

HOME LAUNDRY PRODUCTS – US – 2024

Consumers want products that lean into eco-luxury and customization to meet their heightened desire for quality, sustainability, and personalization.



David Hamlette,
Research Analyst; Health
and Wellbeing



Home Laundry Products – US – 2024

This report looks at the following areas:

- Market factors in home laundry products
- Laundry responsibility
- Laundry product usage
- Purchase influencers for laundry products
- Laundry product shopping behaviors
- Behaviors and attitudes around home laundry products
- Usage and interest in laundry innovations



Consumers want products that lean into eco-luxury and customization to meet their heightened desire for quality, sustainability, and personalization.

Overview

The US home laundry market is navigating a complex terrain of fluctuating sales projections and a discernible shift in consumer behavior, particularly among younger demographics. Anticipated to face a short-term sales decline of 9% in 2024 before rebounding to a promising 5.1% growth rate from 2023–28, the market's vitality hinges on strategic innovation and adaptability. A notable openness to new product innovations among 18–34 year olds offers fertile ground for brands to introduce premium laundry solutions, with 48% of consumers willing to experiment with new brands. This trend towards premiumization is driven by a desire for customizable features, such as personalized scents and care for luxury fabrics, reflecting a broader investment in quality and sustainability.

To leverage these opportunities, brands must focus on partnerships that enhance appliance efficiency, promote the longevity and health of clothing, and develop customizable products that cater to individual preferences and sustainability values. Engaging younger and male

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consumers through tailored marketing strategies that emphasize premium and sustainable attributes can further solidify a brand's position in this evolving marketplace.

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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Market size and forecast
- Opportunities

THE MARKET

Market context

- The US expanded by over 3% in the fourth quarter
 - Graph 1: quarterly real GDP growth, 2020-23
- Consumer prices rose by 3.2% in February, a slight uptick from the preceding month
 - Graph 2: headline CPI, shelter CPI and Zillow Rent Index, 2022-24
- Unemployment continues to sit near historic lows
 - Graph 3: unemployment rate, 2019-23
- Consumers are the most upbeat they have been in over two years
 - Graph 4: consumer sentiment index, 2021-24
- Consumers' financial outlooks are increasingly optimistic
 - Graph 5: opinions on financial future, 2024
- Households' wages have exceeded the rise in prices since May 2022
 - Graph 6: US; wages and CPI, percent change from year ago, 2021-24

Market drivers

- DOE mandating stricter efficiency standards for washer and dryer
- Laundry becoming heavily influenced by BPC products
- Cost of living drives increased desire for value
 - Graph 7: average annual household spending on home laundry products, 2018-23
 - Graph 8: 12-month % change, CPI, all items, 2018-24
- Cost of living drives increased desire for value

Market size and forecast

- Overall sales in home laundry products expected to remain steady
- Retail sales and forecast of home laundry products
- Laundry detergent represents trajectory of market

Market segmentation

- Retail sales of home laundry products, by segment

Market share/brand share

- Sales of home laundry products, by company
- Sales of laundry detergents, by company
- Sales of fabric softener liquid, by company
- Sales of laundry care products, by company

CONSUMER INSIGHTS

Consumer fast facts

Laundry responsibility

- Little change in laundry responsibility, but opportunity to improve
 - Graph 9: laundry responsibility, trended, 2022-24
 - Graph 10: shared laundry responsibility, trended, 2022-24
- Gender equity even more important with advances to laundry routines
 - Graph 11: laundry responsibility, by gender, 2024
- Encourage parents to do chores with children

Laundry product usage

- Need for multitude of unique laundry products decreasing
 - Graph 12: laundry product usage, trended, 2022-24
- 18-34s care most about product maximization and convenience
 - Graph 13: select laundry product usage, by age, 2024
- Private labels match mainstream brands by expanding their product lines and incorporating consumer trends

Purchase influencers for laundry products

- Customers demand enhanced performance and outcomes from detergent products
 - Graph 14: laundry purchase influencers, 2024
- 18-34s care more about environmental factors than other age groups
 - Graph 15: select laundry purchase influencers, by age 18-34, 2024
- Terracycle pairs with Oxiclean to limit waste by increasing rewards
- Parents prioritize natural and sensitive solutions
 - Graph 16: Select laundry purchase influencers, by parental status, 2024

Laundry shopping behavior

- Balance between consumers that have brand loyalty, and those that are open to new products
 - Graph 17: laundry shopping behaviors, 2024

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- Fathers less open, but do want to try products with premium solutions
 - Graph 18: select laundry shopping behaviors, by age and parental status, 2024
- Laundry Sauce uses male celebrity to show doing laundry is both masculine and attractive
- Urban consumers have the flexibility to purchase in smaller quantities
 - Graph 19: select laundry shopping behavior, by area, 2024

Change in laundry routines

- Laundry and dryer consumers alike are looking at packaging more closely...
 - Graph 20: change in laundry routine in the past year, 2024
- ...but are giving dryer products more of a chance at success
 - Graph 21: change in drying routines in the past year, 2024
- Older adults looking for cheaper solutions, not necessarily buying or doing laundry less
 - Graph 22: select changes in drying routines, by age, 2024
- Younger consumer buy clothes that require personalized care methods
 - Graph 23: select changes in drying routines, by age, 2024
- Luxury brands rationalize price through clothing longevity

Laundry behaviors and attitudes

- People have a laundry routine they likely are not going to break...
 - Graph 24: laundry behaviors and attitudes, 2024
- ...yet drying attitudes are a bit more flexible
 - Graph 25: drying behaviors and attitudes, 2024
- Meet middle-class adults where they are in their routine
 - Graph 26: select laundry behaviors and attitudes, by age and household income, 2024
- Win over young consumers through clothing safety
 - Graph 27: select drying behaviors and attitudes, by age and income, 2024

Usage and interest in laundry innovations

- Maintenance of products biggest interest for consumers (whether it be clothes or washing machine)
 - Graph 28: select usage and interest in laundry products, 2024
- ...with ecological benefits leading drying innovation interest
 - Graph 29: select usage and interest in drying innovations, 2024
- Men show the most interest in laundry products overall
 - Graph 30: NET – any interest in laundry products, by gender, 2024
- Younger consumers with higher income are willing to pay more for customizable solutions
 - Graph 31: select usage and interest in drying innovations, by age and income, 2024

COMPETITIVE STRATEGIES

Launch activity and innovation

- Moodify
- LG Downloads customizable settings to different lifestyles
- GE Smart solutions

Marketing and advertising

- Brands take to social media to acknowledge microplastics
- NYC punishes those using pods to combat microplastic pollution
- Life's Good with LG
- All appoints Chief Dermatology Advisor (CDA)

Opportunities

- Facilitate greater appliance and laundry product partnerships
- Experiment with different formats, especially sprays
- Help younger consumers limit fast fashion by promoting benefits of clothing health

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Market size methodology
- Abbreviations and terms
- Forecast
- Forecast fan chart
- Retail sales and forecast, at current prices, 2018-28
- Retail sales and forecast of laundry detergent, at current prices, 2018-28
- Retail sales and forecast of fabric softeners, at current prices, 2018-28
- Retail sales and forecast of laundry care, at current prices, 2018-28

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<u>US</u>	<u>+1 (312) 932 0600</u>
<u>Australia</u>	<u>+61 (0)2 8284 8100</u>
<u>China</u>	<u>+86 (21) 6386 6609</u>
<u>India</u>	<u>+91 22 4090 7217</u>
<u>Japan</u>	<u>+81 (3) 6228 6595</u>
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