

Home Care in the US

February 2024

Table of Contents

Home Care in the US

EXECUTIVE SUMMARY

Home care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for home care?

MARKET INDICATORS

Table 1 - Households 2018-2023

MARKET DATA

Table 2 - Sales of Home Care by Category: Value 2018-2023

Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023

Table 4 - NBO Company Shares of Home Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Home Care by Category: % Value 2018-2023

Table 7 - Distribution of Home Care by Format: % Value 2018-2023

Table 8 - Distribution of Home Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Home Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air care experiences further decline due to post-pandemic stabilisation

Bath & Body Works retains lead in air care, while Newell loses share as it continues to struggle

Pourri's High Hopes candle offers innovative solution to cannabis odour control

PROSPECTS AND OPPORTUNITIES

Air care set to rebound by 2025, creating opportunities for private label

As stress surges, demand for wellness activities, particularly in air care, is set to rise

Air care preferences to shift towards natural ingredients

CATEGORY DATA

Table 11 - Sales of Air Care by Category: Value 2018-2023

Table 12 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 13 - Sales of Air Care by Fragrance: Value Ranking 2021-2023

Table 14 - NBO Company Shares of Air Care: % Value 2019-2023

Table 15 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 16 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 17 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

Bleach in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price hikes contribute to value growth, offsetting weak demand for bleach
Consumer preference for alternative cleaners contributes to volume declines
Design changes reduce packaging with more concentrated formulations

PROSPECTS AND OPPORTUNITIES

Further decline in demand over forecast period, as consumers opt for less harsh alternatives
Bleach retains key disinfecting function in household cleaning, preventing obsolescence
Occasion-based cleaning may contribute to lower sales over forecast period

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2018-2023
Table 19 - Sales of Bleach: % Value Growth 2018-2023
Table 20 - NBO Company Shares of Bleach: % Value 2019-2023
Table 21 - LBN Brand Shares of Bleach: % Value 2020-2023
Table 22 - Forecast Sales of Bleach: Value 2023-2028
Table 23 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining dishwasher use dampens dishwashing sales volumes in the US
The Procter & Gamble Co dominates with innovative spray hand dishwashing and Cascade Plus tablets
Prices remain elevated in 2023, while private label holds steady

PROSPECTS AND OPPORTUNITIES

Automatic tablets lead while liquid and powder formats face obsolescence
Sustainability is a key concern, but cleaning performance to remain a priority
The Procter & Gamble Co set to retain dominance in hand dishwashing with superior performance

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2018-2023
Table 26 - Sales of Dishwashing by Category: % Value Growth 2018-2023
Table 27 - NBO Company Shares of Dishwashing: % Value 2019-2023
Table 28 - LBN Brand Shares of Dishwashing: % Value 2020-2023
Table 29 - Forecast Sales of Dishwashing by Category: Value 2023-2028
Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

Home Insecticides in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price increases offset weaker volume sales for home insecticides in 2023
Zevco gains notable share with targeted and effective sprays and baits
Millennial demand for non-toxic products drives growth of natural insecticides

PROSPECTS AND OPPORTUNITIES

Home insecticides to remain a staple in the US over the forecast period
Pricing is expected to normalise as supply chain issues resolve

Upcoming smart tech integration in pest control presents opportunities for home insecticide players

CATEGORY DATA

Table 31 - Sales of Home Insecticides by Category: Value 2018-2023

Table 32 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 33 - Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023

Table 34 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 35 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 36 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 37 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value grows and volume declines amid economic uncertainty and high stress levels

Decline of fabric softeners among younger consumers as scrutiny over the product grows on social media

The Procter & Gamble Co retains its dominance of laundry care

PROSPECTS AND OPPORTUNITIES

Consumers' interest in sustainability will depend on affordability

Innovation in smart dispensing to aid liquid detergents over forecast period

E-commerce normalises as DTC companies partner with retailers

CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

Table 39 - Sales of Laundry Care by Category: Value 2018-2023

Table 40 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 41 - Sales of Laundry Aids by Category: Value 2018-2023

Table 42 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 43 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 44 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 45 - Sales of In-wash Spot and Stain Removers by Type: % Value Breakdown 2018-2023

Table 46 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 47 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 48 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 49 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 51 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 52 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 53 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers purchasing lower-quality furniture diminishes need for furniture polish

Hybrid working and casual wear contribute to decline in demand for shoe polish

Floor polish impacted by fall in renovation projects and weak housing market

PROSPECTS AND OPPORTUNITIES

Consumers to invest less in maintaining home and household items, driving further declines for polishes over forecast period
Renewed interest in hardwood flooring may be positive driver for floor polish
Shift to multi-purpose cleaners for all household needs may further impact demand for polishes

CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2018-2023
Table 55 - Sales of Polishes by Category: % Value Growth 2018-2023
Table 56 - NBO Company Shares of Polishes: % Value 2019-2023
Table 57 - LBN Brand Shares of Polishes: % Value 2020-2023
Table 58 - Forecast Sales of Polishes by Category: Value 2023-2028
Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rebound for impregnated wipes, driven by further price rises in 2023
The Clorox Co maintains leadership of impregnated wet wipes but private label regains share
Lysol's resilience amid evolving consumer priorities

PROSPECTS AND OPPORTUNITIES

Natural antimicrobial wipe developed by the USDA offers consumers a reusable and washable alternative to disposable options
Drain openers will continue to offer opportunities over the forecast period
The surge of multi-purpose cleaners in response to evolving consumer preferences

CATEGORY DATA

Table 60 - Sales of Surface Care by Category: Value 2018-2023
Table 61 - Sales of Surface Care by Category: % Value Growth 2018-2023
Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023
Table 63 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023
Table 64 - NBO Company Shares of Surface Care: % Value 2019-2023
Table 65 - LBN Brand Shares of Surface Care: % Value 2020-2023
Table 66 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023
Table 67 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023
Table 68 - Forecast Sales of Surface Care by Category: Value 2023-2028
Table 69 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet care's value growth balances a consumer shift in cleaning habits
Clorox remains leading brand, but private label retains strength

PROSPECTS AND OPPORTUNITIES

Slow but stable growth as toilet care competes with other products
Advanced technologies in toilets to impact long-term outlook for toilet care

CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2018-2023
Table 71 - Sales of Toilet Care by Category: % Value Growth 2018-2023
Table 72 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 73 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 74 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 75 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/home-care-in-the-us/report.