

HOME CARE

HOME CARE TOP 10:

Brand Value (US\$M)



Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)



DEFINITION:

Includes brands of products used for cleaning, maintaining, and caring for the home and household items, including laundry and fabric care products (such as detergents, fabric softeners, and laundry additives), dishwashing products, and household cleaning products (such as hard surface, floor, and toilet cleaners).

A WELL-KEPT RANKING/
HOME IS WHERE THE
BRANDS ARE

Category Brand Value
Year-on-Year Change

N/A

Home Care Top 10
Total Brand Value

\$44,911 M

HOME CARE

This year marks the debut of the Kantar BrandZ Global Home Care ranking. Led by Tide, these 10 brands stand atop a fiercely contested field.

In market after market, legacy names now jostle for retail space with niche challengers and premium private labels. Innovation is one way big brands can still win head-to-head. With budgets tight, consumers want multifunctional formulas that do more for their money.

At the same time, major brands can sometimes sound too functional in their messaging, ceding emotion to insurgents. That is risky in a category tied to the idea of 'home'.

The category's human side is surfacing in other ways. The past decade saw the rise of a sizeable 'eco' segment. Yet sustainability claims can often skew technical. A fresher idea is to contextualise 'naturalness' within the frame of cleaning as a wellbeing ritual. To that end, fragrance, soothing design cues, and skin-safe ingredients are now key purchase drivers, offering new opportunities for premium.

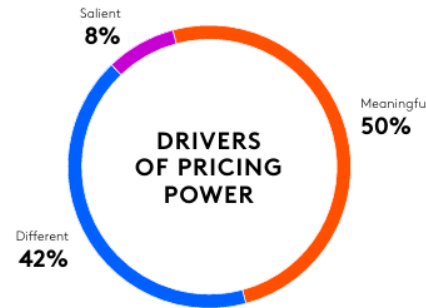
At the other pole sits automation. China has led the way in embracing cleaning robots and connected appliances, prompting leading Chinese laundry brand Blue Moon to revamp its range for smart machines. The next frontier? Greater consumer embrace of autonomous vacuums, mops, and connected washers that don't just use tailored products, but reorder them 'agentially'.

Still, there is plenty of other growth to capture besides. For instance, pet ownership is surging across many emerging markets, creating new opportunities for innovation.

Another opportunity area is marketing. Social platforms and influencer marketing let brands speak to many segments with precision. This allows brands to better address demographic shifts like the rise of single-person households. These days, even legacy brands like Clorox have moved to a social-first strategy, building new communities around cleaning tips and user-generated content.

The most valuable Home Care brands also have strong Meaningful connections supporting higher margins. And 9 out of 10 of the most valuable home care brands have extra Pricing Power.

Home Care brands draw more of their Pricing Power from being Meaningful



Source: Kantar BrandZ database, All 18 Home Care categories, 2024-2025



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Innovating for changing household structures

A convergence of socioeconomic shifts – delayed marriage, declining fertility rates, ageing populations, immigration, rising living costs, housing shortages – is driving growth in both single-person and multigenerational households. As the number of people living alone grows at both the younger and older ends of the age spectrum, it is essential for brands to understand a wide range of distinct needs and preferences. This includes demand for smaller pack sizes, single-use formats, and multi-purpose products, but also different lifestyle priorities.

Younger consumers may seek products that support self-expression and mental wellbeing; while older consumers place greater emphasis on accessibility, ease of use, and safety. At the same time, rising living costs mean singles are increasingly looking for convenient ways to share or split bulk purchases.

In multigenerational households, purchase decisions are increasingly influenced by multiple age groups, prompting brands to develop messaging that can resonate across generations. With very young and elderly people living under the same roof, brands will need to prioritise ease of use, while also considering bundled offerings that support caregiving needs across different life stages.

HOME CARE

BRAND SPOTLIGHT



2026 BRAND VALUE

\$6,386 M

New

Globally consistent, locally relevant

OMO is Unilever's flagship global laundry brand. While it is sold under different names in different markets – Surf Excel in India, Persil in the UK – it shares one unifying global brand platform: 'Dirt Is Good'. First launched in the 2000s, 'Dirt Is Good' has been a longtime source of Meaningful Difference for the brand, allowing it to combine strong functional credentials with positive emotions. Rather than focusing solely on stain removal, OMO frames itself as an enabler of learning and growth, encouraging parents to embrace play and exploration with confidence. What this looks like in practice varies by market: In India, themes of courage shine through; In the UK, there's an emphasis on outdoor play.

Global brand equity



Omo Brand Strengths



Source: Kantar BrandZ Fabric Care, UK, China, India, Brazil, 2024-2025

BRAND TO WATCH



Fabric care brand **Liby** is now #1 in its class for Demand Power in mainland China – competing well against many global brands thanks to its premium feel, innovation focus, and growing emphasis on sustainability.



Source: Kantar BrandZ, China, Fabric Care, 2025

IMPLICATIONS

01

SHIFT FROM FUNCTION TO EMOTION

Functional performance matters in home care – but on its own, it's rarely enough to build lasting memory structures. Stronger brands connect their products to how people want their homes to feel: cared for, calm, healthy, in order. To drive more sales (and spur more switching), brands should build stories around daily rituals, family, and self-care.

02

INNOVATE FOR MODERN LIFESTYLES

Innovation means more than just new formulas. Rather than focusing on incremental line extensions that add little perceived Difference, innovations should speak to real tensions in our shifting lifestyles (less time, more pets, smaller households, smarter homes, etc.). Clearly signal your brand's solutions to emerging needs. When you do, more growth will likely follow.