

Home Care in Estonia

February 2024

Table of Contents

Home Care in Estonia

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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Liquid air fresheners sees volume sales increase by a fifth

Spray/aerosol air fresheners account for most volume sales

Reckitt Benckiser holds on to strong lead with Air Wick

PROSPECTS AND OPPORTUNITIES

Liquid air fresheners continues high growth trajectory

New launches to expand "other" air care

Environmental and health concerns impact offerings 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 - 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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fall in volume sales for bleach
Procter & Gamble retains dominance
Bleach faces threat from alternative products such as surface and toilet care

PROSPECTS AND OPPORTUNITIES

Bleach registers further volume decline over forecast period
Older consumer base remains loyal
Ace continues to dominate competitive landscape

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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Automatic dishwashing powders register highest volume growth, due to affordability
Reduced purchasing power drove volume growth in hand dishwashing
Reckitt Benckiser continues to lead

PROSPECTS AND OPPORTUNITIES

Further growth in automatic dishwashing
Automatic dishwashing powders registers highest volume growth
Consumers increasingly look for eco-friendly products

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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Insecticide baits register highest volume growth
Spray/aerosols insecticides continue to be most popular format
Kapo passes out Raid as most popular brand

PROSPECTS AND OPPORTUNITIES

Insecticide baits continue high growth trajectory
Fall in volume sales for electric insecticides
More demand for greener home insecticides over forecast period

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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Muted constant value and volume growth

Colour safe laundry bleach performs well

Procter & Gamble and Henkel hold on to strong leads

PROSPECTS AND OPPORTUNITIES

Liquid tablet detergents register highest growth

E-commerce continues high growth trajectory

Lidl poised to emerge as serious competitor

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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Marginal volume growth in polishes in 2023

Ritico continues to lead

Surface care products pose increasing threat

PROSPECTS AND OPPORTUNITIES

Further fall in constant value sales over forecast period

Little innovation as other more flexible cleaning products gain value share

Lidl poised to emerge as significant competitor

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 Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Multi-purpose cleaners and descalers perform strongly

Colgate-Palmolive continues to lead surface care

New product development focuses on improved formulas and convenient packaging

PROSPECTS AND OPPORTUNITIES

Increased shift to specialised cleaners

Lidl poised to emerge as serious competitor

Gradual emergence of greener brands 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 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 60 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 61 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 62 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 63 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 64 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet liquids/foam still the most popular product

Henkel continues to have strong lead

Price competition remains fierce in toilet care

PROSPECTS AND OPPORTUNITIES

Existing dynamics continue over forecast period

Lidl poised to emerge as serious competitor

Further development of greener toilet care

CATEGORY DATA

Table 65 - Sales of Toilet Care by Category: Value 2018-2023

Table 66 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 67 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 68 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 69 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 70 - 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-estonia/report.