

Home Care in Australia

April 2024

Table of Contents

Home Care in Australia

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Factors influencing low volume growth in air care in Australia

The fragmented landscape of air care

From air care to aesthetics

PROSPECTS AND OPPORTUNITIES

Understanding the limited growth expected in air care

Rise expected for electric air fresheners

The rise of health and wellness in air care

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 - Sales of Air Care by Fragrance: Value Ranking 2021-2023

Table 14 - NBO Company Shares of Air Care: % Value 2019-2023

Table 15 - LBN Brand Shares of Air Care: % Value 2020-2023

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

Table 17 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

Bleach in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for bleach declines
Consumers shift towards more eco-friendly cleaning
Private label takes centre stage in 2023

PROSPECTS AND OPPORTUNITIES

Anticipated volume and value declines for bleach
Innovative formats and packaging for modern consumers
Supermarkets set to maintain dominance in bleach distribution

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2018-2023
Table 19 - Sales of Bleach: % Value Growth 2018-2023
Table 20 - NBO Company Shares of Bleach: % Value 2019-2023
Table 21 - LBN Brand Shares of Bleach: % Value 2020-2023
Table 22 - Forecast Sales of Bleach: Value 2023-2028
Table 23 - Forecast Sales of Bleach: % Value Growth 2023-2028

[Dishwashing in Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dishwashing maintains growth amidst economic challenges
Sustainability and efficacy: The dual focus of dishwashing brands
The role of private label in dishwashing

PROSPECTS AND OPPORTUNITIES

Consumer preferences and distribution dynamics in dishwashing
Sustainable packaging innovations in dishwashing
Subscription services and online sales on the rise

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2018-2023
Table 26 - Sales of Dishwashing by Category: % Value Growth 2018-2023
Table 27 - NBO Company Shares of Dishwashing: % Value 2019-2023
Table 28 - LBN Brand Shares of Dishwashing: % Value 2020-2023
Table 29 - Forecast Sales of Dishwashing by Category: Value 2023-2028
Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

[Home Insecticides in Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home insecticides sees growth due to warmer weather
Private label on the rise amidst economic challenges
Minor decline in share for retail e-commerce in home insecticides

PROSPECTS AND OPPORTUNITIES

Stable volume growth trend for home insecticides in Australia
The rise of organic ingredients in premium home insecticides

Evolution of electronic pest repellents in Australia

CATEGORY DATA

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

Table 32 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 33 - Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023

Table 34 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 35 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 36 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 37 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive performance for laundry care in 2023

Shifts in consumer spending, with the rise of private label and planned purchases

Spotlight on efficacy

PROSPECTS AND OPPORTUNITIES

Challenges and opportunities for liquid tablet detergents

Trends shaping the future of laundry care

The distribution landscape in laundry care

CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

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

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

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

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

Table 43 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 44 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

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

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

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

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

Table 49 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 50 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 51 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 52 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued volume decline for polishes in 2023

Furniture polish sees a slowing of its decline

The impact of changing dress codes on shoe polish

PROSPECTS AND OPPORTUNITIES

Future trends in polishes: Price dynamics and a surge in sustainability

Rise of retail e-commerce in polishes

Challenges and opportunities for polishes

CATEGORY DATA

Table 53 - Sales of Polishes by Category: Value 2018-2023

Table 54 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 55 - NBO Company Shares of Polishes: % Value 2019-2023

Table 56 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 57 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 58 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Insights into surface care dynamics

The demand for efficacy and affordability

Meeting the demand for advanced hygiene and sustainability

PROSPECTS AND OPPORTUNITIES

Price and efficacy will remain important

Home care disinfectants and multipurpose cleaners will both remain popular

The distribution landscape in surface care

CATEGORY DATA

Table 59 - Sales of Surface Care by Category: Value 2018-2023

Table 60 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 61 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 63 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 64 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 65 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023

Table 66 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023

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

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

Toilet Care in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers value convenient toilet care products in Australia

Competitive landscape in toilet care: Rising share of private label

PROSPECTS AND OPPORTUNITIES

Unit prices of toilet care products set to stabilise over the forecast period

Distribution channel dynamics in toilet care

Sustainable initiatives in toilet care products

CATEGORY DATA

Table 69 - Sales of Toilet Care by Category: Value 2018-2023

Table 70 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 71 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 72 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 73 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 74 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

About Euromonitor International

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-australia/report.