

## From Suds to Storage

Why brands must rethink growth in a constrained economy

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VP Thought Leadership  
Home, Family, & Baby



# Agenda

- 1** Why the old household care playbook breaks under pressure  
*The assumptions that no longer hold — and why “more efficacy” isn’t enough*
- 2** The five forces reshaping demand  
*A new lens for understanding how people buy, use, and value household care*
- 3** Spending, price, channels, and households  
*Where behavior is already shifting — and where growth still exists*
- 4** How challengers are winning in this environment  
*What they do differently across claims, formats, and discovery*
- 5** What this changes for marketers  
*How to rethink claims, formats, channels, and data for the next phase of growth*

# Why the Old household care Playbook Breaks Under Pressure

Economic pressure, household fragmentation, and behavioral shifts are exposing the limits of how growth has traditionally been pursued.

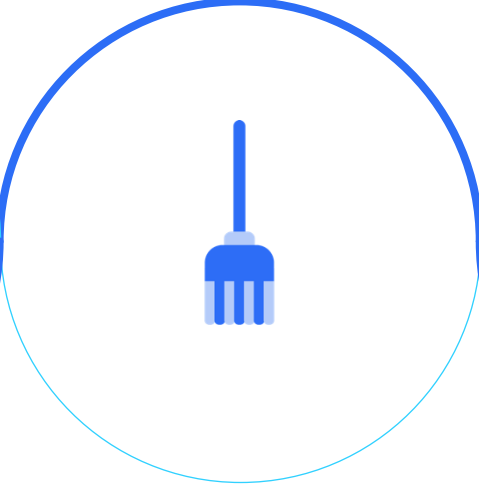
# The traditional household care playbook is incomplete

Consumers still want efficacy, but value also comes from Control, Ritual, Personalization, and Identity...alongside Hygiene



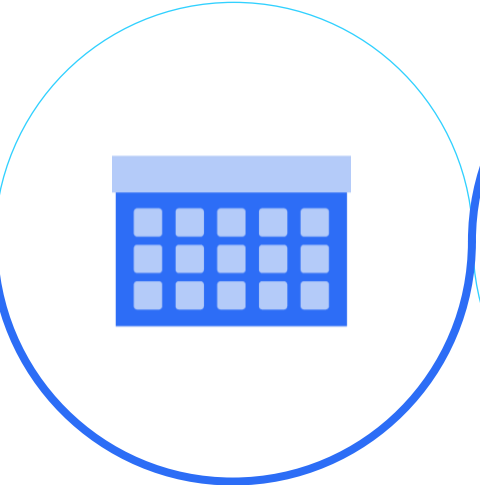
## Hygiene

Keeps the home safe and fresh by removing germs, odors, and visible mess.



## Control

Helps people feel on top of life by reducing chaos, preventing problems, and restoring order.



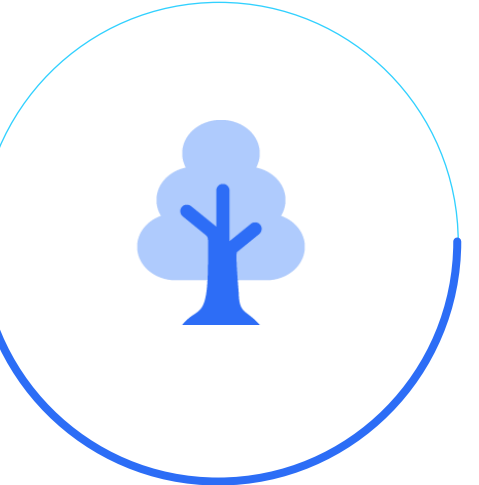
## Ritual

Turns upkeep into a routine that resets the home and supports daily rhythms.



## Personalization

Lets people tailor products to preferences such as scent, format, convenience, and “how I clean.”



## Identity

Signals values and self-image (eco choices, premium cues, or “the kind of home I keep”).

# The household care Playbook Was Built for Stability — Not Volatility

The playbook used to assume:

- ***Predictable households***
- ***Predictable trips***
- ***Predictable value trade-offs***



# 5 Forces Reshaping Demand for household care

These forces explain why price, format, channels, and winners are shifting even when the economy tightens

**01.**

Fragmented  
Home

**02.**

A New Value  
Equation

**03.**

The Control  
Economy

**04.**

Time  
Optimization

**05.**

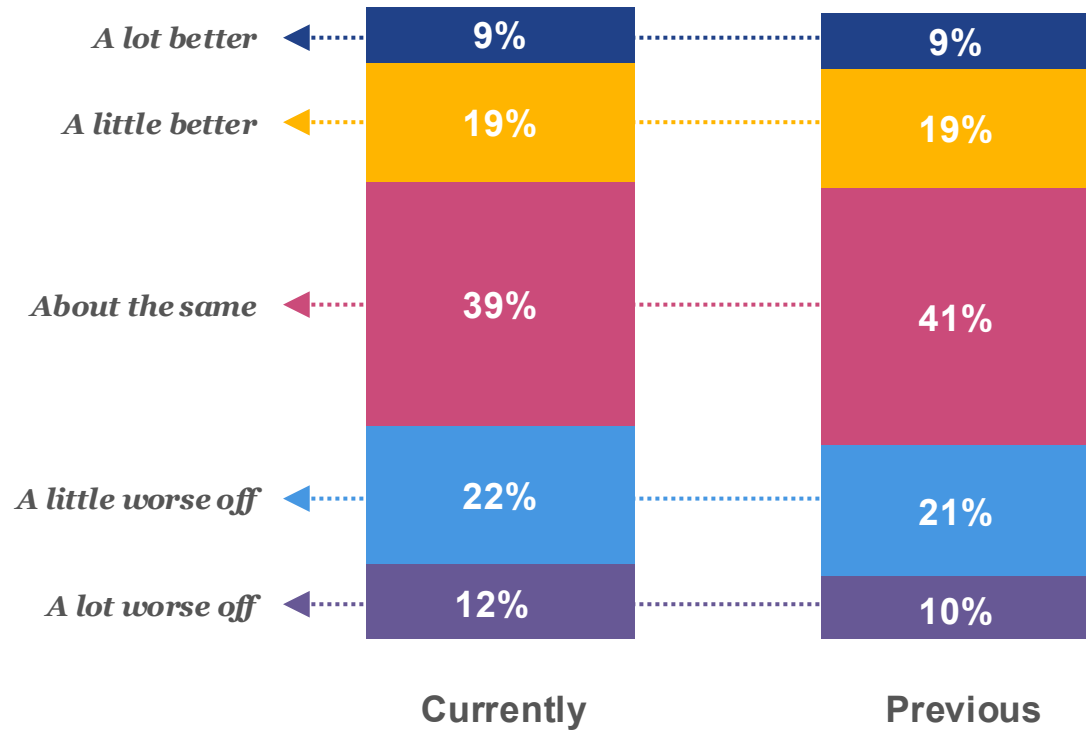
Identity-Driven  
Homes

# What's Breaking Isn't Demand...It's the Old Rules That Explained It

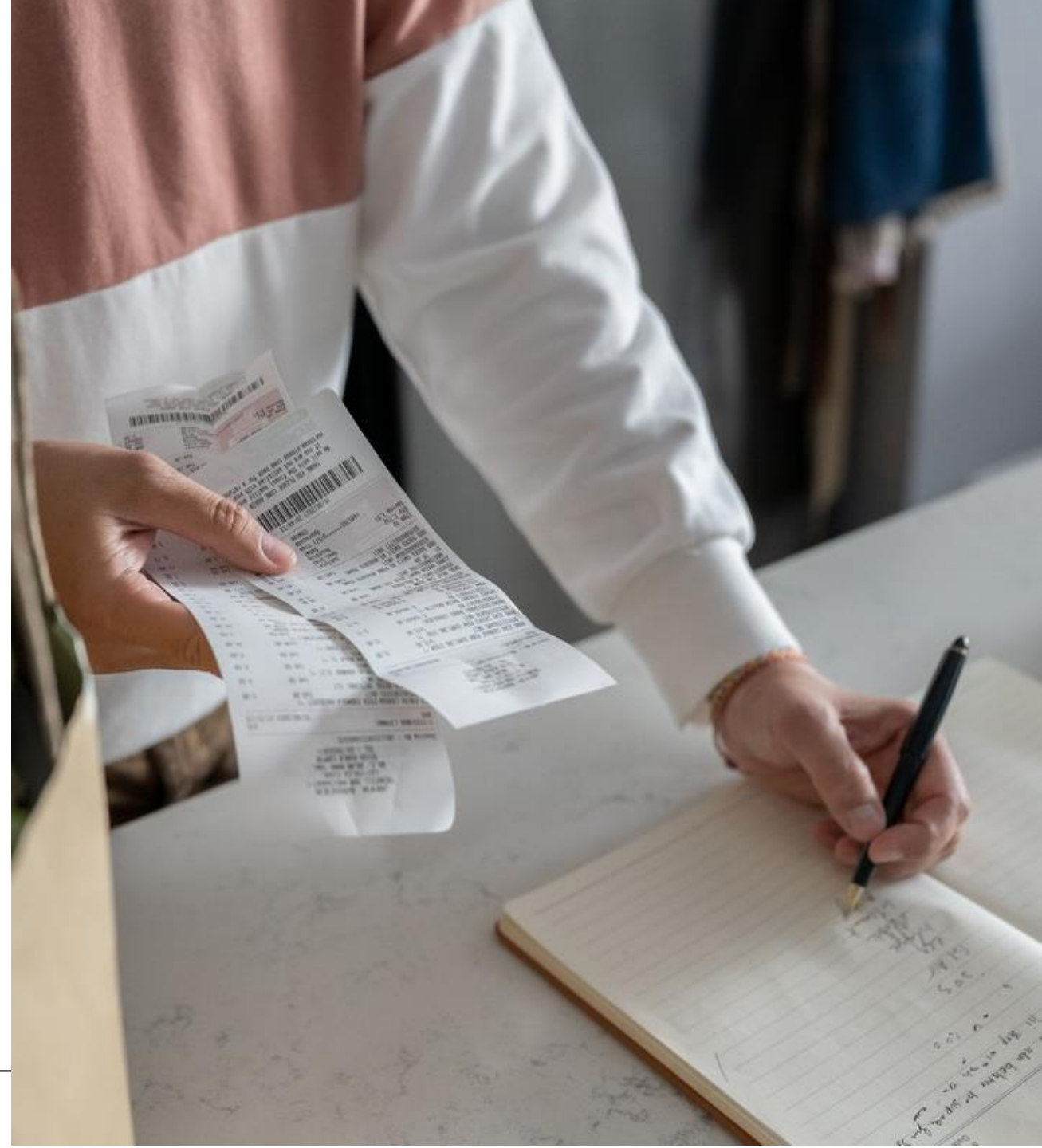
When pressure rises, consumers don't simply trade down. They re-optimize across price, effort, trust, and emotional return

# More consumers feel *worse off financially* than they did a year ago

How is your household's current financial situation compared to a year ago?

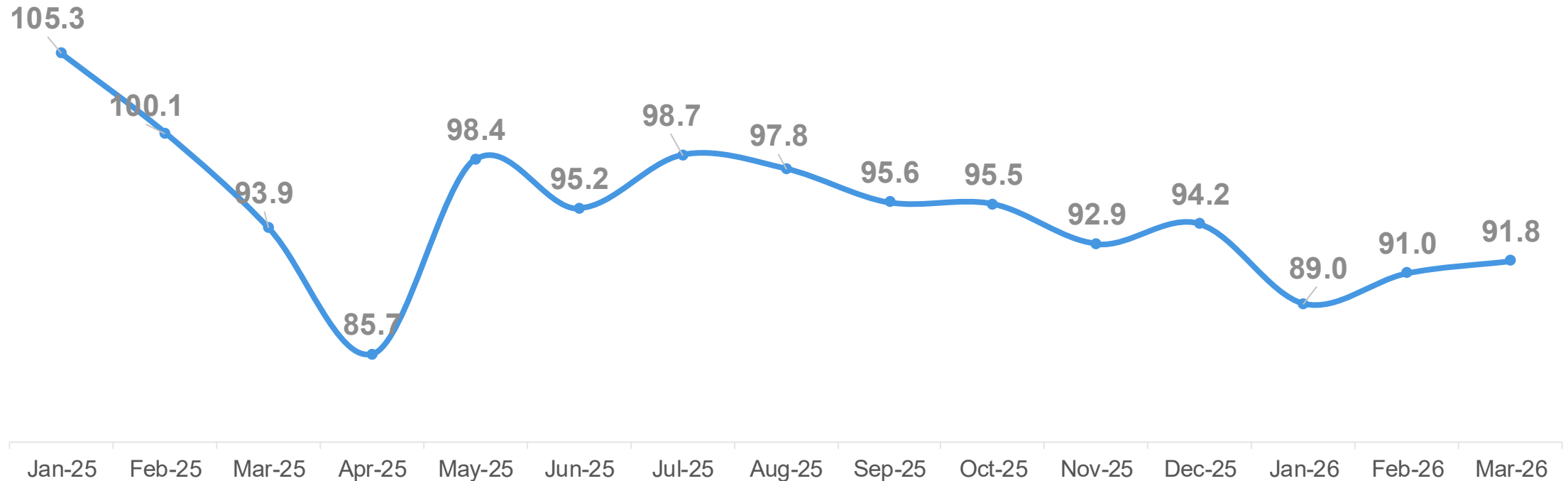


NIQ, BASES Quick Question Omnibus Survey, November 2025, n=1,021



While still at relatively low levels, the US Consumer Confidence recovered slightly in February and March as consumers' pessimistic outlooks eased.

### US Consumer Confidence

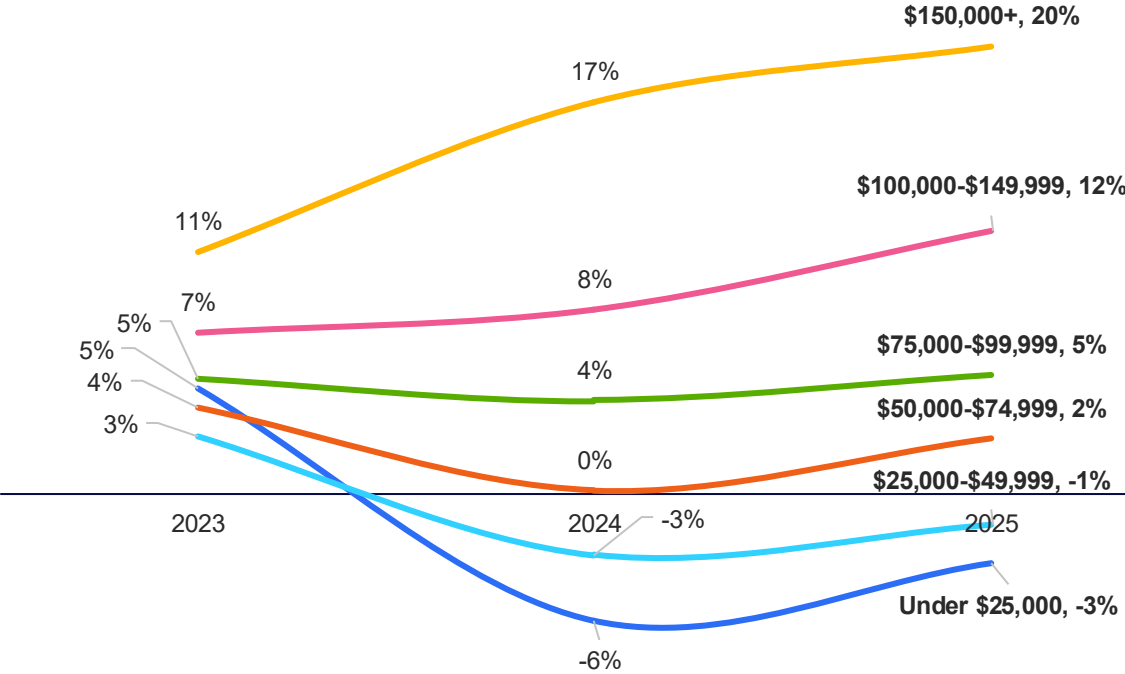


Source: The [Conference Board](#) Consumer Confidence Index® (data updated monthly, through Mar. 2026)

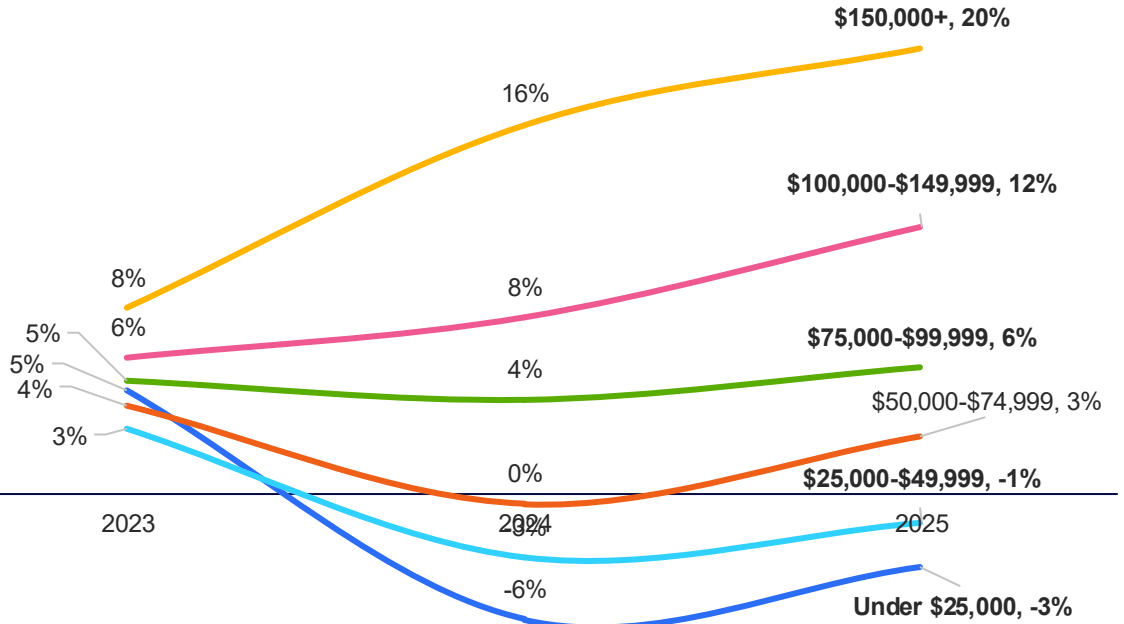
# The K-Shaped Economy Is Reshaping Household Spend

Higher income households continue to spend more but are pulling back in terms of spending growth

**Total Store, Dollar Spend Growth vs. YA by Household Income**



**Food, Dollar Spend Growth vs. YA by Household Income**

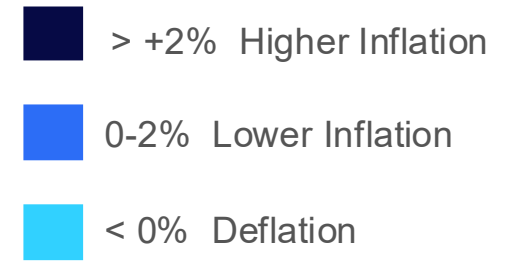
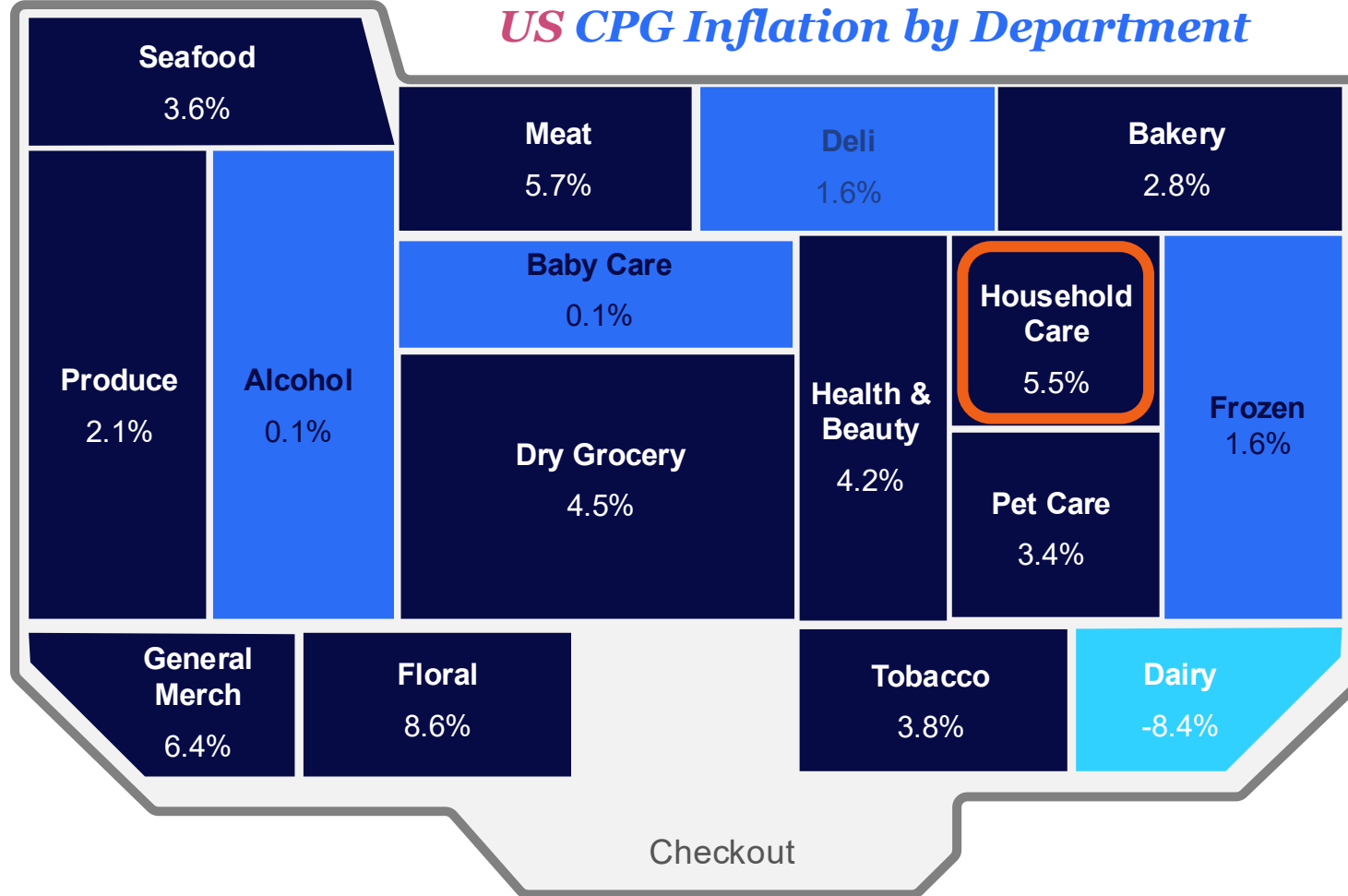


Dataset: NielsenIQ Panel On Demand Omnishopper | US Exp Osh - NDH Synd Full View - 444 5 yr | Entire Dataset

**Overall CPG Inflation increased to 2.5% in March 2026, higher than February (2.4%)**  
**Household care continued to experience high inflation at 5.5%**



**Total CPG Inflation Rate: 2.5%**

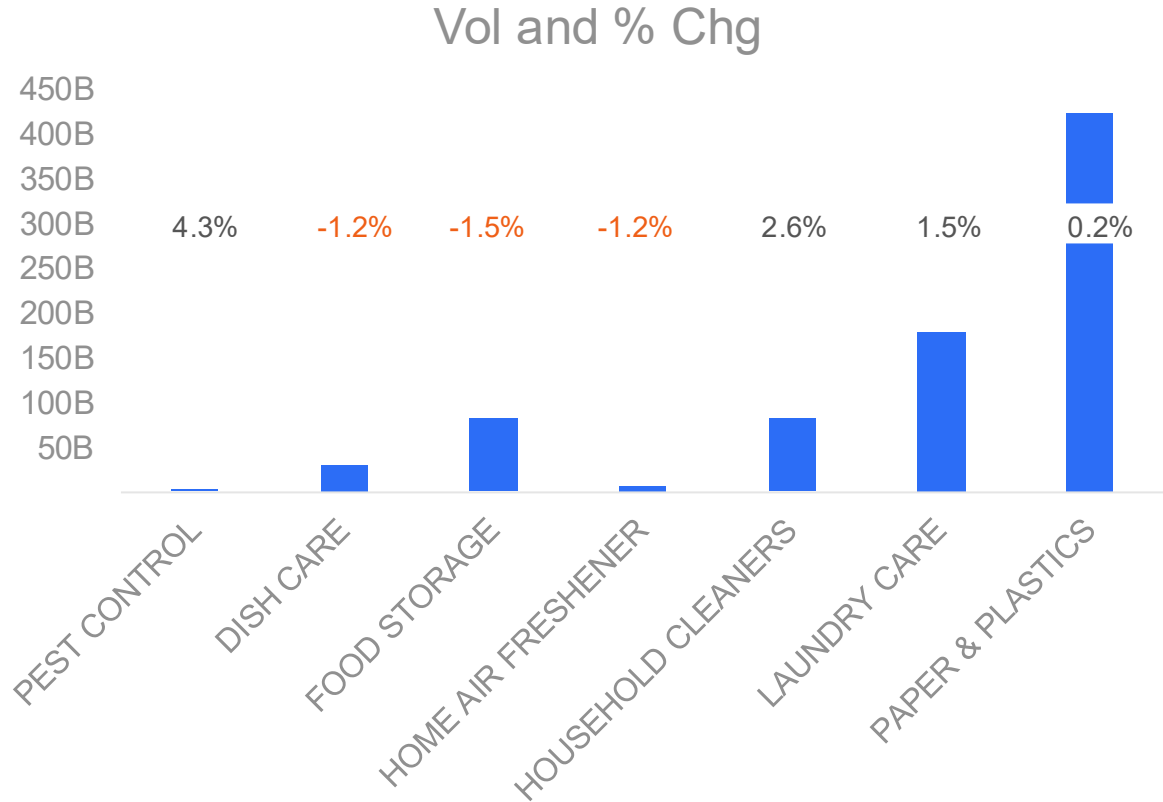
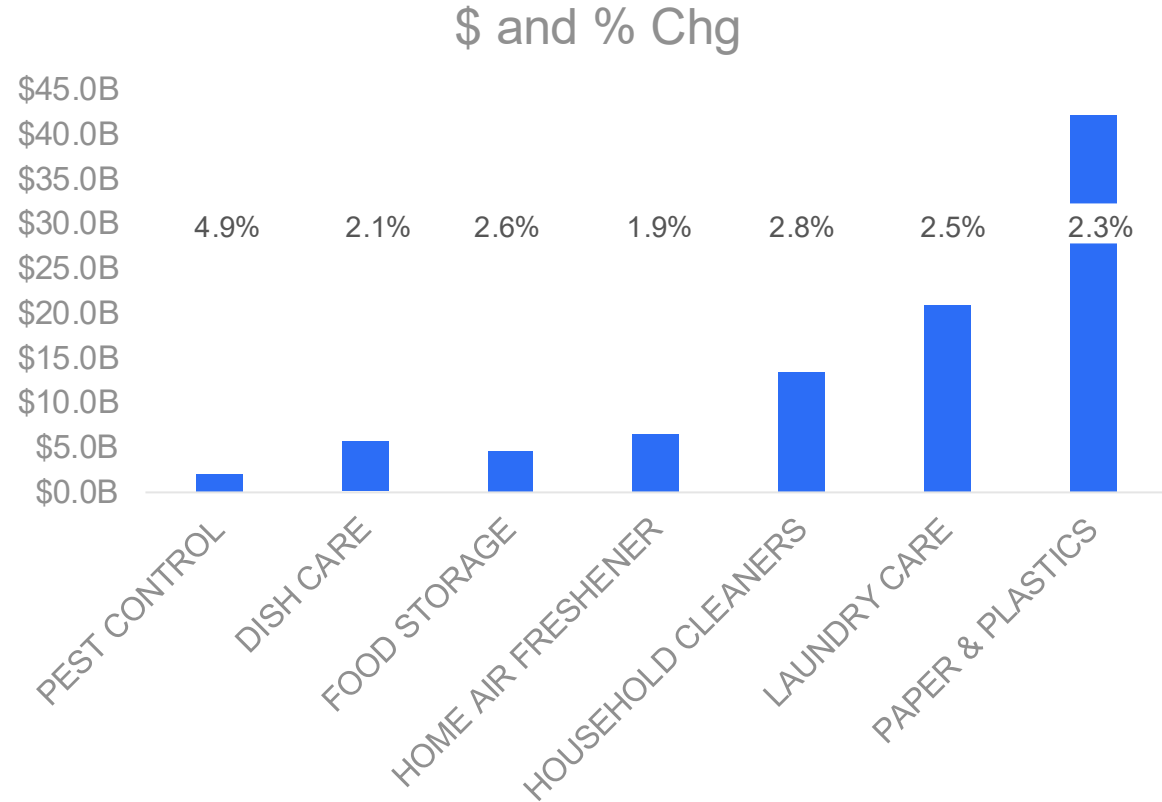


Source: NielsenIQ, Total US Full View, 5 weeks ending Mar 28, 2026 (vs. YAGO)

***Value Isn't Just a Price Point  
It's an Equation Consumers Actively Solve***

# Household Care Continues to Grow With Important Trade-offs

Dollar growth remains intact, but volume trends highlight where demand is strengthening or under stress



# Even in today's economy, higher priced doesn't mean demand destruction

High-priced dollar growth is positive in every category while mid-tier is mixed/declining

Dollar growth by price tier, %Δ

	High Price \$ %Δ	Mid Price \$ %Δ	Low Price \$ %Δ
Dish Care	+6.9%	-8.2%	+1.8%
Food Storage	+16.6%	-80.7%	+1.6%
Home Air Freshener	+9.0%	-0.6%	+1.4%
Household Cleaner & Supply	+2.0%	-2.4%	+2.8%
Laundry Care	+3.2%	+27.5%	+2.3%

**High-price tier**  
Positive across all categories (range +2% to +16.6%)

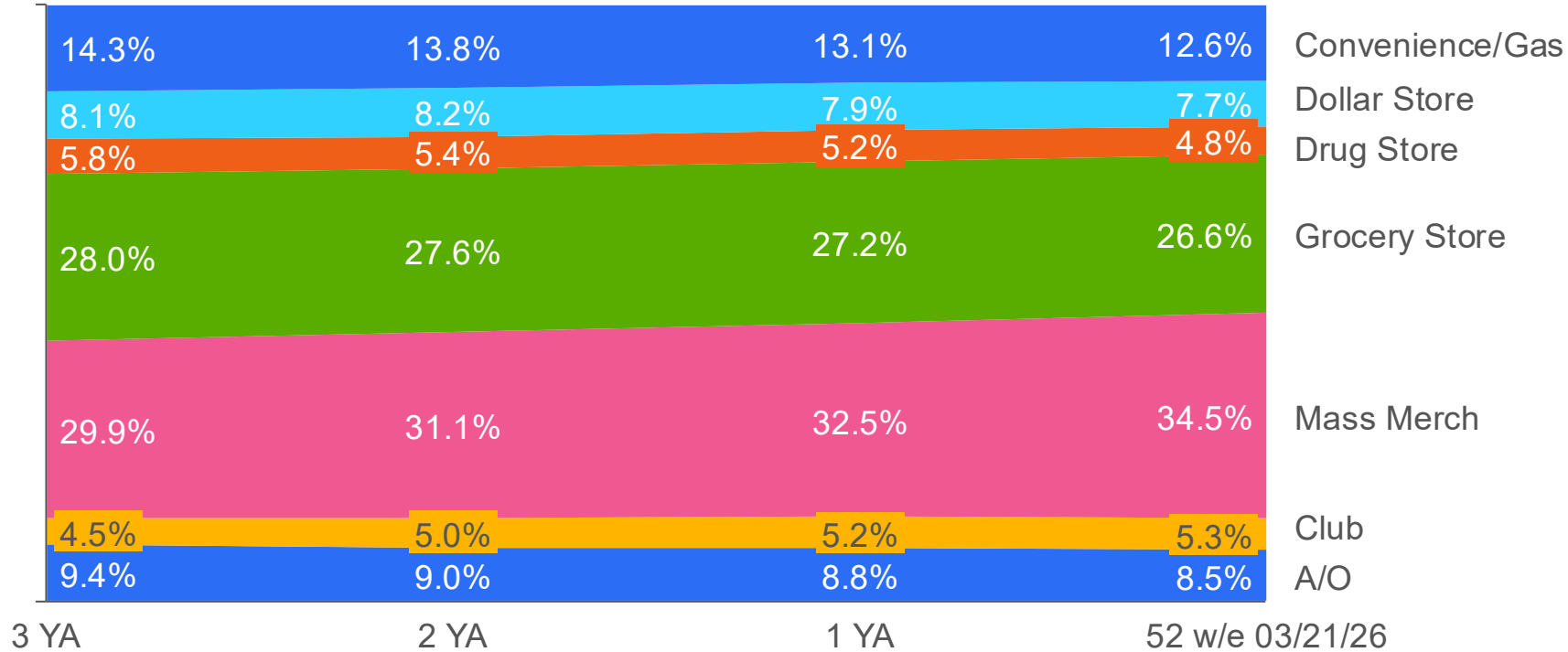
**Mid-price tier**  
Mixed/pressured overall; Food Storage is sharpest decline (-80.7%)

**Notable exception**  
Laundry mid-tier bucks trend (+27.5%)

Source: NielsenIQ, RMS, 52 weeks ending 3/21/2026; High-priced (EQ): > +25% vs category average, Mid-priced (EQ): within ±25% of average, Low-priced (EQ): < -25% vs average

# Consumers are shifting across retail outlets to find the best value for their household care needs

## Share of household care Consumer Trips by Retail Outlet

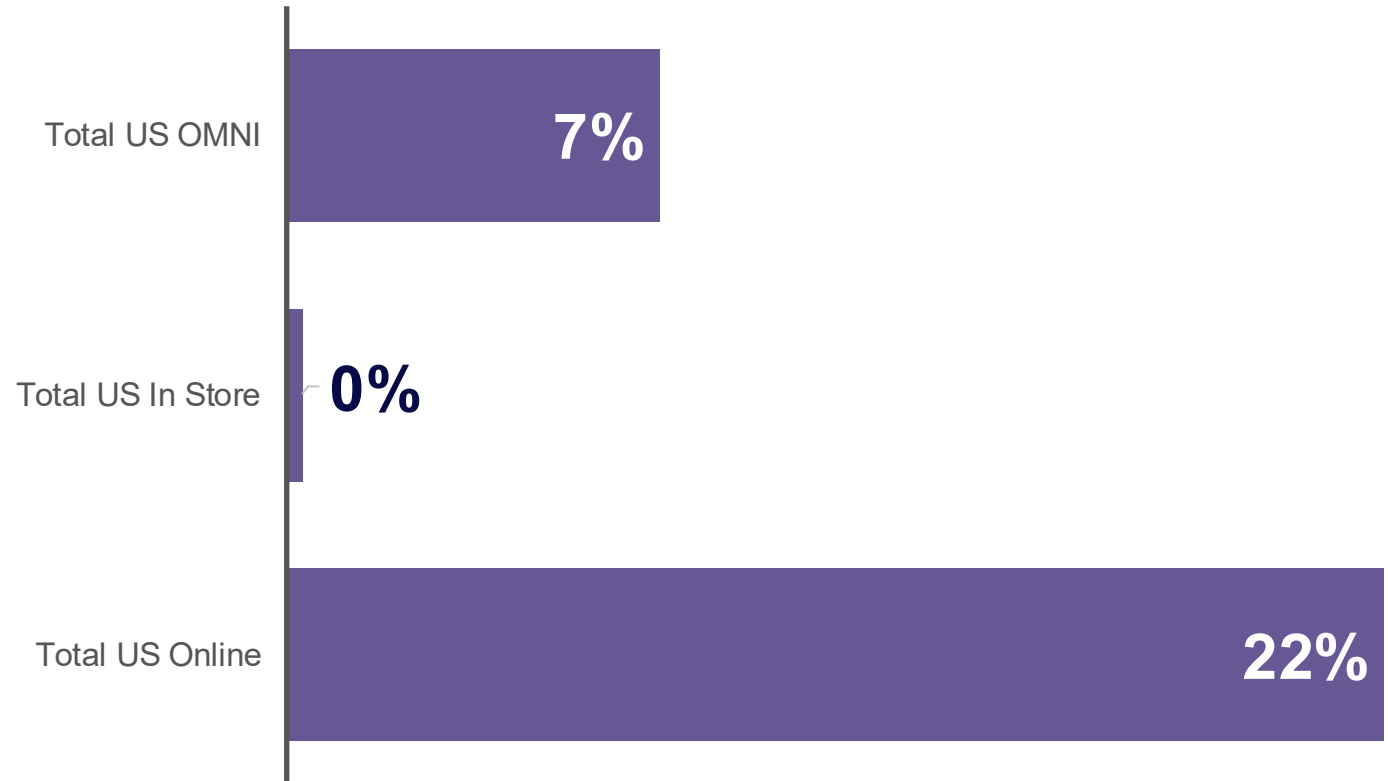


- Mass is winning over consumers seeking value in price
- Club is attracting consumers who seek value across the long-term use of their products
- Grocery and drug continue to lose consumers who find value in other outlets

Source: NIQ Omnishopper Panel

**Online is the main source of growth for cleaners**

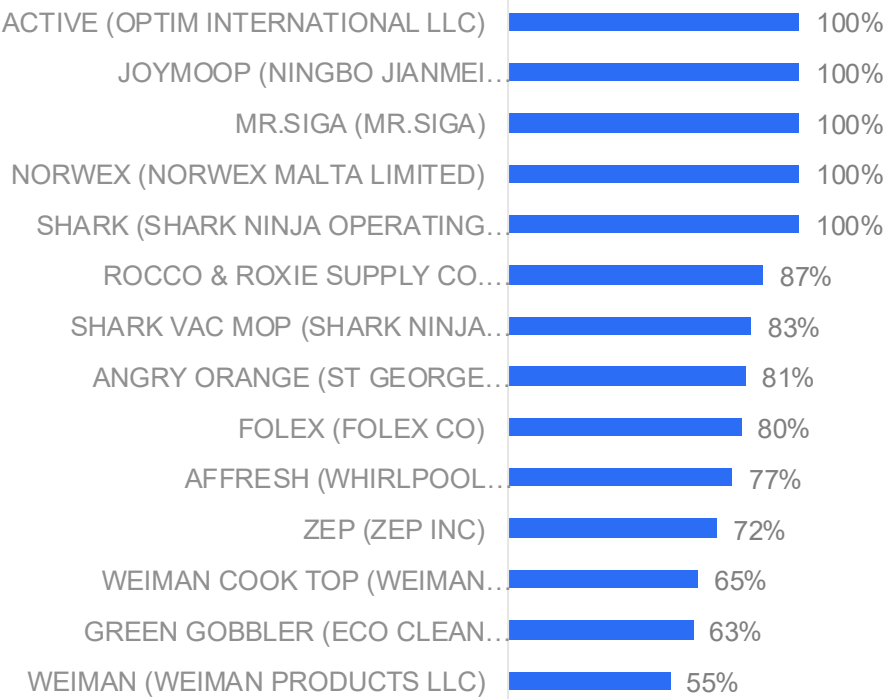
### % Chg \$ Sales vs Year Ago, Household Cleaners and Supply



Source: NielsenIQ Omnisales, 52 we 02/21/26,

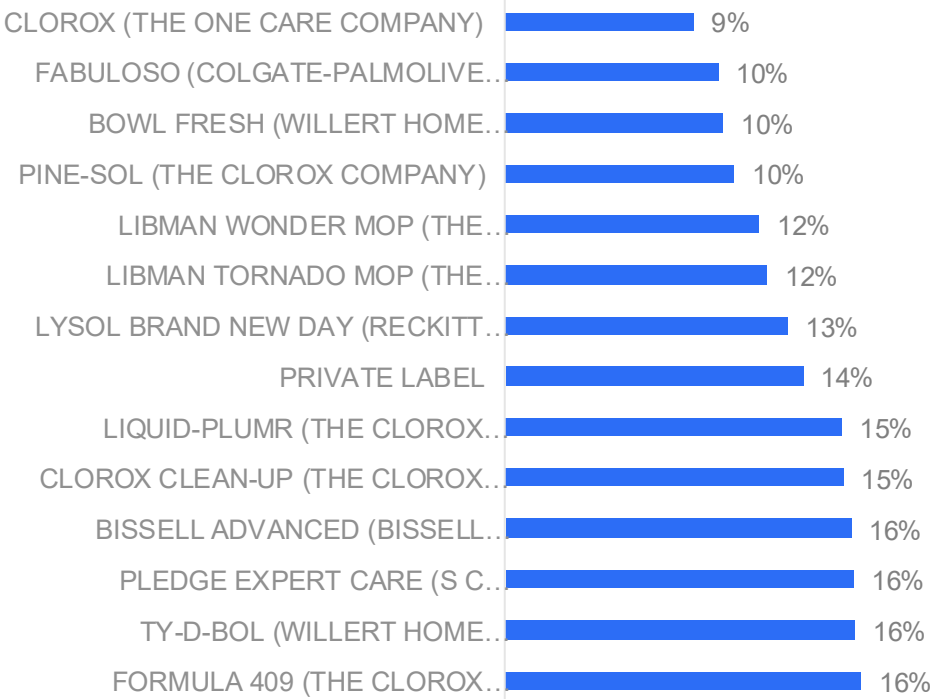
# Online has fewer barriers to entry allowing smaller brands to capture market share

## Select Top Cleaning Brands % \$ Sales Online



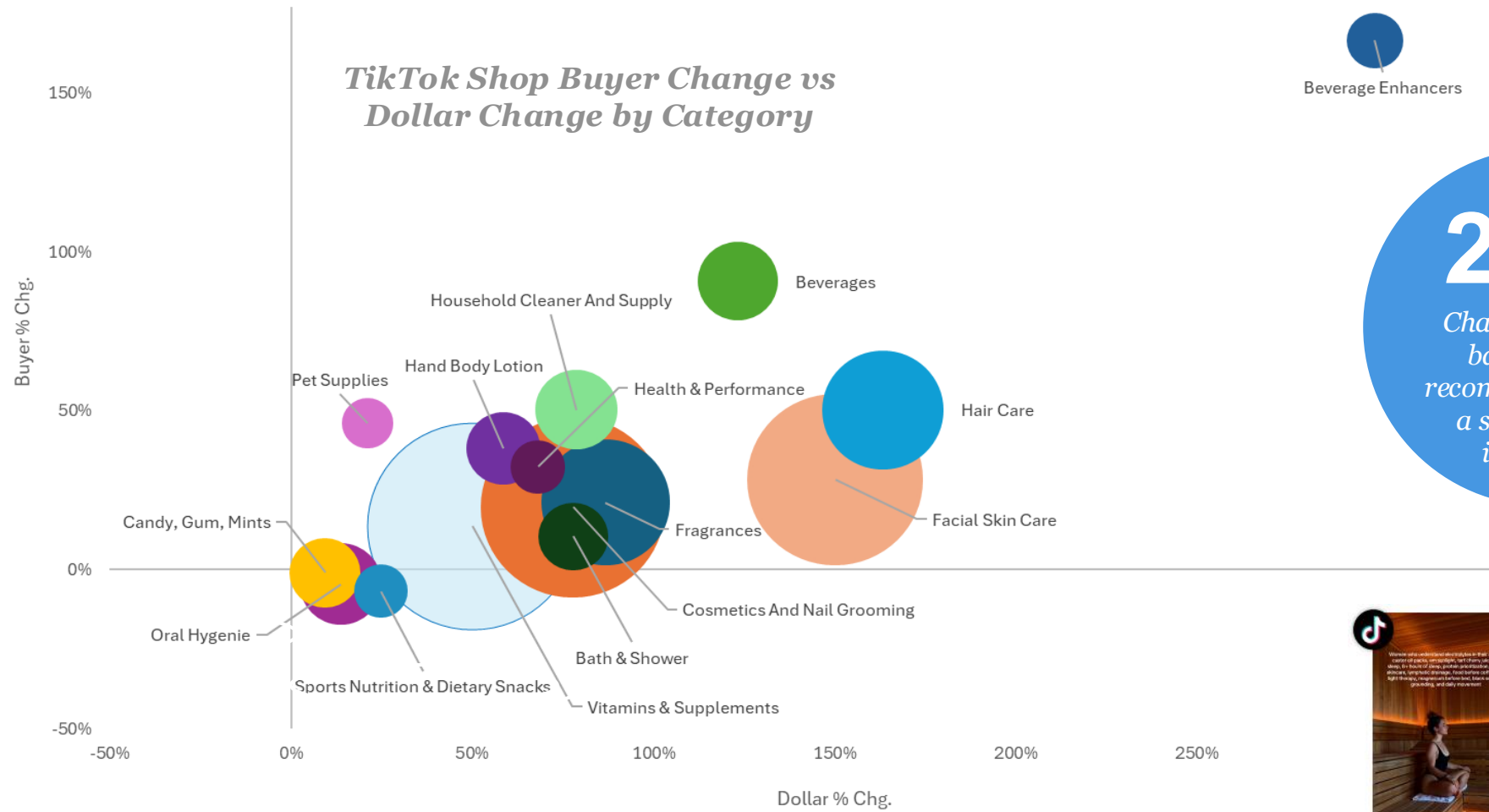
**Category  
Average:  
38%**

## Select Bottom Cleaning Brands % \$ Sales Online



Source: NielsenIQ Omnisales, Share of brands' Total US Online dollar sales, 52 weeks ending 2/21/26

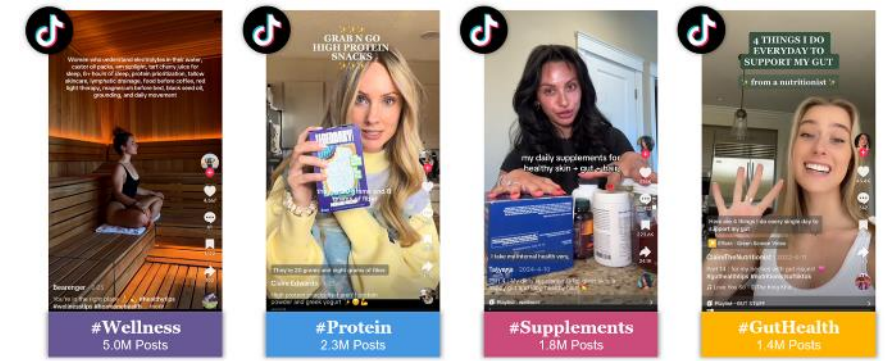
# Health and wellness typically sells well on TikTok shop



Bubble Size = Dollar Volume

**31%**  
Use social media as their primary source to learn about new products and services

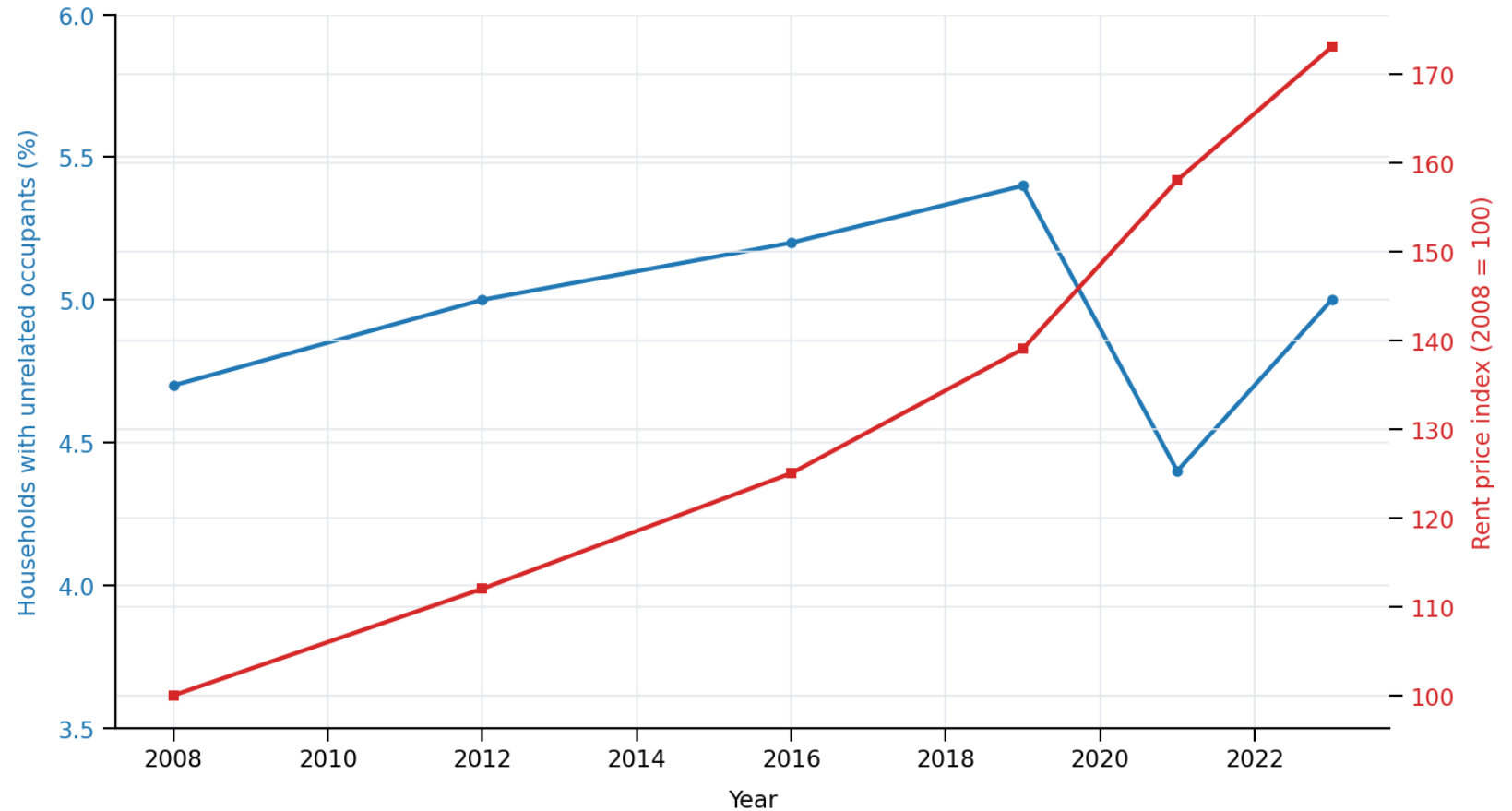
**28%**  
Changed brands based on the recommendation of a social media influencer



Source: NielsenIQ e-commerce Retailer View, TikTok Health & Beauty Categories, 12 months ending 1/31/2026, Source: NIQ 2024 Consumer Outlook, U.S

**Rising housing costs correlate to a rise in non-family member shared homes**

Rent Inflation and Growth of House-Sharing Households

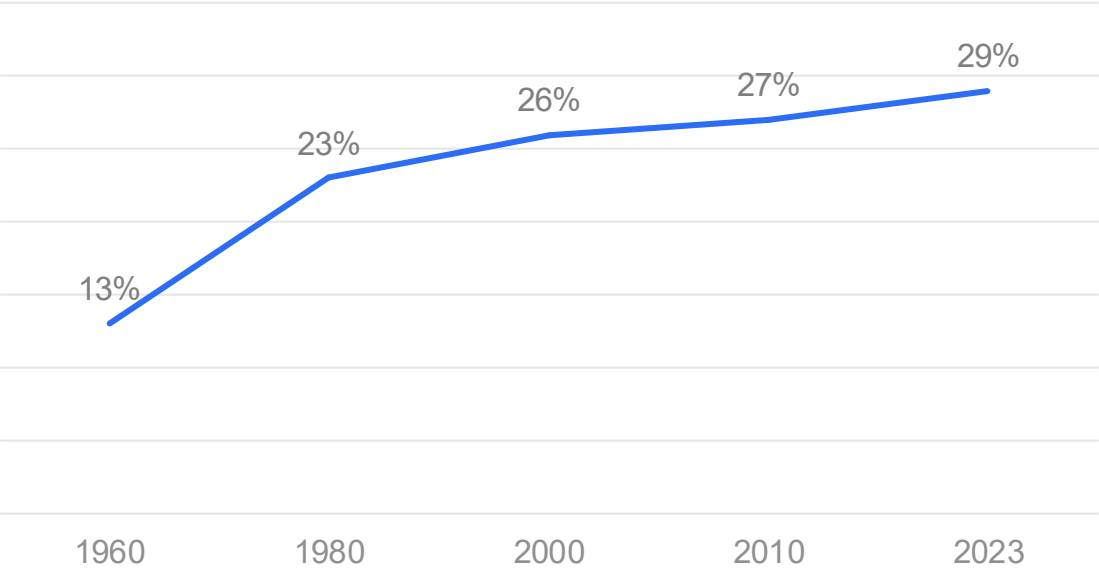


Source: U.S. Census Bureau, Current Population Survey (CPS), Families and Living Arrangements; National Association of Home Builders (NAHB), Eye on Housing

# More people living solo is reshaping household care expectations

As single-person homes grow to nearly 3 in 10 U.S. households, decisions shift toward personal routines, priorities, and identity-driven choices.

### Share of U.S. Households that are Single-Person



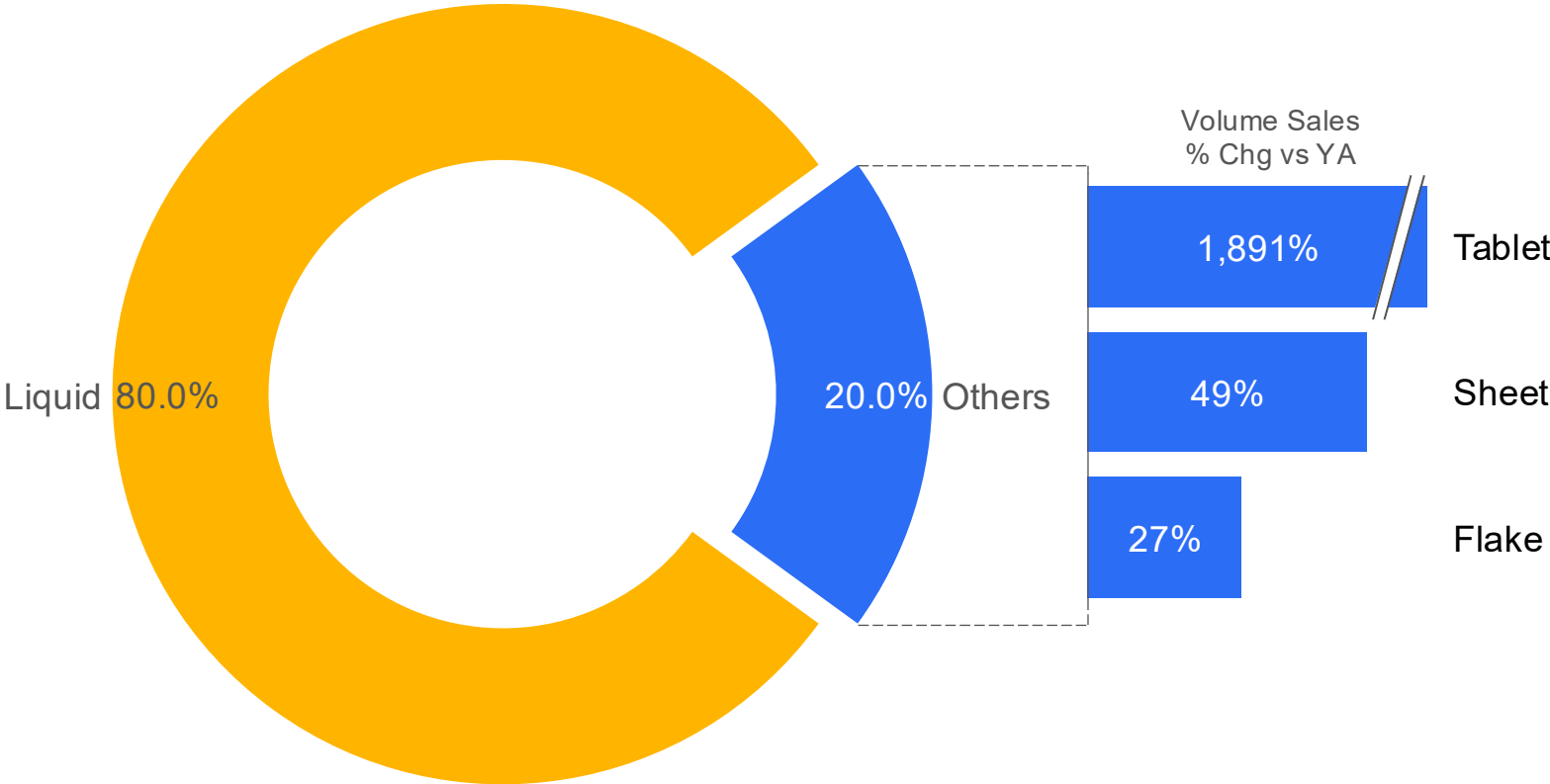
Source: US Census



# Consumers are switching to formats that optimize time and storage space, while still demanding performance

Smaller formats aren't a trend. They're a response to fragmented living.

Volume Share by Laundry Detergent Form



Source: NielsenIQ, RMS, 52 weeks ending 3/21/2026, Full View

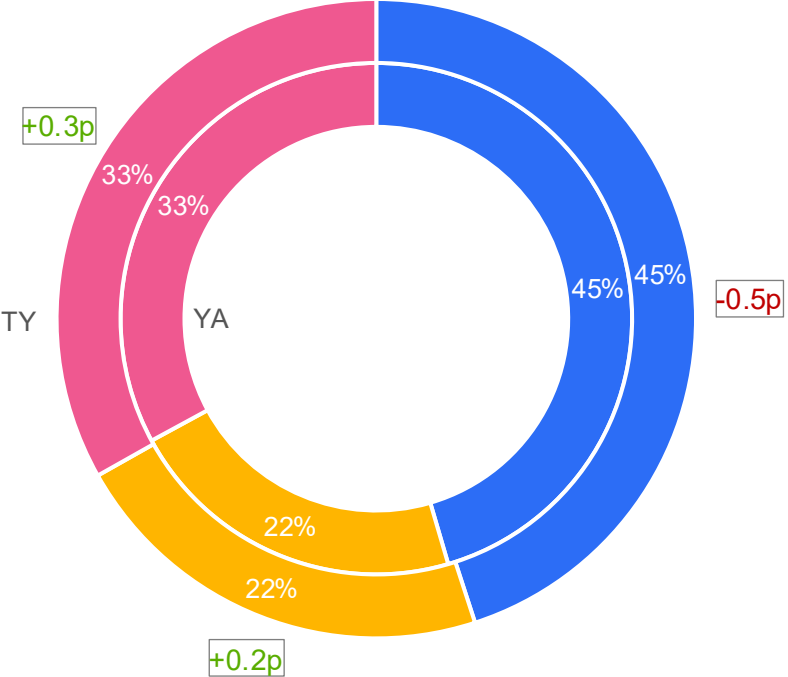
# Challengers Don't Win by Being Cheaper. They Win by Being Designed for Today's Reality

their advantage isn't size. It's alignment with how people discover, evaluate, and live with these products now.

# Challenger players command one-third of the market and deliver the biggest share gain vs ya

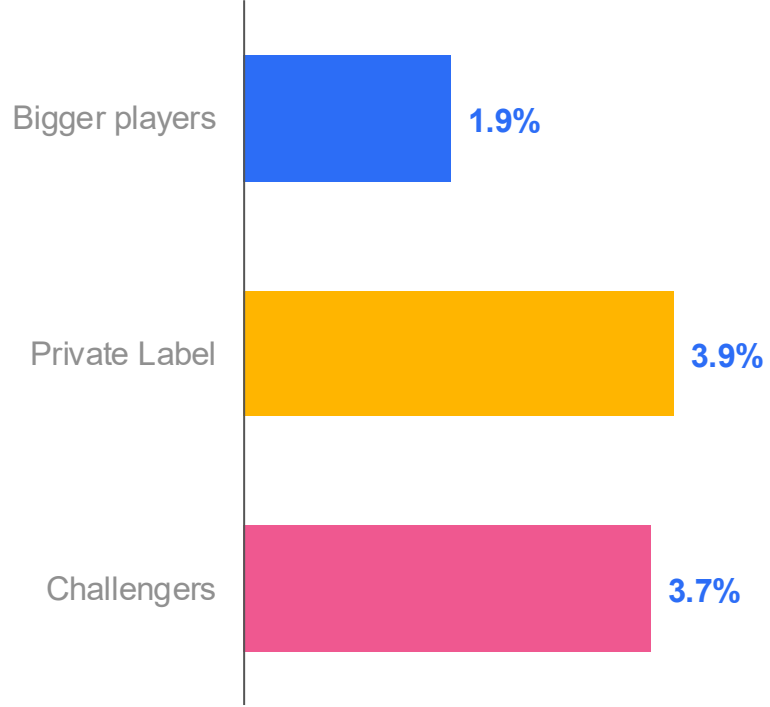
Smaller brands punch above their weight

Global | % Value share



■ Bigger players ■ Private Label ■ Challengers

% Value growth 2025 vs year ago



Challengers represent **33%** of value and contributed with **42%** of value growth

■ Bigger players = More than 3.5% of value share at region x category level

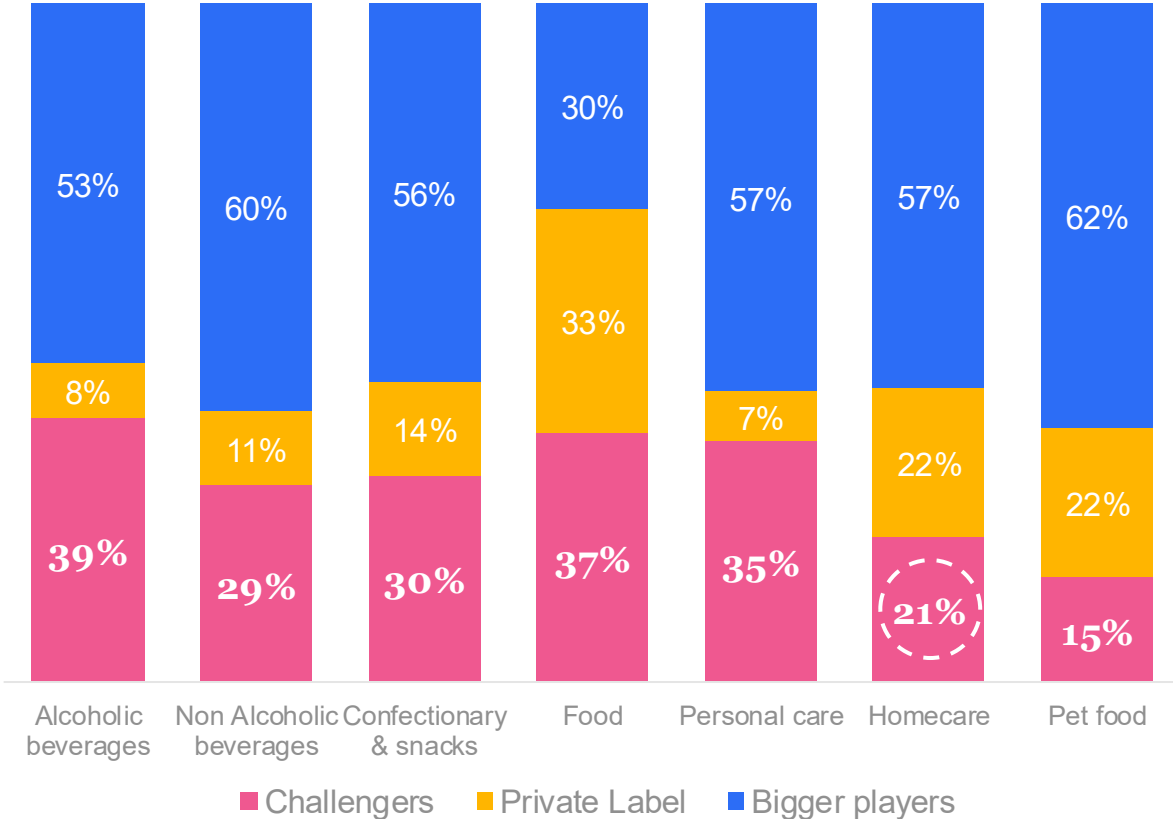
■ Challengers = Less than 3.5% of value share at region x category level

Source: NIQ Strategic Planner – MAT P1 2026

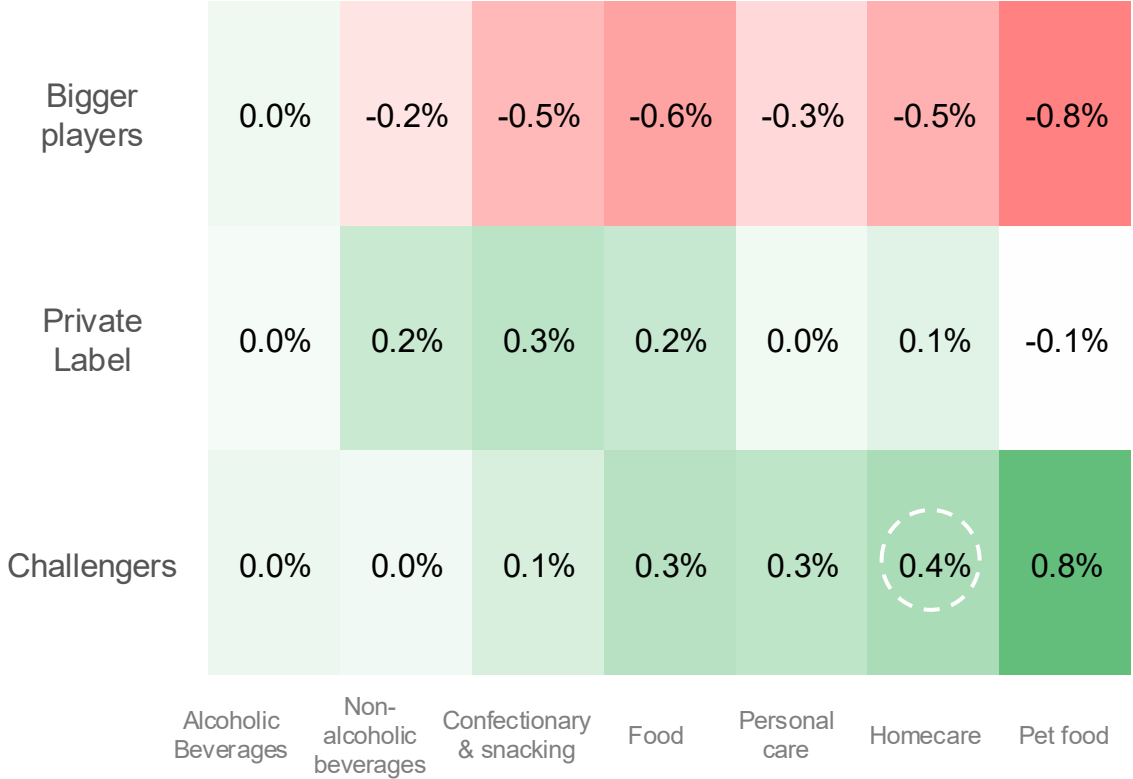
# Challengers are particularly important in Alcoholic beverages, Food and Personal care

Momentum is extending into industries such as Pet and Homecare, where challengers are narrowing the gap

Global | %Value share



Value share change vs YA (p.)



Source: NIQ Strategic Planner – FY 2025  
 Note: Challengers = Less than 3.5% of value share at region x category level; Bigger players = More than 3.5% of value share at region x category level

# Drivers of challenger growth



**Quality and authenticity  
at fair prices**



**Health and purpose without  
compromising experience**



**Cultural relevance and  
Digital First strategy**

## Small brands are winning with “elevated familiar” scents—not generic “fresh.”

Breakout brands cluster in airy/freshness and fruit notes, delivering ~+\$1.2M–\$1.4M incremental dollars per breakout scent (e.g., Crisp Breeze, Fresh Cherry, Pink Grapefruit)

Breakout scent (small brands)	YA \$	Current \$	% Growth	Primary brand(s) behind the breakout*
<b>Blooming Jasmine</b>	~\$60K	~\$975K	~+1,515%	1-2-3
<b>Crisp Breeze</b>	~\$87K	~\$1.30M	~+1,389%	Dropps
<b>Fresh Cherry</b>	~\$110K	~\$1.48M	~+1,244%	Zep
<b>Pink Grapefruit</b>	~\$284K	~\$1.53M	~+437%	Multi-brand small-brand mix (MPC-leaning)
<b>Green Apple</b>	~\$442K	~\$1.62M	~+266%	Multi-brand small-brand mix
<b>No Fragrance Added</b>	~\$57K	~\$175K	~+208%	Challenger “free-from” style brands (single-brand concentration)

Source: NielsenIQ, RMS, Full View, 52 weeks ending 4/11/2026, brands < ~\$25M current \$ and not owned by the largest household players; Private Label excluded; scents with YA \$ < \$1M but ≥ \$50K YA

## Among larger brands, breakout scent growth is coming from expressive multi-purpose cleaners' fragrances and 'free-from' functional claims

Rank	Scent	Approx. % Growth	Categories Driving Growth	Primary Brands Behind Growth
1	Lavender & Cotton Blossom	+1,700%+	Multi-Purpose Cleaners	Lysol
2	Peach	+500%+	Multi-Purpose Cleaners	Fabuloso
3	Cherry Blossom	+300%+	Multi-Purpose Cleaners	Pine-Sol, Mr. Clean
4	Summer Citrus	+300%+	Multi-Purpose Cleaners	Mr. Clean
5	Unscented	+80%+	Laundry Detergent, Auto Dish	Tide, Seventh Gen, Private Label
6	Fragrance Free	+40%+	Laundry, Auto Dish	Tide, Blueland

# Wellness is shifting from taking away to adding benefits

## REMOVAL

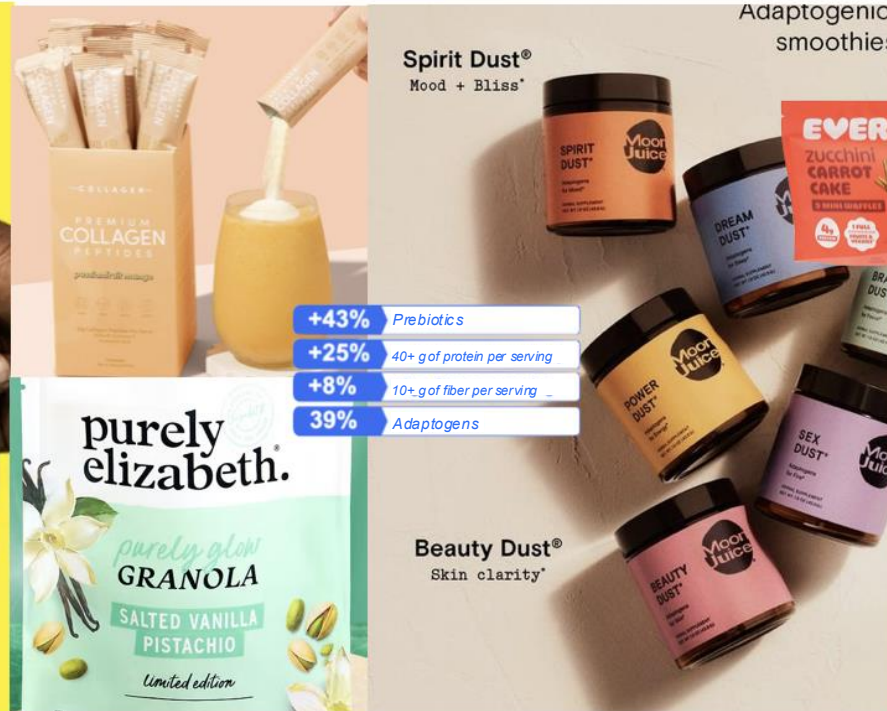
How wellness *borrowed* the codes



Wellness used to mean taking away, the era of low-cal, fat free, no parabens

## ADDITION

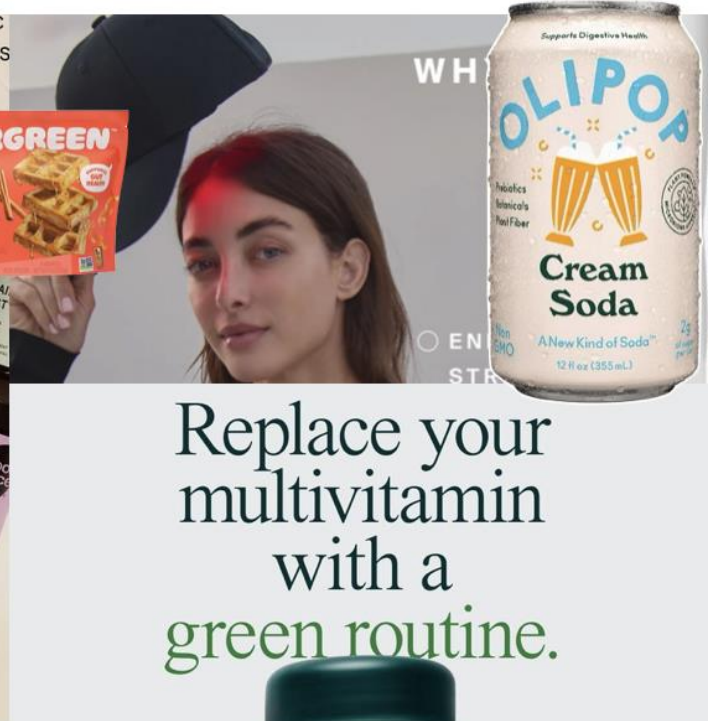
How wellness *blurred* the codes



Shift toward *adding* value + protein, + fiber, + adaptogens and blurring of food, beauty, supplements

## OPTIMIZATION

How wellness is *integrating* the codes



Every bite, sip, application, counts toward cognitive health and quality of life

# Clean & Sustainable is Becoming its Own Ecosystem

# Clean is now the baseline, functional is where value comes

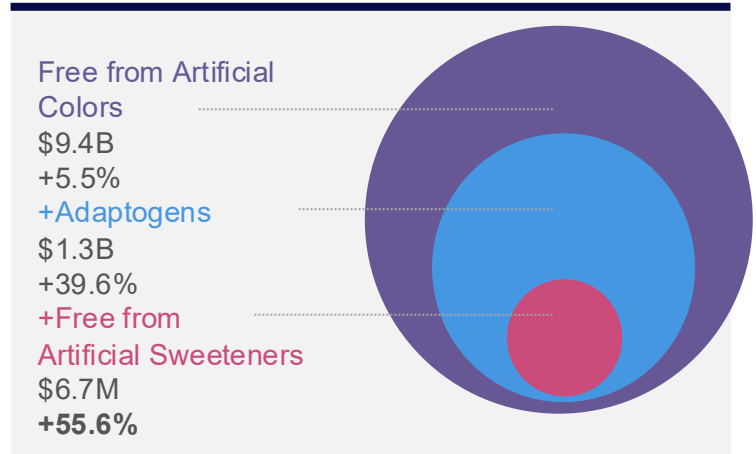
## Beauty



## Laundry Care



## Non-Alcoholic Beverages



## Beverage Alcohol

**“Raising the Bar:** You deserve to know what’s in your alcohol.

Our mission is to redefine the industry standard and raise the bar for ingredient transparency and integrity in alcohol. Every ingredient considered. Every additive disclosed. Every label held accountable.

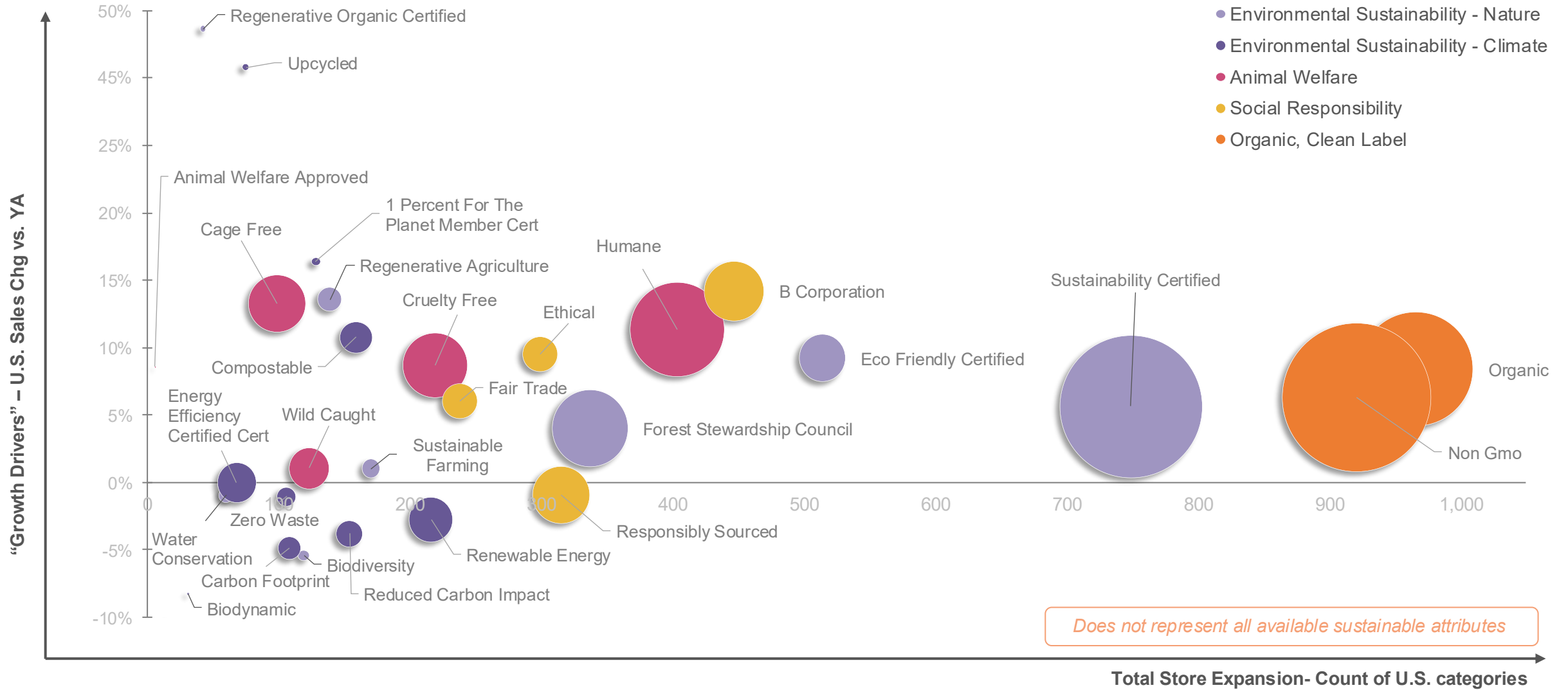
Transparency isn’t a trend. It’s a promise. No compromises. Just alcohol, done right.”

**Clean Label +5.8%**  
**Total Store +2.9%**  
% \$ Change

**Clean + Functional = Value**

Source: Source: NielsenIQ Retail Measurement Services, NIQ Product Insight, powered by Label Insight, Total US Full View + Costco, Total Store & Clean Label; Dollars % change vs. YA, w/e March 7, 2026; NIQ Retail Measurement; Total US Full View + Costco; Total Beauty & Personal Care = H&B without OTC/VMS Super Categories; NPI Clean Beauty Attributes; % change vs year ago; 52 weeks ending Dec. 27, 2025 CLEAN BEAUTY\* = free from parabens, phthalates, sulfates, formaldehyde, triclosan, triclocarban, hydroquinone, BHA, BHT, and nonylphenol ethoxyate; NIQ, Retail Measurement Services; US NIQ Total Store Inc Fresh – 445 – Weekly (Synd); Entire Dataset Plus NPI Chars; Total US Full View + Costco; Functional Beverages; Latest 52 weeks ending March 07, 2026

# Consumers continue to find sustainability attributes aligned with their values

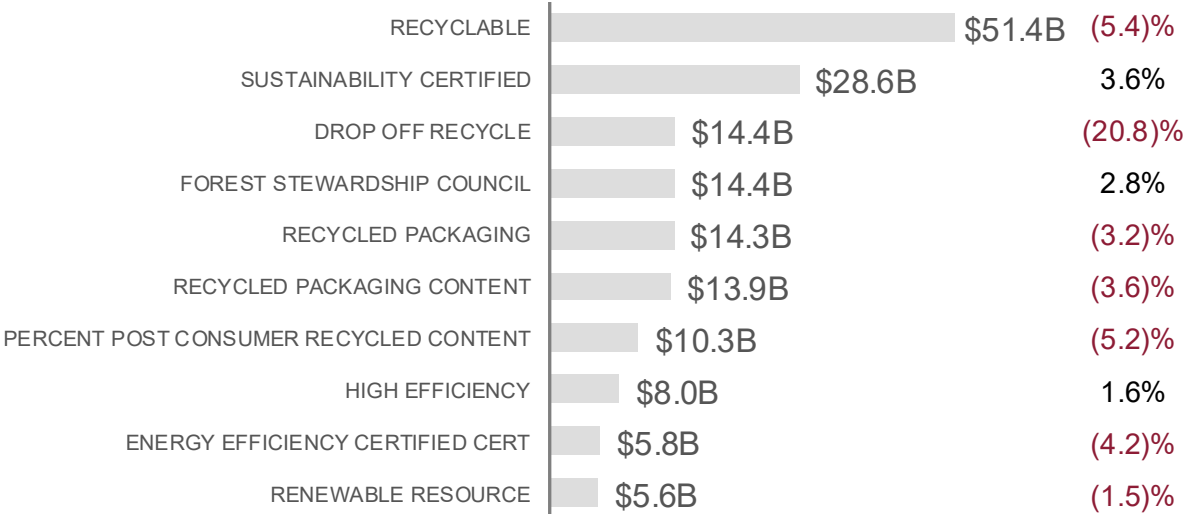


Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an \* symbol  
 Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US Full View + Costco ; Total Store; Count of categories, % \$ Chg vs. YA; 52 weeks ending December 27, 2025



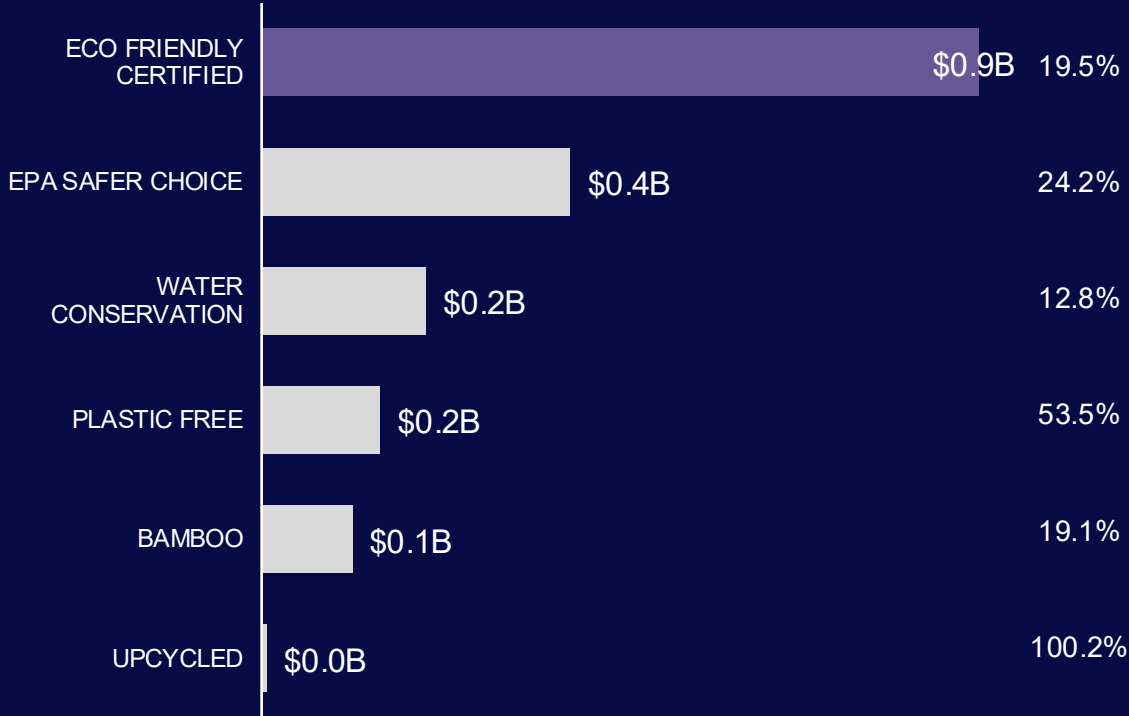
# Recycling has becoming table stakes in household care

\$ Sales and % Chg YA. Household Care by Claim



# Consumers are shifting more dollars to brands where consumers sense less environmental harm after use

Top Growing \$ Sales and % Chg YA. Household Care by Claim



Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, powered by Label Insight, Total Store; Total US Full View (Modeled) + Conv + Pet Retail + Costco (Model) + Rem Accounts; 52 weeks W/E 03/21/26

# Emerging brands win by pairing eco-credentials with efficacy proof, elevated scent/design, and digital-first launch strategies

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## Who's Emerging

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### Laundry

- Dirty Labs
- Blueland
- Tru Earth
- Molly's Suds
- Branch Basics
- Cleancult

### Multi-Purpose Cleaners

- Branch Basics
- Blueland
- Cleancult
- Force of Nature
- Homecourt
- Koala Eco

### Dish Soap

- Blueland
- Cleancult
- Attitude
- Koala Eco
- Public Goods
- Homecourt

### Dish Detergent

- Blueland
- Dirty Labs
- Molly's Suds
- Tru Earth

# Emerging brands win by pairing eco-credentials with efficacy proof, elevated scent/design, and digital-first launch strategies

	Who's Emerging	Common Traits
<b>Laundry</b>	<ul style="list-style-type: none"><li>• Dirty Labs</li><li>• Blueland</li><li>• Tru Earth</li><li>• Molly's Suds</li><li>• Branch Basics</li><li>• Cleancult</li></ul>	<ul style="list-style-type: none"><li>• Sustainability is table stakes</li><li>• Enzyme-led performance</li><li>• Wellness-driven scent</li><li>• Strips &amp; refills</li></ul>
<b>Multi-Purpose Cleaners</b>	<ul style="list-style-type: none"><li>• Branch Basics</li><li>• Blueland</li><li>• Cleancult</li><li>• Force of Nature</li><li>• Homecourt</li><li>• Koala Eco</li></ul>	<ul style="list-style-type: none"><li>• Plant-based safety</li><li>• Professional-grade performance framing</li><li>• Scent as ritual</li></ul>
<b>Dish Soap</b>	<ul style="list-style-type: none"><li>• Blueland</li><li>• Cleancult</li><li>• Attitude</li><li>• Koala Eco</li><li>• Public Goods</li><li>• Homecourt</li></ul>	<ul style="list-style-type: none"><li>• Plant-based formulas</li><li>• Scent as primary differentiator</li><li>• Design-led packaging</li></ul>
<b>Dish Detergent</b>	<ul style="list-style-type: none"><li>• Blueland</li><li>• Dirty Labs</li><li>• Molly's Suds</li><li>• Tru Earth</li></ul>	<ul style="list-style-type: none"><li>• Tablet &amp; strip innovation</li><li>• Performance reassurance</li><li>• Family-safe framing</li></ul>

# Emerging brands win by pairing eco-credentials with efficacy proof, elevated scent/design, and digital-first launch strategies

	Who's Emerging	Common Traits	Online Importance
<b>Laundry</b>	<ul style="list-style-type: none"> <li>• Dirty Labs</li> <li>• Blueland</li> <li>• Tru Earth</li> <li>• Molly's Suds</li> <li>• Branch Basics</li> <li>• Cleancult</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainability is table stakes</li> <li>• Enzyme-led performance</li> <li>• Wellness-driven scent</li> <li>• Strips &amp; refills</li> </ul>	<ul style="list-style-type: none"> <li>• Majority of sales are online</li> </ul>
<b>Multi-Purpose Cleaners</b>	<ul style="list-style-type: none"> <li>• Branch Basics</li> <li>• Blueland</li> <li>• Cleancult</li> <li>• Force of Nature</li> <li>• Homecourt</li> <li>• Koala Eco</li> </ul>	<ul style="list-style-type: none"> <li>• Plant-based safety</li> <li>• Professional-grade performance framing</li> <li>• Scent as ritual</li> </ul>	<ul style="list-style-type: none"> <li>• ~ 50% of sales online</li> </ul>
<b>Dish Soap</b>	<ul style="list-style-type: none"> <li>• Blueland</li> <li>• Cleancult</li> <li>• Attitude</li> <li>• Koala Eco</li> <li>• Public Goods</li> <li>• Homecourt</li> </ul>	<ul style="list-style-type: none"> <li>• Plant-based formulas</li> <li>• Scent as primary differentiator</li> <li>• Design-led packaging</li> </ul>	<ul style="list-style-type: none"> <li>• Disproportionately online compared to established brands</li> </ul>
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# Emerging brands win by pairing eco-credentials with efficacy proof, elevated scent/design, and digital-first launch strategies

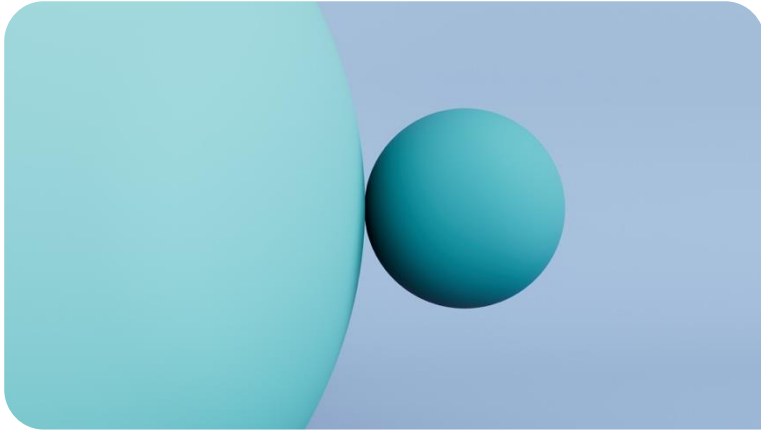
	Who's Emerging	Common Traits	Online Importance	So What
<b>Laundry</b>	<ul style="list-style-type: none"> <li>• Dirty Labs</li> <li>• Blueland</li> <li>• Tru Earth</li> <li>• Molly's Suds</li> <li>• Branch Basics</li> <li>• Cleancult</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainability is table stakes</li> <li>• Enzyme-led performance</li> <li>• Wellness-driven scent</li> <li>• Strips &amp; refills</li> </ul>	<ul style="list-style-type: none"> <li>• Majority of sales are online</li> </ul>	<ul style="list-style-type: none"> <li>• Laundry growth is being driven by brands that combine performance credibility, sustainability, and digital-first formats.</li> </ul>
<b>Multi-Purpose Cleaners</b>	<ul style="list-style-type: none"> <li>• Branch Basics</li> <li>• Blueland</li> <li>• Cleancult</li> <li>• Force of Nature</li> <li>• Homecourt</li> <li>• Koala Eco</li> </ul>	<ul style="list-style-type: none"> <li>• Plant-based safety</li> <li>• Professional-grade performance framing</li> <li>• Scent as ritual</li> </ul>	<ul style="list-style-type: none"> <li>• ~ 50% of sales online</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainability opens the door, performance earns trust, and scent builds loyalty. Online is the proving ground, retail is the accelerant.</li> </ul>
<b>Dish Soap</b>	<ul style="list-style-type: none"> <li>• Blueland</li> <li>• Cleancult</li> <li>• Attitude</li> <li>• Koala Eco</li> <li>• Public Goods</li> <li>• Homecourt</li> </ul>	<ul style="list-style-type: none"> <li>• Plant-based formulas</li> <li>• Scent as primary differentiator</li> <li>• Design-led packaging</li> </ul>	<ul style="list-style-type: none"> <li>• Disproportionately online compared to established brands</li> </ul>	<ul style="list-style-type: none"> <li>• Dish soap is where cleaning, beauty, and wellness blur most clearly. Design, scent, and digital storytelling matter as much as cleaning performance.</li> </ul>
<b>Dish Detergent</b>	<ul style="list-style-type: none"> <li>• Blueland</li> <li>• Dirty Labs</li> <li>• Molly's Suds</li> <li>• Tru Earth</li> </ul>	<ul style="list-style-type: none"> <li>• Tablet &amp; strip innovation</li> <li>• Performance reassurance</li> <li>• Family-safe framing</li> </ul>	<ul style="list-style-type: none"> <li>• Disproportionately online compared to established brands</li> </ul>	<ul style="list-style-type: none"> <li>• Dish detergent challengers grow by reducing perceived risk. Digital education enables switching, while retail enables scale later.</li> </ul>

# What Winning household care Marketing Requires Now

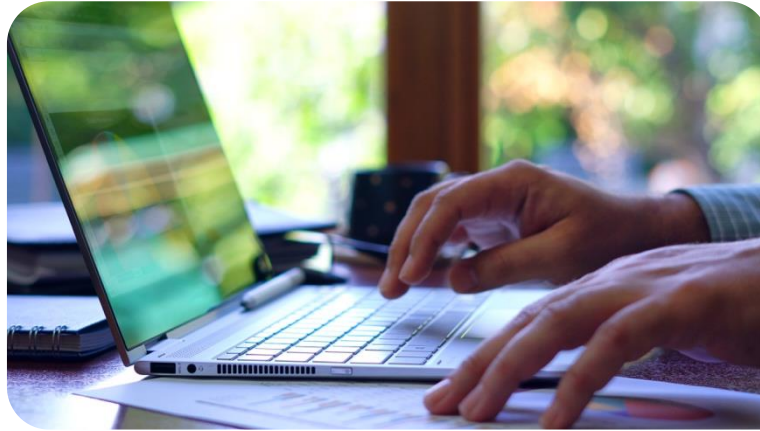
Growth will favor brands that reduce effort, deliver emotional return, and make their value legible to both people and machines.

# This Is Not a Brand-Size Shift. It's a Capability Shift

Growth now favors brands engineered for modern discovery, usage, and decision-making regardless of scale.



**Being small is not the advantage.**



**Being designed for how people shop and live now is.**



**Legacy brands that adopt challenger behaviors can still win.**

# The Shelf Is Shrinking and It Will Be Decided Before Shoppers Arrive

AI agents, digital shelves, and algorithmic discovery are collapsing consideration

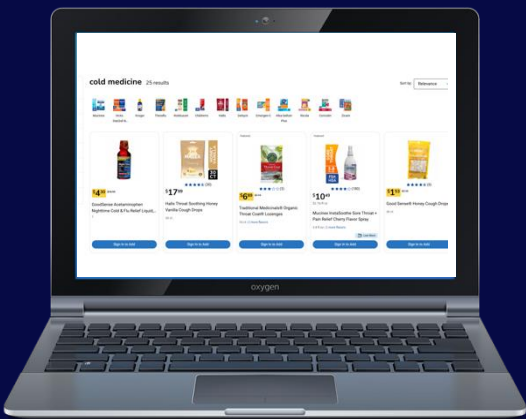
*AI will decide your brand's future, before consumers ever see your packaging*

*Brands that don't structure claims, benefits, and data for machines risk disappearing from discovery altogether*

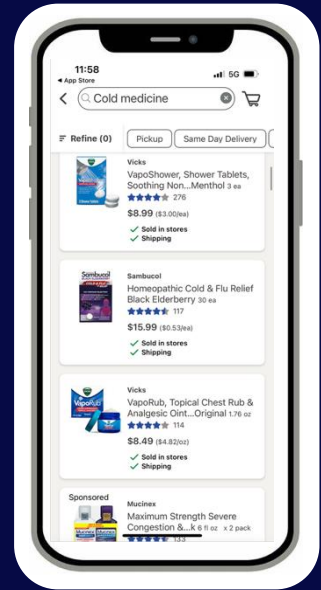
Number of visible SKUs



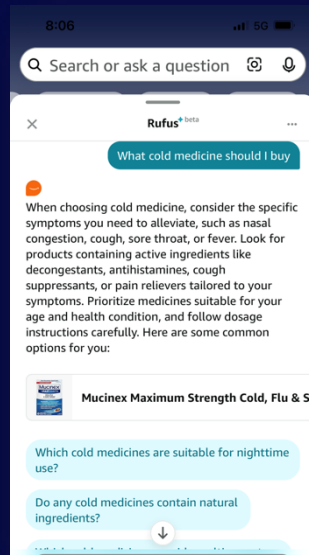
Physical Shelf  
50+ SKUs



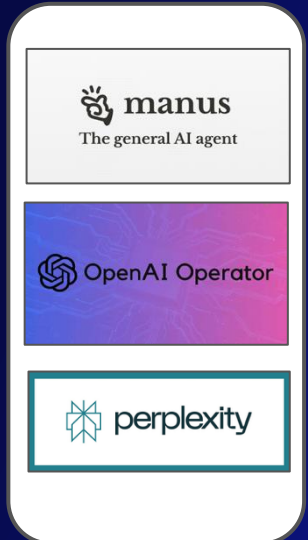
Digital Shelf  
5+ SKUs



Mobile Shelf  
4+ SKUs



AI Controlled Shelf  
1-2 SKUs



Digital Maturity

Source: NIQ Digital Shelf

# These five forces aren't trends. They're the new operating system for household care

Winning now means designing portfolios, claims, and channels to work with these forces.

## 01.

### Fragmented Home

Design modular formats, duplicated usage occasions, storage-friendly SKUs

## 02.

### A New Value Equation

Communicate cost-per-use, time saved, effort reduced, emotional return

## 03.

### The Control Economy

Lead with efficacy proof, reliability signals, and certainty language

## 04.

### Time Optimization

Reduce choices, simplify claims, streamline assortments — fewer decisions win

## 05.

### Identity-Driven Homes

Make scent, design, sustainability, and values visible and intentional

Thank you!

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