



World Market for Home Care

March 2024

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Home care in the wider context of consumer goods and service industries

Moderate value growth in 2023 due to average unit price increase

Diverse performance across regions, with air care dominating growth in Asia Pacific

Emerging and developing countries main contributors to forecast growth

Laundry care set to remain growth driver over the forecast period

Markets in Asia Pacific with highest absolute period growth forecast

In Indonesia growth potential derives from high-paced category innovation

There are different possible macro scenarios depending on economic developments

LEADING COMPANIES AND BRANDS

Local brands dominate in emerging and developing countries

Unilever with the strongest performance out of the top 10 home care companies

Quimica Amparo: An example of a strong local player in Latin America

TOP FIVE TRENDS SHAPING THE INDUSTRY

Examining five trends shaping home care

Private label in home care is growing across all regions globally

Inflation and product price increases are driving consumers towards private label

Leading grocery retailer Coop launches environmentally-friendly private label line

Marks & Spencer expands refill stations for own label home care products in the UK

Presence across different price tiers helps brands to retain consumers

Industry leaders combat downtrading by boosting category innovation

P&G's growth strategy counts on innovation and product superiority

P&G invents new laundry additive category to encourage consumer spending

Unilever consolidates portfolio and increases investment in innovation

Unilever is first leading player in the market to add laundry sheets to its portfolio

Plastic packaging and recycling remains under elevated scrutiny

The cost implications of environmental inaction are strengthening

Managing costs is a big priority as monetary pressures persist driving packaging innovation

Packaging remains in focus for sustainable product development

Reuse offers plastic savings many magnitudes better than anything else

Refill and reuse solutions are being developed by leading home care players

Home care players experiment with paper-based packaging design

Detergent: Detersolín Protect in Spain highlights the "reduced plastic" benefit

Channel sales and growth in 2023: Direct-to-Consumer (D2C) channel gains are widespread

Clean Cult expands from DTC to Walmart stores in the US

A telling statement from the CEO of a strong D2C brand on D2C's role in its growth journey

Rise of D2C brands is partly about post-COVID scale enabling successful entry in retail shops

Against a background of wellness, "home as sanctuary" evolves

Self-care solutions are already emerging beyond the basics, focusing on mood enhancement

Range structures for how self-care and wellness are manifesting in home care

Mood enhancing emerges as a consistent self-care experiential claim in premium positioning

Experimental aspects of fragrance in home care are being more widely understood

Febreze Mood Selection with wellness proposition around "setting the right mood" at home

Beauty care brand Diptyque expands into home care with line of cleaning products

We are going to more extreme efforts to prevent threats being invited into our sanctuary

Probiotics emerge as a way of marrying "natural" with efficacy

TOP SIX TRENDS SHAPING THE INDUSTRY

Recent product launches in the context of microbial cleaning
Faultless Brands: A new market entrant in the probiotic cleaning category
Inflation has put cold water washing back on the agenda as a strategic topic
The need to break our addiction to trying to achieve hygiene through heat
Ambitious emissions targets have set the stage for cold wash in detergency
There remains a lack of knowledge and perceived deficiencies around cold wash
Chemistry needs to improve to prevent overcompensating behaviour in cold washing
P&G and Novozymes develop bio-based cold wash enzyme for European market
Haier WashPass launches smart laundry subscription with superior cold wash performance
Cold wash will proliferate with advanced mixing-in-the-moment
Superior performance from ingredient disaggregation is eroding industry silos
Combining soft water technology with mixing-in-the-moment will be groundbreaking
Cold wash will enable sustainability, democratise access to auto-washing and grow profits

MARKET SNAPSHOTS

Global snapshot of laundry care
Global snapshot of surface care
Global snapshot of dishwashing
Global snapshot of air care
Global snapshot of home insecticides
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Regional snapshot: Asia Pacific
Regional snapshot: North America
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Regional snapshot: Western Europe
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Regional snapshot: Australasia

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