

Where Consumers Shop for Home Care

August 2024

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Scope Key findings

INDUSTRY SNAPSHOT

Industry developments: Home care Category performance Regional market performance Key consumer trends impacting the global home care industry

CHANNEL SHIFTS

Retail offline dominates, but e-commerce continues to attract consumers Digitisation enhances market penetration in home care Growing trend in online home care product purchases signals potential for further growth

STORE-BASED CHANNELS

Store-based snapshot in 2023 Small local grocers: A social pillar for home care in emerging markets Rabbit - a logistics, technology and financial platform for small local grocers in Mexico Pandemic effects and emerging market dynamics shape retail channel trends Pricing pressures drive consumers to value-orientated channels Low unit prices and middle-class cachet are a winning combination for warehouse clubs Private label and local brands win on affordable quality Private label rising to compete with leading brands and capture market share Private label penetration aligns with economic development Leading grocery retailer Coop launches environmentally-friendly private label line Marks & Spencer expands refill stations for own label home care products in the UK Growing share of private label on shelves threatens incumbents

NON-STORE CHANNELS

Non-store snapshot in 2023 Retail e-commerce by category Asia Pacific leading the way in e-commerce New digital commerce platforms are changing the online retail landscape #CleanTok enables Unilever to draw upon consumers captivated with cleaning Channel sales and growth in 2023: Direct-to-consumer (D2C) channel gains are widespread Clean Cult expands from D2C 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

FUTURE DEVELOPMENTS

There are different possible macro scenarios depending on economic developments Moderate growth forecast for global home care market Balancing online and in-store strategies in the omnichannel retail landscape Future consumption opportunities: The silver economy Future consumption opportunities: Furry family members

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