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

Description: Green Household Cleaning Products in the U.S., 3rd Edition

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%. This report expects 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 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; SPINscan Natural data from SPINS, Inc., which tracks sales in the natural supermarket and specialty 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, 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, The author 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.

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