

TOILET AND HARD SURFACE CARE – UK – 2024

There are signs that consumers are focusing more on quality rather than simply on price, but own-label will remain significant throughout 2024 and beyond.



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Toilet And Hard Surface Care – UK – 2024

This report looks at the following areas:

- The impact of the cost of living on toilet and hard surface care products
- Analysis of the size of the market and forecast for the next five years
- Market share of major players, competitive strategies and advertising initiatives
- Product trends and new product development in toilet and hard surface care
- Consumer usage of products, behaviours and attitudes towards the category
- The opportunities and threats facing brands in the toilet and hard surface category



There are signs that consumers are focusing more on quality rather than simply on price, but own-label will remain significant throughout 2024 and beyond.

Overview

The cost-of-living crisis has notably strained consumer budgets, impacting the cleaning products market. In response, 2022 saw a dip in sales as consumers **tightened their belts, reduced product repertoires and frequency of purchases**. However, the slight easing of financial fears in 2023 has seen a resurgence in sales, albeit not to mid-crisis levels, signifying a cautious yet positive shift towards **prioritising quality over sheer affordability**.

The ongoing success of own-label brands is a threat to big name brands, particularly as it is underlined by **more than half of people finding it hard to tell the difference between the two**. If consumers who have traded down during financial difficulties see little reason to return to brands, it may **shift the landscape permanently**.

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Despite a general trend towards cost-saving measures and a preference for multipurpose products, the frustrations that exist when cleaning can **largely be addressed by usage of more specialist products**, for example hard-to-remove stains or specific surface care. Brands that offer specific formats and functionality designed to make people's cleaning experience faster, more convenient and enjoyable will be successful – as evidenced by the impact Domestos's Power Foam Toilet and Bathroom Cleaner has had on the market in a short space of time.

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Report Content

EXECUTIVE SUMMARY

Opportunities for the toilet and hard surface cleaning market

- Early indicators of a specialist cleaner rejuvenation
- Partner hygiene claims with other product benefits
- Premium own-label products can bridge the gap

Market dynamics and outlook

- Market size & forecast
- Market predictions
- Consistent growth, but at a slower rate over the next five years
- Most cleaning segments benefit from growing value sales
- Surface cleaners and bleaches thrive, disinfectants struggle
- Domestos shakes up the bathroom cleaner segment
 - Graph 1: retail value sales of kitchen, bathroom and floor cleaning products, by brand, years ending January, 2023-24
- Shift from own-label to brands in multipurpose cleaners
 - Graph 2: retail value sales of multipurpose surface cleaning products, by brand, years ending January, 2023-24

What consumers want and why

- Innovate with toilet fresheners to explore category potential
- Mould removal products can help during the current cost-of-living crisis
- Use consumer attitudes to guide innovation
 - Graph 3: attitudes towards cleaning the home, 2023
- Cleaning routines can boost overall wellbeing
- Partner sustainability with other purchase drivers

Innovation and marketing

- The post-pandemic decline in bleach and disinfectant has continued
 - Graph 4: share of new surface care and toilet care launches, by sub-category, 2021-23
- Brands increase their share of innovation
 - Graph 5: share of new surface care and toilet care launches, by branded vs own-label, 2021-23

MARKET DYNAMICS

Market size

- 2023 sees a return to growth for toilet and hard surface care
 - Graph 6: value sales of the toilet and hard surface care category in £m, 2018-23

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- Spending on the category is growing, but is still considered

Market forecast

- Consistent growth, but at a slower rate over the next five years
- Expected growth now and later
- Relate product ranges directly towards common frustrations

Market segmentation

- Bleach is the only segment to increase its share in 2023
- Surface cleaning products account for more than half the market
- Toilet cleaning products shift to a focus on long-lasting freshness
- Bleach is a strong value and efficacy option
- Disinfectants experience a decline in value sales

Market share

- Dettol is most impacted by slump in disinfectants
- Zoflora uses scent to lead the segment
- Shift from own-label to brands in multipurpose cleaners
- Flash's focus on speed is helping boost sales
- Own-label outperforms most brands in kitchen, bathroom, shower and floor cleaners
- Domestos shakes up the bathroom segment
- A reliance on big-name brands in other specialist cleaners
- Signs of trading up for specialist cleaners
- Bloo extends its lead in toilet cleaning products
- New product development seeks to boost fortunes

Macro-economic factors

- The UK economy moved into a shallow recession in the second half of 2023
 - Graph 7: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
 - Graph 8: CPI inflation rate, 2021-23
- Interest rates expected to fall in 2024, but borrowing pressures will remain
- Consumer sentiment: the recovery is continuing...
 - Graph 9: the financial wellbeing index, 2016-23
- ...and people feel more confident about their financial prospects
 - Graph 10: the financial confidence index, 2016-23
- Opportunity for own-label with consumer willingness to cut spend in the household category
 - Graph 11: activities consumers expect to do as a result of rising prices, 2023

Behavioural and environmental factors

- Greenwashing scrutiny will increase
- Consumers typically consider themselves adept at cleaning
 - Graph 12: rating of cleaning skills, 2023
- Providing guidance will influence greater engagement

WHAT CONSUMERS WANT AND WHY

Usage of hard surface cleaning products

- Multipurpose cleaners and bleach lead hard surface cleaning products
 - Graph 13: cleaning products used to clean hard surfaces (excluding toilets) in the last six months, 2022-23
- Disinfectant usage is on the decline
- The UK's mould crisis drives usage of products to combat it

Usage of toilet cleaning products

- Bleach tops toilet cleaning
 - Graph 14: cleaning products used to clean the toilet in the last six months, 2022-23
- Exploit the potential of toilet fresheners
- Harpic highlights the convenience of innovative freshener format

Cleaning frequency

- Consumer habits when cleaning toilets and hard surfaces
 - Graph 15: frequency of cleaning hard surfaces and toilets, 2023
- Children in the household drive cleaning frequency
- Market towards parents with product safety claims

Best-suited cleaning products for different areas of the home

- Consumer approach to different cleaning tasks
 - Graph 16: types of cleaner consumers think are best-suited for cleaning particular areas, 2023
- Brands can clarify the benefits of multi-purpose and specialist cleaners

Frustrations when cleaning the home

- Address common frustrations to stand out in the minds of consumers
- Address common frustrations to stand out in consumers' minds
 - Graph 17: frustrations when cleaning the home, 2023
- Make cleaning less of a chore
- Better product positioning may result in higher engagement

Attitudes towards cleaning the home

- Consumer attitudes can help guide innovation strategies

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- Graph 18: attitudes towards cleaning the home, 2023
- Regular cleaning gives more than just hygiene benefits
- The impact of finances on consumer attitudes
- Incentivise sustainable practices
 - Graph 19: select attitudes towards cleaning the home, 2023
- The role of social media in toilet and hard surface care

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- The post-pandemic decline in bleach/disinfectant has continued
 - Graph 20: share of new surface care and toilet care launches, by subcategory, 2021-23
- Cleaners for new appliances and use cases
- Products for specific lifestages hold potential
- Help with cleaning devices
- Extension of ranges remain most common launch type
 - Graph 21: share of new surface care and toilet care launches, by launch type, 2021-23
- New packaging attempts to signpost value
- Wider experimentation with non-traditional scents
 - Graph 22: share of new surface care and toilet care launches, by fragrance component group, 2021-23
- Fragrances are vital to product success
- Fabulosa expands focus on scent
- Major players are most active, but M&S and HG join them in 2023
 - Graph 23: share of new surface care and toilet care launches, by top ultimate company, 2022-23
- SC Johnson launches mainly target toilet cleaning occasions
- Brands increase their share of innovation
 - Graph 24: share of new surface care and toilet care launches, by branded vs own-label, 2021-23
- Own label seeks to cater for consumers beyond price
- Vast majority of cleaning products highlight environmental issues
 - Graph 25: share of new surface and toilet care launches, by leading claims, 2021-23
- Hygiene need is not as dire, but is still influential
- Refill brands enter the mainstream
- Vinegar to boost positive ingredient associations
- Viral launches through pop culture references

Advertising and marketing activity

- Toilet care adspend shifts to toilet cleaners and fresheners

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- Graph 26: share of recorded above-the-line, online display and direct to mail advertising expenditure on toilet cleaning and care products, by segment, 2021-23
- Graph 27: recorded above-the-line, online display and direct to mail advertising expenditure on toilet cleaning and care products, by segment, 2021-23
- Unilever accounts for nearly half of the toilet care adspend
 - Graph 28: recorded above-the-line, online display and direct to mail advertising expenditure on toilet cleaning and care products, by advertiser, 2023
- Boost toilet fresheners with strong media presence
- Henkel builds on the wellness trend
- Domestos' adventurous "Loo with a View" campaign
- Use visual advertising to feature efficacy and scents
- Surface cleaners return to the advertising arena
 - Graph 29: share of recorded above-the-line, online display and direct to mail advertising expenditure on hard surface cleaning products, by segment, 2021-23
 - Graph 30: recorded above-the-line, online display and direct to mail advertising expenditure on hard surface cleaning products, by segment, 2021-23
- Procter and Gamble's big push towards convenient cleaning
 - Graph 31: share of recorded above-the-line, online display and direct to mail advertising expenditure on hard surface care products, by advertiser, 2023
- Cif and Flash hard surface cleaners heavily promoted through television
- Smol focusses on digital campaigns
- Homethings registers its presence on television

APPENDIX

Market forecast data and methodology

- Market size and forecast: at constant and current prices
- Market forecast: prediction intervals
- Forecast methodology

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage

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