Green Household Cleaning and Laundry Products in the U.S., 3rd Edition

Description:

The market for green household cleaning products in the U.S grew at a blistering pace between 2007 and 2010, cooled off, and actually declined from 2010 to 2014 at a compound annual growth rate (CAGR) of 2%. Packaged Facts estimates total retail sales, including both household cleaners and laundry products, at $600 million in 2014. The green market remains a niche, accounting for about 3% of the total household cleaner and laundry product market.

Green Household Cleaning Products in the U.S., 3rd Edition details how growth of the market was driven higher through 2010 by the entry of mainstream mass marketers with green brands such as Clorox Green Works and a host of others. They were backed by heavy marketing support and initially achieved high levels of sales. Established green marketers such as Seventh Generation, Method and others responded and drove the market higher with new products, increased support, and expansion of distribution into more mass retail outlets. The overall market began to slow down and then decline as the recession and difficult economy caused most consumers to purchase less frequently and purchase products less expensive than the typically higher-priced green versions. Sales of mass market brands, with the exception of Purex Natural Elements, began a rapid decline that continued through 2014. Traditional green brands such as Seventh Generation performed well over the last five years as their hard-core green consumer bases have generally remained loyal. However gains by traditional green brands haven't been able to offset the declines by mass marketers, thus the year over year market declines between 2010 and 2014.

Packaged Facts believes green cleaning products will continue to struggle in the future and estimates the market will grow in dollars at a CAGR of about 1% to 2019. Volume will likely continue to decline, with increasing prices driving any dollar growth. Higher-priced traditional green brands like Seventh Generation, Method and Mrs. Meyers will drive market growth, but there are only a few brands with enough critical mass to support a substantially larger market. Hard-core green consumers will continue to buy green cleaning products from these and other green leaders. Since these consumers represent a relatively small part of the population, the green market will likely remain a niche for some time to come unless more consumers become regular green shoppers. American consumers are increasingly “leaning green” and most want healthier, safer choices in their foods and products they use in their homes. However the failure and struggles of green products from mass marketers have shown that the majority of American consumers don't want to buy green cleaners on a regular basis if they are more expensive or if effectiveness comes into question. On a positive note, Purex Natural Elements has done well, although recent sales have declined, by successfully convincing mainstream consumers that a value brand can be green. As Green Household Cleaning Products in the U.S., 3rd Edition notes, new private label green brands from leading retailers may succeed in further attracting mainstream consumers. Walmart's own brand, Great Value Naturals could have the biggest impact on the green cleaner market. Launched in late 2013 the all-natural line of affordable cleaning, dish, and laundry products is an extension of Walmart's hugely successful private label brand. Time will tell if Walmart, the largest retailer by a wide margin, can succeed with affordable green cleaning products when many major mass marketers could not.

Scope of Report

This report presents a detailed, updated analysis of the U.S. market for “green” (natural, organic, or eco-friendly) household cleaner and laundry products. The report outlines key issues and trends affecting the overall market and analyzes all product segments. It also discusses major players and brands and analyzes their performance in terms of sales and market share. Market size data are provided for 2010-2014 and projections for 2014-2019. All retail channels that sell consumer cleaning products are covered and considered in arriving at overall market size estimates, market trends and competitive analysis. Detailed sales data are provided for products tracked by IRI sold through food, drug and mass merchandisers. Natural stores tracked by SPINS, Inc. are included in the more detailed sales analysis.

Methodology

The information in this report was obtained from both primary and secondary research. Primary research included proprietary Packaged Facts online consumer surveys as well as consultation with industry sources.
and on-site examinations of the retail sector. Secondary research entailed gathering data from relevant trade, business and government sources, as well as company promotional literature and annual reports. Our estimates of market size and company performance are based on various sources including reported revenues of product manufacturers and retailers; IRI, which tracks data in mass retail outlets; SPINSscan Natural data from SPINS, Inc., which tracks sales in the natural supermarket and specially gourmet supermarket channels; publications and other market research sources. Our analysis of consumer trends relies on data from various sources including national online consumer usage surveys conducted in February 2009, August 2012, and January 2015 by Packaged Facts, and Simmons National Consumer Surveys for Summer 2010 through Summer 2014, from Experian Marketing Services.

Market Definition

Categories and Segments

For the purpose of this report, green cleaning products are classified under two broad categories:

Green Household Cleaner Products: segments include dish/dishwasher detergents, all-purpose cleaners, tub/tile cleaners, toilet bowl cleaners, household cleaner cloths, glass cleaners, floor cleaners and furniture polish, specialty cleaners/polish, rug/upholstery cleaners, drain cleaners, and oven/appliance cleaner/degreaser.

Green Laundry Products: segments liquid laundry detergents, powder laundry detergents, fabric softener sheets, fabric softener liquids, bleach, laundry prewash/additives, fine washable laundry detergents, and other laundry detergents (packet/bar and includes pods.)

Green Cleaner Defined

There is no specific definition of green cleaners and definitions can vary widely, which can significantly alter the size and scope of the market. Many marketers may claim certain products within their portfolio are “green” because they contain no processed chemicals such as phosphates. Other products may be based on citrus oils, which imply they are green. For the purposes of this report, Packaged Facts has defined green cleaners as products or brands that are specifically marketed as “green” (natural, organic, or eco-friendly), including mass-marketer brands such as Clorox Green Works or eco-specific brands such as Seventh Generation.

Contents:

Chapter 1 Executive Summary
Introduction
Scope of Report
Categories and Segments
Green Cleaner Defined
Products Out of Market Scope
Methodology
Market Size and Growth
Green Cleaning Product Sales Decline to $600 Million in 2014
Figure 1-1 Retail Dollar Sales of Green Household Cleaner and Laundry Products, 2010–2014(millions)
Sales Declines After Several Years of Gains
Table 1-1 Retail Dollar Sales of Green Household Cleaner and Laundry Products, 2010–2014(in millions)
Volume Sales
Figure 1-2 Retail Volume Sales of Green Household Cleaner and Laundry Products, 2010–2014(in millions)
Category Sales
Sales of Cleaners Grow Slowly, Laundry Products Decline
Table 1-2 Retail Dollar Sales of Green Household Cleaner and Laundry Products by Category, 2010–2014 (in millions)
Volume and Prices by Category
Volume Sales Decline at Same Rate for Green Household Cleaners and Laundry Products
Average Prices for Green Household Cleaners Increase Much More Rapidly than Laundry Products
Higher Green Prices a Barrier for Consumers in Most Segments
Supercenters, Mass Merchandisers, Supermarkets Capture Most of Market
Market Forecast
Green Cleaning Products Will Continue to Struggle
Figure 1-3 Projected Retail Dollar Sales of Green Household Cleaner and Laundry Products, 2014–2019 (in millions)
Focus on Product Segments
Green Household Cleaner Retail Sales by Product Segment
Sales Highly Concentrated in a Few Segments
Green Household Cleaners Flat in Dollars, Volume Down 8%
Green Laundry Products Retail Sales by Product Segment
Liquid Laundry Detergents Dominate Green Laundry Product Sales
Green Laundry Products Continue Decline
Green Cleaning Products Only 3% of Total Market
Competitive Landscape
Highly Concentrated Market
Leading Marketer Sales Concentrated in Few Product Segments
Marketing and Retail Trends
Marketing Trends
Marketing Green Credibility and Earning Trust
Greater Transparency
Green Advertising and Promotion
Bundles and Gift Sets
Retail Dynamics
Retailers Promote Green
Target Made to Matter
Private Label Opportunity for Retailers
Illustration 1-1: Walmart’s Great Value Naturals
New Product Trends
Fewer New Product Introductions
Packaging Continues to Be Important for New Products
New Bio-Science Cleaning Technology
Illustration 1-2: Evolve Cleaning Technology
Manufacturers Developing Products for Specific Uses
Green Manufacturers Try to Differentiate Products and Brands
Green Cleaner Manufacturers Continue to Expand Scents
The Consumer
Care of Environment is Shared Responsibility
Table 1-3 Adults Who Agree a Lot and a Little with Selected Statements About Environmental Responsibility, 2010–2014 (percent)
Renewed Interest in Recycling in Last Couple of Years
Purchase and Use of Green Cleaning Products Consistent Over Last 5 Years
Concerns for Environment, Family Safety and Health Drive Product Use
Figure 1-4 Reasons for Choosing Green Household Cleaning or Laundry Products, 2015 (percent)
Availability, Price, and Effectiveness Are Challenges for Green Cleaning
Chapter 2 The Market
Introduction
Scope of Report
Categories and Segments
Green Cleaner Defined
Products Out of Market Scope
Methodology
Market Size and Growth
Green Cleaning Product Sales Decline to $600 Million in 2014
Figure 2-1 Retail Dollar Sales of Green Household Cleaner and Laundry Products, 2010–2014(millions)
Sales Declines After Several Years of Gains
Table 2-1 Retail Dollar Sales of Green Household Cleaner and Laundry Products, 2010–2014(in millions)
Volume Sales
Figure 2-2 Retail Volume Sales of Green Household Cleaner and Laundry Products, 2010–2014(in millions)
Average Volume Prices Higher
Table 2-2 Retail Volume Sales and Average Price per Volume of Green Household Cleaner and Laundry Products, 2010–2014 (volume in millions and price in dollars)
Category Sales
Sales of Cleaners Grow Slowly, Laundry Products Decline
Table 2-3 Retail Dollar Sales of Green Household Cleaner and Laundry Products by Category, 2010–2014 (in millions)
Green Household Cleaners Increase Market Share Since 2010
Figure 2-3 Retail Dollar Shares of Green Household Cleaner and Laundry Products, 2007–2014(percent)
Volume and Prices by Category
Volume Sales Decline at Same Rate for Green Household Cleaners and Laundry Products
Table 2-4 Retail Volume Sales of Green Household Cleaner and Laundry Products by Category,2010–2014 (millions, percent)
Average Prices for Green Household Cleaners Increase Much More Rapidly than Laundry Products
Table 2-5 Average Retail Price per Volume of Green Household Cleaners and Laundry Products, 2010–2014 (dollars, percent)
Higher Green Prices a Barrier for Consumers in Most Segments
Table 2-6 Average Retail Volume Prices for Selected Green Household Cleaner and Laundry Segments, 2014 (dollars)
Green and Non-Green Price Comparisons
Table 2-7 Average Retail Volume Prices for Selected Green Household Cleaner and Laundry Products, 2014 (dollars)
Retail Channel Sales for Green Household Cleaners and Laundry Products
Supercenters, Mass Merchandisers, Supermarkets Capture Most of Market
Figure 2-4 Share of Dollar Sales by Retail Channel for Green Household Cleaning and Laundry Products, 2014 (percent)
Table 2-8 Dollar Sales by Retail Channel of Green Household Cleaner and Laundry Products, 2010–2014 (in millions, percent)
Natural Supermarkets Only 10% of Green Cleaning Product Sales
Table 2-9 Retail Dollar Sales of Green Household Cleaner and Laundry Products: Natural Supermarkets vs. All Other Channels, 2010–2014 (in millions)
Market Forecast
Green Cleaning Products Will Continue to Struggle
Figure 2-5 Projected Retail Dollar Sales of Green Household Cleaner and Laundry Products, 2014–2019 (in millions)
Chapter 3 Focus on Product Segments
Introduction
Green Household Cleaner Retail Sales by Product Segment
Sales Highly Concentrated in a Few Segments
Figure 3-1 Dollar Shares of Green Household Cleaner Product Segments, 2013-2014 (percent)
Green Household Cleaners Flat in Dollars, Volume Down 8%
Dish Detergents Outperform Other Segments
Two Brands Control Dishwasher Detergent/Additive Segment
All Purpose Cleaner Performance Lags
Nonabrasive Tub/Tile Cleaners Up on Small Sales
Cloth Cleaners on the Decline
Specialty Cleaner/Polish Declines By Double-Digits
All Other
Table 3-1 IRI-Tracked Sales of Green Household Cleaners, 2013-2014 (dollars and volume, price per volume)
Green Laundry Products Retail Sales by Product Segment
Liquid Laundry Detergents Dominate Green Laundry Product Sales
Figure 3-2 Dollar Shares of Green Laundry Product Segments, 2013-2014 (percent)
Green Laundry Products Continue Decline
Liquid Laundry Detergents Lead Decline
Fabric Softener Sheets Decline Significantly
Sales of Liquid Fabric Softeners Flat Powder Laundry Detergent
Powder Laundry Detergent
All Other
Table 3-2 IRI-Tracked Sales of Green Laundry Products, 2013-2014 (dollars and volume, price per volume)
Green Cleaning Products Only 3% of Total Market
Figure 3-3 Selected Green Household Cleaner Segments Share of Total Segments, 2014 (percent)
Figure 3-4 Selected Green Laundry Product Segments Share of Total Segments, 2014 (percent)
Chapter 4 Competitive Landscape
Introduction
Highly Concentrated Market
Figure 4-1 Dollar Shares of Leading Brands of Green Cleaning Products, 2014 (percent)
Figure 4-2 Dollar Shares of Leading Brands of Green Cleaning Products, 2013 (percent)
Figure 4-3 Unit Shares of Leading Brands of Green Cleaning Products, 2014 (percent)
Leading Green Cleaning Brand Performance
Seventh Generation Continues to Outperform
Purex Natural Elements
Method Grows More Slowly Than in Past
Mrs. Meyers Continues to Grow
Earth Friendly Products Relies on Liquid Laundry Detergents
Palmolive a Small Player with Two Products
Clorox Green Works Volume Down by a Third
Simple Green Sales Concentrated on All Purpose Cleaner
Arm & Hammer Essentials Continues Decline
Other Green Cleaner Brands
Table 4-1 Leading IRI-Tracked Green Cleaner Brands, 2013-2014 (dollars and volume in millions, price per volume)
Acquisitions and Investments
New Entrants in a Crowded Market
Illustration 4-1: Puretergent Laundry Detergents
Illustration 4-2: Puracy Green Cleaners
Illustration 4-3: Earth Rescue Line
Illustration 4-4: If You Care Natural Laundry Detergent
Illustration 4-5: The Honest Company Cleaners
Companies and Brands Positioned Around Common Themes
Table 4-2 Slogans of Selected Green Household Cleaner Marketers or Brands, 2015
Chapter 5 Marketing and Retail Trends
Marketing Trends
Marketing Green Credibility and Earning Trust
Illustration 5-1: Earth Friendly Products' Green Credentials
Illustration 5-2: Design for the Environment (DfE) Potential New Logo
Illustration 5-3: Biokleen's Natural Child World Eco-Excellence Award
Illustration 5-4: Seventh Generation Stand Up for Safer Chemicals
Greater Transparency
Illustration 5-5: J.R. Watkins Freedom Code
Illustration 5-6: Method Greenskeeping Toolkit
Better by Comparison
Illustration 5-7: Better Life Ingredient Comparison
Green Advertising and Promotion
Method Clean Happy Campaign
Illustration 5-8: Method Clean Happy Campaign
Clorox Tries to Stop Green Works Decline
Illustration 5-9: Clorox's Green Works Muddy Puppies Campaign
Simple Green Runs Contests Monthly
Illustration 5-10: Simple Green Sweepstakes
Marketers Embrace Social Media
---SimpleGreenSelfie
Illustration 5-11: ---SimpleGreenSelfie
Rockin' Green's Guess the Mystery Scent on Facebook
Illustration 5-12: Rockin' Green's Guess the Mystery Scent on Facebook
Bundles and Gift Sets
Illustration 5-13: Green Cleaner Bundles and Gift Sets
Better Life As Seen on Shark Tank
Illustration 5-14: Better Life As Seen on Shark Tank
Retail Dynamics
Retailers Promote Green
Whole Foods Eco-Scale Rating System
Illustration 5-15: Whole Foods Eco-Scale
Target Made to Matter
Illustration 5-16: Target Made to Matter
Home Depot Eco Options
Illustration 5-17: Home Depot Eco Options
Sunshine Makers Promotes Simple Green Eco Options Label
Illustration 5-18: Simple Green Promotes Eco Options Label
Private Label Opportunity for Retailers
Table 5-1 Selected Private-Label Green Household Cleaner Brands, 2015
Walmart's Great Value Naturals
Illustration 5-19: Walmart's Great Value Naturals
Cross-channel Shopping the Norm
Figure 5-1 Type of Store(s) Shopped on Most Recent Grocery Shopping Trip, 2014 (percent of grocery shoppers)
Leading Green Cleaner Brands Sold Across Most Retail Channels
Table 5-2 Selected Green Household Cleaner Brands Carried by Retailers, 2015
ePantry New Online Retailer Focused on Sustainable Cleaners
Illustration 5-20: ePantry Sustainable Cleaner Online Retailer
Chapter 6 New Product Trends

Fewer New Product Introductions
Packaging Continues To Be Important for New Products
Ultra-concentrated Liquid Laundry Detergent Bottled for Convenience
Illustration 6-1: Green Laundry Detergent Bottles
Pourable, Stand-Up Pouches Continue to Gain
Illustration 6-2: Puretergent Liquid Laundry Detergent Pouches
Method's Ocean Plastic Dish + Hand Soap
Illustration 6-3: Method Ocean Plastic dish + hand soap
Ecover Plantplastic Made from Sugarcane
Illustration 6-4: Ecover Plantplastic
Simple Green's More Sustainable Package
Illustration 6-5: Simple Green's More Sustainable Package
Clorox Smart Tube Enhances Value and Performance
Illustration 6-6: Clorox Smart Tube
New Bio-Science Cleaning Technology
Illustration 6-7: Evolve Cleaning Technology
Concentrates Continue to Gain in Cleaners
Illustration 6-8: Seventh Generation Cleaner Concentrates
Green Single Use Pods and Packs
Illustration 6-9: Single Use Packs
Illustration 6-10: Grab Green Pod Science
Manufacturers Extending into New Segments
Cleaning Up After Pets Becoming More Popular
Illustration 6-11: Green Pet Cleaners
More Manufacturers Target Baby Products
Illustration 6-12: Green Baby Detergents
Active Wear Detergents
Illustration 6-13: Green Active Wear Detergents
Manufacturers Developing Products for Specific Uses
Illustration 6-14: BuggyLOVE Stroller Cleaning Kit
Illustration 6-15: Attitude Toy Cleaner
Illustration 6-16: Bottle Bright
Personal Stories Drive Green Brand Product Development
Table 6-1 Selected Green Household Cleaner Brand Stories, 2015
Green Manufacturers Try to Differentiate Products and Brands
Illustration 6-17: Eco-Me New Package and Branding
Illustration 6-18: Rockin' Green Differentiates
Green Cleaner Manufacturers Continue to Expand Scents
Table 6-2 Selected Green Household Cleaner Brand Scents, 2015
Illustration 6-19: Brands Highlighting Scent
Laundry Product Alternatives
Illustration 6-20: Soap Nuts
Illustration 6-21: Dryer Balls
Chapter 7 The Consumer

Sources

Concern of Environment is Shared Responsibility
Table 7-1 Adults Who Agree a Lot and a Little with Selected Statements About Environmental Responsibility, 2010-2014 (percent)
Renewed Interest in Recycling in Last Couple of Years
Table 7-2 Adults Who Agree a Lot and a Little with Selected Statements About Recycling, 2010-2014 (percent)
Purchase and Use of Green Cleaning Products Consistent Over Last 5 Years
Figure 7-1 Adults Who Purchased or Used Green Household Cleaner or Laundry Products in the Last 12 Months: 2009, 2012, 2015 (percent)
Concerns for Environment, Family Safety and Health Drive Product Use
Figure 7-2 Reasons for Choosing Green Household Cleaning or Laundry Products, 2015 (percent)
Availability, Price, and Effectiveness Challenges for Green Cleaning
Figure 7-3 Adults Who Agree a Lot and a Little About Price, Effectiveness and Availability of Green Household Cleaner or Laundry Products, 2015 (percent)
Simmons Data Reaffirms Cost and Quality Issues for Green Products
Table 7-3 Adults Who Agree a Lot and a Little with Selected Statements About Environmentally Friendly Products, 2010-2014 (percent)
Brands from Mass Marketers Have Highest Recall
Figure 7-4 Brands of Green Household Cleaning or Laundry Products Purchased or Used in the Last 12 Months, 2015 (percent)

Demographic Differences in Brand Preference
Table 7-4 Demographic Characteristics of Selected Household Cleaning Brand Users, 2014 (index)

Consumer Attitudes Measured with Simmons Segmentation System
Brand Perception by Simmons Health and Well-Being Segments

Table 7-5 Selected Brand Use by Simmons Health and Well-Being Segments, 2014 (index)

Walmart Number One with Green Cleaning Product Buyers

Figure 7-5 Where Green Household Cleaning or Laundry Products Were Bought in the Last 12 Months, 2015 (percent)

Appendix: Selected Marketers and Websites

Ordering:

Order Online - http://www.researchandmarkets.com/reports/3163618/

Order by Fax - using the form below

Order by Post - print the order form below and send to

  Research and Markets,
  Guinness Centre,
  Taylors Lane,
  Dublin 8,
  Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Green Household Cleaning and Laundry Products in the U.S., 3rd Edition
Web Address: http://www.researchandmarkets.com/reports/3163618/
Office Code: SCIS3BFS

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td>USD 2995</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td>USD 5990</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:  Mr  Mrs  Dr  Miss  Ms  Prof
First Name: __________________________ Last Name: __________________________
Email Address: * __________________________
Job Title: __________________________
Organisation: __________________________
Address: __________________________
City: __________________________
Postal / Zip Code: __________________________
Country: __________________________
Phone Number: __________________________
Fax Number: __________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

Account number: 833 130 83
Sort code: 98-53-30
Swift code: ULSBIE2D
IBAN number: IE78ULSB98533083313083
Bank Address: Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World