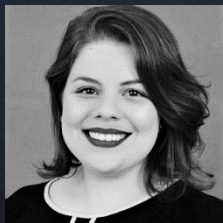


The Future of Household Care: 2022

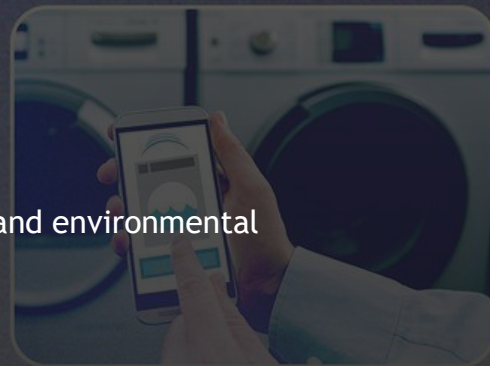
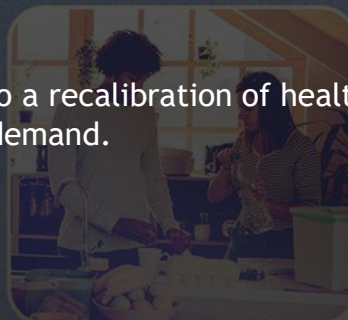
A return to pre-pandemic homecare concerns will lead to a recalibration of health and environmental claims. Long term, partnerships will be key to meeting demand.



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May 2022



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The now, the next and beyond

Where we are now

Consumers are still reeling from the pandemic, **elevating the role of health in purchasing decisions.**

Although hygiene is still critical, stakeholders can be prepared for the potential for chore fatigue and therefore **align with core needs to prevent any disengagement with the market.**

In the next two years

As consumers return to focusing on concerns that existed before the pandemic, brands can ensure their products fully align with them.

Brands can begin the journey towards **redefining natural products** to ensure longevity and ensure they are launching and **positioning new compact products successfully.**

In five years and beyond

In order to meet new demands from consumers, there will be **greater dependence on partnerships between companies, academic institutions and start-ups** within the homecare industry.

Companies can look **outside the immediate category** for market disrupting ideas and **explore licensing and acquisitions** to stay ahead of the competition.

WHERE WE ARE NOW



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What we're seeing

EMEA

The EMEA region has the **highest share of claims related to ethical and environmental** goals, including product, packaging and recyclability.

Initiatives and regulations from organisations like the EU have encouraged a faster shift towards environmental launches than elsewhere in the world.

APAC

Antibacterial is the second-most prominent claim on homecare launches in the APAC region.

This reflects the **historic concern around germs** that exists in that part of the world, which has been even **further exacerbated by the COVID-19 pandemic**.

The Americas

Toxins-free claims feature on a higher share of product launches in the Americas region than elsewhere in the world. This demonstrates the **potential for products that focus on wider holistic health in that region**, compared to the hygiene-first attitude seen in the last two years.

IN THE NEXT TWO YEARS



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Return to pre-pandemic priorities with new vigour

The pandemic temporarily created new demands in the household care category. These will not disappear overnight, but consumers concerns will gradually shift more towards the factors that were growing before the pandemic, like **holistic health and the environment**. Products that **marry new behaviours that have emerged with pre-pandemic issues** will be best placed for success.

Capture the transition momentum to drive change

Clearly tap into Mintel Trend Driver [Wellbeing](#) via gentle formulas that respect the environment while supporting healthy immunity and indoor environments



[Branch Basics](#) aims to create healthy homes by helping consumers remove toxic cleaning supplies and embrace a proactive approach to preventive healthcare (US).



[AWA](#) is a bar launched by mineral water brand Andea, which contains ingredients that decontaminate river water, while encouraging to keep a cultural practice inherited from the Incas (Peru).



Freemet [Limarí River](#) pack supports an NGO that tackles water scarcity (Chile).

Explore the importance of good bacteria to wellness

As more people recognise good bacteria's health benefits, Mintel's 2018 Household Trend [Homebiome](#) becomes more relevant than ever.



[Aunt Fannie's Microcosmic Probiotic Power Multi-Surface Cleaner](#) is 100% essential oil scent, and is made using plant-based ingredients to be tough on dirt and gentle on consumers - including pets (US).



[Simple Goods Black Currant Lemongrass Sea Buckthorn](#) is described as a gentle and pH-neutral cleaner, and contains sustainable surfactants from renewable resources through fermentation (Germany).



[We Are Probiotic](#) offers household cleaning formulas empowered with probiotics, that are refillable and concentrate, encouraging consumers to join a sustainable revolution (UK).

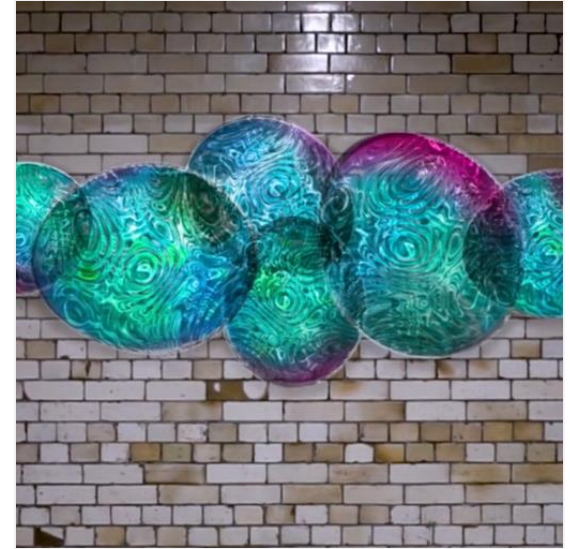
Make the imperceptible visible to consumers' eyes

Besides creating analogies with other categories, brands can **team up with creatives and scientists** to encourage a wider audience to familiarise with the indoor microbiome concept.

Brands can open pop-up stores or develop apps that frame science in engaging ways and **give consumers the chance to discover the various microorganisms that shape and coexist within the home and other indoor environments.**



The [Community of Microbes](#) exhibit at [The Cooper Union](#) (New York)



[CELLUL-AIR](#), the air filtration system that breathes out clean, purified air (London)

Act now on eco regulation to stay ahead

The introduction of consumer-focused regulations by governments are forcing companies to become eco-forward and transparent.

- Introduced in 2005, the [Detergents Regulation \(EC\)](#) aims to protect human health and the environment through a set of common rules around biodegradability, labelling and dosing that apply to all detergents and surfactants used and sold in the EU, [Great Britain and Northern Ireland](#).
- In 2017, the state of California passed the [Cleaning Product Right to Know Act](#), which requires cleaning product manufacturers to disclose their formulas' components on both the label and company websites.
- In 2021, over 100 business, investors, state regulators, NGO leaders and health advocacy groups in the US endorsed the [Principles for Chemical Ingredient Disclosure](#). The document lists six principles designed to improve access to information about chemicals in products and their hazards and create a marketplace of goods made from safe and healthy chemical substances.

As more governments enact decrees on ingredient disclosure, companies will need to act to prepare for the future. Over the next two years, projects designed to provide in-depth ingredient information will be vital to stay ahead of the competition and any regulatory requirements.

Redefine natural products for the long term

The race to providing more natural products and upping the share of natural components is an unsustainable one, particularly with environmental and financial constraints that consumers and companies find themselves in. **Take a different approach from the traditional issue of natural ingredients by focusing on the drivers behind why people find natural products appealing** and encouraging consumers to see new, non-traditional options as meeting those same demands.

Use natural ingredients help to strike the balance

Ensure that existing natural components are **clearly signposted** as having positive impacts on product efficacy, health and the environment.



[Positiv.A Dishwashing Detergent with Orange Essential Oil](#) is plant-based, made with Ecocert certification organic oil (Citrus aurantium linnaeus) and features the Certificado SVB Vegano (Brazilian Vegetarian Society Vegan) (Brazil).



[Frosch Limpiador Eco-Friendly Limecale Cleaner with Vinegar](#) is said to naturally remove limescale and dirt with the proven power of vinegar, contains natural ingredients and is free from harmful chemical substances (Peru).



[Eco Le Plant Tropical Forest Scented Biodegradable Detergent](#) is biodegradable, free from sulfates, formaldehyde, parabens, colors, phosphate or triclosan. It's made with plant based ingredients and has not been tested on animals (Colombia).

Reduce reliance on fossil fuels

Consumers are doing their research and looking at the full impact of sourcing, manufacturing and end-of-life disposal.



[GiG Al Emlaq Dishwashing Liquid](#) is made at a facility that runs largely on solar power (Jordan).



[Sunlight Gentle Skin Dishwashing Liquid](#) uses rhamnolipids, which is the result of a partnership between Unilever and Evonik (Vietnam).



[Ype Green Lava Louças Gel Concentrado](#) offers sustainable formula, containing ingredients from renewable sources and 100% natural fragrances (Brazil).

Link local sourcing with lower carbon footprint and national economic support



FreeMet (Chile)



Alquimyst (Ecuador)

Household brands can take inspiration from food/drink brands and link local sourcing to [low carbon emissions](#) and how this benefits the nation's economy. Peruvian brands can take inspiration from:

- [Freemet Apple Scented Concentrated Detergent](#) is made in Chile, thus reducing its carbon footprint and boosting the economy.
- [Alquimyst Natural Blends Window Cleaner](#) is said to support the environment and is produced locally in Ecuador to reduce environmental impact.

Differentiate between food sources and homecare inputs

The shift to natural and renewable product components and feedstocks will provoke conversations about competition with other areas and what else those renewable inputs could be used for.

Inevitably, homecare components that are derived from tropical oils or sugarcane will be asked **if they could have been used for food sources** - particularly as there are existing concerns around food shortages.

It will be important to ensure these two issues are kept separate - that consumers are **left in no doubt that the natural products they demand are not having negative impacts elsewhere**, and highlighting the use of waste byproducts can reassure consumers. Brands can also take inspiration from paper categories that are relying on alternative fibres, in which **panda-friendly claims are emerging on bamboo-derived products**.



[The Cheeky Panda](#) - not made from the type of bamboo that pandas eat

Utilise scientific background to inspire nature identical



[The Nue Co](#) Forest Lungs

The pandemic period has renewed faith in science and the wonders it's capable of. The coming years will be a good time to lean on the possibilities that science can create. Brands like [Deciem](#) have placed chemistry at the forefront of their offering in personal care, **leveraging trust placed in science to provide superior products.**

Receptiveness to science can be used to explain relatively novel technologies that are emerging. For example, **replicating molecules found in nature to contribute towards scents can be used in a way to ensure continued biodiversity while meeting demand for scented products.**

The Nue Co's Forest Lungs fuses olfactory chemistry and patented technology to replicate the [molecular compounds produced in forests](#). It is said to possess the positive health benefits associated with forest bathing, primarily for stress reduction and rest.

Successfully position new compact formats

The boom in online retail and the growing concern around carbon emissions will provide fertile ground for greater compaction in household care products. However, **the introduction of novel formats can provoke scepticism from consumers** in a largely traditional category. It will be critical that such products can **prove their performance, leverage their environmental benefits and maximise the limited space available on packaging.**

Leverage environmental concerns to push compaction

The drive towards online shipping, as well as environmental concerns are **continuing to promote more compact packaging and formats.**



Concentrated bleach
[Clorox Original Disinfecting Bleach](#) has been repackaged in a newly designed 24 fl oz recyclable pack with a 33% more compact dosage (Puerto Rico).



10 rolls in one
[PiùMe Divina Multi-Purpose Paper Roll](#) is a new, more compact formula in which one roll is equivalent to 10 rolls, with more sheets, fewer CO2 emissions and less plastic and is made with only certified paper (Italy).



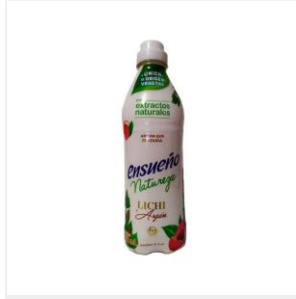
Three times as compact
[Henkel Perwoll All-in-1 Laundry Detergent Capsules](#) claim to be three times more compact than Perwoll liquid laundry detergent (Bulgaria).

Focus on proving performance of new formats

Show how eco-friendly products can save resources and **lower utility bills**.



[La Oca Liquid Detergent with Aloe Vera for Color Clothes](#) can also be used in high-efficiency machines, which use 60% less water and 50% less energy than traditional ones (Peru).



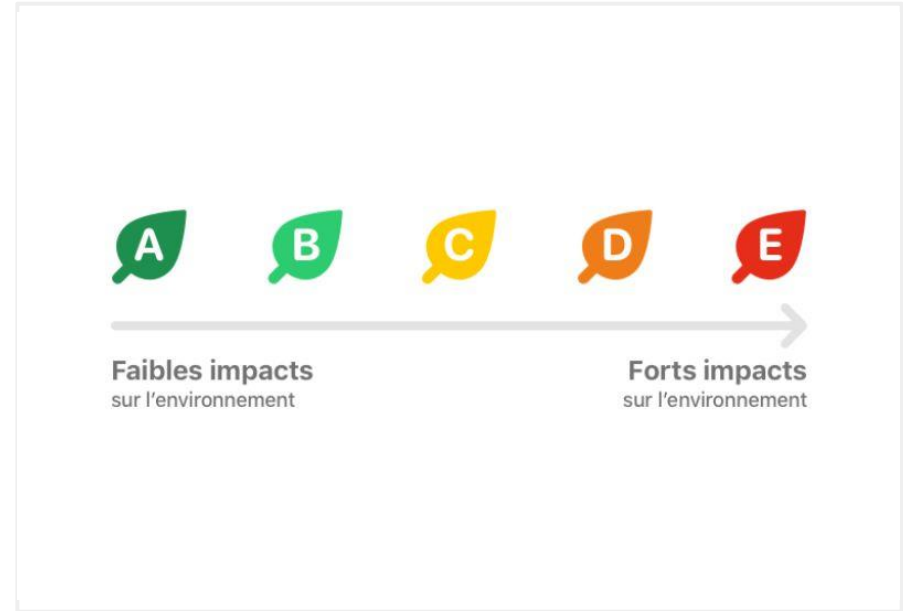
[Ensueño Natureza Lychee and Argan Fabric Softener](#) is biodegradable, plant-based, said to make ironing easy and does not require rinsing. The manufacturer claims to take care of its emissions, replants forests and saves water (Mexico).



[OneTab Floor Cleaning Tabs](#) are said to provide effective cleaning for all washable surfaces and give a shiny clean result. They are 100% biodegradable and just need to be added to 750ml of warm water in a bottle (Netherlands).

Promote clearer environmental grading

- Smaller packaging leaves less room for certifications and ingredient disclosure.
- The Eco Score in France shows how infographics are a potential fix.
- The score takes into account impact on air, water, ocean and soil, and can help consumers make better decisions in the moment



In France the [Eco Score](#) for food products has launched, based on Life Cycle Analysis.

IN FIVE YEARS AND BEYOND



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Seek partnerships to adapt for the future

Partnerships between different organisations will prove to be effective ways for companies to stay ahead of the competition and ensure they are **fully meeting consumer needs for the future**. This opportunity will not be limited to those companies active within homecare. **Adjacent, cross-industry partnerships will allow for brands to be more flexible**, while the **creativity among start-ups** will provide incentive to explore licensing and acquisition.

Old and new: partnering to create 'the hidden competition'

Leveraging product formats from other industries or new market entrants is becoming a stronger innovation driver.



2005: oil and pens

[WD-40 No-Mess Pen](#) is the result of a partnership with a ballpoint pen company to change how consumers use household lubricant.



2020: new format for Microban

[Microban 24](#) creates antimicrobial activity on surfaces for 24 hours. The partnership between P&G and Microban transitioned the chemistry from something that's built into surfaces to a spray that controls germs on all household surfaces.



2021: cartridge refill cleaner

Big brands like [Clorox](#) have been either acquiring or imitating a class of start-ups selling spray cleaners with refill cartridges that make the refill process more convenient, sustainable and ecommerce-friendly.

Better, safer and greener disinfection will drive new partnerships

Reckitt is partnering with Halo for natural and more concentrated disinfectants as well as continuous UV light disinfection



There is a broad strategic desire for quat alternatives



Automated UV disinfecting is gaining, but still a long way from mainstream adoption

Cross-industry collaborations will bring cleaning brands into the realm of appliances

Air quality will be among the top concerns linked to multiple health diseases. In Brazil, for instance, 49% of adults would be interested in devices that can improve household air quality.



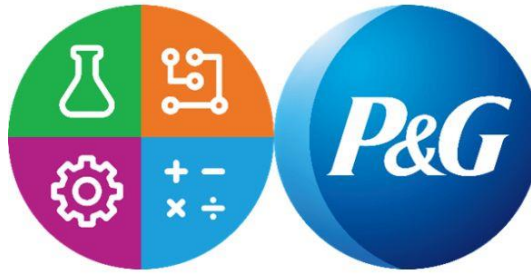
[Febreze air purifiers](#) produced in partnership Honeywell



[Clorox air purifiers](#) made in partnership with Hamilton Beach

P&G: Casting a wider net to make eco-friendly more effective

- P&G has partnered with **Durham University in the UK** to create a new generation of **cleaning products** that will be effective with reduced environmental impact.
- The partnership hopes to clean with reduced **heat, water usage and electricity**.
- P&G's Tide is also partnering with NASA to clean laundry in space. This will provide learning for water-stressed markets.



P&G & Durham U: Next-generation eco friendly cleaning products



P&G is partnering with NASA to wash in water-stressed environments

The universe (of startups) is expanding

The homecare industry is consolidated, and in many countries, it's quite common for a handful of market leaders to represent more than 80% of value sales. However, there has also been a **massive wave of market entrants looking for a foothold**.

This trend is enabled by a growing number of **contract manufacturers that allow niche brands to prosper without having to invest in production assets**. Most of these homecare start-ups lack a unique value proposition and won't last the decade. But if we consider that quantity breeds quality, there are **many new brands with the potential to change the playing field from a cost, efficacy, ecommerce and sustainability standpoint**.

Face to SurFace: Three Main takes an innovation cue from skincare

- One emerging genre of homecare startup involves formulas that emphasize safety with food or skincare ingredients.
- [ThreeMain](#) promotes safe disinfecting with cleaners that disinfect with hydrogen peroxide and clean with hyaluronic acid, which consumers routinely use on their skin.
- Brands that can deliver a balance between safety, sustainability and germ-management will be meeting a strong consumer need.
- **34% of Brazilians would be willing to pay more in household products that are mild to their skin.**



ThreeMain disinfectant uses hydrogen peroxide and hyaluronic acid

Base: Brazil: 1,500 internet users aged 16+

Source: Kantar Profiles/Mintel, April 2021; [ThreeMain](#)

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Efficacious Enzymes: Defunkify shows how natural can outperform

- Defunkify drives both convenience and safety against COVID-19 with an all-natural formula.
- The convenience angle is the result of its ability to create a barrier that shields fabrics from odor-causing bacteria for several days.
- Defunkify represents a more complete evolution of natural because of its unique benefits
- Startups that achieve this will quickly set the stage for rapid organic growth, partnerships or acquisition.



[Defunkify Free & Clear Liquid Laundry Detergent](#)

Shrewd simplicity

The homecare market is entering a new era of simplicity that **delivers convenience, cost savings and sustainability.**

Concentrated products like Blueland tablets are trending because removing water reduces the carbon footprint of product distribution while making refills more convenient.

Product lines that use fewer formulas also drive convenience because fewer products need to be bought and stored. **Koh, for instance, uses one formula for the entire household.**



[Blueland Multi-Surface Cleaner](#) uses tablets and tap water



[Koh](#) sells a simplified line of household cleaning products

Household cleaning brands can tap into the hype of robotic helpers



[iRobot and Bona](#) teamed up to upgrade the floor cleaning experience

Some smart cleaning devices can be pre-loaded with cleaning products such as soap or polish to make their use more seamless. **Household cleaner brands in Mexico could partner with some of these smart appliance brands to offer their endorsement**, just like fabric care brands endorse washing machines.

For example, in the US and Canada, iRobot and [floor cleaning brand Bona](#) have partnered to "deliver the ultimate in robotic mopping." These types of partnerships can help both brands build credibility and trust.

Dishwasher brands can also tap into consumer interest in smart cleaning equipment to highlight the benefits of using dishwashers, such as saving time, water and electricity. [Whirlpool Mexico and Finish](#) have teamed up to do that as well as to promote [less known functions](#) of the dishwasher such as rinsing fruits and vegetables by running a cold, soap-free rinse cycle.

Meet the Expert



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