The Natural Household Consumer - US - 2022

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This report looks at the following areas:

- **Sales and market share of selected natural brands vs the broader market.**
- **The impact on COVID-19 on the natural household consumer.**
- **Key innovations and competitive strategies.**
- **Consumer usage of natural and mainstream brands by category.**
- **Sales channels for natural vs. mainstream products.**
- **Cleaning goals.**
- **Attitudes toward natural household products.**

Leading up to the pandemic, natural homecare brands dramatically outgrew the market. While home hygiene, wellness and sustainability all became more important during the pandemic, sales of natural brands declined sharply over the past year as historic inflation made consumers think twice before paying the premium that still distinguishes the natural segment. Despite this, there is cause for optimism. Even though value sales of natural products have declined, the percentage of consumers who use any natural homecare products actually grew. This suggests that increasing exposure will set the stage for natural sales growth once inflation abates. Eco-niche challenger brands will see a growing threat from the greening of mainstream brands. From an ingredient perspective, these two formally disparate sectors are becoming more similar. That means many eco-niche brands without a unique value proposition will struggle. Still, natural brands that can deliver higher order efficacy and convenience – not in spite of their natural status, but because of it – will find enthusiastic new consumers.

"As the pandemic began to transition to an endemic and the need to immediately kill germs in the home declined, many predicted a broader adoption of natural/eco-friendly cleaners. But due to historic inflation, consumers prioritized their wallets over their eco values and revenue for the country's largest natural brands declined."

– Jamie Rosenberg, Associate Director, Global Household and Personal Care

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

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