

HOUSEHOLD SURFACE CLEANERS – US – 2023

Consumers are adjusting behaviors in response to inflation and economic uncertainty. However, consumers remain committed to cleaning and caring for their home.



Rebecca Watters,
Associate Director,
Household & Health



Household Surface Cleaners - US - 2023

This report looks at the following areas:

- Market factors impacting the household surface cleaner market
- Household surface cleaner usage and frequency
- Purchase factors impacting product choice
- Important environmental claims for cleaning products
- Attitudes and behaviors toward cleaning and cleaning products
- Perceptions of select household surface cleaner brands



Consumers are adjusting behaviors in response to inflation and economic uncertainty. However, consumers remain committed to cleaning and caring for their home.

Overview

Years of price increases and a backdrop of economic uncertainty are taking their toll on the historically resilient household surface cleaner market, with many consumers altering their cleaning and shopping behaviors to reduce category spend.

Still, household cleaners are essential to maintaining a health and happy home, insulating the market from moving into the negative. Shoppers are unwilling to compromise on efficacy and performance, creating opportunities for brands across all price points that can deliver and reassure shoppers on quality, convenience and healthfulness. Health and safety, for people and planet, are especially important among young shoppers.

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The next generation of cleaners is also more likely than their experienced counterparts to hold brands accountable for their environmental and ethical impact, signaling that the future market will see sustainability and value strongly linked, with efficiencies in cleaning behaviors benefitting both environment and consumer budgets.

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Report Content

EXECUTIVE SUMMARY

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

CONSUMER INSIGHTS

Consumer fast facts

Household surface cleaner usage and frequency

- Surface cleaners remain an essential, yet value demands drive all-purpose appeal
 - Graph 1: household surface cleaner product usage, trended, 2021-23
- Expect more specialty to expand to align with multi-purpose demand
- Cutting down, but not cutting out: consumers shift usage behaviors
 - Graph 2: repertoire of household surface cleaners used, trended, 2020-23
- Dirty jobs: products for ad hoc cleaning most used
 - Graph 3: usage frequency of household cleaning products, 2023
- Deliver convenience for core demographics
 - Graph 4: usage of select household cleaning products – at least weekly, by age, parental status, 2023

Household surface cleaner purchase influencers

- Focus on making function and performance consistent
 - Graph 5: purchase factors for household surface cleaners, 2023
- Multi-purpose nearly as important as cleaning power
 - Graph 6: importance of top claims, trended, 2020-23
- Deliver a scent experience to attract women
- Parents enthusiastic for safer options: for people and planet
 - Graph 7: select purchase factors for household surface cleaners, by parental status, 2023
- Strengthen natural appeal through functional health properties

Importance of environmental claims

- A focus on what is familiar
 - Graph 8: importance of environmental claims among household surface cleaners, any rank (net), 2023
- Plastic and waste reduction draw greatest attention
- Upcycle and preserve for the next generation

Shifts in cleaning routine

- A need for value amid inflation
 - Graph 9: shifts in household cleaning routine, 2023
- Online shopping supports heavier usage
- The future of cleaning is shared
 - Graph 10: shift in sharing cleaning responsibilities, by gender and age, 2023
 - Graph 11: shift in sharing cleaning responsibilities, by aged of children in household, 2023
- There is still work to be done in closing the chore gap
- Focus on bringing home equity to the next generation

Attitudes toward cleaning and home hygiene

- An emotional response to clean: both good and bad
 - Graph 12: attitudes toward cleaning and home hygiene, 2023
- Assuage safety concerns of parents through natural germ management
 - Graph 13: select attitudes toward cleaning and home hygiene, by age of children in household, 2023
- Multicultural consumers recognize a wider impact of cleaners
 - Graph 14: concern on cleaners impact on air quality, by race and Hispanic origin, 2023
- Seventh Generation acknowledges environmental racism

Brand perceptions and preferences

- Mainstream players benefit from greater visibility
- As mainstream brands get greener, eco brands must reclaim the sustainability high road

COMPETITIVE STRATEGIES

Launch activity and innovation

- Focus on antibacterial claims dwindles
- Antibacterial claims decline as focus shifts from germ killing to value
 - Graph 15: % of share of new household cleaning product launches with antibacterial claims, 2018-23*
- As markets normalize, consumers seek greener products
 - Graph 16: share of household cleaning product launches with ethical and environmental claims, 2018-23*
- For sustainability success, combine eco-friendly, time-saving, and value elements
- Private label continues its run (with no signs of slowing down)

Marketing and advertising

- Providing value becomes essential
- With a wider range of needs to fulfill, meet consumers diverse ideas of what indicates 'quality'
- Expanding the definition of health as it relates to home

Opportunities

- Promote a new way to manage germs
- Rising prices give retailers an opening to make further gains with private label
 - Graph 17: household surface cleaner MULO private label market share, by segment, 2022-23
- Private label with a premium touch
- A focus on waste reduction takes center stage
- Brands embrace "reduce" stage of waste hierarchy

THE MARKET

Market context

Market drivers

- An era of protracted inflation creates cautious spending
- Following 2020 spike, inflation finally begins to simmer
 - Graph 18: Consumer Price Index change from previous period, 2020-23
- Efforts to regulate plastic pollution increase in 2023
- The ripple effect of the EU Green Deal

Market size and forecast

- Market moderates with inflation assisting category sales
- Retail sales and forecast of household surface cleaners
- Despite economizing, market remains stable
 - Graph 19: average annual household spending on household surface cleaners, 2018-23

Market segmentation

- Retail sales of household surface cleaners, by segment
 - Graph 20: total retail sales of household surface cleaners, by segment, at current prices, 2018-23
- Retail sales of household surface cleaners, by segment
- Cut backs in spending challenge specialized players

Market share

- Leading players see mixed results, private strengthens lead
- Sales of household surface cleaners, by company
- Stronger performance across the board put SCJ on top of toilet, tub & tile cleaners
- All-purpose regains momentum amid search for value
- Specialty cleaners struggle
- Few willing to spend the premium for cleaning clothes/wipes
- Floor cleaners/wax removers sales slip with Colgate and private label alone in gains

- Furniture polish sales remain flat

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart
- Retail sales and forecast of household surface cleaners, at inflation-adjusted prices
- Total retail sales of household surface cleaners, by segment, 2018-23
- Total US retail sales of surface cleaners, by segment, 2021 and 2023
- Total retail sales of toilet, tub & tile cleaners, at inflation-adjusted prices, 2018-23
- Total retail sales of all-purpose cleaners, at inflation-adjusted prices, 2018-23
- Total retail sales of specialized cleaners, at inflation-adjusted prices, 2018-23
- Total retail sales of cleaning wipes/cloths, at inflation-adjusted prices, 2018-23
- Total retail sales of floor cleaners/wax removers, at inflation-adjusted prices, 2018-23
- Total retail sales of furniture polish, at inflation-adjusted prices, 2018-23
- Total retail sales of household surface cleaners, by channel, 2018-23
- Total retail sales of household surface cleaners, by channel, 2021-23

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<u>Australia</u>	<u>+61 (0)2 8284 8100</u>
<u>China</u>	<u>+86 (21) 6386 6609</u>
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