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Global Household Laundry Detergents Market Growth 2026-2032

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Abstracts

The global Household Laundry Detergents market size is predicted to grow from US$ 53400 million in 2025 to US$ 67620 million in 2032; it is expected to grow at a CAGR of 3.5% from 2026 to 2032.

Household laundry detergents are formulated cleaning products used in domestic settings to remove soils, odours, and microorganisms from textiles while preserving fabric appearance and handle. They sit at the core of the home and fabric care value chain, linking upstream surfactants, builders, enzymes, solvents, fragrance, packaging and filling services with downstream household users and retail channels.

In the current market, global production is around 26500 k tonnes, with an average selling price of about 2000 USD per tonne EXW basis. At the upstream end, supply is dominated by large chemical producers of linear alkylbenzene sulfonate, alcohol ether sulfates, nonionic surfactants, zeolite and carbonate builders, enzymes, and polymers, which are often under long term supply contracts with the major detergent brand owners. Downstream, the main users are mass market households served through supermarkets, discounters, e commerce platforms, and community stores, complemented by specialist channels for baby care and sensitive skin products. Typical procurement models combine annual framework agreements and joint demand planning between brand owners and retailers for base volumes, with promotional spot buying layered on top. On a global average EXW basis, an industry gross margin around 27% can be considered representative, reflecting the interplay of technology barriers in formulation and encapsulation, trademark and advertising assets, stringent safety and environmental compliance, appliance compatibility testing, and strong lock in via brand loyalty and routine purchase behaviour at the shelf.

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In the current market, the value pool is moderately concentrated. The leading global consumer goods groups such as Procter and Gamble, Unilever, Henkel, Kao, LG Household and Health Care, Church and Dwight and several regional champions in China and emerging Asia account for a large share of value, with CR5 by revenue sitting in the low sixties and CR10 approaching the high seventies. Asia Pacific, led by China, India and Southeast Asia, has become the single largest demand region, representing a little more than one third of global value, while North America and Europe each contribute roughly one quarter, supported by high per household usage and strong penetration of automatic washing machines.

Latin America, Middle East and Africa together form a smaller but faster growing tail, where bar soaps, hand wash powders and low cost liquids still play an important role. Within the product mix, liquid detergents and unit dose pods continue to gain share from traditional powders in developed markets, while concentrated formats and large refill packs are used to control logistics cost and shelf space. Eco label and high bio based formulations are growing from a small base, driven by retailer private labels and regulatory pressure on surfactant biodegradability and microplastic content.

Looking ahead over 2025 to 2031, the industry is expected to maintain low to mid single digit growth in value, with mid single digit volume growth in emerging regions partially offset by more mature consumption in high income markets. Key demand drivers include rising urbanisation and appliance penetration in Asia and Africa, growing middle class willingness to pay for fabric protection, fragrance and convenience features, and regulatory and consumer pressure to wash at lower temperatures and shorter cycles to reduce energy use. On the supply side, producers are deploying advanced enzymes, polymer soil release agents, and surfactant systems optimised for cold wash conditions, as well as more compact formats that reduce packaging and transport emissions. At the same time, leading groups are investing heavily in artificial intelligence and robotics across the value chain: Unilever’s Wonder Wash and related launches used AI accelerated digital models and robotics to design short cycle detergents with high performance in fifteen minute cold washes, while P and G is working with bio AI partners to discover new cold active enzymes and uses large scale data platforms and digital twins to optimise fabric care formulations and global supply chains.

Capital intensity remains manageable but not trivial, as modern liquid and pod plants require high speed filling, encapsulation and automation, plus investment to meet tightening wastewater and emission standards. The main bottlenecks and risks lie in volatile feedstock prices for surfactants and packaging resins, the time and cost required to qualify new raw materials or new formulas with retailers and appliance

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makers, and the need to comply with increasingly strict regional regulations on chemical safety, labelling, microplastics and lifecycle emissions. Overall, the sector is likely to see continued share gains for Asia Pacific producers, gradual premiumisation into concentrated and specialised products, and deeper integration of AI tools in R and D, demand forecasting and in store execution, against a backdrop of steady but disciplined capacity expansion.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Household Laundry Detergents Industry Forecast” looks at past sales and reviews total world Household Laundry Detergents sales in 2025, providing a comprehensive analysis by region and market sector of projected Household Laundry Detergents sales for 2026 through 2032. With Household Laundry Detergents sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Household Laundry Detergents industry.

This Insight Report provides a comprehensive analysis of the global Household Laundry Detergents landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Household Laundry Detergents portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Household Laundry Detergents market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Household Laundry Detergents and breaks down the forecast by Product Form, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Household Laundry Detergents.

This report presents a comprehensive overview, market shares, and growth opportunities of Household Laundry Detergents market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

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Segmentation by Product Form:

Powder Detergents

Liquid Detergents

Unit Dose Pods

Bars and Pastes

Sheets and Strips

Other Specialized Formats

Segmentation by Washing Method:

Machine Wash Dedicated

Hand Wash Dedicated

Dual Use Machine and Hand

Segmentation by Concentration Level:

Regular Concentration

Concentrated

Ultra Concentrated

Segmentation by Surfactant Origin:

Conventional Petrochemical Formulations

High Bio Based Content Formulations

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Certified Eco Label Formulations

Segmentation by Application:

Routine Machine Laundry

Hand Wash Laundry

Baby and Sensitive Laundry

Premium and Specialty Fabric Laundry

Other Household Laundry

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

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India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Procter and Gamble

Unilever

Henkel

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Kao Corporation

LG Household and Health Care

Church and Dwight

Lion Corporation

Reckitt Benckiser Group

Colgate Palmolive

Blue Moon Group

Liby Group

Nice Group

Wings Corporation

Aekyung Industrial

PZ Cussons

Amway

SC Johnson

Guangzhou Lonkey Industrial

Shanghai Hutchison Whitecat

Faberlic

Key Questions Addressed in this Report

What is the 10-year outlook for the global Household Laundry Detergents

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market?

What factors are driving Household Laundry Detergents market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Household Laundry Detergents market opportunities vary by end market size?

How does Household Laundry Detergents break out by Product Form, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Household Laundry Detergents Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Household Laundry Detergents by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Household Laundry Detergents by Country/Region, 2021, 2025 & 2032
2.2 Household Laundry Detergents Segment by Product Form
  2.2.1 Powder Detergents
  2.2.2 Liquid Detergents
  2.2.3 Unit Dose Pods
  2.2.4 Bars and Pastes
  2.2.5 Sheets and Strips
  2.2.6 Other Specialized Formats
  2.2.7 Household Laundry Detergents Sales by Product Form
    2.2.7.1 Global Household Laundry Detergents Sales Market Share by Product Form (2021-2026)
    2.2.7.2 Global Household Laundry Detergents Revenue and Market Share by Product Form (2021-2026)
    2.2.7.3 Global Household Laundry Detergents Sale Price by Product Form (2021-2026)
2.3 Household Laundry Detergents Segment by Washing Method
  2.3.1 Machine Wash Dedicated
  2.3.2 Hand Wash Dedicated
  2.3.3 Dual Use Machine and Hand

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2.3.4 Household Laundry Detergents Sales by Washing Method
2.3.4.1 Global Household Laundry Detergents Sales Market Share by Washing Method (2021-2026)
2.3.4.2 Global Household Laundry Detergents Revenue and Market Share by Washing Method (2021-2026)
2.3.4.3 Global Household Laundry Detergents Sale Price by Washing Method (2021-2026)
2.4 Household Laundry Detergents Segment by Concentration Level
2.4.1 Regular Concentration
2.4.2 Concentrated
2.4.3 Ultra Concentrated
2.4.4 Household Laundry Detergents Sales by Concentration Level
2.4.4.1 Global Household Laundry Detergents Sales Market Share by Concentration Level (2021-2026)
2.4.4.2 Global Household Laundry Detergents Revenue and Market Share by Concentration Level (2021-2026)
2.4.4.3 Global Household Laundry Detergents Sale Price by Concentration Level (2021-2026)
2.5 Household Laundry Detergents Segment by Surfactant Origin
2.5.1 Conventional Petrochemical Formulations
2.5.2 High Bio Based Content Formulations
2.5.3 Certified Eco Label Formulations
2.5.4 Household Laundry Detergents Sales by Surfactant Origin
2.5.4.1 Global Household Laundry Detergents Sales Market Share by Surfactant Origin (2021-2026)
2.5.4.2 Global Household Laundry Detergents Revenue and Market Share by Surfactant Origin (2021-2026)
2.5.4.3 Global Household Laundry Detergents Sale Price by Surfactant Origin (2021-2026)
2.6 Household Laundry Detergents Segment by Application
2.6.1 Routine Machine Laundry
2.6.2 Hand Wash Laundry
2.6.3 Baby and Sensitive Laundry
2.6.4 Premium and Specialty Fabric Laundry
2.6.5 Other Household Laundry
2.6.6 Household Laundry Detergents Sales by Application
2.6.6.1 Global Household Laundry Detergents Sale Market Share by Application (2021-2026)
2.6.6.2 Global Household Laundry Detergents Revenue and Market Share by

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Application (2021-2026)
2.6.6.3 Global Household Laundry Detergents Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Household Laundry Detergents Breakdown Data by Company
3.1.1 Global Household Laundry Detergents Annual Sales by Company (2021-2026)
3.1.2 Global Household Laundry Detergents Sales Market Share by Company (2021-2026)
3.2 Global Household Laundry Detergents Annual Revenue by Company (2021-2026)
3.2.1 Global Household Laundry Detergents Revenue by Company (2021-2026)
3.2.2 Global Household Laundry Detergents Revenue Market Share by Company (2021-2026)
3.3 Global Household Laundry Detergents Sale Price by Company
3.4 Key Manufacturers Household Laundry Detergents Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Household Laundry Detergents Product Location Distribution
3.4.2 Players Household Laundry Detergents Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR HOUSEHOLD LAUNDRY DETERGENTS BY GEOGRAPHIC REGION

4.1 World Historic Household Laundry Detergents Market Size by Geographic Region (2021-2026)
4.1.1 Global Household Laundry Detergents Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Household Laundry Detergents Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Household Laundry Detergents Market Size by Country/Region (2021-2026)
4.2.1 Global Household Laundry Detergents Annual Sales by Country/Region (2021-2026)
4.2.2 Global Household Laundry Detergents Annual Revenue by Country/Region (2021-2026)

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4.3 Americas Household Laundry Detergents Sales Growth
4.4 APAC Household Laundry Detergents Sales Growth
4.5 Europe Household Laundry Detergents Sales Growth
4.6 Middle East & Africa Household Laundry Detergents Sales Growth

5 AMERICAS

5.1 Americas Household Laundry Detergents Sales by Country
  5.1.1 Americas Household Laundry Detergents Sales by Country (2021-2026)
  5.1.2 Americas Household Laundry Detergents Revenue by Country (2021-2026)
5.2 Americas Household Laundry Detergents Sales by Product Form (2021-2026)
5.3 Americas Household Laundry Detergents Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Household Laundry Detergents Sales by Region
  6.1.1 APAC Household Laundry Detergents Sales by Region (2021-2026)
  6.1.2 APAC Household Laundry Detergents Revenue by Region (2021-2026)
6.2 APAC Household Laundry Detergents Sales by Product Form (2021-2026)
6.3 APAC Household Laundry Detergents Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Household Laundry Detergents by Country
  7.1.1 Europe Household Laundry Detergents Sales by Country (2021-2026)
  7.1.2 Europe Household Laundry Detergents Revenue by Country (2021-2026)
7.2 Europe Household Laundry Detergents Sales by Product Form (2021-2026)
7.3 Europe Household Laundry Detergents Sales by Application (2021-2026)

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7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Household Laundry Detergents by Country
8.1.1 Middle East & Africa Household Laundry Detergents Sales by Country (2021-2026)
8.1.2 Middle East & Africa Household Laundry Detergents Revenue by Country (2021-2026)
8.2 Middle East & Africa Household Laundry Detergents Sales by Product Form (2021-2026)
8.3 Middle East & Africa Household Laundry Detergents Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Household Laundry Detergents
10.3 Manufacturing Process Analysis of Household Laundry Detergents
10.4 Industry Chain Structure of Household Laundry Detergents

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

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11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Household Laundry Detergents Distributors
11.3 Household Laundry Detergents Customer

12 WORLD FORECAST REVIEW FOR HOUSEHOLD LAUNDRY DETERGENTS BY GEOGRAPHIC REGION

12.1 Global Household Laundry Detergents Market Size Forecast by Region
12.1.1 Global Household Laundry Detergents Forecast by Region (2027-2032)
12.1.2 Global Household Laundry Detergents Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Household Laundry Detergents Forecast by Product Form (2027-2032)
12.7 Global Household Laundry Detergents Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Procter and Gamble
13.1.1 Procter and Gamble Company Information
13.1.2 Procter and Gamble Household Laundry Detergents Product Portfolios and Specifications
13.1.3 Procter and Gamble Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Procter and Gamble Main Business Overview
13.1.5 Procter and Gamble Latest Developments
13.2 Unilever
13.2.1 Unilever Company Information
13.2.2 Unilever Household Laundry Detergents Product Portfolios and Specifications
13.2.3 Unilever Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Unilever Main Business Overview
13.2.5 Unilever Latest Developments
13.3 Henkel
13.3.1 Henkel Company Information
13.3.2 Henkel Household Laundry Detergents Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.3.3 Henkel Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Henkel Main Business Overview
13.3.5 Henkel Latest Developments
13.4 Kao Corporation
13.4.1 Kao Corporation Company Information
13.4.2 Kao Corporation Household Laundry Detergents Product Portfolios and Specifications
13.4.3 Kao Corporation Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Kao Corporation Main Business Overview
13.4.5 Kao Corporation Latest Developments
13.5 LG Household and Health Care
13.5.1 LG Household and Health Care Company Information
13.5.2 LG Household and Health Care Household Laundry Detergents Product Portfolios and Specifications
13.5.3 LG Household and Health Care Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 LG Household and Health Care Main Business Overview
13.5.5 LG Household and Health Care Latest Developments
13.6 Church and Dwight
13.6.1 Church and Dwight Company Information
13.6.2 Church and Dwight Household Laundry Detergents Product Portfolios and Specifications
13.6.3 Church and Dwight Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Church and Dwight Main Business Overview
13.6.5 Church and Dwight Latest Developments
13.7 Lion Corporation
13.7.1 Lion Corporation Company Information
13.7.2 Lion Corporation Household Laundry Detergents Product Portfolios and Specifications
13.7.3 Lion Corporation Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Lion Corporation Main Business Overview
13.7.5 Lion Corporation Latest Developments
13.8 Reckitt Benckiser Group
13.8.1 Reckitt Benckiser Group Company Information
13.8.2 Reckitt Benckiser Group Household Laundry Detergents Product Portfolios and

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Specifications
13.8.3 Reckitt Benckiser Group Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Reckitt Benckiser Group Main Business Overview
13.8.5 Reckitt Benckiser Group Latest Developments
13.9 Colgate Palmolive
13.9.1 Colgate Palmolive Company Information
13.9.2 Colgate Palmolive Household Laundry Detergents Product Portfolios and Specifications
13.9.3 Colgate Palmolive Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Colgate Palmolive Main Business Overview
13.9.5 Colgate Palmolive Latest Developments
13.10 Blue Moon Group
13.10.1 Blue Moon Group Company Information
13.10.2 Blue Moon Group Household Laundry Detergents Product Portfolios and Specifications
13.10.3 Blue Moon Group Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Blue Moon Group Main Business Overview
13.10.5 Blue Moon Group Latest Developments
13.11 Liby Group
13.11.1 Liby Group Company Information
13.11.2 Liby Group Household Laundry Detergents Product Portfolios and Specifications
13.11.3 Liby Group Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Liby Group Main Business Overview
13.11.5 Liby Group Latest Developments
13.12 Nice Group
13.12.1 Nice Group Company Information
13.12.2 Nice Group Household Laundry Detergents Product Portfolios and Specifications
13.12.3 Nice Group Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Nice Group Main Business Overview
13.12.5 Nice Group Latest Developments
13.13 Wings Corporation
13.13.1 Wings Corporation Company Information

+357 96 030922
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13.13.2 Wings Corporation Household Laundry Detergents Product Portfolios and Specifications
13.13.3 Wings Corporation Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Wings Corporation Main Business Overview
13.13.5 Wings Corporation Latest Developments
13.14 Aekyung Industrial
13.14.1 Aekyung Industrial Company Information
13.14.2 Aekyung Industrial Household Laundry Detergents Product Portfolios and Specifications
13.14.3 Aekyung Industrial Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Aekyung Industrial Main Business Overview
13.14.5 Aekyung Industrial Latest Developments
13.15 PZ Cussons
13.15.1 PZ Cussons Company Information
13.15.2 PZ Cussons Household Laundry Detergents Product Portfolios and Specifications
13.15.3 PZ Cussons Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 PZ Cussons Main Business Overview
13.15.5 PZ Cussons Latest Developments
13.16 Amway
13.16.1 Amway Company Information
13.16.2 Amway Household Laundry Detergents Product Portfolios and Specifications
13.16.3 Amway Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Amway Main Business Overview
13.16.5 Amway Latest Developments
13.17 SC Johnson
13.17.1 SC Johnson Company Information
13.17.2 SC Johnson Household Laundry Detergents Product Portfolios and Specifications
13.17.3 SC Johnson Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 SC Johnson Main Business Overview
13.17.5 SC Johnson Latest Developments
13.18 Guangzhou Lonkey Industrial
13.18.1 Guangzhou Lonkey Industrial Company Information

+357 96 030922
info@marketpublishers.com

13.18.2 Guangzhou Lonkey Industrial Household Laundry Detergents Product Portfolios and Specifications
13.18.3 Guangzhou Lonkey Industrial Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Guangzhou Lonkey Industrial Main Business Overview
13.18.5 Guangzhou Lonkey Industrial Latest Developments
13.19 Shanghai Hutchison Whitecat
13.19.1 Shanghai Hutchison Whitecat Company Information
13.19.2 Shanghai Hutchison Whitecat Household Laundry Detergents Product Portfolios and Specifications
13.19.3 Shanghai Hutchison Whitecat Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Shanghai Hutchison Whitecat Main Business Overview
13.19.5 Shanghai Hutchison Whitecat Latest Developments
13.20 Faberlic
13.20.1 Faberlic Company Information
13.20.2 Faberlic Household Laundry Detergents Product Portfolios and Specifications
13.20.3 Faberlic Household Laundry Detergents Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Faberlic Main Business Overview
13.20.5 Faberlic Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Household Laundry Detergents Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Household Laundry Detergents Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Powder Detergents
Table 4. Major Players of Liquid Detergents
Table 5. Major Players of Unit Dose Pods
Table 6. Major Players of Bars and Pastes
Table 7. Major Players of Sheets and Strips
Table 8. Major Players of Other Specialized Formats
Table 9. Global Household Laundry Detergents Sales by Product Form (2021-2026) & (Kilotons)
Table 10. Global Household Laundry Detergents Sales Market Share by Product Form (2021-2026)
Table 11. Global Household Laundry Detergents Revenue by Product Form (2021-2026) & ($ million)
Table 12. Global Household Laundry Detergents Revenue Market Share by Product Form (2021-2026)
Table 13. Global Household Laundry Detergents Sale Price by Product Form (2021-2026) & (US$/Ton)
Table 14. Major Players of Machine Wash Dedicated
Table 15. Major Players of Hand Wash Dedicated
Table 16. Major Players of Dual Use Machine and Hand
Table 17. Global Household Laundry Detergents Sales by Washing Method (2021-2026) & (Kilotons)
Table 18. Global Household Laundry Detergents Sales Market Share by Washing Method (2021-2026)
Table 19. Global Household Laundry Detergents Revenue by Washing Method (2021-2026) & ($ million)
Table 20. Global Household Laundry Detergents Revenue Market Share by Washing Method (2021-2026)
Table 21. Global Household Laundry Detergents Sale Price by Washing Method (2021-2026) & (US$/Ton)
Table 22. Major Players of Regular Concentration
Table 23. Major Players of Concentrated

+357 96 030922
info@marketpublishers.com

Table 24. Major Players of Ultra Concentrated
Table 25. Global Household Laundry Detergents Sales by Concentration Level (2021-2026) & (Kilotons)
Table 26. Global Household Laundry Detergents Sales Market Share by Concentration Level (2021-2026)
Table 27. Global Household Laundry Detergents Revenue by Concentration Level (2021-2026) & ($ million)
Table 28. Global Household Laundry Detergents Revenue Market Share by Concentration Level (2021-2026)
Table 29. Global Household Laundry Detergents Sale Price by Concentration Level (2021-2026) & (US$/Ton)
Table 30. Major Players of Conventional Petrochemical Formulations
Table 31. Major Players of High Bio Based Content Formulations
Table 32. Major Players of Certified Eco Label Formulations
Table 33. Global Household Laundry Detergents Sales by Surfactant Origin (2021-2026) & (Kilotons)
Table 34. Global Household Laundry Detergents Sales Market Share by Surfactant Origin (2021-2026)
Table 35. Global Household Laundry Detergents Revenue by Surfactant Origin (2021-2026) & ($ million)
Table 36. Global Household Laundry Detergents Revenue Market Share by Surfactant Origin (2021-2026)
Table 37. Global Household Laundry Detergents Sale Price by Surfactant Origin (2021-2026) & (US$/Ton)
Table 38. Global Household Laundry Detergents Sale by Application (2021-2026) & (Kilotons)
Table 39. Global Household Laundry Detergents Sale Market Share by Application (2021-2026)
Table 40. Global Household Laundry Detergents Revenue by Application (2021-2026) & ($ million)
Table 41. Global Household Laundry Detergents Revenue Market Share by Application (2021-2026)
Table 42. Global Household Laundry Detergents Sale Price by Application (2021-2026) & (US$/Ton)
Table 43. Global Household Laundry Detergents Sales by Company (2021-2026) & (Kilotons)
Table 44. Global Household Laundry Detergents Sales Market Share by Company (2021-2026)
Table 45. Global Household Laundry Detergents Revenue by Company (2021-2026) &

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($ millions)
Table 46. Global Household Laundry Detergents Revenue Market Share by Company (2021-2026)
Table 47. Global Household Laundry Detergents Sale Price by Company (2021-2026) & (US$/Ton)
Table 48. Key Manufacturers Household Laundry Detergents Producing Area Distribution and Sales Area
Table 49. Players Household Laundry Detergents Products Offered
Table 50. Household Laundry Detergents Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 51. New Products and Potential Entrants
Table 52. Market M&A Activity & Strategy
Table 53. Global Household Laundry Detergents Sales by Geographic Region (2021-2026) & (Kilotons)
Table 54. Global Household Laundry Detergents Sales Market Share Geographic Region (2021-2026)
Table 55. Global Household Laundry Detergents Revenue by Geographic Region (2021-2026) & ($ millions)
Table 56. Global Household Laundry Detergents Revenue Market Share by Geographic Region (2021-2026)
Table 57. Global Household Laundry Detergents Sales by Country/Region (2021-2026) & (Kilotons)
Table 58. Global Household Laundry Detergents Sales Market Share by Country/Region (2021-2026)
Table 59. Global Household Laundry Detergents Revenue by Country/Region (2021-2026) & ($ millions)
Table 60. Global Household Laundry Detergents Revenue Market Share by Country/Region (2021-2026)
Table 61. Americas Household Laundry Detergents Sales by Country (2021-2026) & (Kilotons)
Table 62. Americas Household Laundry Detergents Sales Market Share by Country (2021-2026)
Table 63. Americas Household Laundry Detergents Revenue by Country (2021-2026) & ($ millions)
Table 64. Americas Household Laundry Detergents Sales by Product Form (2021-2026) & (Kilotons)
Table 65. Americas Household Laundry Detergents Sales by Application (2021-2026) & (Kilotons)
Table 66. APAC Household Laundry Detergents Sales by Region (2021-2026) &

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(Kilotons)
Table 67. APAC Household Laundry Detergents Sales Market Share by Region (2021-2026)
Table 68. APAC Household Laundry Detergents Revenue by Region (2021-2026) & ($ millions)
Table 69. APAC Household Laundry Detergents Sales by Product Form (2021-2026) & (Kilotons)
Table 70. APAC Household Laundry Detergents Sales by Application (2021-2026) & (Kilotons)
Table 71. Europe Household Laundry Detergents Sales by Country (2021-2026) & (Kilotons)
Table 72. Europe Household Laundry Detergents Revenue by Country (2021-2026) & ($ millions)
Table 73. Europe Household Laundry Detergents Sales by Product Form (2021-2026) & (Kilotons)
Table 74. Europe Household Laundry Detergents Sales by Application (2021-2026) & (Kilotons)
Table 75. Middle East & Africa Household Laundry Detergents Sales by Country (2021-2026) & (Kilotons)
Table 76. Middle East & Africa Household Laundry Detergents Revenue Market Share by Country (2021-2026)
Table 77. Middle East & Africa Household Laundry Detergents Sales by Product Form (2021-2026) & (Kilotons)
Table 78. Middle East & Africa Household Laundry Detergents Sales by Application (2021-2026) & (Kilotons)
Table 79. Key Market Drivers & Growth Opportunities of Household Laundry Detergents
Table 80. Key Market Challenges & Risks of Household Laundry Detergents
Table 81. Key Industry Trends of Household Laundry Detergents
Table 82. Household Laundry Detergents Raw Material
Table 83. Key Suppliers of Raw Materials
Table 84. Household Laundry Detergents Distributors List
Table 85. Household Laundry Detergents Customer List
Table 86. Global Household Laundry Detergents Sales Forecast by Region (2027-2032) & (Kilotons)
Table 87. Global Household Laundry Detergents Revenue Forecast by Region (2027-2032) & ($ millions)
Table 88. Americas Household Laundry Detergents Sales Forecast by Country (2027-2032) & (Kilotons)
Table 89. Americas Household Laundry Detergents Annual Revenue Forecast by

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Country (2027-2032) & ($ millions)
Table 90. APAC Household Laundry Detergents Sales Forecast by Region (2027-2032) & (Kilotons)
Table 91. APAC Household Laundry Detergents Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 92. Europe Household Laundry Detergents Sales Forecast by Country (2027-2032) & (Kilotons)
Table 93. Europe Household Laundry Detergents Revenue Forecast by Country (2027-2032) & ($ millions)
Table 94. Middle East & Africa Household Laundry Detergents Sales Forecast by Country (2027-2032) & (Kilotons)
Table 95. Middle East & Africa Household Laundry Detergents Revenue Forecast by Country (2027-2032) & ($ millions)
Table 96. Global Household Laundry Detergents Sales Forecast by Product Form (2027-2032) & (Kilotons)
Table 97. Global Household Laundry Detergents Revenue Forecast by Product Form (2027-2032) & ($ millions)
Table 98. Global Household Laundry Detergents Sales Forecast by Application (2027-2032) & (Kilotons)
Table 99. Global Household Laundry Detergents Revenue Forecast by Application (2027-2032) & ($ millions)
Table 100. Procter and Gamble Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 101. Procter and Gamble Household Laundry Detergents Product Portfolios and Specifications
Table 102. Procter and Gamble Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 103. Procter and Gamble Main Business
Table 104. Procter and Gamble Latest Developments
Table 105. Unilever Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 106. Unilever Household Laundry Detergents Product Portfolios and Specifications
Table 107. Unilever Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 108. Unilever Main Business
Table 109. Unilever Latest Developments
Table 110. Henkel Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors

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Table 111. Henkel Household Laundry Detergents Product Portfolios and Specifications
Table 112. Henkel Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 113. Henkel Main Business
Table 114. Henkel Latest Developments
Table 115. Kao Corporation Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 116. Kao Corporation Household Laundry Detergents Product Portfolios and Specifications
Table 117. Kao Corporation Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 118. Kao Corporation Main Business
Table 119. Kao Corporation Latest Developments
Table 120. LG Household and Health Care Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 121. LG Household and Health Care Household Laundry Detergents Product Portfolios and Specifications
Table 122. LG Household and Health Care Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 123. LG Household and Health Care Main Business
Table 124. LG Household and Health Care Latest Developments
Table 125. Church and Dwight Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 126. Church and Dwight Household Laundry Detergents Product Portfolios and Specifications
Table 127. Church and Dwight Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 128. Church and Dwight Main Business
Table 129. Church and Dwight Latest Developments
Table 130. Lion Corporation Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 131. Lion Corporation Household Laundry Detergents Product Portfolios and Specifications
Table 132. Lion Corporation Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 133. Lion Corporation Main Business
Table 134. Lion Corporation Latest Developments
Table 135. Reckitt Benckiser Group Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors

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Table 136. Reckitt Benckiser Group Household Laundry Detergents Product Portfolios and Specifications
Table 137. Reckitt Benckiser Group Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 138. Reckitt Benckiser Group Main Business
Table 139. Reckitt Benckiser Group Latest Developments
Table 140. Colgate Palmolive Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 141. Colgate Palmolive Household Laundry Detergents Product Portfolios and Specifications
Table 142. Colgate Palmolive Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 143. Colgate Palmolive Main Business
Table 144. Colgate Palmolive Latest Developments
Table 145. Blue Moon Group Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 146. Blue Moon Group Household Laundry Detergents Product Portfolios and Specifications
Table 147. Blue Moon Group Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 148. Blue Moon Group Main Business
Table 149. Blue Moon Group Latest Developments
Table 150. Liby Group Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 151. Liby Group Household Laundry Detergents Product Portfolios and Specifications
Table 152. Liby Group Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 153. Liby Group Main Business
Table 154. Liby Group Latest Developments
Table 155. Nice Group Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 156. Nice Group Household Laundry Detergents Product Portfolios and Specifications
Table 157. Nice Group Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 158. Nice Group Main Business
Table 159. Nice Group Latest Developments
Table 160. Wings Corporation Basic Information, Household Laundry Detergents

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Manufacturing Base, Sales Area and Its Competitors
Table 161. Wings Corporation Household Laundry Detergents Product Portfolios and Specifications
Table 162. Wings Corporation Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 163. Wings Corporation Main Business
Table 164. Wings Corporation Latest Developments
Table 165. Aekyung Industrial Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 166. Aekyung Industrial Household Laundry Detergents Product Portfolios and Specifications
Table 167. Aekyung Industrial Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 168. Aekyung Industrial Main Business
Table 169. Aekyung Industrial Latest Developments
Table 170. PZ Cussons Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 171. PZ Cussons Household Laundry Detergents Product Portfolios and Specifications
Table 172. PZ Cussons Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 173. PZ Cussons Main Business
Table 174. PZ Cussons Latest Developments
Table 175. Amway Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 176. Amway Household Laundry Detergents Product Portfolios and Specifications
Table 177. Amway Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 178. Amway Main Business
Table 179. Amway Latest Developments
Table 180. SC Johnson Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 181. SC Johnson Household Laundry Detergents Product Portfolios and Specifications
Table 182. SC Johnson Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 183. SC Johnson Main Business
Table 184. SC Johnson Latest Developments
Table 185. Guangzhou Lonkey Industrial Basic Information, Household Laundry

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Detergents Manufacturing Base, Sales Area and Its Competitors
Table 186. Guangzhou Lonkey Industrial Household Laundry Detergents Product Portfolios and Specifications
Table 187. Guangzhou Lonkey Industrial Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 188. Guangzhou Lonkey Industrial Main Business
Table 189. Guangzhou Lonkey Industrial Latest Developments
Table 190. Shanghai Hutchison Whitecat Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 191. Shanghai Hutchison Whitecat Household Laundry Detergents Product Portfolios and Specifications
Table 192. Shanghai Hutchison Whitecat Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 193. Shanghai Hutchison Whitecat Main Business
Table 194. Shanghai Hutchison Whitecat Latest Developments
Table 195. Faberlic Basic Information, Household Laundry Detergents Manufacturing Base, Sales Area and Its Competitors
Table 196. Faberlic Household Laundry Detergents Product Portfolios and Specifications
Table 197. Faberlic Household Laundry Detergents Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 198. Faberlic Main Business
Table 199. Faberlic Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Household Laundry Detergents
Figure 2. Household Laundry Detergents Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Household Laundry Detergents Sales Growth Rate 2021-2032 (Kilotons)
Figure 7. Global Household Laundry Detergents Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Household Laundry Detergents Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Household Laundry Detergents Sales Market Share by Country/Region (2025)
Figure 10. Household Laundry Detergents Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Powder Detergents
Figure 12. Product Picture of Liquid Detergents
Figure 13. Product Picture of Unit Dose Pods
Figure 14. Product Picture of Bars and Pastes
Figure 15. Product Picture of Sheets and Strips
Figure 16. Product Picture of Other Specialized Formats
Figure 17. Global Household Laundry Detergents Sales Market Share by Product Form in 2026
Figure 18. Global Household Laundry Detergents Revenue Market Share by Product Form (2021-2026)
Figure 19. Product Picture of Machine Wash Dedicated
Figure 20. Product Picture of Hand Wash Dedicated
Figure 21. Product Picture of Dual Use Machine and Hand
Figure 22. Global Household Laundry Detergents Sales Market Share by Washing Method in 2026
Figure 23. Global Household Laundry Detergents Revenue Market Share by Washing Method (2021-2026)
Figure 24. Product Picture of Regular Concentration
Figure 25. Product Picture of Concentrated
Figure 26. Product Picture of Ultra Concentrated
Figure 27. Global Household Laundry Detergents Sales Market Share by Concentration

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Level in 2026
Figure 28. Global Household Laundry Detergents Revenue Market Share by Concentration Level (2021-2026)
Figure 29. Product Picture of Conventional Petrochemical Formulations
Figure 30. Product Picture of High Bio Based Content Formulations
Figure 31. Product Picture of Certified Eco Label Formulations
Figure 32. Global Household Laundry Detergents Sales Market Share by Surfactant Origin in 2026
Figure 33. Global Household Laundry Detergents Revenue Market Share by Surfactant Origin (2021-2026)
Figure 34. Household Laundry Detergents Consumed in Routine Machine Laundry
Figure 35. Global Household Laundry Detergents Market: Routine Machine Laundry (2021-2026) & (Kilotons)
Figure 36. Household Laundry Detergents Consumed in Hand Wash Laundry
Figure 37. Global Household Laundry Detergents Market: Hand Wash Laundry (2021-2026) & (Kilotons)
Figure 38. Household Laundry Detergents Consumed in Baby and Sensitive Laundry
Figure 39. Global Household Laundry Detergents Market: Baby and Sensitive Laundry (2021-2026) & (Kilotons)
Figure 40. Household Laundry Detergents Consumed in Premium and Specialty Fabric Laundry
Figure 41. Global Household Laundry Detergents Market: Premium and Specialty Fabric Laundry (2021-2026) & (Kilotons)
Figure 42. Household Laundry Detergents Consumed in Other Household Laundry
Figure 43. Global Household Laundry Detergents Market: Other Household Laundry (2021-2026) & (Kilotons)
Figure 44. Global Household Laundry Detergents Sale Market Share by Application (2025)
Figure 45. Global Household Laundry Detergents Revenue Market Share by Application in 2026
Figure 46. Household Laundry Detergents Sales by Company in 2026 (Kilotons)
Figure 47. Global Household Laundry Detergents Sales Market Share by Company in 2026
Figure 48. Household Laundry Detergents Revenue by Company in 2026 ($ millions)
Figure 49. Global Household Laundry Detergents Revenue Market Share by Company in 2026
Figure 50. Global Household Laundry Detergents Sales Market Share by Geographic Region (2021-2026)
Figure 51. Global Household Laundry Detergents Revenue Market Share by

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Geographic Region in 2026
Figure 52. Americas Household Laundry Detergents Sales 2021-2026 (Kilotons)
Figure 53. Americas Household Laundry Detergents Revenue 2021-2026 ($ millions)
Figure 54. APAC Household Laundry Detergents Sales 2021-2026 (Kilotons)
Figure 55. APAC Household Laundry Detergents Revenue 2021-2026 ($ millions)
Figure 56. Europe Household Laundry Detergents Sales 2021-2026 (Kilotons)
Figure 57. Europe Household Laundry Detergents Revenue 2021-2026 ($ millions)
Figure 58. Middle East & Africa Household Laundry Detergents Sales 2021-2026 (Kilotons)
Figure 59. Middle East & Africa Household Laundry Detergents Revenue 2021-2026 ($ millions)
Figure 60. Americas Household Laundry Detergents Sales Market Share by Country in 2026
Figure 61. Americas Household Laundry Detergents Revenue Market Share by Country (2021-2026)
Figure 62. Americas Household Laundry Detergents Sales Market Share by Product Form (2021-2026)
Figure 63. Americas Household Laundry Detergents Sales Market Share by Application (2021-2026)
Figure 64. United States Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 65. Canada Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 66. Mexico Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 67. Brazil Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 68. APAC Household Laundry Detergents Sales Market Share by Region in 2026
Figure 69. APAC Household Laundry Detergents Revenue Market Share by Region (2021-2026)
Figure 70. APAC Household Laundry Detergents Sales Market Share by Product Form (2021-2026)
Figure 71. APAC Household Laundry Detergents Sales Market Share by Application (2021-2026)
Figure 72. China Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 73. Japan Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)

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Figure 74. South Korea Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 75. Southeast Asia Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 76. India Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 77. Australia Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 78. China Taiwan Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 79. Europe Household Laundry Detergents Sales Market Share by Country in 2026
Figure 80. Europe Household Laundry Detergents Revenue Market Share by Country (2021-2026)
Figure 81. Europe Household Laundry Detergents Sales Market Share by Product Form (2021-2026)
Figure 82. Europe Household Laundry Detergents Sales Market Share by Application (2021-2026)
Figure 83. Germany Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 84. France Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 85. UK Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 86. Italy Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 87. Russia Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 88. Middle East & Africa Household Laundry Detergents Sales Market Share by Country (2021-2026)
Figure 89. Middle East & Africa Household Laundry Detergents Sales Market Share by Product Form (2021-2026)
Figure 90. Middle East & Africa Household Laundry Detergents Sales Market Share by Application (2021-2026)
Figure 91. Egypt Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 92. South Africa Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 93. Israel Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 94. Turkey Household Laundry Detergents Revenue Growth 2021-2026 ($

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millions)
Figure 95. GCC Countries Household Laundry Detergents Revenue Growth 2021-2026 ($ millions)
Figure 96. Manufacturing Cost Structure Analysis of Household Laundry Detergents in 2026
Figure 97. Manufacturing Process Analysis of Household Laundry Detergents
Figure 98. Industry Chain Structure of Household Laundry Detergents
Figure 99. Channels of Distribution
Figure 100. Global Household Laundry Detergents Sales Market Forecast by Region (2027-2032)
Figure 101. Global Household Laundry Detergents Revenue Market Share Forecast by Region (2027-2032)
Figure 102. Global Household Laundry Detergents Sales Market Share Forecast by Product Form (2027-2032)
Figure 103. Global Household Laundry Detergents Revenue Market Share Forecast by Product Form (2027-2032)
Figure 104. Global Household Laundry Detergents Sales Market Share Forecast by Application (2027-2032)
Figure 105. Global Household Laundry Detergents Revenue Market Share Forecast by Application (2027-2032)

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