

India Household Cleaners Market Report by Product (Laundry, Dishwashing, Surface Cleaner, Toilet Bowl Cleaner, Window Cleaner, Glass Cleaner, Scourers, and Others), Ingredients (Builders, Solvents, Surfactants, Antimicrobials, and Others), Distribution Channel (Convenience Stores, Supermarkets and Hypermarkets, Online, and Others), Income Group (Middle (INR 2.5 lacs- INR 27.5 lacs), Low (Less than INR 2.5 Lacs), High (Greater than INR 27.5 lacs)), Application (Fabric, Kitchen, Bathroom, Floor, and Others), Premiumization (Economy, Mid-Sized, Premium), and Region 2024-2032

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Abstracts

The India household cleaners market size reached US\$ 8,961.9 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 34,254.1 Million by 2032, exhibiting a growth rate (CAGR) of 15.58% during 2024-2032. The increasing consumer awareness towards maintaining household cleanliness, the growing prevalence of several virus-mediated diseases, and the easy availability of innovative cleaning products are bolstering the market.

India Household Cleaners Market Analysis:

Major Market Drivers: The elevating occurrence of virus-mediated diseases that are causing flu-like symptoms and numerous other health complications is

primarily propelling the market across the country. Besides this, the launch of policies by government bodies to inflate the need for maintaining household hygiene in rural areas is also contributing to the market growth.

Key Market Trends: The development of toxic and chemical-free cleaners is one of the emerging trends stimulating the market. Apart from this, the growing number of organized retail stores is further catalyzing the market.

Competitive Landscape: Some of the prominent companies in the market across the country include Hindustan Unilever Limited (Unilever), Rohit Surfactants Private Limited, Reckitt Benckiser (India) Limited (Reckitt Benckiser Group PLC), Procter & Gamble Hygiene and Healthcare Ltd. (Procter & Gamble), Jyothy Labs Limited, Nirma Limited, Fena (P) Limited, Dabur India Limited, S. C. Johnson Products Pvt. Ltd. (SC Johnson & Son Investment Ltd.), and Pitambari Products Private Limited, among many others.

Geographical Trends: North India exhibits a clear dominance in the market, owing to the increasing construction of residential complexes. Moreover, the widespread awareness among individuals towards health and hygiene is acting as another significant growth-inducing factor.

Challenges and Opportunities: Price sensitivity among consumers represents one of the factors hindering the market growth. However, the launch of household cleaners in small packs that provide affordability and accessibility to larger audiences will continue to fuel the market in the coming years.

India Household Cleaners Market Trends:

Need for Sustainable Products

The rising health concerns among consumers associated with chemical cleaners are augmenting the adoption of non-toxic, biodegradable, and plant-based household cleaners. For example, in November 2023, the Organic World (TOW), one of the organic and natural retail store chains in India, introduced its three product ranges within its plant-based home care brand, Osh. Based in Bengaluru, the company aims to provide easier access to plant-based home cleaning solutions without straining the monthly budget of individuals. Moreover, the increasing investments by key players in plant-based cleaners are also strengthening the market in India. For instance, in

February 2024, Koparo, a sustainable and plant-based home care brand offering cleaning products in India, secured an INR 70 Lakh investment. Besides this, government bodies across the country are implementing extended producer responsibility (EPR) regulations and supporting urban local bodies (ULBs), which are catalyzing the market. Furthermore, they have also launched awareness programs like Blue Flag Certification, the Coastal Clean Sea Campaign, and the Swachh Bharat Mission to combat ocean-bound plastic waste, thereby escalating the demand for sustainable cleaning products. For example, floor cleaners by Happi Planet are gaining extensive traction in India, as they are prepared from active microbes that eliminate germs and naturally derived surfactants that remove dirt. Other than that, in September 2021, one of the packaged consumer goods companies, Hindustan Unilever Ltd., announced the transition of its popular detergent brand Surf Excel to recyclable bottles made from 50% post-consumer recycled plastic while adopting 100% biodegradable actives in its formulation.

Rising Demand for Convenient Products

The busy lifestyles of the working population and the evolving preferences of consumers are increasing the requirement for multipurpose cleaners, as they offer convenience. This, in turn, is elevating the India household cleaners market's recent price. Moreover, these products offer the advantage of simplifying cleaning routines by providing versatile solutions that can be used on several surfaces, thereby reducing the need for multiple specialized cleaners. Multipurpose cleaners are particularly appealing to urban households where timesaving and efficiency are paramount. Products like all-in-one surface sprays, disinfectant wipes, and multipurpose liquid cleaners are gaining traction for their ability to tackle dirt, grime, and germs across kitchens, bathrooms, and living areas with ease. For example, the article published by Hindustan Unilever Limited in November 2023 highlighted the popularity of one of its brands, Vim, products, such as Vim Scrubber, Vim Liquid, and Vim Matic (Machine dishwash). Additionally, in October 2023, Vim launched a novel scrubber that provides the benefit of a steel scrubber and soft scrubber in one. Brands, such as Colin and Dettol, successfully tapped into this trend by offering effective, easy-to-use products that promise both convenience and comprehensive cleaning. For example, in September 2023, Dettol released a campaign urging individuals to use superior hand hygiene solutions, which provides germ-kill and efficient cleaning solutions.

Accessibility via E-Commerce

The expanding e-commerce industry is transforming the way consumers purchase

cleaning products across the country. For example, online platforms, such as Flipkart, Amazon, Big Basket, etc., offer a wide array of household cleaners, ranging from detergents and disinfectants to specialized surface cleaners and eco-friendly options. Besides this, the rising popularity of D2C brands, as they allow consumers to browse, compare, and select products, benefiting from user reviews, detailed descriptions, competitive pricing, etc., is one of the India household cleaners market recent opportunities. According to a report published by Inc42 in May 2024, the direct-to-consumer (D2C) market in India is projected to reach a size of US\$100 Billion by 2025. Additionally, in December 2023, one of the sustainable products brands based in India, Eco Soul Home, planned to expand its presence to all major e-commerce platforms. Apart from this, e-commerce platforms often provide attractive discounts, subscription services, and swift delivery options, catering to both urban and rural areas. For example, in May 2024, Empower India collaborated with LocalCircles, India's leading public and consumer pulse aggregator, to gather the data of consumers on e-commerce shopping. The survey aimed to understand the shift in individual preferences towards online transactions, which is fueled by the demand for better options and unparalleled convenience. Apart from this, it indicated that approximately 37% of women and 63% of men were inclined towards digital transactions.

India Household Cleaners Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with the India household cleaners market forecast at the country and regional levels for the period 2024-2032. Our report has categorized the market based on the product, ingredients, distribution channel, income group, application, and premiumization.

Breakup by Product:

Laundry

Dishwashing

Surface Cleaner

Toilet Bowl Cleaner

Window Cleaner

Glass Cleaner

Scourers

Others

Among these, laundry currently hold the largest market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes laundry, dishwashing, surface cleaner, toilet bowl cleaner, window cleaner, glass cleaner, scourers, and others. According to the report, laundry represented the largest segmentation.

The growing demand for clean and fresh clothing in Indian households is augmenting the growth in this segmentation. Consequently, consumers are inclined toward effective laundry solutions. For example, in January 2024, Clean Craft launched revolutionary laundry and dry-cleaning stores in India. Moreover, the cultural emphasis on personal hygiene and the preference for neatly ironed clothes for daily wear, work, and social occasions are also acting as significant growth-inducing factors. Additionally, the expansion of the middle class with higher disposable incomes has led to greater adoption of branded laundry detergents. For instance, in December 2023, Godrej Consumer Products introduced an enhanced brand of liquid detergent called Godrej Fab in South India.

Breakup by Ingredients:

Builders

Solvents

Surfactants

Antimicrobials

Others

Builders currently exhibits a clear dominance in the India household cleaners market

share

The report has provided a detailed breakup and analysis of the market based on the ingredients. This includes builders, solvents, surfactants, antimicrobials, and others. According to the report, builders represented the largest segmentation.

Builders cater to a wide range of cleaning needs essential for new constructions and ongoing property maintenance. The inflating urbanization levels and infrastructure development are expanding the residential and commercial construction projects across the country. Builders require a variety of cleaning products to ensure that new properties are ready for occupancy, including heavy-duty cleaners for post-construction cleanup, floor and surface cleaners, and products for maintaining common areas. For example, KPS offers cleaning and maintenance services for homes as well as office spaces that are registered and certified by the Ministry of Micro, Small, and Medium Enterprises (MSME) in India. The high volume and frequency of cleaning required during and after construction projects drive substantial demand in this segment. Furthermore, builders often procure cleaning products in bulk, contributing significantly to market volume. Their focus on maintaining the aesthetic and sanitary standards of newly built spaces aligns with the rising expectations of property buyers and tenants.

Breakup by Distribution Channel:

Convenience Stores

Supermarkets and Hypermarkets

Online

Others

As per the India household cleaners market overview, convenience stores accounted for the largest market share

The report has provided a detailed breakup and analysis of the market based on the distribution channel. This includes convenience stores, supermarkets and hypermarkets, online, and others. According to the report, convenience stores represented the largest segmentation.

Convenience stores are gaining traction owing to their widespread accessibility and crucial role in everyday consumer shopping habits. In India, they, often locally referred to as kirana stores, are deeply embedded in both urban and rural communities, providing essential goods, including household cleaners, to a vast and diverse population. Their proximity to residential areas makes them a preferred choice for quick and frequent purchases, especially for daily necessities like cleaning products. These stores often carry a wide range of affordable and familiar brands, catering to the price-sensitive nature of many Indian consumers. Some of the commonly available convenience stores across the country include Big Bazar, 24 SEVEN, Reliance Fresh, etc. Their ability to provide personalized service and the trust they have built within their communities further enhance their significance in the market. As a result, convenience stores dominate the distribution landscape of household cleaners in India, ensuring high product availability and consistent consumer demand.

Breakup by Income Group:

Middle (INR 2.5 lacs- INR 27.5 lacs)

Low (Less than INR 2.5 Lacs)

High (Greater than INR 27.5 lacs)

According to the India household cleaners market statistics, middle (INR 2.5 lacs- INR 27.5 lacs) exhibit a clear dominance in the market

The report has provided a detailed breakup and analysis of the market based on the income group. This includes middle (INR 2.5 lacs- INR 27.5 lacs), low (less than INR 2.5 lacs), and high (greater than INR 27.5 lacs). According to the report, middle (INR 2.5 lacs- INR 27.5 lacs) represented the largest segmentation.

The rising preference among middle-class individuals across the country for branded cleaners over traditional methods is driven by convenience, superior results, and value for money. Apart from this, brands like Surf Excel and Vim dishwash liquid are popular choices, offering reliable performance at reasonable prices. Surf Excel, for instance, provides a range of laundry detergents suitable for both hand washing and machine washing, addressing the varied needs of middle-class households. Vim dishwash liquid, known for its grease-cutting capabilities, is a staple in many kitchens due to its cost-effectiveness and efficiency. Additionally, brands like Lizol offer multipurpose floor

cleaners that promise hygiene and pleasant fragrances, catering to the increasing awareness among the middle-class population towards cleanliness and health. These products are often available in various pack sizes, allowing consumers to choose based on their budget and usage requirements, which is positively influencing the India household cleaners market outlook.

Breakup by Application:

Fabric

Kitchen

Bathroom

Floor

Others

Fabric currently exhibits a clear dominance in the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes fabric, kitchen, bathroom, floor, and others. According to the report, fabric represented the largest segmentation.

The rising need for presentable attire in social, professional, and educational settings is propelling the segment's growth. According to Mintel's consumer research report, India's fabric care market is projected to grow from approximately INR 52,100 Crore in 2022 to INR 63,900 Crore in 2025. Moreover, the diverse and extensive wardrobe requirements, from daily wear to traditional outfits for special occasions, are escalating the demand for effective fabric cleaning solutions. Products like detergents, fabric softeners, and stain removers are indispensable, addressing the need for thorough cleaning, fabric care, and maintenance of clothing quality. This, in turn, is elevating the India household cleaners market revenue. For instance, in November 2023, one of the organic and natural retail store chains in India, the Organic World (TOW) launched three products under its plant-powered home care label, Osh.

Breakup by Premiumization:

Economy

Mid-Sized

Premium

Economy accounted for the largest market share

The report has provided a detailed breakup and analysis of the market based on the premiumization. This includes economy, mid-sized, and premium. According to the report, economy represented the largest segmentation.

A significant portion of the population across the country prioritizes affordability when it comes to daily necessities, including cleaning products. Economy cleaners, such as budget-friendly detergents, surface cleaners, and dishwashing liquids, cater to this demand by providing effective cleaning solutions at lower price points. Brands like Ghadi detergent and Wheel detergent, known for their affordability and decent performance, are gaining widespread popularity. These products are often available in smaller pack sizes, making them accessible to lower-income households and those who prefer to manage their expenses on a daily or weekly basis. The emphasis on value for money, combined with the vast distribution network of local kirana stores, ensures that economy cleaners reach a broad audience across both urban and rural areas. This, in turn, is escalating the India household cleaners market demand.

Breakup by Region:

North India

West and Central India

South India

East India

North India currently dominates the market

The report has also provided a comprehensive analysis of all the major regional

markets, which include North India, West and Central India, South India, and East India. According to the report, North India was the largest market for India household cleaners.

Major cities like Delhi, Jaipur, and Chandigarh lead the demand for a wide range of cleaning products, from basic detergents and floor cleaners to specialized bathroom and kitchen cleaners. The region's climatic conditions, with hot summers and cold winters, necessitate frequent cleaning, particularly for maintaining indoor air quality and reducing dust accumulation. Popular brands like Surf Excel, Lizol, and Vim are well-entrenched in both urban and semi-urban markets, offering products tailored to local needs and preferences. Additionally, the proliferation of retail chains is also bolstering the market. For example, in February 2024, homecare products start-up Happi Planet, founded by two former P&G executives, raised a funding round of approximately INR 8.47 Crore from Fireside Ventures to expand its offline presence and generate awareness campaigns regarding hygiene. The cultural emphasis on cleanliness, especially during festivals and social gatherings, further boosts the market. Overall, North India's household cleaners market is marked by strong growth potential, driven by evolving consumer habits and increasing penetration of branded cleaning solutions.

Competitive Landscape:

The report has also provided a comprehensive analysis of the competitive landscape in the market. Competitive analysis such as market structure, market share by key players, player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major India household cleaners market companies have been provided. Some of the key players in the market include:

Hindustan Unilever Limited (Unilever)

Rohit Surfactants Private Limited

Reckitt Benckiser (India) Limited (Reckitt Benckiser Group PLC)

Procter & Gamble Hygiene and Healthcare Ltd. (Procter & Gamble)

Jyothy Labs Limited

Nirma Limited

Fena (P) Limited

Dabur India Limited

S. C. Johnson Products Pvt. Ltd. (SC Johnson & Son Investment Ltd.)

Pitambari Products Private Limited

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

India Household Cleaners Market Recent Developments:

February 2024: One of the plant-based household cleaners brands in India, Koparo, secured funding of approximately INR 5.2 Crore from 4P Capital Partners, in addition to INR 70 Lakhs from Shark Tank India.

February 2024: Specializing in toxin-free and plant-based home care products, Happi Planet, raised a funding round of INR 8.47 Crore from Fireside Ventures to expand their offline presence.

Key Questions Answered in This Report

1. What was the size of the India household cleaners market in 2023?
2. What is the expected growth rate of the India household cleaners market during 2024-2032?
3. What has been the impact of COVID-19 on the India household cleaners market?
4. What are the key factors driving the India household cleaners market?
5. What is the breakup of the India household cleaners market based on the product?
6. What is the breakup of the India household cleaners market based on the ingredient?

7. What is the breakup of the India household cleaners market based on the distribution channel?
8. What is the breakup of the India household cleaners market based on the income group?
9. What is the breakup of the India household cleaners market based on the application?
10. What is the breakup of the India household cleaners market based on the premiumization?
11. What are the key regions in the India household cleaners market?
12. Who are the key players/companies in the India household cleaners market?

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