



CIRCANA INSPIRE

Home Care's Evolution Goes Beyond Clean

Trends and Opportunities
for a Changing Industry

January 2025



Executive Summary

How consumers think and act when it comes to caring for their homes and living spaces has changed significantly in recent years. With the pandemic (mostly) behind us, Circana takes a fresh look at how consumers approach home cleaning, including examining routines, how and where they shop, and the products they use, and **summarizes changes and opportunities for driving growth with these new and exciting dynamics.**

- **Living spaces have changed;** consumers are spending more time at home and are **more conscious** about cleanliness; they have redefined what **clean means for them.**
- **Demand** for cleaning products **continues to grow**, but it is much more diversified today. Consumers seek value *and* experiences beyond functional cleaning. Value means more than low price and reflects the attributes that consumers seek, including efficacy, scent, multipurpose and more.
- **Innovators are extending their brands into adjacencies** or adopting benefits from non-cleaning categories (e.g., personal care brands moving into air fresheners, or deodorizers moving into the cleaning space).
- Broader consumer trends supporting **well-being are bolstering growth** across home care aisles. Having a clean home or even the idea of a **clean home promotes mental health by reducing stress and anxiety.** As **owning a pet contributes to well-being**, there are opportunities to further support pet owners with convenient cleaning solutions.
- Clean and natural ingredients are becoming more important, and products with **sustainability benefits** (e.g., less plastic, biodegradable ingredients, fewer chemicals) are demonstrating growth.



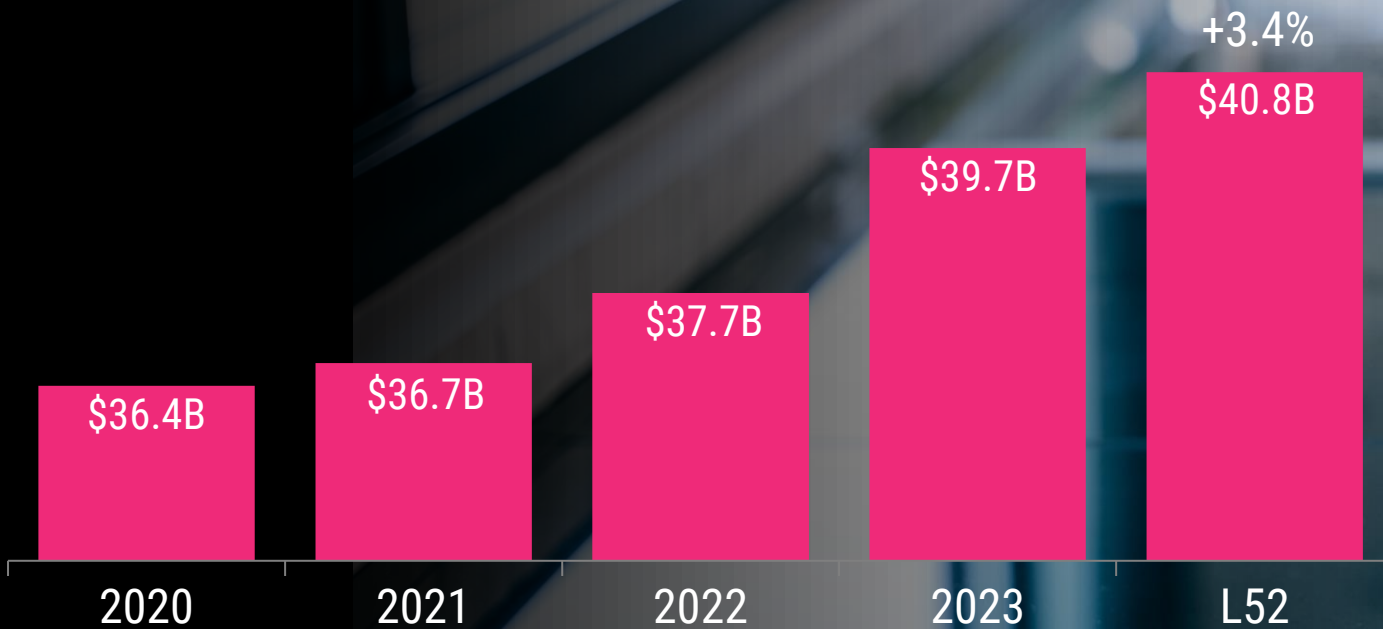
Disruptors driving home care trends

The pandemic changed the importance of cleanliness and how we cleaned our homes. Those disruptions laid the foundation for how we clean today.



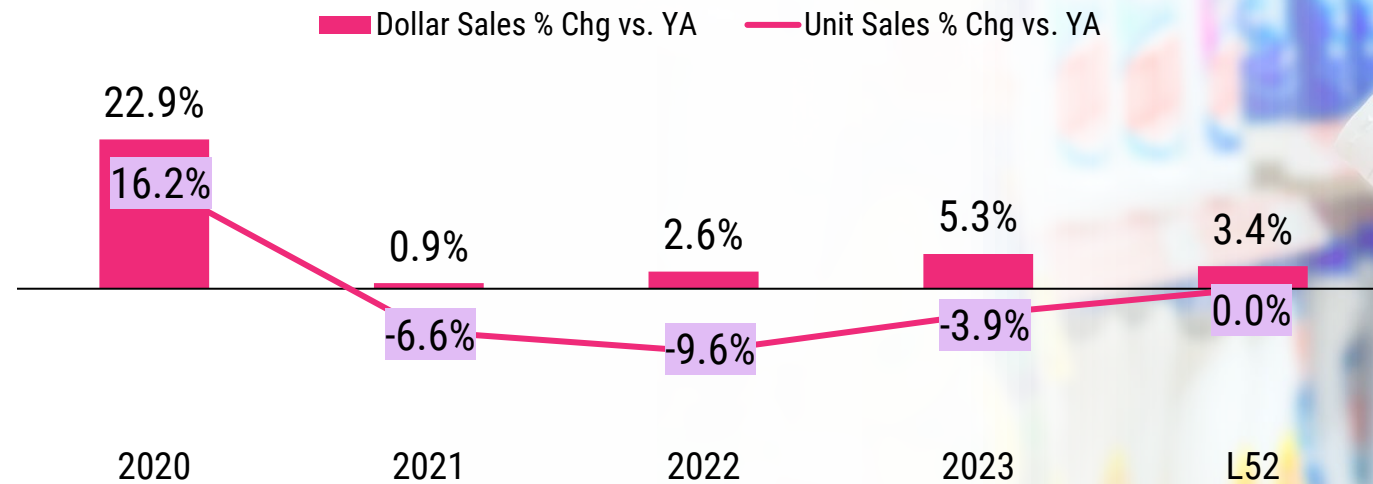
Home care is a \$40 billion U.S. industry and continues to grow

Home Care – MULO+ Sales Trends (\$ Billions)



Continued dollar growth in home care is partially driven by price increases

As inflation eases, unit depression appears to be rebounding.



Home Care Sales

\$40B
(+3.4%)

Units
(0.0%)

PPU
(+3.4%)

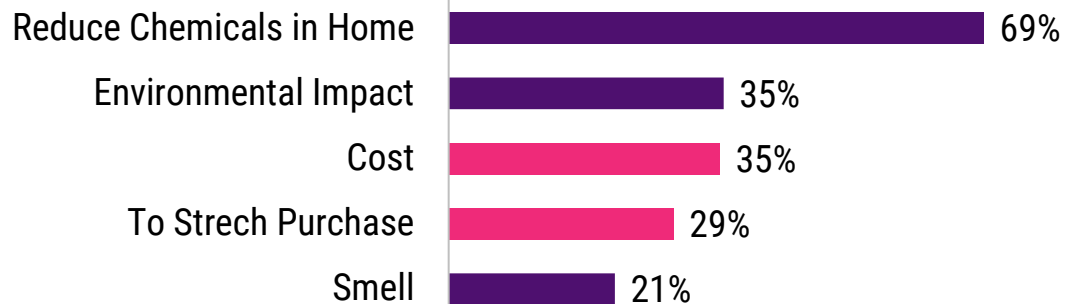
PPU vs. 4 YA
(+38.9%)

Inflation impacts purchasing, resulting in cutting back on cleaning agents and considering DIY solutions



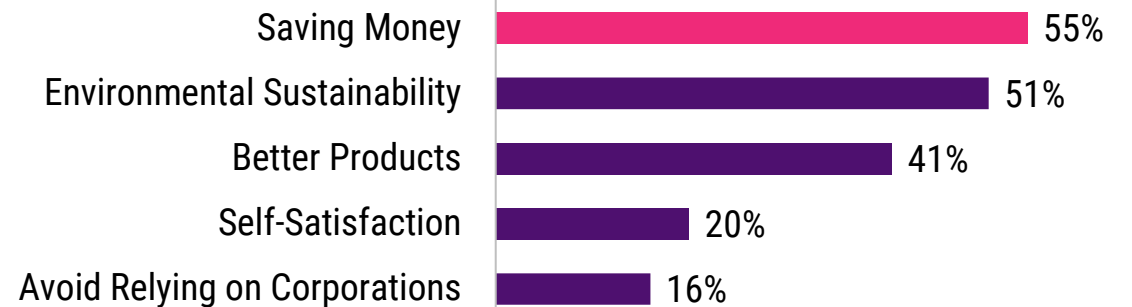
51% of respondents try to limit the volume of cleaning agents they use

Why do you limit the volume of cleaning agents you use?



32% of respondents make homemade cleaning agents as a part of their cleaning routine

What is your primary motivation for making homemade cleaning agents?



Consumers are changing their shopping behaviors to accommodate the shifting economy

18- to 34-year-olds are significantly outpacing other generational cohorts in terms of deal seeking



55% of all shoppers are **looking for sales / deals** more often
63% of 18- to 34-year-olds



40% of all shoppers are **looking for coupons (paper or online)** more often
57% of 18- to 34-year-olds



32% of all shoppers are **switching to lower-cost brands** more often
44% of 18- to 34-year-olds

94%
of all households
are **concerned**
about **food cost**
inflation



In home care, consumers are increasing their spend on private brand items



Home care private brand products are found in
98.6%
of U.S. households



13.2%
of home care
basket spend comes
from private brand items










Home care private brand
spend is up
14.0% \$ % Chg. vs. 4YA

As consumers seek value, home care growth has accelerated in club, dollar and e-commerce

There is a migration to e-commerce, club and dollar channels as consumers seek value in overall convenience, larger sizes and smaller sizes, respectively.

Total Home Care – \$ Sales Trends By Class of Trade

		Grocery	Mass	Convenience	Drug	Club	Dollar	E-Commerce
								
Dollar Sales (\$B)		\$9.0	\$15.8	\$0.3	\$1.1	\$7.2	\$5.0	\$9.5
Dollar Sales % Change vs. YA	vs. 2023	1.2%	2.4%	1.6%	-8.4%	17.6%	9.4%	14.6%
	vs. 2022	4.3%	7.5%	10.0%	-5.0%	0.8%	1.6%	31.7%
\$ Growth vs. YA		\$103M	\$364M	\$3.8M	-\$96M	\$1.1B	\$425M	\$1.3B

While growth across home care aisles appears to be driven by pricing...

Home Care Aisles Dollar, Unit and Weighted Average Base Price Trends vs. YA



Laundry

Dollar Sales

2.9% from YAG

Unit Sales

0.9% from YAG

Wtd. Avg. Base Price/Unit
+2.3% from YAG



Household Cleaning

Dollar Sales

4.1% from YAG

Unit Sales

0.7% from YAG

Wtd. Avg. Base Price/Unit
+3.6% from YAG



Air Fresheners

Dollar Sales

2.9% from YAG

Unit Sales

-4.2% from YAG

Wtd. Avg. Base Price/Unit
+7.7% from YAG



... price increases are mostly driven by changes in product mix and shelf composition



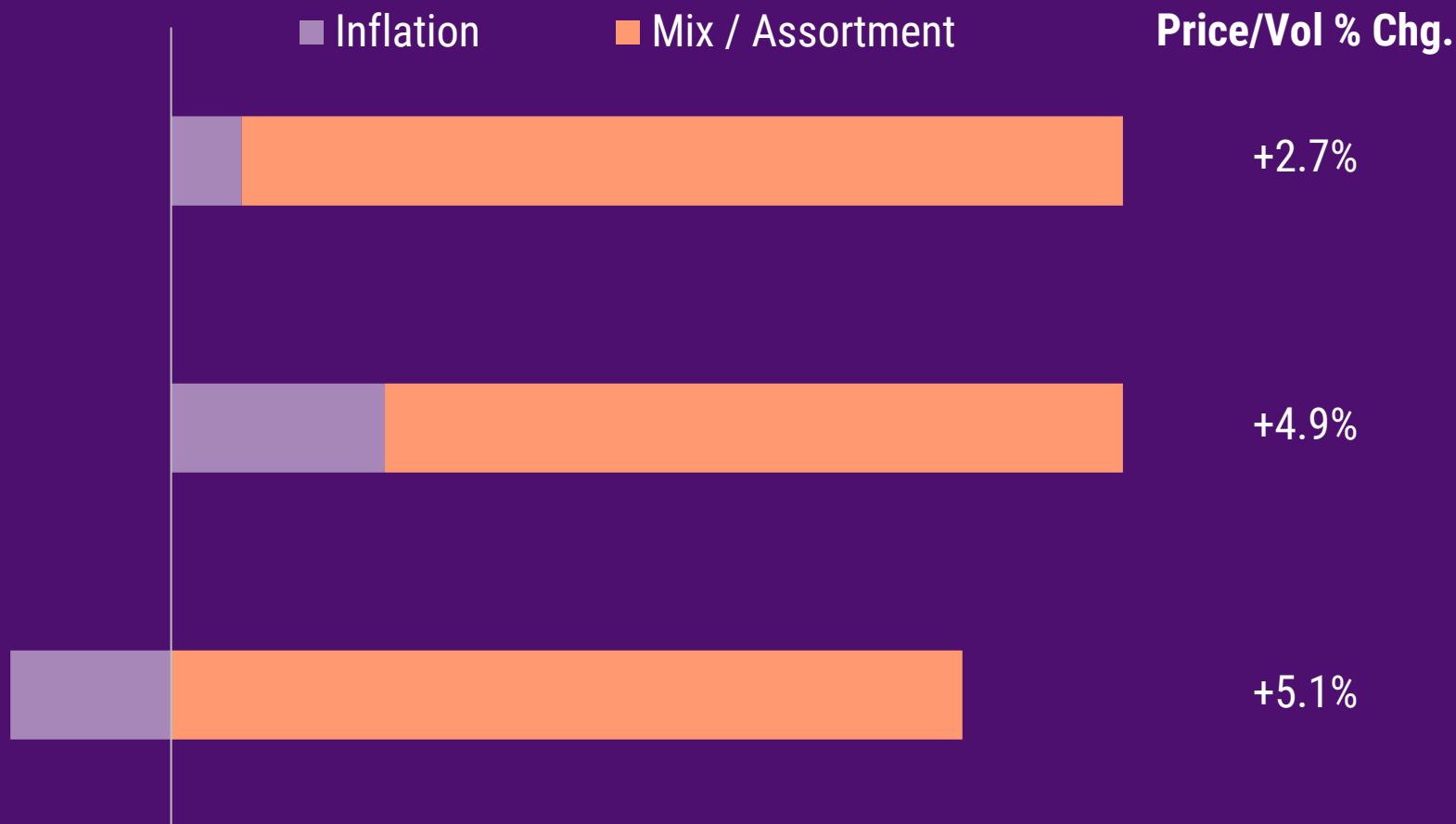
Laundry



Household Cleaning



Air Fresheners

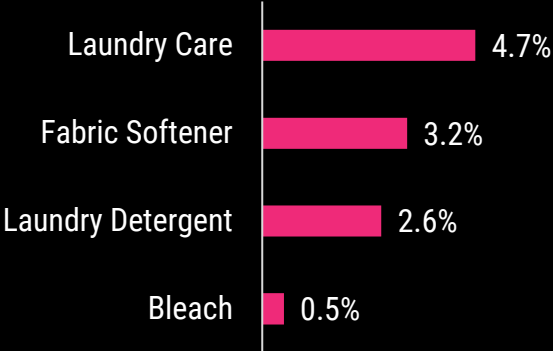


Nearly all home care subcategories are posting growth vs. a year ago



+2.9%
vs. YA

LAUNDRY



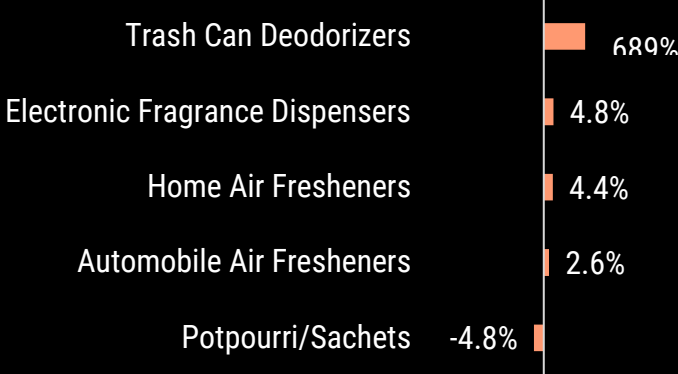
+4.1%
vs. YA

HOUSEHOLD CLEANING



+2.9%
vs. YA

AIR FRESHENERS



Megabrands drove growth across home care aisles

With private label also leading in cleaning and air fresheners



New Product Pacesetters | Top 10 | Nonfood

Top nonfood 2023 Pacesetters reflect a commitment to home care and self-care; odor elimination is emphasized in laundry products.



The evolution in laundry products includes a shift away from extreme scents to deep clean and odor elimination



2020
Gain blasts strong scents such as “midnight bloom”



2022
Downy launches a “scent booster”



2023
Gain and Tide lean in with launches positioned to eliminate odor

Water-oriented scents top the chart in home care

Top-Growing Scents in Home Care Department	\$ Growth	\$ % Chg. vs. YA	Unit %Chg. vs. YA
#1 – Water	\$265M	25.9%	12.5%
#2 – Other Fresh	\$208M	3.1%	2.4%
#3 – Lemon	\$109M	6.9%	1.5%
#4 – Other Floral	\$49M	8.2%	1.4%
#5 – Lavender	\$22M	1.4%	-0.2%
#6 – Mango	\$20M	23.3%	22.2%
#7 – Vanilla	\$17M	16.9%	10.4%
#8 – Spring	\$14M	1.5%	-2.1%
#9 – Unscented/Plain	\$11M	0.8%	-3.0%
#10 – Clean	\$4M	0.2%	-6.0%

Home Care Brands Contributing to Water Scent Growth



Laundry

Gain Ultra Plus Oxi-Liquid Laundry Detergent
Waterfall Delight Scent

+141%
\$ Sales Chg. vs. YA

+162%
Unit Sales Chg. vs. YA



Household
Cleaning

Dawn-Manual Dish Detergent
Refreshing Rain Scent

+82%
\$ Sales Chg. vs. YA

+182%
Unit Sales Chg. vs. YA



Air
Fresheners

Febreze Car-Automobile Air Fresheners
Ocean Scent

+21%
\$ Sales Chg. vs. YA

+13%
Unit Sales Chg. vs. YA



Source: Circana TSV, Total .U.S – MULO+ with C, L52WE Oct. 6, 2024, Ranked by \$ Growth

Well-being around the world has evolved to encompass many areas of life



Home care routines support overall mental wellness and play a role in consumers' approach to well-being



Mental Wellness

Pursuing positive mental health
for emotional well-being



Clean home, clean mind mentality provides relief from **stress and anxiety**. **66%** agree that keeping their home clean is a self-care action they do regularly to support **overall health and wellness**.



Pet ownership improves general mental wellness and provides opportunities for new cleaning and air care regimens. Of those who have a dog or cat, **72%** state owning a **pet contributes to their overall mental health**.



Consumers leaning toward **“free from”** and **sustainability** claims when it comes to household cleaning, with **71%** of consumers strongly agreeing that they seek brands that have **clean ingredients**.

Clean home, clean mind mentality has boosted sales

Strong growth is also observed across more durable cleaning categories supporting the need for maintaining a deep clean underfoot.



**Electric
Diffusers**

+5%

unit growth vs. 2023



**Deep Carpet
Cleaners**

+10%

dollar growth vs. 2023



**Bare Floor
Cleaners**

+33%

dollar growth vs. 2023



**Cleaning
Supplies**

+6%

dollar growth vs. 2023



**Laundry
Products**

+4%

dollar growth vs. 2023



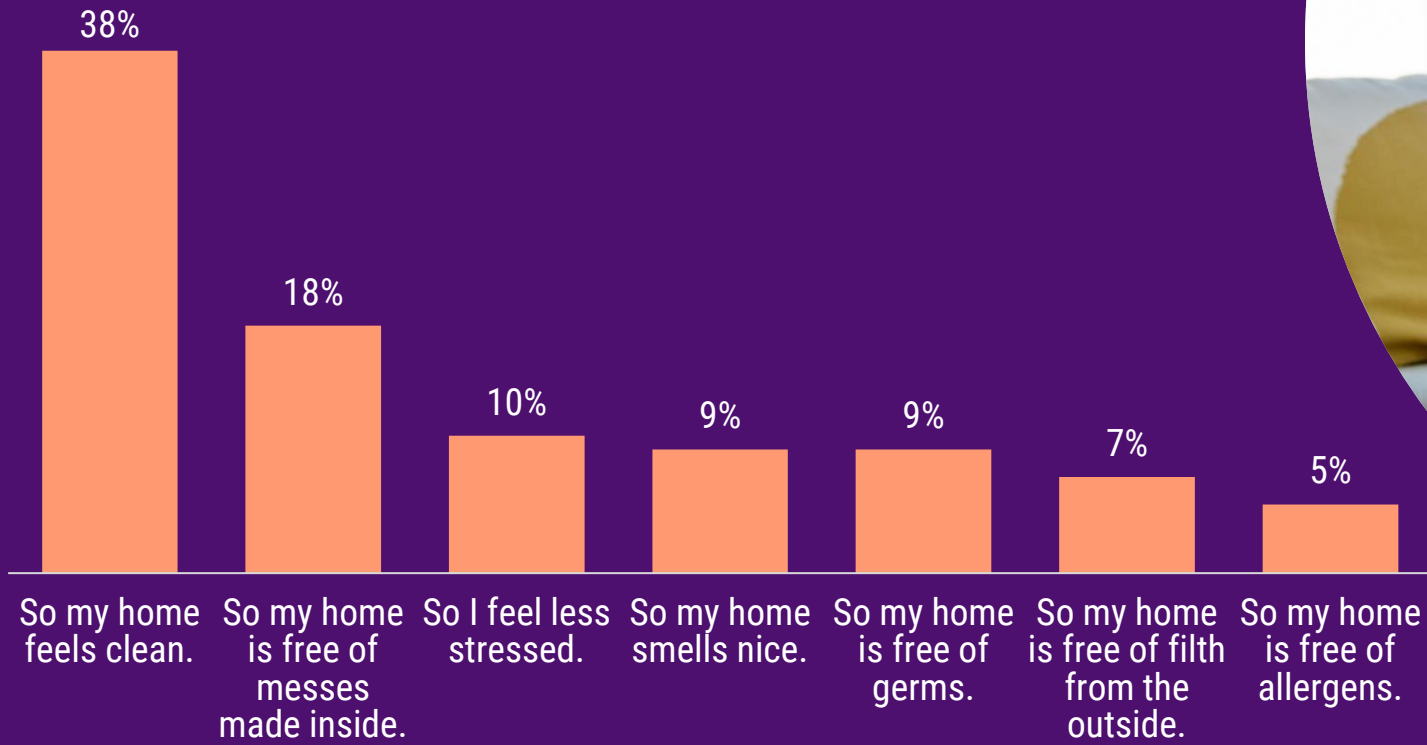
**Air
Fresheners**

+3%

dollar growth vs. 2023

Consumers clean to de-mess and de-stress

Which of the following outcomes do you desire most when performing cleaning?

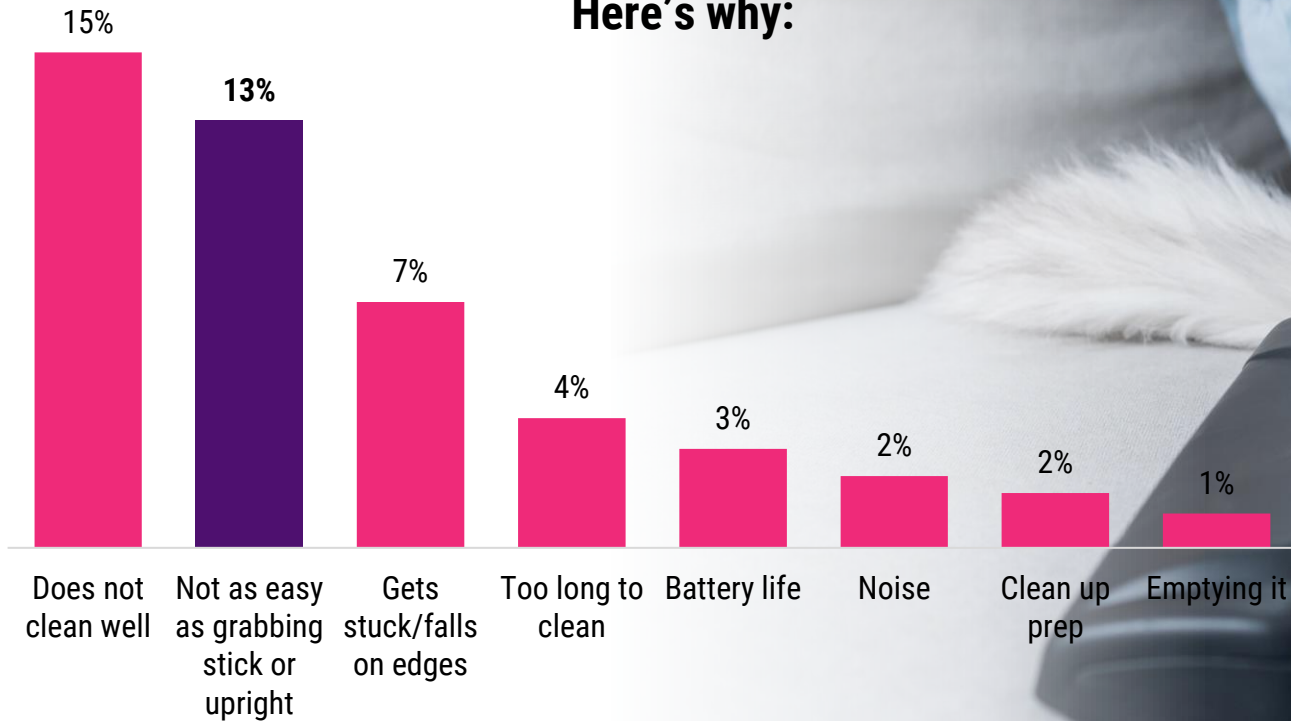


Source: Circana, Shopper Survey, June 2024
Which of the following outcomes do you desire most when performing cleaning? (Rank Options)

Consumers are redefining convenience

Some consumers feel a stick or upright vacuum is more convenient than a robotic vacuum. With stick vacuums being left out in the open, design is becoming more critical.

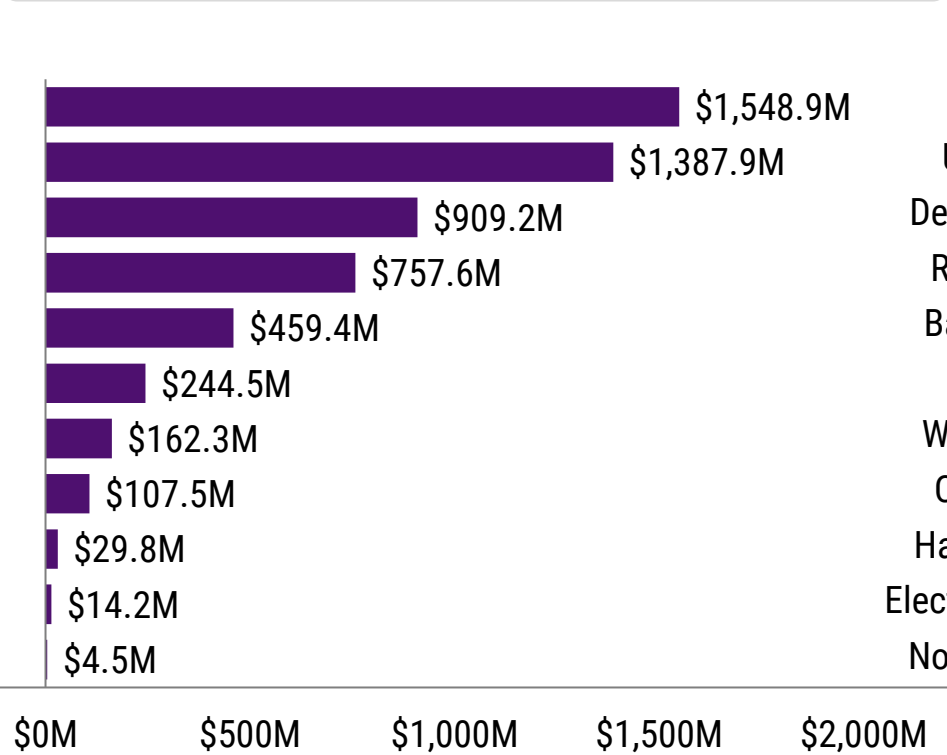
30% of consumers currently do not have a robotic vacuum.
Here's why:



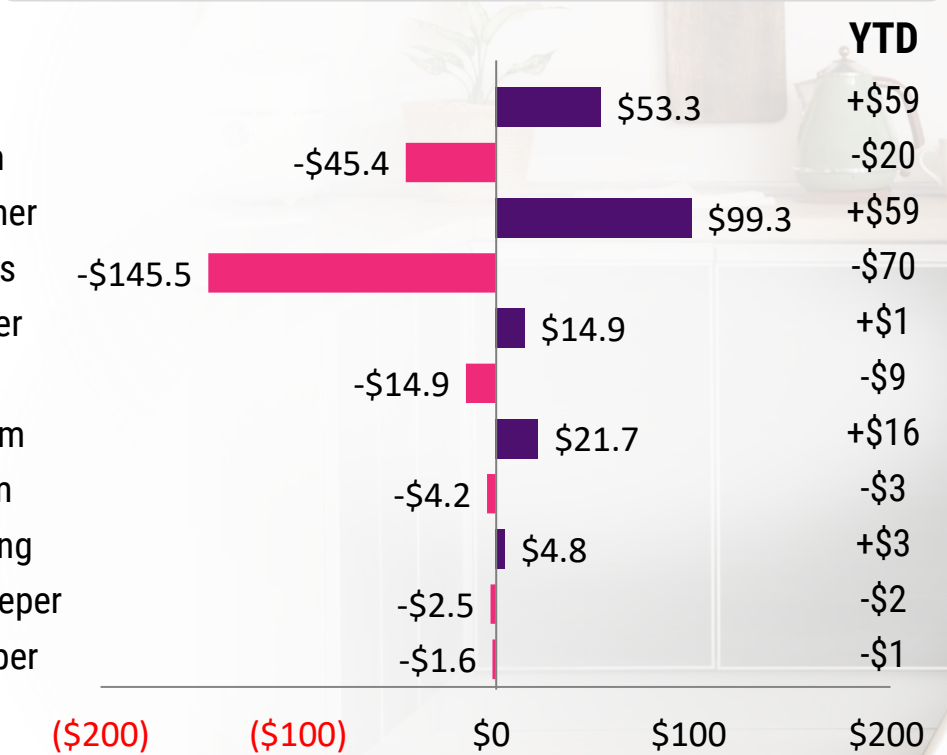
Stick vacuums are now the largest subcategory

They are taking over the top dollar volume spot from upright vacuums in the floor care appliance category.

52WE Oct 5: Dollar Volume (\$M)



52WE Oct 5: Dollar Volume Change (\$M)

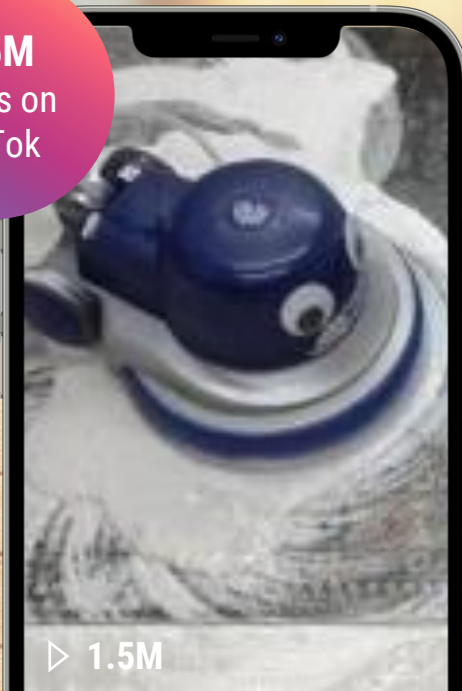


Home organization and cleaning videos provide stress and anxiety relief to individuals

Rug Cleaning

Tuning in and on the edge of your seat to see the results of a dirty to clean transition? You're not alone. TikTokers eagerly tune in to view a rug go from dirty and tattered to clean and good as new again.

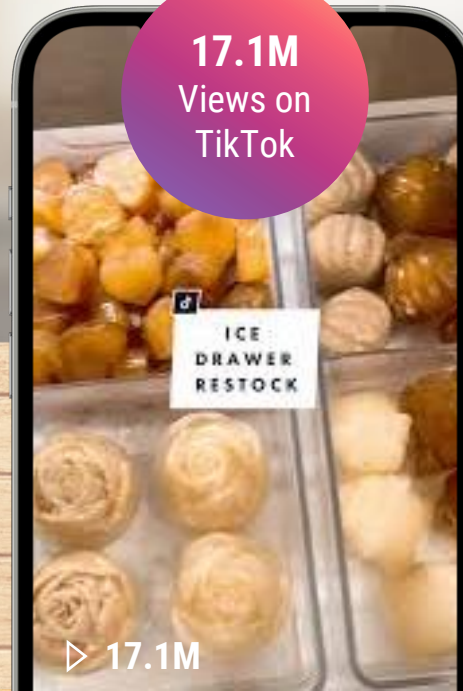
1.5M
Views on
TikTok



Ice Cube Organization

This infused ice drawer perfectly coordinated by color idea has gained in popularity as many are looking for an outlet to get away from their own mess or inspiration to get organized themselves.

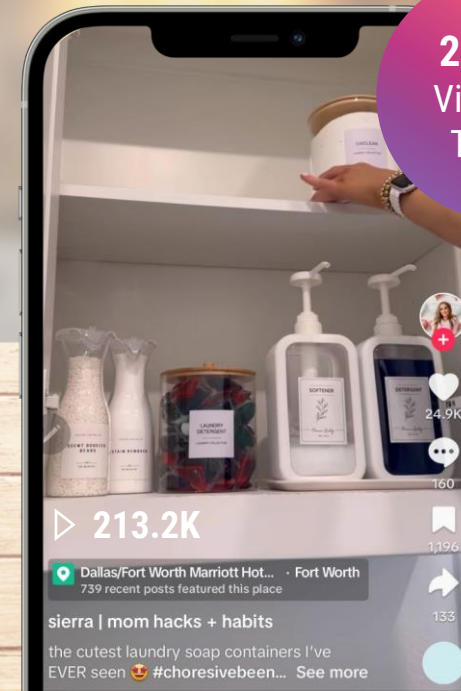
17.1M
Views on
TikTok



Laundry

Hacks and habits for organizing cleaning spaces.

213.2K
Views on
TikTok



Owning a pet contributes to wellness

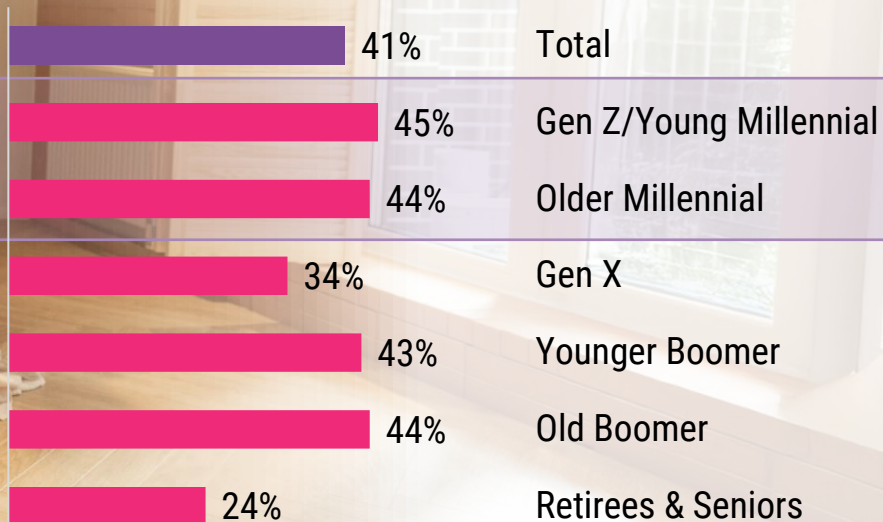
86%

of those who have a
dog or cat say that
their **pets** contribute to
their **overall** wellness

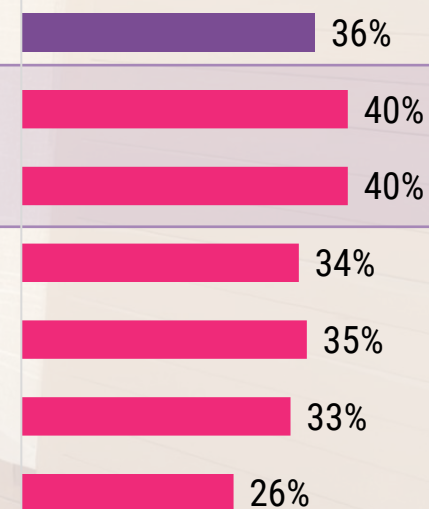


Across generational cohorts, Gen Z and millennials are most likely to clean more frequently because they own a pet

I clean more frequently because I own a pet...



...and clean certain rooms more often



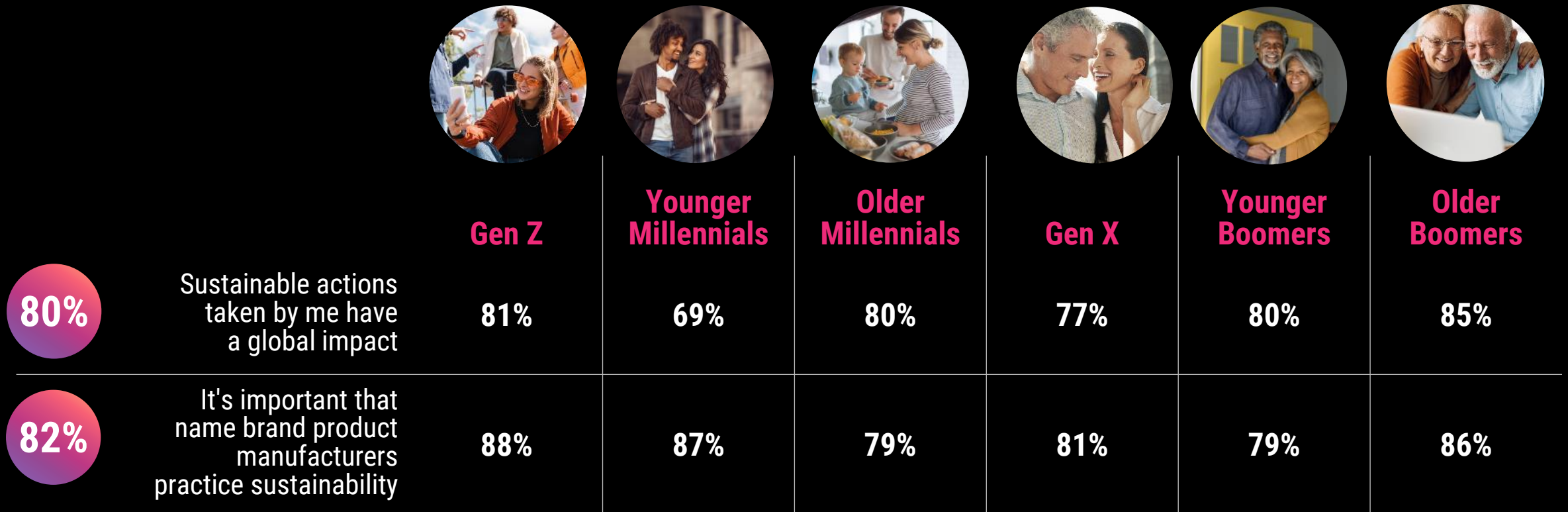
It's a pet life

An increase in pet adoptions has been met with increases in innovation, with traditional cleaning brands like Arm & Hammer, Woolite and Bissel leveraging brand equity to address pet health, messes and odors.



Sustainability matters across all generations

Sustainability is becoming less polarizing and more mainstream by generation.



Home care leads the way with new, sustainable product trials



41%

have tried new, sustainable home care products during the past year



Product innovations: eliminating plastic

Home care categories like toilet bowl cleaner, laundry detergent and surface cleaners offer alternative and innovative eco-friendly options that continue to gain popularity as awareness arises.

Shared benefits among innovative sustainable products

- Typically requires **less plastic for packaging**, reducing plastic waste and environmental impact
- Some products are **better portioned for single use**, reducing the replenishment cycle for consumers
- Usually made of **eco-friendly ingredients** and are **biodegradable**



Tablet Toilet Bowl Cleaner



Laundry Detergent Sheets

Concentrated Surface Cleaner

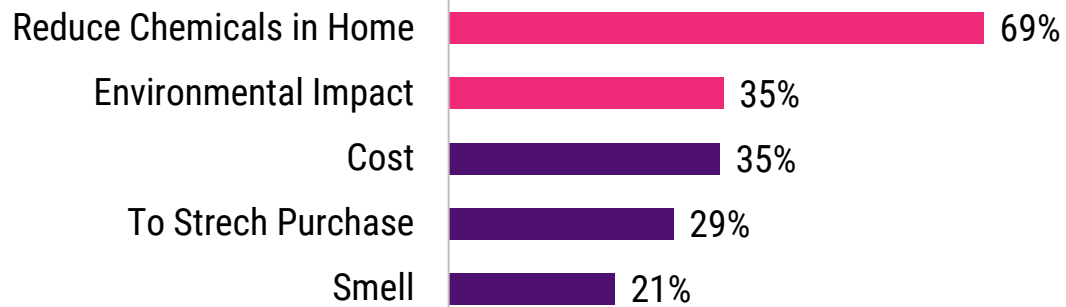


Sustainability and chemical concerns drive consumers to cut back on cleaning agents and consider DIY solutions



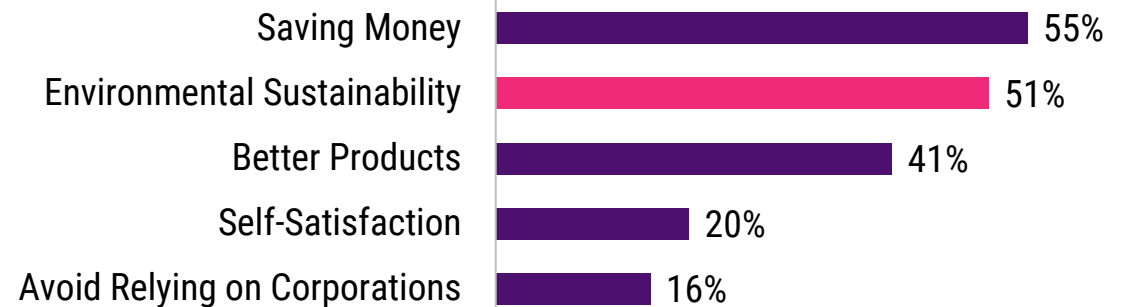
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Capitalizing on trends for long-term growth in home care



01

Value

Focus on redefining value as Gen Z and millennials feel the impact of sustained economic pressures. New "value" is the best "x" for the money vs. lowest cost.

02

Shopping Shifts

Leverage digital media to reach consumers where they shop, as e-commerce is now the leading driver of growth in home care.

03

Innovation

Delight consumers with reinvention and brand expansion; consider new attributes, adjacencies and white space opportunities.

04

Well-Being

Align product benefits to consumer needs around well-being; consider the strong connection with pets, mental health and a clean home.

05

Sustainability

Recognize category disruption by cleaning / safe alternatives; green attributes are becoming table stakes for growth.

Circana Solutions

Learn more about how the solutions in this report can support your business.



Scan Panel

The best source for understanding consumer behavior below the brand level and across channels calibrated to POS truth



Survey Solutions

Operates at the intersection of what people think and what they do, leveraging verified purchase behaviors and a comprehensive survey portfolio to better explain and anticipate people's choices



MULO+

The largest census-based POS coverage of CPG core channels



Complete E-Commerce

Leverages the best available data sources, combining point-of-sale and receipts, to deliver unified sales and share intelligence across online channels



Retail Tracking

Captures point-of-sale data reported directly from retailers across a broad range of brick-and-mortar and online channels, from mass merchants and national chains to specialty, off-price, sporting goods and e-commerce, including apparel, beauty, footwear, fashion accessories, and sports equipment



Inflation Monitor

Identifies the drivers of average price change for products across customizable geographies, time and promotional condition

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