Brands can support the shift towards sustainable behaviours with proven product efficacy. Innovative product formats that tap into convenience will stand out.
Brands can support the shift towards sustainable behaviours with proven product efficacy. Innovative product formats that tap into convenience will stand out.

Consumers have looked to save money due to their financial constraints. This has meant that some have adopted more sustainable laundry habits in an effort to save money.

**Shorter cycles and colder washes will become more commonplace** if performance matches expectations.
Report Content

Key issues covered in this Report

• Overview

EXECUTIVE SUMMARY

Opportunities for the laundry and fabric care market

• Product development and marketing to target split and mixed loads
• The potential of alternative product formats
• Prove product efficacy to encourage shorter and colder washes

Market dynamics and outlook

• The five year outlook for laundry and fabric care
• Market composition between detergents and ancillaries remains consistent
• 2023 expected to be a stronger year for fabric conditioners
• Persil strengthens position in laundry detergents
• Fairy goes from strength to strength in fabcons
• A mixed picture for big name brands in wash treatments

What consumers want and why

• Fabric damage from washes and sustainable fashion trends
• 25-34s are the most responsible for laundry tasks
  - Graph 1: responsibility for doing the laundry, 2022-23
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• Younger consumers are also using cold washes more frequently
  - Graph 2: attitudes towards laundry and fabric care, 2023
• Cold washers have noticed a drop in performance
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• Fabric conditioner launch activity peaks in 2022
  - Graph 4: new fabric care product launches, by sub-category, 2019-23
• Stain removal becomes of utmost concern
• General ethical and environmental claims are almost ubiquitous
  - Graph 5: leading claims on new fabric care product launches, 2021-23
• Brands push fragrance to differentiate
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Market size
- Graph 6: market size for laundry, fabric conditioners and fabric care products, 2019-23 (prepared October 2023)
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- Overall upwards momentum across laundry and fabric care
- Future market will slow compared to 2022 and 2023
- Opportunities to develop over the next five years

Market segmentation
- Market composition between detergents and ancillaries remains consistent
- Consumer confidence translates into higher priced products
- Laundry detergent value sales reach new heights
- A return to normality boosts specialist detergents
- Fabric care outperforms fabric conditioners in 2022
- 2023 expected to be a stronger year for fabric conditioners

Distribution channels
- Discounters get a boost
  - Graph 7: type of retailer typically used to buy household care, 2023
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Market share
- Persil strengthens position in laundry detergents
- Persil invests in sensitivity and performance
- Success for Surf and own-label
- Lenor and Fairy are big winners in fabric conditioners, Comfort struggles
- Fairy goes from strength to strength
- Wash treatments
- A mixed picture for big name brands
- Own-label alternatives for laundry cleansers

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- Greenwashing scrutiny will increase
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**WHAT CONSUMERS WANT AND WHY**

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  - Graph 13: responsibility for doing the laundry, 2022-23
- Online presence will appeal to younger consumers
- Gender disparities remain amongst laundry chores and purchases...
  - Graph 14: responsibility for performing laundry tasks, and buying laundry detergents and fabric care products, by gender, 2023
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  - Graph 15: laundry frequency, 2021-23
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- Parents bear the load
  - Graph 16: laundry frequency, by presence of children in the home, 2023
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  - Graph 17: types of laundry detergents used, 2022-23
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- Wash less with washless laundry care
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• Market definition
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