

MINTEL

GLOBAL

HOUSEHOLD CARE TRENDS



2023



What household care consumers want and why—now, next and in the future



Editor's note

As the experts in what consumers want and why, Mintel is the trusted market intelligence partner to identify the upcoming trends in consumer behaviour, product innovation and marketing tactics that will impact the future of your business. Mintel was founded by entrepreneurs with a passion for data, and we've been getting it right for over half a century—from consumer research and market analysis to machine learning, artificial intelligence and advanced analytics.

The 2023 Global Household Care Trends are the result of workshops comprised of Mintel's team of household and personal care analysts around the world. Our analysts' predictions are supported by consumer data from 36 global markets, product launches from Mintel Global New Products Database (GNPD) and evidence from Mintel's suite of data science and analytics tools.

The following is a preview of two trends that Mintel analysts believe will impact consumer demands in the household industry in 2023, over the next few years, as well as 5+ years into the future. The full and in-depth insight and analysis of the trends are available exclusively to those who subscribe to Mintel's premium insights—who should speak with their Account Manager about setting up a meeting to discuss the implications of these trends for their business. All other Mintel clients should speak to their Account Managers about upgrading their subscription to view the full research and recommendations. If you're not a Mintel client, **visit [mintel.com](https://www.mintel.com) to get in touch**. We look forward to hearing from you.



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01

Home Economics

As the need to kill germs gives way to the need to save money, consumers will look to reassess what value means to them.

Consumers and manufacturers are both experiencing tough economic circumstances, prompting new behaviours, attitudes and production methods. The methods used to save money now mirror those of more sustainable behaviours in the future, creating the potential for a seismic shift within the industry, and encouraging a recalibration of the definition of value.

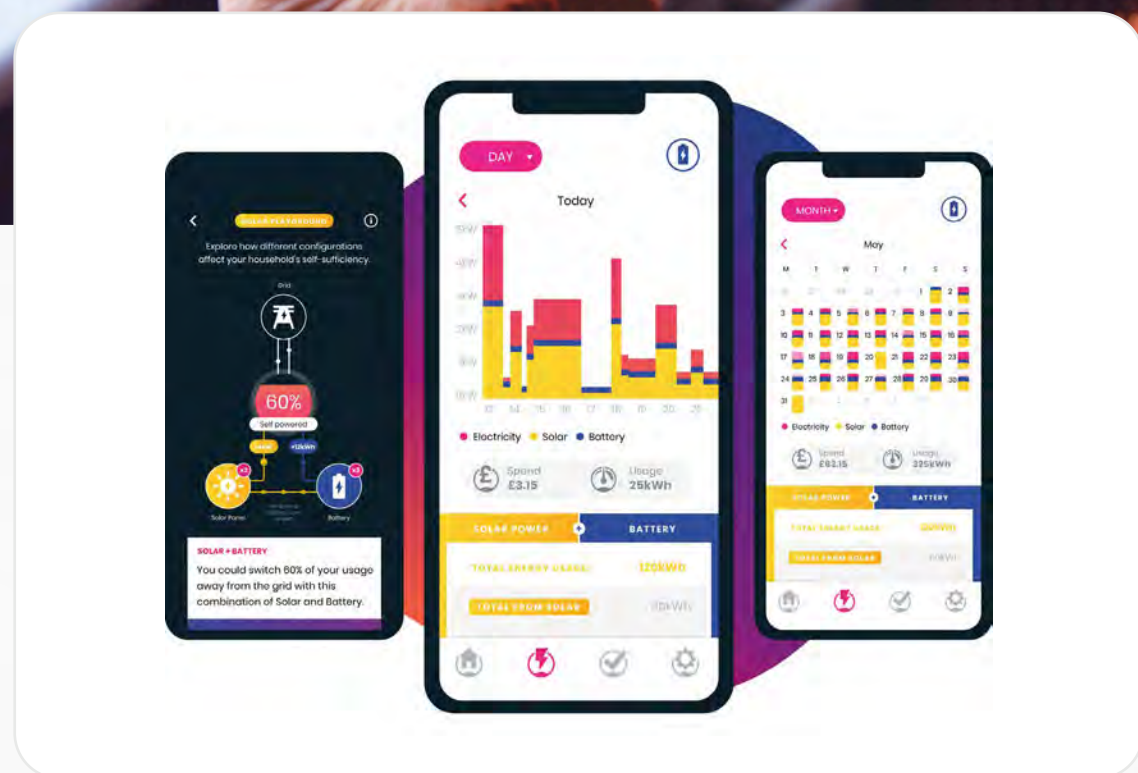
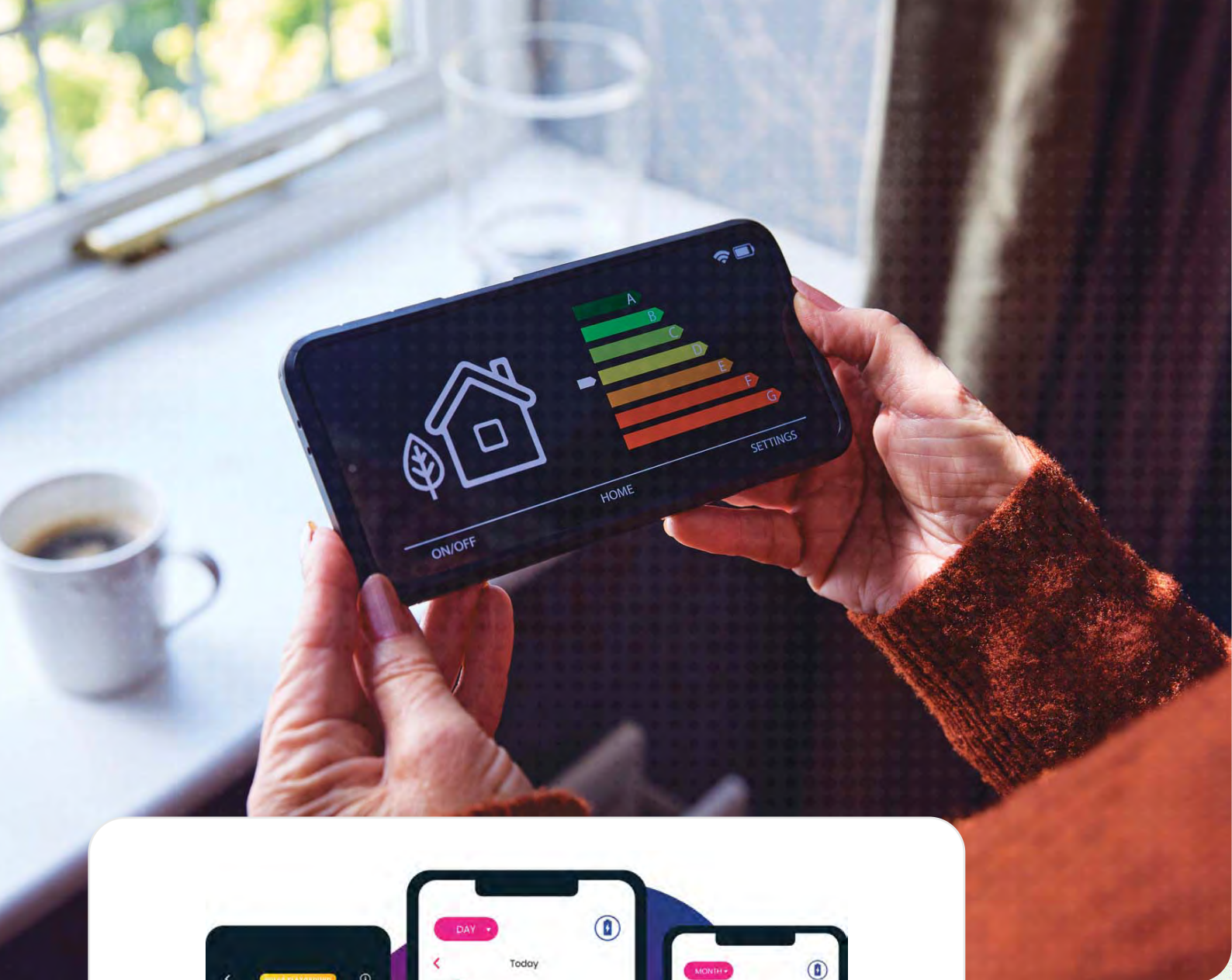


What's happening now

Consumers are squeezing budgets and skimping on cleaning

Consumers are beginning to trade down for products that they consider a better value. Homecare is still an important aspect of their daily lives, but now CPG products are competing more directly with food, housing and energy costs. Consumers will skimp on cleaning products before going without these other essential products and services, putting pressure on brands to reiterate the value they can offer.

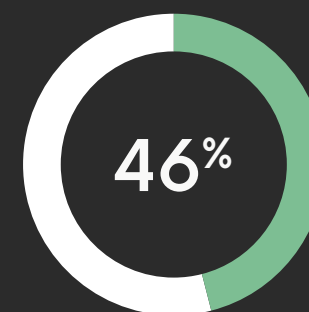
Already we are seeing consumers respond to their squeezed budgets when carrying out homecare chores. Many of these behaviours for cost-saving mirror those that also benefit the planet. As they become more common, consumers will realise these changes can be made for the longer term, not just when they are squeezed financially. This will create added pressure for brands to consider how they can reduce costs to maintain margins over the longer term.



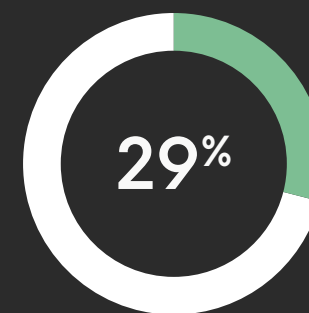
Tools like **Loop**—a ‘smarter meter’ app in the UK—are helping people to measure their home energy consumption in order to save money.

Source: loop.homes

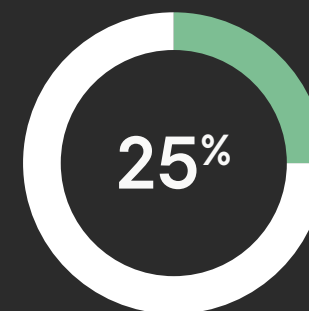
Thinking carefully about purchases



of Canadians looked more carefully at the price of household care products in the six months to August 2022.



of Brazilians bought bigger pack sizes of household care products than they normally do in the six months to August 2022.



of UK laundry product buyers/users did the laundry less frequently to save money in the six months to July 2022.

Base: 1,000 Canadian internet users aged 18+; 1,000 Brazilian internet users aged 16+; 1,522 UK internet users aged 16+ who are responsible for doing the laundry and buying laundry products in their household
Source: Mintel Global Consumer, Beauty, Personal Care & Household, September 2022; Mintel Reports UK, Laundry Detergents, Fabric Conditioners and Fabric Care, 2022

What's next

While Mintel predicted that the end of the pandemic would drive a preference for homecare products focused on personal and planetary wellness, the need to make ends meet amid historic inflation has overshadowed wellness goals. Price will continue to represent a bigger part of the value equation, particularly for low- and middle-income homecare consumers, for the next two years.

Yet even as consumers adopt an economising mindset, there is an opportunity to drive value with higher-order performance. Unilever is innovating at the intersection of cost, sustainability and performance, as its new Skip 3-in-1 laundry capsules improve performance

both at temperatures below 20 Celsius (68 Fahrenheit) and shorter cycles. According to Unilever, this reduces energy costs by 60%; given today's escalating energy costs, that adds up to big savings. Brands that can deliver savings and sustainability, while raising the performance bar, will be well-positioned for the next two years.

Eco-positioned brands still carry a price premium relative to the market. These brands have been especially battered as shoppers trade down to budget products. Yet despite a more expensive supply chain, a handful of eco brands are predicated on affordability. This is a strategy that will grow over the next two years.



Unilever's Skip 3-in-1 laundry capsules (UK) improve performance both at temperatures below 20 Celsius and with shorter cycles.

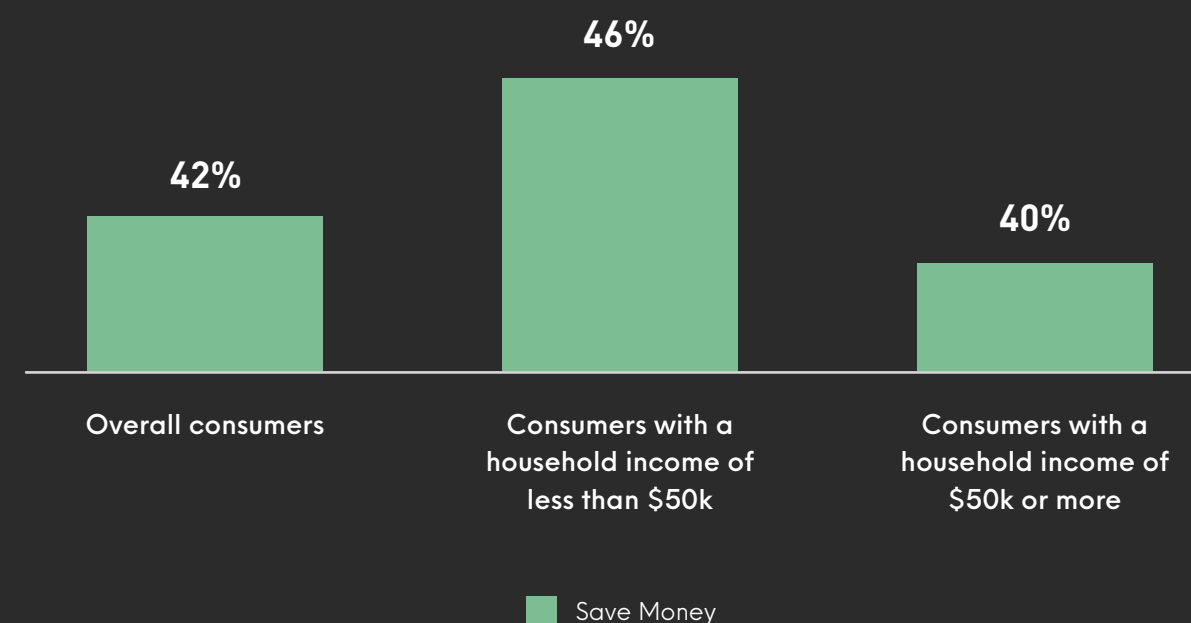
Source: Unilever



Public Good's Refillable Surface Cleaner in the US uses private label-style brand management to keep costs down.

Source: Public Goods

How important is saving money when you clean your home?



Base: 1,932 US internet users aged 18+ who have purchased household products in the 12 months to June 2022
Source: Mintel Reports US, The Natural Household Consumer, 2022



Future forecast

More brands will take the long view when innovating cost out of their product, such as exploring greater supply chain flexibility. Societies will continue to look inward for the materials and ingredients needed to meet the consumption needs of their population—tapping strategic oil reserves is among the highest-profile examples, and this strategy will happen more commonly within CPG also.

The shift toward natural homecare has already diversified the scope of ingredients used. In some cases, this will mean a return to heritage ingredients that are tied to a region. Soapnut, for instance, is a tree-based fruit native to Asia and South America that serves as a natural surfactant. As the cost of edible oils skyrockets, bio-based surfactants that are not tied to a food source have many advantages.

In addition, more brands will adopt artificial intelligence-based supply chain management software that can identify global ingredient alternatives to those seeing the highest inflation. While Mintel recommends staying local, it will also be critical to building global sourcing into a future-proof supply chain strategy.

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02

Homemade Joy

Facing difficult times in the world around them, consumers will look to homecare as an inexpensive way to destress and find joy.

The difficulties consumers are facing will encourage them to seek out simple, small and inexpensive ways of destressing and brief moments of happiness. Household care is perfectly placed to act on this, as it is accessible, ubiquitous, and relatively inexpensive. The recent shift we've seen towards homecare as a way to manage mental health can therefore be extended into actively encouraging joy and pleasure.



What's happening now

Consumers have certainly not had an easy time over the last few years. Political division, global pandemics and decades-high levels of inflation have all put stresses and strains on ordinary people. As a result, people are looking for ways they can derive enjoyment from everyday life to offset the worrying issues they are facing.

Household care is ideally placed to build on this. After experiencing greater engagement during the pandemic, homecare brands built on their existing reputation and trust. In addition, the relatively low cost and ubiquity of homecare products mean that almost everyone around the world has the potential to experience a mood boost from using them in their home. Brands can, therefore, benefit from inviting people to experience the positive emotions that homecare can provide. For those who inherently don't like doing chores, more effective and efficient products that elongate the time between necessary occasions can still contribute towards generating happiness in the home.

Linking homecare to happiness

75%

of Thais agree it is worth spending money on products that uplift their mood.

50%

of UK adults who clean their homes say they generally enjoy cleaning their homes.

44%

of Indian males would be encouraged to do household chores if they felt it would help them de-stress.

Base: 1,927 UK internet users aged 16+ who personally spend time cleaning their home in a typical week; 1,485 male Indian internet users aged 18+ who do household chores; 2,000 Thai internet users aged 18+
Sources: Mintel Reports UK, Cleaning for the Family, 2019; Mintel Reports India, Men and Household Responsibilities, 2022; Mintel Reports Thailand, Home Fragrance, 2022



In 2022, Diptyque launched a new range of homecare products under its La Droguerie label. The French brand typically focuses on high-end scents, bringing luxury and enjoyment into ordinary homecare chores.

Source: Diptyque



What's next

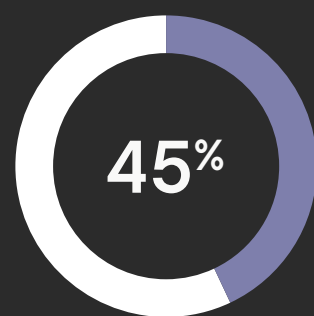
Homecare chores are a more social activity than they sound. The level of existing discussion about the topic on social media provides a basis for brands to encourage people to further create and share content on social channels to make them a topic of face-to-face and virtual conversations.

Trending social media homecare themes are often centred on sensorial aspects, such as colour explosions, unusual textures or sounds while they work. These drivers of social engagement can inspire new product launches to prompt purchases, and the more enjoyable experience that follows can then help build brand loyalty.

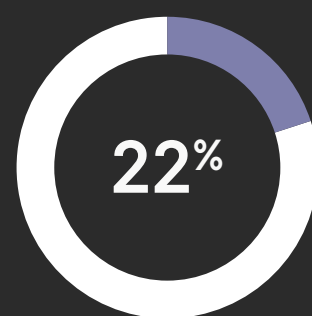
Pandemic-induced shortages encouraged consumers to become more hands-on with building their own products. Such homemade cleaning products offer unique value for money, but also give consumers more control over the components used in formulations, satisfying the demand for transparency and products with fewer ingredients.

While DIY trends can potentially represent a threat to brands, DIY-inspired ranges and online content designed to guide consumers can provide additional room for creativity and enjoyment, ultimately providing a boost to brand performance.

Engaging in homecare content and conversations



of Chinese adults talk about homecare (eg products, routines) with their friends/family.



of German cleaning product buyers/users watch online videos to learn cleaning 'hacks'.

Base: 1,860 German internet users aged 16+ who are responsible for cleaning surfaces (including toilets) and buying hard surface cleaning products (including toilet cleaners) for their home; 1,000 Chinese internet users aged 18+
Sources: Mintel Reports Germany, Toilet and Hard Surface Care, 2022; Mintel Global Consumer, Beauty, Personal Care and Household, September 2022



Fizzing action is typically used within toilet cleaning products but can be extended into other categories - like Sard Wonder's Power Fizz Stain Remover in Australia - to prove a visual indication of product efficacy and provide theatre.

Source: Mintel GNPD

More aircare launches - like WoodWick's Fireside Candle in the US - are utilising Pluswick wooden wicks, which crackle as they burn to add an aural element to the experience of enjoying a candle.

Source: Mintel GNPD



Future forecast

Consumers are looking for proof of claims, and the greater focus on mood and wellbeing will drive a need to provide evidence of product impact. Neuroscience has become a more common part of beauty and personal care launches in recent years, paving the way to empower consumers with this information in household care in the future.

Therapy Clean is one homecare brand using scientific backing for the positive mood impact that using its range of cleaners provides, but it is largely an untapped area of potential differentiation.

Brands can benefit from refocusing their efforts on home automation and technology to reduce the number of chores and the time it takes to do them. Doing so can ultimately enable consumers to pick and choose their level of involvement with homecare making it a less onerous and overwhelming task. This has the potential to take homecare chores into the new territory of activities done for the sake of health or even pure enjoyment.



Source: Therapy Clean

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