According to a new study of Fact.MR, worldwide sales of fabric conditioners closed in on 3,000 thousand tons in 2018, and are estimated to record a 2.7% Y-o-Y growth in 2019. The fabric conditioners industry has been underpinned by a slew of factors that range from development of environment-friendly products by manufacturers to increasing number of R&D activities for improving the water absorption and softness retention properties.

The study finds that several initiatives have been implemented over the years for maintaining high standards of environment and health safety of the laundry care products. The International Association for Soaps, Detergents and Maintenance Products (A.I.S.E.) continues to launch campaigns that promote a more sustainable use of energy and products in the laundry process. The Product Resource Efficiency Project of A.I.S.E. for the liquid fabric conditioner is a key example of such initiatives, which commits to targeted communication activities and create awareness on formulations of fabric conditioners and their applicability.

The study opines that the fabric conditioners market is highly fragmented with low entry barriers, which in turn has resulted in an influx of variants. This has led manufacturers of premium products to face challenges apropos of price vis-à-vis quantity offered as compared to various other low-cost products that offer competent value. These manufacturers are focusing on packaging & labelling innovation, along with novel marketing strategies, in a bid to create a bold impression on consumers and drive sales.

R&D Efforts for Improved Performance and Eco-Friendly Additives to Favor Growth

The study finds that liquid fabric conditioners witnessed worldwide sales of over 1,500 thousand tons in 2018, accounting for over 50% sales. As viscosity remains a vital aspect for convenient handling of liquid fabric conditioners, key manufacturers are offering effective thickener formulations that comprise acrylic copolymers highly compatible with cationic ingredients. Additionally, manufacturers are also taking R&D efforts toward eco-friendly preservatives for fabric conditioners. Development of biocides, such as Quimidroga's 'lactic acid L-(+)', which are biodegradable, safe, and highly efficient, is one of the most significant R&D measures taken by players in the fabric conditioners market.

The study opines that almost all products in the fabric conditioners market offer water absorption and softness to clothes, and differentiating their products for better gains continues to remain a key concern among the players. This has resulted in R&D investments for enhancing the softness and water absorption properties in fabric conditioners, with the help of superior-performance additives that reduce the esterquat content. Development of non-ionic additive with broad surfactant compatibility that facilitates formulation of fabric conditioners is one of the primary focus areas of the market players.

The study finds that performance reviews from the consumer advocacy groups worldwide have been holding some fabric conditioners to be completely ineffective. For example, Choice – Australia's leading consumer advocacy firm – has recently ranked and likened 5 fabric conditioner products to be just as better as water, without any meant properties. This has raised consumer awareness regarding the performance and applicability of fabric conditioners, who now demand clean-label products.

According to the study, conventional fabric conditioners continue to lead in terms of sales, despite a robust rise in consumer inclination toward organic products. Conventional fabric conditioners account for over 80% sales, which can be primarily attributed to their pervasive penetration and acceptance among consumers. However, recent years have witnessed laundry care product manufacturers making modifications to formulations with natural alternatives to surfactants, including derivatives from coconut oil and palm oil. Additionally, growing inconsistencies in oil prices have pushed manufacturers to include oleo chemical alternatives for the development of green surfactants.

This study also offers a long-term forecast of the fabric conditioners market for the period between 2019 and 2027. The fabric conditioners market is projected to record a volume CAGR of over 2.5% through 2027.