

Home Care in Ecuador

February 2024

Table of Contents

Home Care in Ecuador

EXECUTIVE SUMMARY

Home care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for home care?

MARKET INDICATORS

Table 1 - Households 2018-2023

MARKET DATA

Table 2 - Sales of Home Care by Category: Value 2018-2023

Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023

Table 4 - NBO Company Shares of Home Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Home Care by Category: % Value 2018-2023

Table 7 - Distribution of Home Care by Format: % Value 2018-2023

Table 8 - Distribution of Home Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Home Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Renewed interest in air care after the pandemic

Johnson Wax continues to lead air care in 2023

Eco-friendly and decorative candles are increasingly popular

PROSPECTS AND OPPORTUNITIES

Air care to benefit from link with wellbeing

Air care is appealing for entrepreneurs

Private label will maintain steady growth moving forward

CATEGORY DATA

Table 11 - Sales of Air Care by Category: Value 2018-2023

Table 12 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 13 - NBO Company Shares of Air Care: % Value 2019-2023

Table 14 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 15 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

Bleach in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sustained residual demand after the pandemic
Informal market hampers growth
Institutional sales are the drivers of the category

PROSPECTS AND OPPORTUNITIES

Convenient multi-purpose cleaners will increasingly compete with bleach
Lack of differentiation limits value growth
Hard discounters to take share from small local grocers and informal market could lose relevance

CATEGORY DATA

Table 17 - Sales of Bleach: Value 2018-2023
Table 18 - Sales of Bleach: % Value Growth 2018-2023
Table 19 - NBO Company Shares of Bleach: % Value 2019-2023
Table 20 - LBN Brand Shares of Bleach: % Value 2020-2023
Table 21 - Forecast Sales of Bleach: Value 2023-2028
Table 22 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Normalisation of consumers' lifestyles reduces demand for dishwashing products
Cream presentations preferred, but liquid products on the rise
Stable average price supported by growth of hard discounters

PROSPECTS AND OPPORTUNITIES

Automatic dishwashing expected to remain niche
Innovation and variety to compete with discounters
Keep an eye on laundry care

CATEGORY INDICATORS

Table 23 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 24 - Sales of Dishwashing by Category: Value 2018-2023
Table 25 - Sales of Dishwashing by Category: % Value Growth 2018-2023
Table 26 - NBO Company Shares of Dishwashing: % Value 2019-2023
Table 27 - LBN Brand Shares of Dishwashing: % Value 2020-2023
Table 28 - Forecast Sales of Dishwashing by Category: Value 2023-2028
Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

Home Insecticides in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Quick-acting and affordable spray/aerosol insecticides are preferred by Ecuadorians
Price and fragrance support sales of insecticide coils
Players promote sales through in-store promotions rather than advertising

PROSPECTS AND OPPORTUNITIES

El Niño phenomenon will generate a new push in sales
Consumption driven by necessity rather than marketing
Pest control services may compete with home insecticides

CATEGORY DATA

Table 30 - Sales of Home Insecticides by Category: Value 2018-2023

Table 31 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 33 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 34 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 35 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Powder detergent benefits from its affordability and versatility

Bar detergents suffer a strong price increase

Laundry aids see a strong recovery as life returns to normal

PROSPECTS AND OPPORTUNITIES

Private label expected to gain further ground over the forecast period

Multiple use of powder detergent is a key determinant of growth

Powder and bar detergents hampered by already high penetration, whilst laundry aids have a promising future

CATEGORY INDICATORS

Table 36 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

Table 37 - Sales of Laundry Care by Category: Value 2018-2023

Table 38 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 39 - Sales of Laundry Aids by Category: Value 2018-2023

Table 40 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 41 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 42 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 43 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 44 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 45 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 46 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 47 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 48 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 49 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 50 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Return to school and work supports strong growth of shoe polish

Lack of advertising limits awareness and growth

Limited innovation further impacts demand

PROSPECTS AND OPPORTUNITIES

Shoe polish manufacturers need to focus on consumers' changing lifestyles

Consumers increasingly demanding convenience

Less time at home and lower purchasing power will dampen sales of polishes

CATEGORY DATA

Table 51 - Sales of Polishes by Category: Value 2018-2023

Table 52 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Polishes: % Value 2019-2023

Table 54 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 55 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 56 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Many households still place a strong emphasis on home cleanliness in 2023

Lower level of investment spending

Hard discounters help keep prices down

PROSPECTS AND OPPORTUNITIES

Laundry products set to remain a key competitor

Innovation to generate value

Multi-purpose cleaners and disinfectants will continue to drive most sales in surface care

CATEGORY DATA

Table 57 - Sales of Surface Care by Category: Value 2018-2023

Table 58 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 59 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 60 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 61 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 62 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

SC Johnson invests in advertising in a normally stagnant category

Competition from multi-purpose cleaners and disinfectants impacts growth

Discounts and promotions to boost sales

PROSPECTS AND OPPORTUNITIES

Lower purchasing power will limit the development of toilet care products

SC Johnson could inject life into the category

Affordability is key for growth

CATEGORY DATA

Table 63 - Sales of Toilet Care by Category: Value 2018-2023

Table 64 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 65 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 66 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 67 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 68 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/home-care-in-ecuador/report.