

Home Care in Saudi Arabia

February 2024

Table of Contents

Home Care in Saudi Arabia

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air care struggles to recover from pandemic slump due to non-essential nature

Spray/aerosol remains dominant format of air care, driven by accessible pricing

International brands continue to dominate as new product development remains key

PROSPECTS AND OPPORTUNITIES

Positive outlook for air care as players look to innovate to drive up interest and value

Consumers expected to shift towards products with more natural image

E-commerce can help smaller, local brands gain greater visibility

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Competitive price, multifunctionality and heightened hygiene awareness sustain demand for bleach

Bleach retains loyal consumer base, driven by older generation

Clorox retains its dominance in bleach

PROSPECTS AND OPPORTUNITIES

Despite positive outlook, eco concerns and competition will remain relevant

Players could look to add value through scented and non-chlorine bleach

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hand dishwashing continues to dominate demand in the category

Increasing possession rate of dishwashers supports rising demand for automatic dishwashing products

Multinationals lead, while e-commerce continues to flourish

PROSPECTS AND OPPORTUNITIES

Further potential for automatic dishwashing, driven by increasingly busy lifestyles and penetration of women in the workforce

Hand dishwashing offers opportunities to explore more sustainable options

Potential for local brands and private label to increase presence in automatic dishwashing

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand remains high due to proliferation of insects in Saudi Arabia

Odourless options and spray format remain most demanded

Raid and Pif Paf remain the clear leaders as players look to expand their offer

PROSPECTS AND OPPORTUNITIES

Positive outlook to be driven by affordable spray/aerosol format

Regulations will make it challenging for smaller brands or private label to strongly penetrate the category

Health concerns may encourage development of more natural formulations

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Attractive price promotions and expanding workforce support laundry care's strength in home care

Players' various strategies to encourage trials of concentrated liquid detergents

National dress requires specialised laundry care to ensure correct maintenance

PROSPECTS AND OPPORTUNITIES

Concentrated liquid detergents set for further growth as consumers become increasingly aware of this format's benefits

E-commerce set to further penetrate category as players invest in online presence

Further exploration of sustainable laundry care solutions

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 - Sales of In-wash Spot and Stain Removers by Type: % Value Breakdown 2018-2023

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

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

Table 48 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 49 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 51 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

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

Table 53 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Improving demand for shoe polish, driven by mobility and expanding workforce

Increasing competition from more convenient and sophisticated floor cleaners

Price promotions remain relevant to drive up volumes

PROSPECTS AND OPPORTUNITIES

Full recovery for shoe polish, despite increasingly casual dress codes
Lack of innovation will challenge potential for stronger value growth
Floor polish will be one of the weaker performers due to ongoing competition

CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2018-2023
Table 55 - Sales of Polishes by Category: % Value Growth 2018-2023
Table 56 - NBO Company Shares of Polishes: % Value 2019-2023
Table 57 - LBN Brand Shares of Polishes: % Value 2020-2023
Table 58 - Forecast Sales of Polishes by Category: Value 2023-2028
Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

[Surface Care in Saudi Arabia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heightened hygiene awareness continues to support solid demand for surface care, but value sales remain weak
Strong demand for multi-purpose cleaners driven by convenience and cost savings
Multinational brands continue to lead surface care in Saudi Arabia

PROSPECTS AND OPPORTUNITIES

Further focus on promotions to drive volumes
Stronger potential for local brands and private label in the future
Players to continue to address rising consumer awareness of hygiene in the home

CATEGORY DATA

Table 60 - Sales of Surface Care by Category: Value 2018-2023
Table 61 - Sales of Surface Care by Category: % Value Growth 2018-2023
Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023
Table 63 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023
Table 64 - NBO Company Shares of Surface Care: % Value 2019-2023
Table 65 - LBN Brand Shares of Surface Care: % Value 2020-2023
Table 66 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023
Table 67 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023
Table 68 - Forecast Sales of Surface Care by Category: Value 2023-2028
Table 69 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

[Toilet Care in Saudi Arabia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet liquids/foam remains most popular format, supported by convenience, ease of use and competitive pricing
Rim blocks continues to gain ground due to multiple benefits
Harpic is dominant brand, supported by wide product portfolio and attractive promotions

PROSPECTS AND OPPORTUNITIES

Rising demand likely to result in greater competition and innovation efforts
Local brands may have more of an opportunity than private label to penetrate category
Price promotions through retailers set to dampen value sales, while e-commerce offers further growth potential

CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2018-2023
Table 71 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 72 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 73 - LBN Brand Shares of Toilet Care: % Value 2020-2023

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

Table 75 - 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-saudi-arabia/report.