

# 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.



Jamie Rosenberg,  
Associate Director,  
Global Household and  
Personal Care



# 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
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- 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
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- Consumer sentiment underscores the growth potential of laundry care
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#### 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

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  - Graph 6: consumers who have traded down to value laundry products due to inflation, 2023
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- Brands with a compelling anti-plastic stance that goes beyond packaging
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- Auto dose washers allow liquids to leapfrog unit dose convenience
- As washers allow for better personalization, create complimentary detergents
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- Roux Maison's variants could work with auto dose washing machines
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- The "sheetwave" has yet to crest
  - Graph 8: new product launches of detergent sheets, by region/market, 2018-23
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