

Household cleaning & sanitisation

Trends, insights & keeping it clean in 2021

In South Africa, the cleaning products market had an estimated value of R20 billion in 2019, with the largest segment being laundry care (www.prnewswire.com). While the health threats and lockdowns brought about by the Covid-19 pandemic saw many consumers allocating more of their budget to cleaning products, especially surface cleaners, toilet cleaners, bleach and alcohol-based sanitisers, the economic fallout from the pandemic has also meant a pullback on spending. Manufacturers are hopeful that this will be short-term, as the vaccination programme rolls out, the country unlocks, and the economy picks up.

Overview

Long-term, the cleaning products market is always expanding and is undoubtedly one of the biggest markets, both nationally and globally. Cleaning products are a necessity and any industry with such great demand fosters a large and competitive market. The basic need to keep one's home clean and hygienic on a regular basis means that consumers will always purchase at least a basic range.



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There are specific trends driving growth in the category, such as the increase in urbanisation, better standards of living, product innovation and accessibility of surface cleaning products. A report by Mordor Intelligence finds that the leading cleaning product brands in South Africa have benefited from their extensive distribution networks across sales channels, with e-commerce having 'cleaned up' since 2020, in the light of Covid-19 and its effects on purchasing.

Manufacturers are focused their marketing and advertising efforts to promote the germ-killing capabilities of their products to capitalise on the domestic cleanliness craze, also driven by the pandemic

Major retailers remain the preferred place for consumers to purchase their domestic cleaning products. Just why do consumers choose one store over another? The decision is made based on multiple factors – price, product availability, product performance and selection, as well as convenience. Price is a destination driver for bigger shops and convenience plays a role for top ups.



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Clear sales trends

- Disinfectants including surface cleaners, bleach, soap, and hand sanitisers have seen dramatic increases in sales volumes since the outbreak of the pandemic. The emphasis here is on the proven effectiveness of these products in killing germs. Since the outbreak the World Health Organisation (WHO) and the South African Department of Health have suggested that disinfecting high-touch surfaces in the home with bleach could be key in helping to curb the spread of Covid-19. This certainly was good news for manufacturers. News24 reported in June 2020 that Unilever had tested their Domestos thick bleach in a leading US laboratory and the results proved that the product kills the SARS-CoV-2 (Covid-19) virus in one minute. This was a highly reassuring result, and Lethepu Matshaba, Vice President Home Care, Unilever, spoke of the accessibility of the product for South Africans to protect their safety during the pandemic, saying, "Not only are bleach products proven to be effective against the Coronavirus, but they are also easily accessible and affordable.

- Consumers are increasingly buying in bulk and the demand for multi-purpose products is strengthening. The global multipurpose cleaners market is projected to reach a value of approximately USD 5.15 billion by 2026, according to the latest research forecasting. The multipurpose cleaners market growth is driven by their ability to eliminate germs, bacteria, and dirt, and also due to rising product innovation by the major manu-



Image by Matilda Wormwood from Pexels

facturers. Multipurpose cleaners are widely used for disinfecting and cleaning various surfaces in homes. Most are positioned as offering long-lasting freshness and can be used on hard, non-porous surfaces in bathrooms, kitchens, and other areas in the home. These varied benefits are the notable point of attraction for consumers, though there is a developing concern with regards to the chemical raw materials used in the production of these cleaners.

- Due to concerns about toxicity and environmental friendliness, less harmful biological products and packaging are being developed, and natural ingredients are becoming more widely included. In laundry care, the global trend is in the change from powder and bar products to more concentrated products which are available in liquid, liquid tablet or pod form.



Advertising speaks to the consumer's need for multipurpose products with the power to eliminate germs and bacteria throughout the home.

Cleaning up our environmental act

There is a growing concern that the more frequent use of household cleaning products and chemicals could be placing people, their children, and animals in danger of toxic load – a build-up of harmful toxins in the body through exposure from food, personal care, and household cleaning products. This, as well as a drive towards more responsible sourcing of raw ingredients, such as palm oil, is largely propelling a shift from chemicals to sustainable biological products. The market for eco-friendly cleaning products is growing steadily across the globe.

Manufacturers have been diversifying their product portfolios by adding sustainable and eco-friendly cleaning ranges featuring natural, vegan or chemical-free ingredients. Catering to the growing demand has allowed certain brands to gain a larger market share while maintaining their position in the South African home care market.

These products are considered safe, non-toxic, biodegradable and the packaging is generally made with sustainability in mind. However, going green in terms of cleaning can be costly and difficult to achieve. Consumers should be informed and aware of labels claiming terms such as 'environmentally friendly', 'eco safe', or 'green', which may be open to interpretation.

Ecolabels are a good tool to help purchasers quickly and easily identify certified and environmentally responsible products. Eco-Choice Africa (ECA), established in 2001, is Africa's first consumer goods-focused ecolabel and a member of the Global Ecolabel Network (GEN). This international body develops and monitors standards compliant with ISO 14024, regulating ecolabels globally. Licensed products are internationally recognised, allowing trade between all member-countries of the GEN.

The Eco-Choice Ecolabel Standard specifies environmental performance requirements of general purpose and laundry cleaning products, seeking to define good environmental performance benchmarks for a wide range of cleaning products. These benchmarks include energy- and water usage, waste management, procurement, awareness,



Image from Getty Images

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and requirements for ethical trading. A product bearing an approved environmental label communicates to the consumer that they are purchasing a product which has been verified and is not misleading on environmental aspects.

That said, value for money remains essential in consumer purchasing behaviour across the country, says Mordor Intelligence. In a struggling economy with consumers having lower disposable income, there is a marked demand for cost effective alternative products. Value offerings have brought about the rise of private label ranges from leading retailers.

Industry growth through private labelling

Home care, cleaning products and polishes are essential items in the shopping trolley of the South African consumer, and the market is on a steady incline across all income groups. House brands offered by retailers have developed and come into their own, with budget-conscious consumers economising by switching to private label products such as Pick 'n Pay's 'No Name Brand', Checkers' 'Housebrand' and similar lines from Woolworths, Spar and others.

The private label cleaning products market is driven by attractive discounts and promotional offers, and also employs appealing packaging, innovation and marketing that simultaneously meets the consumer's demand for eco-friendly and cruelty free options.

As an example, Pick n Pay offers a range of cleaning products under its PNP 'Green' brand label that are certified as vegan and cruelty free, biodegradable and non-toxic – addressing the increased consumer focus towards environmental awareness in health and hygiene.



Image courtesy of Checkers

Checkers strives to make it easier for customers to make better choices, by providing earth-friendly alternatives which are accessible and affordable, with their Simple Truth range.

Checkers' 'Simple Truth' range contributes to the demand for products that help save the environment with a selection that is bio-degradable, cruelty-free, and features naturally derived cleaning ingredients. The principle is making it easier for customers to make better choices, by providing healthier alternatives which are accessible and affordable.



“Consumers are increasingly aware of how their actions can affect the environment, and those looking for ways to minimize their carbon footprint are thinking in new ways, which includes using home remedies,” says Sarah Peters, Global Business Partner, Nielsen. “While environmental considerations may be a secondary purchasing driver for many consumers, as more shoppers lean towards green, manufacturers that balance environmental benefits with strong performance results and cost effectiveness will be positioned well for success.”

On the other side of the ecological coin, one can still argue that purchasing decisions in respect of cleaning products are primarily focused on product performance, price, brand, and ease of use, with environmental impact usually lower on the priority list.

Big brands make a clean sweep

Large multinational fast-moving consumer goods names continue to dominate the multi-billion-rand industry. With their traditionally strong brand awareness and among South African consumers, big brands such as Unilever, Reckitt Benckiser, Procter & Gamble, Colgate-Palmolive, and SC lead the pack when it comes to household cleaning products. However, there are also many mid-size and smaller players, and some have done very well, such as Bliss Brands with their MAQ washing powder brand that has grown to become a household name.

SC Johnson & Son retains the lead in toilet care, attributable to the Duck brand which is highly

trusted among consumers who are more aware than ever of the areas where extra care is necessary for cleaning. Toilets and kitchens are high concentration areas for germs and with people spending more time in the home, consumers want to focus on the proper cleaning of these areas. Home care products that are ultra-effective whilst offering value for money, like multi-purpose bleach cleaners, remain top performers in the industry.

Consumer priorities – hygiene and disinfecting. Shoppers in the household cleaning aisle are likely to focus on hygiene for as long as the pandemic is still with us. Cleaning products have become part of the domestic survival strategy, and this has meant a surge in sales of antibacterial products and disinfectants, as people are not only cleaning but are far more conscious of disinfecting in their homes.

Home care and staying healthy have merged and this presents an opportunity for retailers to apply smart merchandising with displays that feature products that highlight the cleaning and health aspects, such as anti-bacterial and powerful hygienic cleaning.



Laundry and powders

The focus on cleanliness has touched the very fabric of consumers' lives. Sales of surface cleaners, disinfectants and hand sanitisers have skyrocketed over the past 18 months and similarly, laundry detergent, bleach and other fabric care products have also benefitted from the increased awareness about hygiene.

Ellen Chen, Research Analyst, Euromonitor International, says, "Detergent and complementary products such as liquid fabric softeners and dryer sheets have increased. We've also seen powder detergent and bar detergent increase from previous declines, supporting the fact that consumers are doing more laundry during the pandemic." Further findings from Euromonitor International indicate strong performance by leading brands during 2020 as consumers were spending their money on trusted products. Yet, research also shows that consumers have been willing to experiment with new brands and products when retailers were low on stock or when purchasing online. Private label offerings in laundry care have also seen firm demand among consumers seeking value for money.

Performance seems to top the list of attributes that consumers prioritise when purchasing their laundry detergent. They seek out the products that are best at removing stains while providing colour protection. As with other home care products, value is of utmost importance, with consumers wanting high efficiency using less water/shorter cycles and being able to wash for a variety of fabrics.



Photo by Rodnae Productions from Pexels

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Consumers seem to be washing smaller loads of laundry far more frequently to remove germs and bacteria from the home and after public outings. As an extra precautionary measure, consumers are also washing at higher temperatures and purchasing more bleach products and sanitisers than previously seen, the data shows.

The pandemic created a clear shift in the way consumers behave and approach purchasing choices. It is predicted that as the world continues to battle the pandemic and consumers keep increasing their use of laundry products, the fabric care market will stay on an upward curve.

In terms of eco-friendly products, current market trends indicate a demand for products providing reliable cleaning power and budget friendly prices. Consumers are looking for additional benefits in

their products, including natural fragrances, less harmful ingredients, and packaging options such as refillables and recyclables.

Global consumer goods company, Unilever launched its 'Clean Future' campaign in South Africa in late 2020, explaining their strategy to encourage the use of renewable or recycled carbon sources as opposed to non-renewable fossil fuels, transforming the chemical composition of its cleaning and laundry brands.

Lethepu Matshaba, Unilever Homecare Vice President for Africa says, "The move to sourcing renewable sources of carbon in the creation of our products is a deliberate shift away from the fossil fuel economy and a critical step towards our pledge of net zero emissions by 2030." The scale of Unilever's market reach gives a powerful context to the potential impact of the campaign, "We work with 6 200 employees across 150 factories. Homecare has a turnover of \$12,6 billion, or 21% of total Unilever turnover. Over 1 billion people [use] our product every day," says Matshaba.

Unilever has since partnered with LanzaTech and India Glycols to produce a surfactant (an ingredient used to create the foam and cleaning action in many household cleaning and laundry products) made from industrial carbon emission instead of fossil fuels. This marks the first entry into the cleaning market of a surfactant that has been made using captured carbon emissions. The surfactant will be used in an OMO (Persil) laundry capsule and was launched on World Earth Day 2021 (22 April) in China.

Sanitisation and hygiene

It's not surprising to note that the sale of hand sanitisers and related antibacterial products has soared more than 900% according to Nielsen's research. Hand wipes and liquid soaps have experienced similar growth and both new and established brands stand to benefit in the current market.

There are many new entrants in the sanitisation space and interestingly, some who have staged a comeback like Unilever's Lifebuoy, introducing range extensions of sanitiser, hand spray, handwash in addition to the trusted soap bar. Interestingly, Lifebuoy soap was born in the midst of a cholera pandemic in 1894 and has a long history in catering to the hygienic demands of concerned consumers.

Taking a long-term view, hand sanitiser has become an essential in the personal care shopping trolley. New products are so prolific that merchandising has become more important than ever, placing products at high-traffic locations with clear messaging.

Experts agree that while consumers are looking for protection during the pandemic, they also prefer simplicity and ease of use. It can become complicated for the average person to distinguish between cleaning, sanitising, disinfecting, and antibacterial products. Therefore, bold and clear messaging is helpful in making customers aware of what kinds of products they can use where, to achieve the results they ultimately want.

International innovations



Image by Cottonbro from Pexels

Too many to mention

Here are three examples ...

- In the ever-developing sanitisation market, demand is delivering continuous improvement. Unilever was prompted to launch moisturising hand sanitisers in its Dove line, as constant washing and sanitising has led to a need for products that also care and protect the skin. These products launched in the UK in February 2021.
- Reckitt Benckiser released a line-up of Dettol products for UK customers who are concerned

about the environmental impact of cleaning products, with their Tru Clean range. These products are free from bleach, dyes and phosphates and for added peace of mind, zero waste goes to landfills during the manufacturing process.

- The children's (parents) market sees sanitisers colourfully branded with popular TV characters in fun, fruity fragrances.

In-store sanitisation

Retailers are required to provide hand sanitisation for their customers in accordance with national regulations. Particularly in the initial months of the pandemic in South Africa, the excessive demand for effective alcohol-based hand sanitisers led to some manufacturers falling short of the national standard. Ingredients were found to be inadequate in their concentration and counterfeit certification was added to shady product labels. As a result, the South African Bureau of Standards (SABS) has published amendments to the national standard, SANS 490, which specifies the requirements for all alcohol-based hand sanitisers.

"In consultation with the South African Health Products Regulatory Authority (SAHPRA) and international guidelines set by the World Health Organisation (WHO), the amended SANS 490 provides greater and more detailed requirements for hand sanitisers and hand rubs," says Jodi Scholtz, Lead Administrator, SABS.

These requirements include the regulation of the alcohol content and other active ingredients, as well as a list of prohibited ingredients.



Furthermore, packaging and labels must provide certain information, and products are to be submitted to the SABS for testing in accordance with the new regulations. Official certification of alcohol-based sanitisers can take approximately three months. The products will then bear the 'SABS Approved' Mark Scheme, being classified as safe and effective for use.

“Since the outbreak of the coronavirus, the SABS and its technical committee, together with regulatory authorities, have been working vigorously to review and publish South African National Standards that are able to respond efficiently to protect the health and safety of South African citizens,” says Scholtz.



How to keep the hygiene momentum going in retail stores

Sanitisation is now, more than ever, a critical component of running a successful retail business. Your store plays a vital role in keeping the public safe and assisting in minimising the spread

of Covid-19 as much as possible. This, of course, is no easy feat when you are dealing with constant foot traffic, patrolling safe social distancing, and finding the time to clean and sanitise frequently touched surfaces.

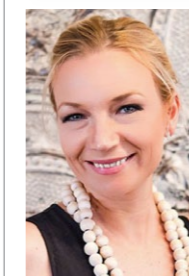


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It is possible to successfully ensure the continued safety of your store environment with an effective hand sanitising strategy that includes choosing the right-hand sanitiser, placing the sanitising stations strategically, encouraging hand hygiene with clear signage for customer education and enforcing a strict in-store hygiene policy and schedule, amongst others.

Keeping your customers and employees safe can be a heavy burden and with Covid fatigue creeping in, management of your store hygiene procedures is crucial to keep the momentum going. Constant review of schedules, checklists and signage will help to make sure that your systems are working

effectively. Paying attention to the small and seemingly minor details and keeping up with the latest updates from health officials will ensure that you are doing your utmost to provide a safe, healthy, and clean shopping environment. **SR**



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