



Euromonitor
International

Premiumisation Opportunities in Home Care Through Wellness and Self-Care

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INTRODUCTION

Key findings

We have yet to see the full extent of how priorities post-COVID are reset, but our disquiet continues

Wellness is an attractive growth driver defining new value options across home care

A snapshot of the map and the territory of Euromonitor's need states

This report builds upon previous work covering how this theme manifests in home products

THE SCIENCE OF MOOD: HOME CARE AND ITS ROLE IN WELLNESS

Range structures for how self-care and wellness are manifesting in home care

Wellness ideation gains from a basic knowledge of brain chemistry and the endocrine system

Of the 50+ identified hormones in our bodies, there are six most closely driving "mood"

There is a dark side to this, with a hormone that creates stress (for good reasons, but still...)

Parallel sectors have invested in neuroscientific testing of fragrance profiles to build claims

As an antidote to stress, mood boosting emerges as the top of range wellness solution

Mood boosting through functional fragrance is spilling over into home care

Functional fragrance is being more widely explored for its positive impact on mood

Wellness leaders are seeking incremental value by expanding into home care

Sleepy's Scented pillow inserts claim to boost happy hormones and aid sleep

Procter & Gamble introduces mood boosting claims to its leading air freshening brand

There are lessons to deploy from our advancing knowledge in the science of mood

EVOLVING CONSUMER NEED STATES: A RISING TIDE OF CHEMOPHOBIA

Chemical-free and natural claims are growing

Consumer sensitivity to artificial ingredients increasingly dictates product choice

Chemicals in home care products get linked to adverse health risks and awareness is growing

Ingredient exclusions are picking up pace as the topic is pushed into the public debate

Ingredients are an issue; but "toxin" release is game changing if visible to users in real time

Home care ingredients in focus for regulatory action and consumer boycott (1)

Home care ingredients in focus for regulatory action and consumer boycott (2)

AirWick launches its first aerosol-free electric air freshener in the mass market

The EU chemicals strategy will increase pressure on companies to reformulate

"Non-toxic" is an entry requirement for brands to earn their right to play in wellness

BIOLOGY IS REPLACING CHEMISTRY ACROSS HOME CARE MISSIONS

Euromonitor's Global Consumer Trends give insight into health as a consumer priority

Home care is migrating from artificial into bio-based solutions as a strategic priority

Balancing naturals with performance attributes is a winning formula

Microbial cleaning provides answers to the age-old efficacy versus naturals conundrum

Non-chemical home hygiene solutions are also being developed away from FMCG

Appeal of premium attracts new launches and new players entering home care

Unilever and Evonik partner on a 100% plant-based biosurfactant for premium dishwashing

Faultless Brands: A new market entrant in the probiotic cleaning category

Home care is reinventing itself finding inspiration in biology

CONCLUSION

This affects all regions, but not equally; this is a practical snapshot of the local trend strength

Moodo : A smart essential oil diffuser offers advanced scent personalisation

Activations and low hanging fruit for product positioning and claims

Evolution of wellness in home care

Opportunities for growth - the five step journey to exploiting wellness growth prospects

Questions we are asking

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/premiumisation-opportunities-in-home-care-through-wellness-and-self-care/report.