTS – US – 2023

Inflation has forced consumers to trade down, but the market is on the cusp of an innovation renaissance for improved convenience, economy and sustainability.



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Home Laundry Products - US - 2023

This report looks at the following areas:

- Market performance and drivers
- Competitive strategies and market opportunities
- How inflation is impacting consumer behavior
- The growing convergence of convenience, sustainability and economy
- Shifting format preference
- Purchase influencers
- Interest in innovation



Inflation has forced consumers to trade down, but the market is on the cusp of an innovation renaissance for improved convenience, economy and sustainability.

Overview

Two years of a cost of living crisis has forced consumers to prioritize value. For 20% of the population, this means **trading down to lower-cost laundry products**. But value is multifaceted. The laundry care segment has shown the largest percentage gains, and through 2028, its ability to protect clothing from stains and odor, extend the lifespan of clothing and save on utility costs, will fuel significant market growth.

Despite this, brands have an educational opportunity. For instance, compared to upper-income consumers, **low-income consumers are less likely to believe that washing in cold water saves money**, despite the fact that a large portion of a washer's energy utilization is for heating water. Because **educational opportunities are consumer engagement opportunities**, brands have that can springboard off the improved efficacy of cold water detergents will win new consumers with the promise of saving money while protecting clothing from the ravages of hot water.

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Looking ahead, **brands need to prepare for new market entrants**, including smart appliance brands that develop proprietary detergents to support auto dosing systems that can customize the mix for specific cycles. This is a competitive threat, but also an opportunity to partner with appliance brands.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- What you need to know
- Consumer trends: key takeaways
- Market Predictions
- Opportunities

THE MARKET

Market context

Market size and forecast

- Brands need to think beyond price increases to maintain margin expectations
- Growth will moderate as inflation declines
- Beyond 2024, market growth is tepid
- Adjusting for inflation suggests a need to grow volume sales
- Annual household spend on laundry products has grown by nearly \$30 since 2018
 - Graph 1: average annual household spending on home laundry products, 2018-23

Market segmentation

- Prepare for a growing laundry care segment
 - Graph 2: total retail sales and forecast of home laundry products, by segment, at current prices, 2028-28
- The future of fabric care will involve more spraying and less washing
- Consumer sentiment underscores the growth potential of laundry care
 - Graph 3: interest in and use of innovations that extend the time between washes, 2023

Market drivers

- Shelter and fuel prices remain high, but the inflation rate for food and CPG is declining
- Consumer confidence and unemployment resume their expected relationship
- Consumers also have more money in their pockets

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- Trade down behavior is palpable
- Store brands are growing the fastest, but overall share remains low

Home Laundry Products – US – 2023

- Graph 4: private label market share, by segment, 2023
- Graph 5: value share growth of home laundry products, by segment, private label vs total, 2023
- Do name brands need more value variants? It depends
- A notable minority of consumers are trading down
 - Graph 6: consumers who have traded down to value laundry products due to inflation, 2023
- P&G represents more than half of value sales, but was also the biggest share loser
- Private label gains at P&G's expense
- P&G brands that are posting the biggest sales growth
- P&G eco brands are struggling, but the jury is still out
- Small brands struggle for relevance
 - Graph 7: "others" growth rate vs. market, against "others" market share, 2023
- Expand the anti-plastic focus from packaging waste to synthetic clothing
- Brands with a compelling anti-plastic stance that goes beyond packaging
- Sync with evolving appliance capabilities
- Forge partnerships with auto dosing washer brands
- Auto dose washers allow liquids to leapfrog unit dose convenience
- As washers allow for better personalization, create complimentary detergents
- Roux Maison shows a strong segmentation strategy for a natural laundry brand
- Roux Maison's variants could work with auto dose washing machines
- L'Oréal offers a lesson from the skincare market
- The "sheetwave" has yet to crest
 - Graph 8: new product launches of detergent sheets, by region/market, 2018-23
- Emerging formats represent an expansion opportunity
- Elevate box graphics to show the value of emerging formats
- Transfer cross-category equity into fabric care
- Fragrance-focused detergents from Ouai and Bath & Body Works
- Designer fragrances have strong allure in fabric care
 - Graph 9: interest in and use of home laundry products with a designer fragrance, 2023
- Look out for novel dispensing systems
- MyKirei now has a strong position in beauty personal care and fabric care
- Traditional skin conditioning/protection ingredients have migrated from BPC to laundry
 - Graph 10: use of skin conditioning and skin protection ingredients in laundry detergent and laundry care products, 2014-23
- Laundry detergents with trending skincare ingredients
- Center laundry products around skincare ingredients for greater assurance that products are safe for sensitive skin
 - Graph 11: interest in fabric care products that are safe for sensitive skin, 2023
 - Graph 12: interest in laundry products with skincare ingredients, by age, 2023
- Innovate nature-identical ingredients

Home Laundry Products – US – 2023

- Consumers want nature-identical ingredients, but few laundry brands have obliged
 - Graph 13: interest in laundry products with nature-identical ingredients, by age, 2023

THE CONSUMER

The consumer: fast facts

- The US needs gender equity campaigns as much as emerging markets
 - Graph 14: laundry responsibility, by gender and marital status, 2023
- Ariel Share the Load campaign in India
- Liquids dominate, but there is a growing preference for convenience formats.
 - Graph 15: purchase of home laundry products, by segment, 2023
- Men are less likely to use supplemental laundry products
 - Graph 16: laundry product format use, by gender, 2023
- Compared to last year, more consumers are looking for cold water cleaning
 - Graph 17: most important factors when choosing laundry detergent, 2022 vs 2023
- Promote the economizing benefits of cold water and fabric protection detergents
 - Graph 18: interest in cold water and fabric protection detergents, by income, 2023
- Target younger consumers with greater scent variety
 - Graph 19: importance of fragrance and odor removal benefits, 2023
- Drive trial of waterless formats through discounting
- Across nearly all benefits, liquids are rated most favorably
 - Graph 20: consumer perception of detergent benefits, by format, 2023
- Trial is half the battle to the adoption of alternative formats
 - Graph 21: selected detergent sheet attributes, sheet users vs all consumers, 2023
- Dispel misconceptions about the cost of fabric care
 - Graph 22: select attitudes toward laundry products, 2023
- Help consumers reconcile convenience and cost avoidance
 - Graph 23: laundry behaviors, 2022 vs 2023
- Convenience and cost innovations show the highest interest
- Innovations for cold water washing and that allow more time between washes see high support
 - Graph 24: interest in and use of home laundry innovations, 2023
- Nearly everyone wants products that reduce laundry frequency
 - Graph 25: interest in innovations that reduce the frequency of laundry, 2023

APPENDIX

- Market definition
- Consumer research methodology

Home Laundry Products – US – 2023

- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart
- Total retail sales of home laundry products, by segment, 2021 and 2023
- Total retail sales and forecast of laundry detergent, at inflation-adjusted prices, 2018-28
- Total retail sales and forecast of liquid fabric softener, at inflation-adjusted prices, 2018-28
- Total retail sales and forecast of fabric softener sheets, at inflation-adjusted prices, 2018-28
- Total retail sales and forecast of laundry care products, at inflation-adjusted prices, 2018-28
- Total retail sales and forecast of bleach at inflation-adjusted prices, 2018-28
- Total retail sales of home laundry products, by channel, at current prices, 2018-23
- Total retail sales of home laundry products, by channel, 2018-23

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