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Home Care Trends

A look at the trends influencing home care design and innovation.

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Introduction

In recent years, the North American household cleaners and laundry care markets have been impacted by price hikes and changing consumer habits. As pandemic fears continue to recede, there has been a shift toward less frequent and more occasion-based cleaning (e.g., tidying up when guests are coming). A 2023 Euromonitor survey found that only 20.5% of consumers engaged in daily cleaning and domestic chores - a 10% decline from 2019.

As the industry adapts to evolving consumer lifestyles and new economic challenges, brands that prioritize emotional and physical health, affordable quality, and sustainability will have an advantage.

**The brands mentioned in this report are trademarks of their respective owners. Inclusion of these brands in this report is not meant to imply an association with or endorsement from the respective trademark owners.*

Sensory Experiences

As consumers become more focused on self-care and holistic wellness, they seek more sensory experiences when cleaning their homes. According to a 2024 Euromonitor survey, one in four North American consumers say fragrance is an influential feature when buying a home care or cleaning product. While scent has been a key attribute in home care for some time, it is taking on a more premium and benefit-orientated positioning. Fragrance in home care products can improve a home's atmosphere and ambiance, signal cleanliness and freshness, promote relaxation and stress relief, and improve the user experience. A GlobalData survey found that consumers are most interested in home cleaning and laundry product fragrances that make them feel refreshed and relaxed.

“[Research] shows how the functional, emotional and in-use benefits of fragrance in household products contribute to overall wellbeing, memory, motivated behavior and social behavior.”

Morgan Eberhard - Senior Scientist R&D Procter & Gamble

Aesthetic product packaging is another application of this trend. GlobalData notes, “Products packaged in uniquely designed bottles with unusual textures, and packaging that consumers want to display in their homes, can capture these aesthetics and provide a more dynamic sensory experience.” Studio One Eleven® develops custom packaging solutions that elevate home cleaning, including the countertop-worthy Branch Basics refillable glass spray bottle and one-of-a-kind Zum aromatherapy laundry soap bottle.





Premium + Value

Today's consumers are looking for premium products at a good value. They are more budget-conscious but don't want to sacrifice quality. Private label products are offering premium attributes, creating competition for brands. Euromonitor notes, "Private label is not just addressing a price gap but focusing on consumer needs across different price points, including premium." In addition to high-quality ingredients and efficacious formulations, brands can incorporate multi-functionality, sustainability, and convenience to add value and warrant a higher price.

23% of consumers say "multi-benefit/multi-functional" represents a good value for money for household care and laundry products. (GlobalData)



Packaging can deliver the premium attributes consumers value. When it comes to sustainability, Berlin Packaging provides refill systems, post-consumer recycled options, lightweight pouches, custom solutions, and more. Our Studio One Eleven team creates custom designs with added functionality, like the Rejuvenate Dual System, which allows consumers to wash their house and windows without disconnecting and reconnecting separate packages.

Health Focus

Health-consciousness is driving new product development in home care categories, with consumers wanting products using safe ingredients and formulations. This is especially true among younger consumers who show a stronger interest in healthy household cleaning products. There is growing backlash over harsh chemicals and artificial ingredients, with negative news and social media coverage over product recalls. Products with natural positioning, “free-from” claims, and plant-based ingredients can alleviate much of the fear around toxic ingredients. With pet ownership on the rise, pet-safe is becoming important as well.

More than 60% of global Gen Z, Y, and X consumers say how a household care product impacts their health always or often impacts their purchase. (GlobalData)

Transparent ingredient information and prominent health-focused claims can reassure consumers that a product is safe to use and instill trust. Label graphics, package shapes, and color can also reinforce that a product is safe and natural. Studio One Eleven created a custom A-shape bottle for Charlie’s Soap in pure white that feels clean and gentle. Our graphic design team created branding that reflects the brand’s “Live Green, Deep Clean” positioning. A fresh, pastel color palette, whimsical leaf imagery, and strong but simple brandmark suggest a safe but effective clean.





Sustainability Innovation

Sustainability continues to be a priority for consumers and home care brand owners. Over the last several years, large and niche brands alike have worked to reduce their plastic footprint by introducing refill systems, using cardboard packaging, incorporating post-consumer recycled materials, and more. Moving forward, the industry will see innovations that will further reduce waste, water, and energy consumption. Innovations around cold wash have been gaining momentum in laundry and dishwashing. Smart appliance technology and new product formulations help deliver efficacy at lower temperatures, reducing energy consumption and lowering consumers' energy bills.

Reducing plastic use, water, and energy consumption are among the top 10 green activities consumers typically do to lead a more sustainable life. (Euromonitor)

Compaction is also driving innovative and sustainable product formats. Tide Evo is a liquid-free laundry detergent made with compaction. The dry laundry tile combines cleaning surfactants and turns them into a fiber-layered material. The concentrated formulation eliminates the need for water, fillers, and traditional plastic bottles.



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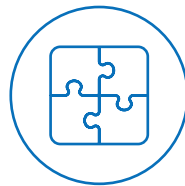
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