Sales of home laundry products continued a slow decline in 2015 as consumers took advantage of discounts and promotions and other ways to save money. Still, ample opportunities exist in the $12.4 billion category for marketers and retailers that offer consumers ways to simplify the laundry process and improve results.

This report looks at the following areas:

- Declining detergent sales weigh on home laundry category
- While liquid remains dominant, single-dose detergent overtakes powder
- Regular use of in-wash scent boosters increasing but still low
- Most fabric care products used only on an occasional basis

The home laundry products category experienced declining sales nearly every year between 2010 and 2015, dropping 3% over the five-year period in current dollars and 12% on an inflation-adjusted basis to $12.4 billion. Laundry detergent accounts for nearly two thirds of total home laundry product sales, but steady declines for detergent, driven by ongoing price competition at retail as well as the growth of single-dose detergents and the increasing prevalence of HE (high-efficiency) washers, have more than offset small gains in all other home laundry segments combined.
Home Laundry Products - US - August 2015

Report Price: £2466.89 | $3995.00 | €3133.71

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

The issues
Declining detergent sales weigh on home laundry category
   Figure 1: Total US sales and fan chart forecast of home laundry products, at current prices, 2010-20
While liquid remains dominant, single-dose detergent overtakes powder
   Figure 2: Regular use of laundry detergent forms, April 2015
Regular use of in-wash scent boosters increasing but still low
Most fabric care products used only on an occasional basis
   Figure 3: Regular and occasional use of fabric softener and fabric care products, April 2015

The opportunities
Detergent pod users value both effectiveness and convenience
   Figure 4: Attitudes toward single-dose detergent pods, by usage of home laundry products – Single-dose pod or pack laundry detergent, April 2015
Fragrance nearly as important as core fabric softener benefits
Functional benefits could help spur fabric softener growth
   Figure 5: Attitudes toward fabric softeners and scent boosters, by usage of home laundry products – Use regularly, April 2015
Opportunity for more personalized and customizable approach to laundry
   Figure 6: Attitudes toward detergent and other home laundry products, April 2015

What it means
Declining detergent sales weigh on home laundry category
Laundry detergent dominates category sales
Growth of in-wash scent boosters helps fabric care, hurts fabric softener
Bleach back on downward trend after boost from concentration

The Market – What You Need to Know

Declining detergent sales weigh on home laundry category
Laundry detergent dominates category sales
Growth of in-wash scent boosters helps fabric care, hurts fabric softener
Bleach back on downward trend after boost from concentration

Market Size and Forecast

Declining detergent sales weigh on home laundry category
   Figure 7: Total US sales and fan chart forecast of home laundry products, at current prices, 2010-20
   Figure 8: Total US retail sales and forecast of home laundry products, at current prices, 2010-20

Market Breakdown

Laundry detergent dominates category sales
   Figure 9: Segment share of home laundry products, 2015
Pressure on detergent sales continues, but pace of decline eases
Next round of compaction may not lead to a big bump in sales
Growth of in-wash scent boosters helps fabric care, hurts fabric softener

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

reports.mintel.com © 2015 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
Bleach back on downward trend after boost from concentration
Figure 10: Sales of home laundry products, by segment, 2010-15

Market Factors

Household income stabilizes but remains weak
Figure 11: Median household income, in inflation-adjusted dollars, 2003-13

Rising consumer confidence could help market
Figure 12: Thomson Reuters/University of Michigan Index of Consumer Sentiment, 2007-15

Households with kids decline as a percentage of all households
Figure 13: Households, by presence of children, 2003-13

Growing influence of Hispanic market
Figure 14: Households with own children, by race and Hispanic origin of householder, 2013
Figure 15: Population, by race and Hispanic origin, 2010-20

Market Perspective

Slow growth in broader household care market
Figure 16: Total US sales of select household care product categories (five-year growth rate), at current prices, 2009-14

Key Players – What You Need to Know

Pods and boosters lift P&G share
Church & Dwight gains with OxiClean line extension
Sun Products and Henkel suffer declines

Manufacturer Sales of Home Laundry Products

Pods and boosters lift P&G share
Church & Dwight gains with OxiClean line extension
Sun Products and Henkel suffer declines
Manufacturer sales of home laundry products
Figure 17: MULO sales of home laundry products, by leading companies, rolling 52 weeks 2014 and 2015

What’s Working?

Single-dose detergents continue to gain
Figure 18: MULO sales and share of leading unit dose detergent brands, rolling 52 weeks 2014 and 2015

In-wash scent boosters maintain momentum
Figure 19: Unstopables “Smell Like the Lifestyle You Deserve” TV Commercial, 2015
Figure 20: MULO sales of leading in-wash scent booster brands, 2011-15

Clorox adds value to bleach
Figure 21: MULO sales of leading in-wash scent booster brands, 2014 and 2015

Combination of value and innovation lifts Suavitel fabric softener

What’s Struggling?

Dryer sheets for men
Sales of value-priced detergents fall faster than overall 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 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

reports.mintel.com © 2015 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
What’s Next?

More concentrated laundry detergents

Functional fabric care additives

Figure 23: Downy Fresh Protect “Deodorant for Your Clothes” TV Commercial, 2015

The Consumer – What You Need to Know

Gender gap in laundry may be narrowing

While liquid remains dominant, single-dose detergent overtakes powder

Regular use of in-wash scent boosters increasing but still low

Most fabric care products used only on an occasional basis

The power to remove tough stains tops the priority list for detergents

Detergent pod users value both effectiveness and convenience

Opportunity for more personalized, customizable approach to fabric care

Fragrance nearly as important as core fabric softener benefits

Functional benefits could help to spur fabric softener growth

Responsibility for Doing Laundry and Shopping for Laundry Products

Women more likely to be responsible for laundry, but gap may be narrowing

Figure 24: Responsibility for doing laundry, by gender and age, April 2015

Figure 25: Tide “Baby” TV Commercial, 2015

In their words

Use of Home Laundry Products

Liquid remains dominant form of detergent

Single-dose detergents overtake powder as second most widely used form

Figure 26: Use of laundry detergent, April 2015

Regular use of in-wash scent boosters still low

Figure 27: Use of fabric softener, April 2015

Most fabric care products used only on an occasional basis

Figure 28: Use of fabric care products, April 2015

Laundry Detergent Attribute Importance

The power to remove tough stains tops the priority list

A variety of other claims offer opportunities

Figure 29: Laundry detergent attribute importance, April 2015

Attitudes toward Single-Dose Detergents

Detergent pod users value both effectiveness and convenience

Figure 30: Tide Pods “Science Teacher” TV Commercial, 2015

Safety concerns higher among current users

Figure 31: Attitudes toward single-dose detergent pods, by usage of home laundry products – Single-dose pod or pack laundry detergent, April 2015

BUY THIS REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

reports.mintel.com © 2015 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.
In their words

**Opportunity for more personalized and customizable approach to laundry**

Figure 32: Attitudes toward detergent and other home laundry products, by age, April 2015

---

**Fabric Softener Attribute Importance**

Fragrance nearly as important as core softener benefits

Opportunity to extend scent boosters into lower-income households

Figure 33: Fabric softener attribute importance, April 2015

---

**Opportunity for fragrance exploration, mixing, and matching**

Functional benefits could help to spur growth

Figure 34: Attitudes toward fabric softeners and scent boosters, by usage of home laundry products – Use regularly (ie in most loads), April 2015

---

**Appendix – Data Sources and Abbreviations**

Data sources

- Sales data
- Fan chart forecast
- Consumer survey data

Abbreviations and terms

---

**Appendix – Market**

Figure 35: Total US retail sales and forecast of home laundry products, at inflation-adjusted prices, 2010-20

Segment sales

Figure 36: Total US retail sales of home laundry products, by segment, at current prices, 2013 and 2015

Figure 37: Total US retail sales and forecast of laundry detergent, at current prices, 2010-20

Figure 38: Total US retail sales and forecast of liquid fabric softener, at current prices, 2010-20

Figure 39: Total US retail sales and forecast of fabric softener sheets, at current prices, 2010-20

Figure 40: Total US retail sales and forecast of fabric care products, at current prices, 2010-20

Figure 41: Total US retail sales and forecast of bleach, at current prices, 2010-20

Retail channel sales

Figure 42: Total US retail sales of home laundry products, by channel, at current prices, 2010-2015

Figure 43: Total US retail sales of home laundry products, by channel, at current prices, 2013 and 2015

---

**Appendix – Key Players**

Figure 44: MULO sales of laundry detergent, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 45: MULO sales of liquid fabric softener, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 46: MULO sales of fabric softener sheets, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 47: MULO sales of fabric care products, by leading companies and brands, rolling 52 weeks 2014 and 2015
Figure 48: MULO sales of bleach, by leading companies and brands, rolling 52 weeks 2014 and 2015

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