

THE NATURAL HOUSEHOLD CONSUMER – US – 2023

Inflation has created a difficult environment for eco-friendly products, but as supply chains scale up, cost parity with mainstream brands is on the horizon.



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This report looks at the following areas:

- Sales trends for eco-friendly homecare products
- Innovation and competitive dynamics
- Incidence of and change in eco-friendly homecare product use
- Retail channel preference
- Consumers' preferred product attributes and claims
- Consumers' cleaning goals relative to eco-friendly brand attributes
- Attitudes and behaviors related to eco-friendly homecare products



Inflation has created a difficult environment for eco-friendly products, but as supply chains scale up, cost parity with mainstream brands is on the horizon.

Overview

In the wake of the pandemic, the homecare industry's severe price hikes led to intense trade down behavior as consumers looked to compensate for escalating food, shelter and energy costs. This caused eco-friendly brands to lose sales relative to the category. Despite this, there is cause for optimism. Pandemic-driven shortages exposed millions of consumers to eco-friendly cleaners for the first time because they were often the only products left on the shelf.

This helped mainstream-dominant shoppers understand that these products can be just as good, and sometimes better than their mainstream rivals. The net effect has been to grow household penetration of eco-friendly products, even as sales declined. **Consumers in Mintel's "Committed Natural" segment grew from 45% in 2022 to 50% in 2023, suggesting that more shoppers are transitioning from light to heavy natural product users.**

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What's more, the gap separating mainstream and natural consumers is narrowing, especially as more shoppers look to natural products as a means of enhancing health and safety.

Over time, Mintel expects this gap to narrow around eco attributes also. This will be driven by a worsening climate crisis and the global migration of regulations that provide incentives for bio-based cleaners, the reduction of plastic waste and obtaining carbon/climate neutral status.

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THE MARKET

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This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by Kantar Profiles ([See Research Methodology for more information](#)).

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