

Home Care in Kazakhstan

February 2024

Table of Contents

Home Care in Kazakhstan

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

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

Table 8 - Forecast Sales of Home Care by Category: Value 2023-2028

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

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

A bad year for air care

Private label products make an entrance

Glade loses market share

PROSPECTS AND OPPORTUNITIES

Volume sales growth to rebound

International brands will retain leadership

Innovation set to remain problematic

CATEGORY DATA

Table 10 - Sales of Air Care by Category: Value 2018-2023

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

Table 12 - NBO Company Shares of Air Care: % Value 2019-2023

Table 13 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 14 - Forecast Sales of Air Care by Category: Value 2023-2028

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

Bleach in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bleach records moderate growth in 2023

Local brands in demand
Innovation in bleach is limited

PROSPECTS AND OPPORTUNITIES

Bleach to enjoy continued demand
Private label will see expansion
Demand higher in rural areas

CATEGORY DATA

Table 16 - Sales of Bleach: Value 2018-2023
Table 17 - Sales of Bleach: % Value Growth 2018-2023
Table 18 - NBO Company Shares of Bleach: % Value 2019-2023
Table 19 - LBN Brand Shares of Bleach: % Value 2020-2023
Table 20 - Forecast Sales of Bleach: Value 2023-2028
Table 21 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dishwashing sees steady growth in volume and value terms
Local brands expand
Fairy leads dishwashing, stealing share from Somat

PROSPECTS AND OPPORTUNITIES

Innovation likely to be stymied by Russia/Ukraine war impact
Competition will remain intense within automatic dishwashing, with eco-trends rising
Rising demand for lighter and compact products in automatic dishwashing

CATEGORY INDICATORS

Table 22 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 23 - Sales of Dishwashing by Category: Value 2018-2023
Table 24 - Sales of Dishwashing by Category: % Value Growth 2018-2023
Table 25 - NBO Company Shares of Dishwashing: % Value 2019-2023
Table 26 - LBN Brand Shares of Dishwashing: % Value 2020-2023
Table 27 - Forecast Sales of Dishwashing by Category: Value 2023-2028
Table 28 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

Home Insecticides in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales continue to rise in 2023
Raid brand sees supply difficulties.
Spray/aerosol insecticides remains most popular segment

PROSPECTS AND OPPORTUNITIES

Home insecticides to see further growth
Private label to expand within the category
Environmental trends to influence purchasing decisions

CATEGORY DATA

Table 29 - Sales of Home Insecticides by Category: Value 2018-2023

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

Table 31 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 32 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 33 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

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

Laundry Care in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

2023 sees continued decline for laundry care

Demand for liquid tablet detergents is falling sharply.

Fabric softeners suffers waning interest

PROSPECTS AND OPPORTUNITIES

Laundry aids to see recovery to positive volume sales

Carpet cleaners and fabric softeners to bounce back

Amway offers growth opportunity for liquid tablet detergents

CATEGORY INDICATORS

Table 35 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

Table 36 - Sales of Laundry Care by Category: Value 2018-2023

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

Table 38 - Sales of Laundry Aids by Category: Value 2018-2023

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

Table 40 - Sales of Laundry Detergents by Category: Value 2018-2023

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

Table 42 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 43 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 44 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 45 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 46 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 47 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 48 - Forecast Sales of Laundry Care by Category: Value 2023-2028

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

Polishes in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Polishes sees persistent decline

International brands rule competitive landscape

Shoe polish sales stagnate

PROSPECTS AND OPPORTUNITIES

Furniture fashion dictates demand for polishes

Growth potential in innovative care products for sports shoes

Parallel imports to remain problematic

CATEGORY DATA

Table 50 - Sales of Polishes by Category: Value 2018-2023

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

Table 52 - NBO Company Shares of Polishes: % Value 2019-2023

Table 53 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 54 - Forecast Sales of Polishes by Category: Value 2023-2028

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

Surface Care in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Surface care sees progress in 2023

Procter & Gamble targets pet owners

Sprays see popularity rise as Unilever remains ahead.

PROSPECTS AND OPPORTUNITIES

Problems with parallel market to persist

International players will continue to dominate

Russian brands to gain ground thanks for cost reasons

CATEGORY DATA

Table 56 - Sales of Surface Care by Category: Value 2018-2023

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

Table 58 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 59 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 60 - Forecast Sales of Surface Care by Category: Value 2023-2028

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

Toilet Care in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet liquids/foam most popular products within toilet care

Domestos remains leader overall

ITBs continues dramatic decline in 2023

PROSPECTS AND OPPORTUNITIES

Toilet care will see continued demand and solid growth

Competition between players set to intensify

ITBs holds the potential for recovery

CATEGORY DATA

Table 62 - Sales of Toilet Care by Category: Value 2018-2023

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

Table 64 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 65 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 66 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 67 - 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-kazakhstan/report.