

What drives Consumers' Perception toward Sustainability in Homecare Products?

An analysis of spontaneous conversations about fabric care, surface cleaners, dishwashing products, and cleaning tools/ accessories from social media, forums, and blogs in the US 2022 – YTD June 2024



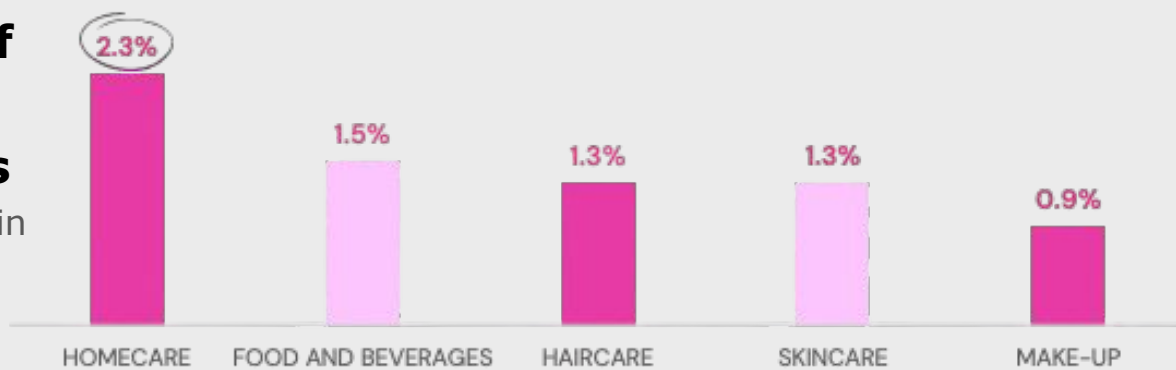
The Trend



Sustainability conversations are more common in homecare products than in other categories.

Penetration of Sustainability Conversations

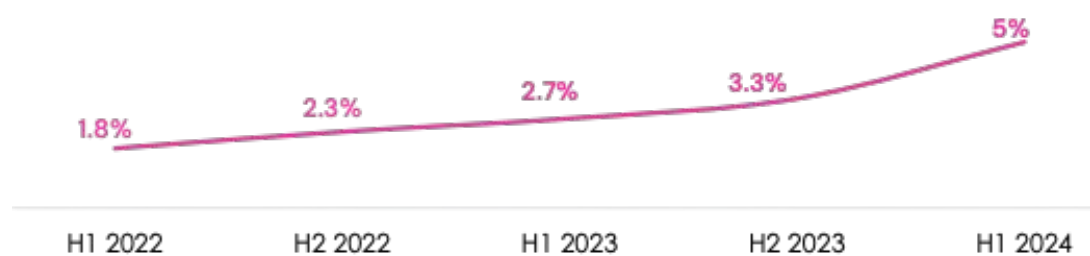
% of conversations in the US (2022 – YTD June 2024)



There has been a **steady growth in sustainability** discussions in the **home care category** since 2022

Penetration of Sustainability Conversations

% of conversations about homecare in the US (2022 – YTD June 2024)



Main Drivers of Conversation



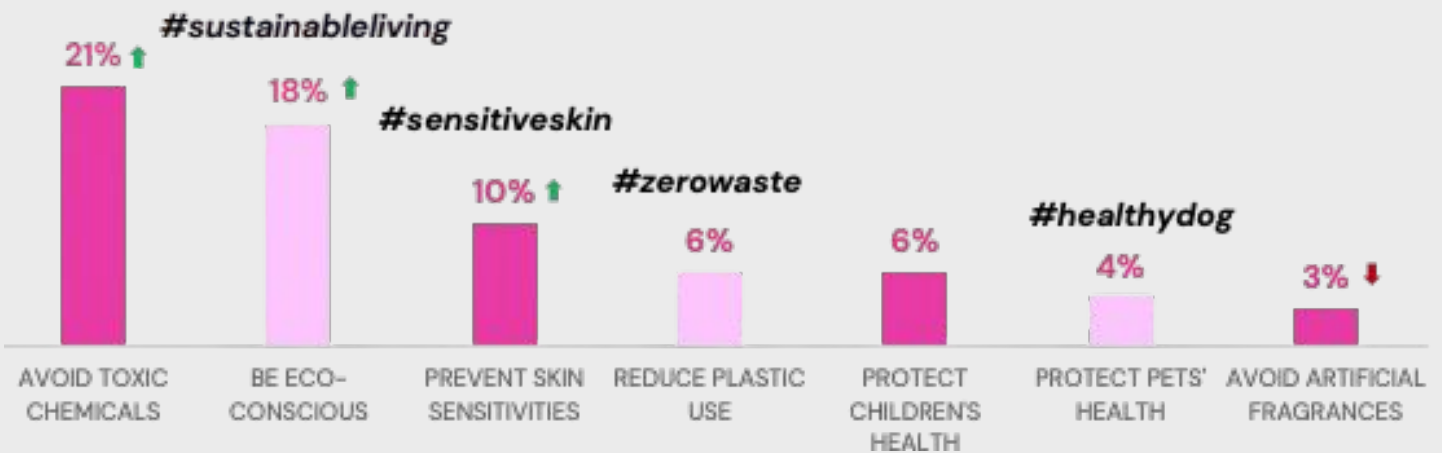
68%

of sustainable homecare conversations mention motivations

Consumers choose sustainable home care products mainly for health and environmental reasons.

Top mentioned motivations

% of sustainable homecare conversations in the US (2022- YTD June 2024)



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Laundry detergent is problematic for so many people, ***especially* those of us with sensitive skin.** #laundry #laundrydetergent #slsfree #nontoxicswaps #nontoxichome #cleanswaps #lowtoxliving

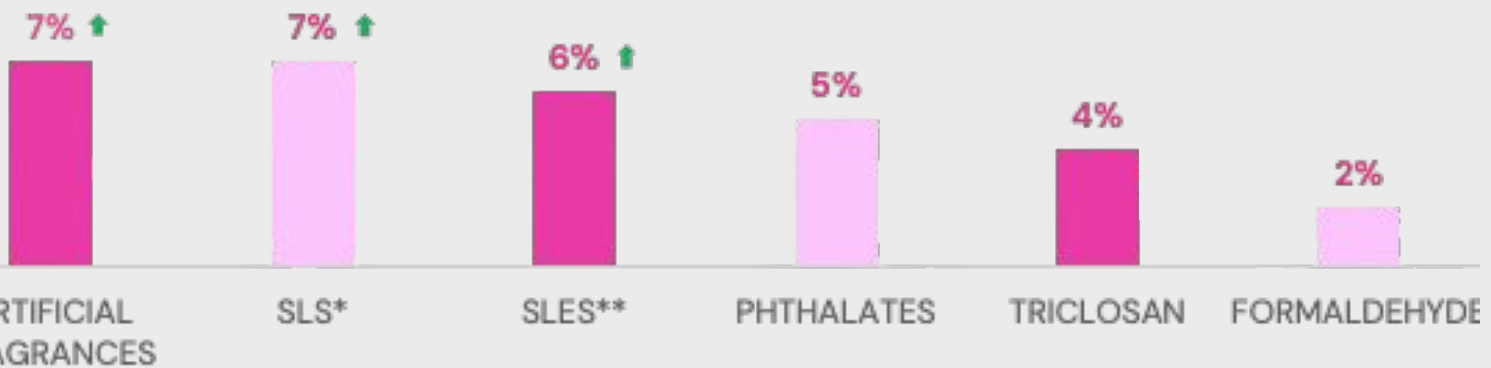
Main Drivers of Conversation



Consumers often look for both sustainable, natural, and non-toxic ingredients.

Top mentioned toxic ingredients

% of sustainable homecare conversations in the US (2022- YTD June 2024)



SLS*: Sodium lauryl sulfate
SLES**: Sodium laureth sulfate



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Traditional detergents are loaded with harmful chemicals such as 1,4-dioxane, **phosphates, surfactants, phthalates, and toxic dyes**, which can disrupt hormones and damage your health by affecting your lungs and other organs over time! Here's a simple DIY, non-toxic recipe to make your own safe and effective laundry detergent (...)

Main Drivers of Conversation



Consumers have different expectations based on the category.

Fabric Care

(50% of sustainable homecare posts)

- **Fabric care is usually the 1st impacted category** when consumers switch to sustainable homecare products
- **Pregnant women, new parents, pet owners, and those with sensitive skin** want to stay away from toxic ingredients to avoid itching and redness
- Consumers **prioritize natural scents** like myrrh and prefer a long-lasting subtle scent
- **The top sustainable formats are powders and bars**, while opinions on pods and sheets vary over plastic concerns



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Grab my Home Detox Guide **as mom to remove toxins from your home** room by room! #lowtoxliving #lowtoxlifestyle #crunchymom

Dishwashing Products

(35% of sustainable homecare posts)

- Consumers seek products with **simple or natural ingredients such as essential oils for fragrance**
- Consumers often **test the effectiveness of sustainable products**, as some doubt their performance
- The most mentioned **sustainable formats include powders and tablets**, while **opinions on pods vary, with some consumers noting they still contain plastic**



“

We buy this dishwasher powder from Target, and we wait for when there's deals to **stock up!** #lowwaste #sustainable

Main Drivers of Conversation



Consumers have different expectations based on the category.

Surface Cleaners

(8% of sustainable homecare posts)

- Consumers look for the **most efficient multi-purpose** surface cleaners
- Consumers are **more concerned about packaging, seeking recyclable or compostable options such as carton boxes or reusable glass containers**

Cleaning Tools/Accessories

(7% of sustainable homecare posts)

- Consumers are becoming more aware of the **tools they use and often seek reusable products** like aluminum containers, refillable spray bottles, and eco-fiber sponges
- Some suggest **repurposing fabric items into rags for cleaning** instead of discarding them

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This multi-purpose cleaner starter kit **comes with a reusable spray bottle and 3 sachets of cleaning tablets. All these tablets are natural and plant based with no chemicals like ammonia, EDTA, or parabens** that are common

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Dive into the world of **eco-friendly cleaning** with these amazing **all natural sponges!**
#biodegradable
#greenliving

Main Drivers of Conversation

46%

of sustainable homecare conversations mention **formats**

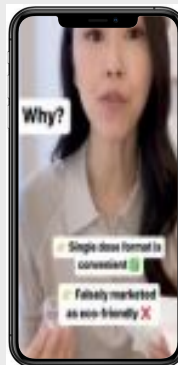
Consumers see formats as key to sustainability and are willing to try new options.

Powders (12%)



Consumers prefer **powder formats for being plastic-free**, often packaged in **compostable cartons** like Seventh Generation dishwasher detergent powder.

Pods (8%)



Some consider pods a **more sustainable option than liquids**, but there is **debate over whether pods still contain PVA***, as seen in posts about Dropps laundry pods.
* PVA: Polyvinyl Alcohol

Tablets (6%)



Consumers enjoy the **zero-waste aspect**, but some **complain about the cleaning efficacy** and the quality of spray bottles from brands like Blueland Multi-Surface tablets.

Sheets (5%)



Some view sheets as a **sustainable option that helps reduce plastic**, but some **believe they still contain PVA**, like in Clean People laundry sheets.

Brands Mapping

24%

of sustainable homecare conversations mention sustainable brands

Top brands are categorized into 4 distinct clusters.

Indie Brands

Perceived As Healthy

Perceived As Eco-Friendly



National Distribution

Main Drivers of Conversation



17%

of sustainable homecare conversations mention indie brands

Consumers are open to trying non-mainstream brands for eco-friendliness, toxin-free options, and unique scents.

Dirty Labs – Bio Enzyme Detergent

Consumers appreciate the natural ingredients, enjoy the plastic-free packaging, and value the great scent while finding it effective for cleaning dishes.



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I like VERY MUCH that **my dishes don't taste like creepy soap and chemicals or have that weird squeaky coating** on them.

Zum – Laundry Soap

Consumers love its distinct, perfume-like scent and appreciate its non-toxic, natural ingredients, including Saponified Coconut Oil, Essential Oils, Baking Soda, and Vegetable Glycerin.



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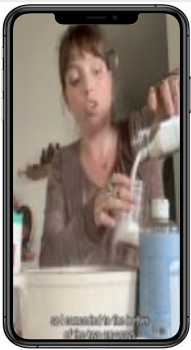
Scent is wonderful yet not overpowering on the clothes. They add extra scent for a long-lasting fresh smell.

Main Drivers of Conversation

15%

of sustainable homecare conversations mention homemade products

Consumers are making their own homecare products to save money and avoid toxins.



Homemade laundry detergent recipes use Borax, Odor Blasters, baking soda, OxiClean, washing soda, and Zote soap bars. Some even mention **spending under \$35 for supplies that last up to a year.**

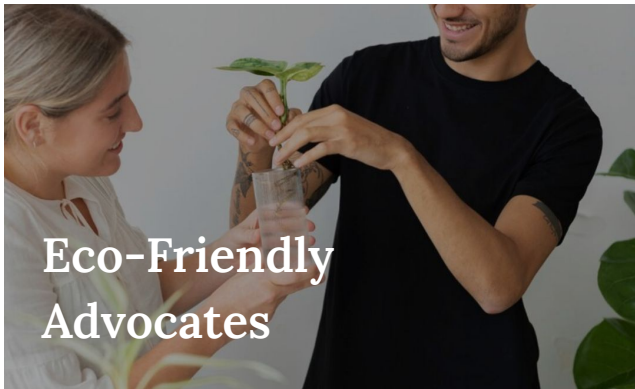


Homemade dish detergent recipes include baking soda, super wash soda, citric acid, and essential oils for scent. Consumers find that the recipes **effectively clean dishes.**



Homemade non-toxic all-purpose cleaners use lemon and orange peels with white vinegar. Consumers find them **helpful for balancing postpartum hormones and effective for cleaning.**

4 main personas



Eco-Friendly Advocates

PROFILE

- Men and women aged 20-35 who seek sustainable solutions and prefer locally sourced products with green certifications

PAIN POINTS

- Misleading 'greenwashed' communication



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Sheets, pods, powder, or tablets(...) to be plastic free & support positive environmental efforts.



Health-Cautious Consumers

PROFILE

- Pregnant women, pet owners, and users with sensitive skin who prioritize non-toxic ingredients

PAIN POINTS

- Sustainable products are not as effective



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Laundry detergent for sensitive skin
#skincare #bodycare
#skincaretips
#bodycareroutine

4 main personas



DIY Consumers

PROFILE

- Women aged 30+ with a limited budget for home care products who want to live more sustainably

PAIN POINTS

- A lot of time and money is spent finding the right product



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Homemade laundry detergent for under \$35 to last up to one year



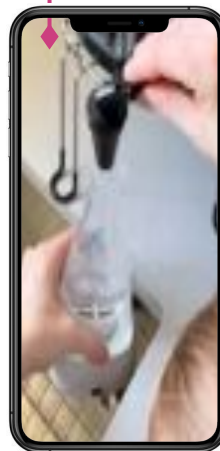
New Parents

PROFILE

- Parents of newborns or young children who seek products that are safe for their kids

PAIN POINTS

- Unsure if the products are truly toxin-free



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Cleaning solution in our home **with young kids**
#nontoxicliving
#nontoxic
#crunchymom
#momtok

The opportunities

Multiple opportunities for brands to disrupt the market

🎯 Targeting & Claims

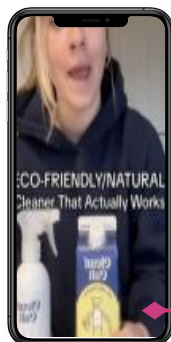
Target pregnant women, new parents, pet owners, or individuals with sensitive skin



“

How to find the **best non toxic laundry detergent for you** #pregnantmama #pregnanttiktok #babylaundrydetergent #nontoxicliving

Reassure on the cleaning efficacy of sustainable products



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Eco-friendly/ natural cleaner that ACTUALLY works #ecofriendly #sustainability #ecofriendlycleaning #sustainablecleaningproducts #lowwaste #refills

Highlight the healthy benefits of natural ingredients



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Ditch the toxic dishwasher detergent for one that is Non-Toxic Dad-approved Most popular brands of dishwashing detergent are full of toxic chemicals (...)

The opportunities

Packaging and Distribution

Focus on compostable, recyclable, or reusable nonplastic packaging options, such as carton boxes, glass bottles, and aluminum containers



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I do think we need better recycling. We also need to **require companies to come up with packaging that is 100% recyclable or compostable.**

Distribute locally-made products

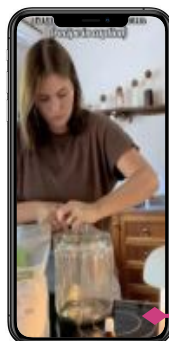


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Things I'm looking for: Zero-waste packaging (or as much as possible). Preferably as low-cost-conscious as possible! **Ships within the USA.** A good clean!

Sensorial

Offer customized essential oil options that allow consumers to create their favorite scents



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Organic home made laundry detergent recipe: aluminium free bi carb soda, epsom salt, salt (helps soften fabrics), **essential oil of choice (i used pepper mint).**

Provide natural, unique, layered, and long-lasting scents with delicate top, mid, and bottom notes, as consumers treat laundry detergent like candles or perfumes



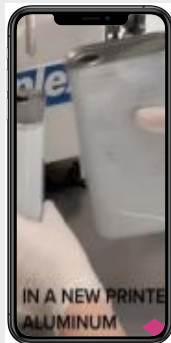
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Gah, I love when i find a family owned brand that I love! I've tried so many differnt laundry detergents and the scent never lats past the dryer. **The scent seriously lasts for DAYS!**

The opportunities

Brand Content

Create content that showcases the product's production process and delivery methods



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I've been using earth breeze for about 6 months. It works as well as the usual detergents, but no plastic, **ships via regular mail** and a lot less use of storage -

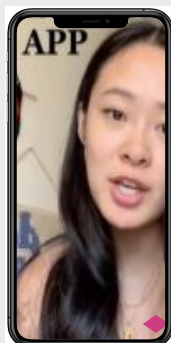
Educational content on green label certifications such as EPA Safer Choice, Green Seal, B Corporation, EWG ...



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If it bears the **"EPA Safer Choice" mark, the product went through a formal toxicological review and may have been partially reformulated to be safer/greener**

Collaborate with eco-friendly certified apps to build customers trust



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Excluding EWG, **are there any apps or sites that you use to look up cleaning products?** I have Yuka but that's for food and beauty products. TIA!

Contact us to learn more

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