

## The Natural Household Consumer - US - June 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.



"The household consumer's motivation for buying natural products is becoming more complex. Traditional product claims around health, sustainability and social justice still drive natural purchases."

**- Jamie Rosenberg, Senior Global Analyst,  
Household & Personal Care**

This report looks at the following areas:

- Consolidation is expanding natural product distribution
- Waste and water issues are concerning to most consumers
- Perception of high cost and poor performance slow natural product adoption

If we were to condense the diverse insights contained in this Report into a single message, it would be that brands should recognize that not every consumer's incentive for buying eco-friendly household products is the same. Even among people who are defined as committed natural household product shoppers, there is diversity in their motivations.

Many consumers, for instance, say that their family's health and safety is paramount. Parents of young children are especially focused on how household chemicals impact the people living within their four walls. Other consumers are more focused on environmental health and how their consumerism affects wildlife, the water supply, and human populations in far-flung parts of the world.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# The Natural Household Consumer - US - June 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

Natural consumers are evolving, complex and sometimes contradictory

The issues

Consolidation is expanding natural product distribution

Waste and water issues are concerning to most consumers

Figure 1: Limit plastic pollution – any importance (net), by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Figure 2: Use as little water as possible – any importance (net), by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Perception of high cost and poor performance slow natural product adoption

Figure 3: Attitudes toward product affordability, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

The opportunities

Make green synonymous with convenience

Figure 4: Interest in probiotic surface cleaners, by age, July 2018

Heavy sampling will convert skeptical mainstream consumers

Figure 5: Frequency of natural household product usage compared to a year ago, by age, April 2019

Figure 6: Changes in natural household usage, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

What it means

### Market Trends and Future of Green Consumerism

Water scarcity is becoming a US issue

Figure 7: Use as little water as possible – any importance (net), by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Plastic bans could come to the US

Figure 8: Importance of plastic pollution in household care – any important (net), April 2019

A refill revolution?

Figure 9: Interest in home delivery refills, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Natural is giving way to clean

### Key Players – What You Need to Know

Better distribution as green brands are being acquired by mainstream brands

Affordability is a new platform for natural innovation

New innovations mimic nature's germ-control methods

### What's Happening?

Better distribution as green brands are being acquired by mainstream brands

Affordability is a new platform for natural innovation

Figure 10: Attitudes toward affordability, April 2019

New innovations mimic nature's germ-control methods

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# The Natural Household Consumer - US - June 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 11: Interest in probiotic surface cleaners, by age, July 2018

## The Consumer – What You Need to Know

- Stark differences in green/mainstream priorities but also common ground
- Natural consumers show greater channel diversity for mainstream products
- Consumers who try natural products come back for more
- Competitive pricing is driving adoption among lower-income consumers
- Consumers are somewhat aligned on the ideal natural product
- Consumers are especially aligned on germ management

## Household Product Purchases

Stark differences in green/mainstream priorities but also common ground

Figure 12: Household Product purchase, by brand type, April 2019

Young consumers most likely to try natural products

Figure 13: Household product purchase by brand type – fabric care, by age, April 2019

## Retailers Shopped

Retail channels differ for natural and mainstream consumers

Figure 14: Natural/eco-friendly purchase locations, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Natural consumers show greater channel diversity for mainstream products

Figure 15: Mainstream purchase locations, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

## Usage Frequency of Natural Household Products

Early-middle-aged consumers are most rapidly increasing natural product usage

Figure 16: Usage frequency of natural household products compared to a year ago, by age, April 2019

Consumers who try natural products come back for more

Figure 17: Changes in natural household usage, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Parents of young children are going natural the fastest

Figure 18: Usage frequency of natural household products compared to a year ago, by age of child, April 2019

## Reasons for Using Natural Household Products More Often

Safety and sustainability are driving increased usage

Figure 19: Reasons for using more natural household products than a year ago, April 2019

Parents prioritize safety over all other benefits

Figure 20: Reasons for using more natural household products than a year ago, by age of child, April 2019

Competitive pricing is driving adoption among lower-income consumers

Figure 21: Reasons for using more natural household products than a year ago, by income, April 2019

## Natural Household Product Attributes and Attitudes

Consumers are somewhat aligned on the ideal natural product

Figure 22: Ideal eco-friendly product, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Cost and perceived efficacy hinder broader adoption

The definition of natural is still a sticking point

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

# The Natural Household Consumer - US - June 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.

Recycling and plastic waste continue to divide the natural and mainstream consumer

Figure 23: Eco-friendly attitudes, by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

## Household Cleaning Goals

Most consumers are motivated by saving time, money and reducing germs

Figure 24: Goals in household cleaning the house – any important (net), April 2019

Saving water is a lower priority, but that could change

Figure 25: Use as little water as possible – any importance (net), by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Importance of sustainable sourcing has the largest mainstream/natural gap

Figure 26: Use products from sustainable sources – any importance (net), by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

Consumers are especially aligned on germ management

Figure 27: Create a germ-free environment – any importance (net), by repertoire of brand type purchased: (NET) Any natural product purchase, April 2019

## Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)