

Home Laundry Products - US - September 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"In 2019, home laundry products are estimated to increase. While the market enjoys strong penetration – as nearly all consumers purchase laundry products – industry players are challenged to generate meaningful sales growth due to shoppers' habitual approach to the category. Mintel projects continued modest growth of laundry products from 2019-24."

- Rebecca Cullen, Household Care Analyst

This report looks at the following areas:

- Substantial growth remains elusive for laundry products market
- Laundry shoppers are driven by brand and price
- Laundry detergent sales static compared to dynamic laundry care segment

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Home Laundry Products - US - September 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Overview

Figure 1: Repertoire of product usage, July 2019

The issues

Substantial growth remains elusive for laundry products market

Figure 2: Total US sales and fan chart forecast of home laundry products, at current prices, 2014-24

Laundry shoppers are driven by brand and price

Figure 3: Shopping for laundry products, July 2019

Laundry detergent sales static compared to dynamic laundry care segment

Figure 4: Total US retail sales of home laundry products, by segment, at current prices, 2017 and 2019

The opportunities

Move beyond stain removal and scent to add value

Figure 5: TURF Analysis – Laundry detergent important attributes, July 2019

Pods continue to offer growth opportunity in detergent

Figure 6: Multi-outlet sales of laundry detergent products, by format, rolling 52 weeks 2018 and 2019

Demand for safer products sets stage for natural and clean ingredients

Figure 7: Attitudes toward ingredients and natural products, by age, July 2019

What it means

The Market – What You Need to Know

Steady market with “more of the same” forecasted

Laundry care segment exhibits growth

Home laundry products support innovation in washers/dryers

Families important to market

Gender gap still exists in laundry responsibility

Market Size and Forecast

Routine, budget-minded approach to category limits growth

Figure 8: Total US sales and fan chart forecast of home laundry products, at current prices, 2014-24

Figure 9: Total US retail sales and forecast of home laundry products, at current prices, 2014-24

Market Breakdown

Smaller segments outperform laundry detergent

Figure 10: Share of US retail sales of home laundry products, by segment, at current prices, 2019

Figure 11: Total US retail sales of home laundry products, by segment, at current prices, 2017 and 2019

Other retailers dominate home laundry products

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Home Laundry Products - US - September 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Total US retail sales of home laundry products, by channel, at current prices, 2017 and 2019

Market Perspective

Home laundry products must support desired attributes in appliances

Market Factors

Families represent shrinking share of US households

Figure 13: Households by presence of related children, 2008-18

The gender gap still evident in laundry responsibility

Figure 14: Laundry responsibility, by gender, July 2019

Cost-conscious mentality challenges premium spending

Figure 15: Consumer Sentiment Index, January 2007-Aug 2019

Key Players – What You Need to Know

P&G maintains market lead

Success in pod format

Bleach yields to competitive pressures

Enhancing green identity

Company and Brand Sales of Laundry Products

P&G accounts for majority of market sales

Figure 16: Gain tropical sunrise in-wash scent booster

Henkel struggles while Church & Dwight yields solid growth

Figure 17: Arm & Hammer 3-in-1 concentrated laundry detergent power paks

Sales of home laundry products by company

Figure 18: MULO sales of home laundry products, by leading companies, rolling 52 weeks 2018 and 2019

What's Working?

Format: liquid dominates, but pods fuel growth

Figure 19: Laundry product usage, by format, July 2019

Figure 20: Tide+ Ultra Concentrated Detergent with Ultra Oxi

Figure 21: MULO sales of laundry detergent products, by format, rolling 52 weeks 2018 and 2019

Figure 22: Share of laundry product launches, by format, 2016-19

Figure 23: Multi-outlet sales of Tide laundry detergent products, by format, rolling 52 weeks 2018 and 2019

Figure 24: Tide+ Pods Ultra Oxi

Figure 25: Tide Simply Clean & Fresh Pods

Scent boosters drive sales of laundry care

Figure 26: Multi-outlet sales of laundry care products, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 27: Multi-outlet sales of select laundry care products, by brand, rolling 52 weeks 2018 and 2019

Figure 28: Downy Sport Odor Defense

What's Struggling?

Bleach sales dwindle in face of competition

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Home Laundry Products - US - September 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 29: Multi-outlet sales of bleach, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 30: Lysol Crisp Linen Scented Laundry Sanitizer

What's Next?

Powder detergents due for a comeback

Brands outsource services

Figure 31: Tide cleaners, Chicago, September 2019

Authentic environmentalism

Figure 32: Share of laundry product launches, by top 10 claim categories, 2016-19

Figure 33: Multi-outlet sales of Seventh Generation and Method, by segment, rolling 52 weeks 2018 and 2019

Figure 34: Seventh Generation Free & Clear Laundry Detergent

Figure 35: Method laundry products

Formulations, packaging can build green identity

Figure 36: Select attitudes toward laundry products, July 2019

Figure 37: Earth Friendly Products Ecos Lemongrass Scented 4in1 Plant-Powered Concentrated Laundry Detergent with Built-In Fabric Softener

The Consumer – What You Need to Know

Women carry the load in laundry responsibility

Liquid is the go-to format for laundry detergent

Tout attributes beyond stain removal and scent

Scent is an essential laundry care attribute

Brand and price drive shopping habits

Preventive steps to preserve clothing is part of the laundry routine

Concentrated products can hit the trifecta: natural, eco-friendly, effective

Laundry Responsibility

Gender gap remains when it comes to laundry responsibility

Figure 38: Laundry responsibility, by gender and age, July 2019

Moms take over laundry duties

Figure 39: Laundry responsibility, by parental status and gender, July 2019

Multicultural households unlikely to share laundry chores

Figure 40: Laundry responsibility, by race and Hispanic origin, July 2019

Laundry Product Usage

Liquid detergent still preferred by majority of laundry doers

Figure 41: Laundry product usage, July 2019

Younger laundry doers seek budget and eco-friendly products

Figure 42: Select laundry product usage, by age, July 2019

Parents have strong engagement across product lines

Figure 43: Laundry product usage, by parental status, July 2019

Laundry Detergent Important Attributes

Stain fighting remains top priority

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Home Laundry Products - US - September 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 44: Laundry detergent important attributes, July 2019

Expand brand reach by incorporating function and safety

Figure 45: TURF Analysis – Laundry detergent important attributes, July 2019

Methodology

Scent is important to parents, but ingredients matter

Figure 46: Select laundry detergent important attributes, by parental status and age of children in household, July 2019

Laundry Care Important Attributes

Sensorial benefits stand out for scent boosters

Detergent boosters/sanitizers must disinfect and remove stains

Figure 47: Laundry care important attributes, July 2019

Scent is important in laundry care products

Scent boosters: long lasting scent adds value

Figure 48: TURF Analysis – Laundry care important attributes – Scent boosters, July 2019

Fabric softeners: wrinkle release and scent are a priority

Figure 49: TURF Analysis – Laundry care important attributes – Fabric softeners, July 2019

Detergent boosters/sanitizers: shoppers want function and scent

Figure 50: TURF Analysis – Laundry care product's important attributes – Detergent boosters/sanitizers, July 2019

Methodology

Women focus on scent, men want odor removal

Figure 51: Scent booster and fabric softener important attributes – Scent/fragrance, odor removal, by gender, July 2019

Shopping for Laundry Products

Routine drives laundry purchases

Figure 52: Shopping for laundry products, July 2019

Older adults more brand loyal, younger adults budget conscious

Figure 53: Select shopping behaviors for laundry products, by age, July 2019

Parents are more engaged shoppers

Figure 54: Select shopping behaviors for laundry products, by parental status, July 2019

Laundry Routines

Pre-laundry tasks fairly common

Figure 55: Laundry routines, July 2019

Younger adults have less established laundry routines

Figure 56: Select laundry routines, by age, July 2019

Attitudes toward Laundry Products

The case for concentrated products is strong

Figure 57: Attitudes toward laundry products, July 2019

Older adults receptive to concentrated products

Figure 58: Select attitudes toward laundry products, by age, July 2019

Appendix – Data Sources and Abbreviations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Home Laundry Products - US - September 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 59: Total US sales and forecast of home laundry products, at inflation-adjusted prices, 2014-24

Figure 60: Total US retail sales of home laundry products, by segment, at current prices, 2014-24

Appendix – Key Players

Figure 61: Multi-outlet sales of laundry detergent, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 62: Multi-outlet sales of liquid fabric softener, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 63: Multi-outlet sales of fabric softener sheets, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 64: Multi-outlet sales of laundry care products, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 65: Multi-outlet sales of bleach, by leading companies and brands, rolling 52 weeks 2018 and 2019

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com