

Home Care in Ireland

February 2024

Table of Contents

Home Care in Ireland

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers focus on essentials during rising price points, dampening retail growth

Electric air fresheners focus on scent and technical innovations to attract consumers

Yankee Candle retains its overall lead, with a strong position in candle air fresheners

PROSPECTS AND OPPORTUNITIES

Moderate growth driven by candle air care, while sprays/aerosols decline

Consumers increasingly seek local products with eco-friendly positionings

Private label looks to gain ground with sophisticated scents and packaging

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bleach sales continue to decline, perceived as toxic and outdated
Price-sensitive consumers trade down, boosting share for private label in 2023
Irish consumers opt for bleach with thick formulas

PROSPECTS AND OPPORTUNITIES

Multi-purpose cleaners and toilet care challenges sales of bleach
Budget-conscious consumers will continue to use bleach as an effective cleaning agent
Players focus on sustainable packaging to offset negative perceptions of 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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers view dishwashing as essential, benefiting sales during 2023
Rising price points favour larger formats that offer greater value
Finish and Fairy retain the lead, however, share declines in favour of private label

PROSPECTS AND OPPORTUNITIES

Price stabilisation leads to positive growth in retail volume sales
Private label continues its expansion across the forecast period
Consumers preference sustainable options with eco-friendly attributes

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive retail volume demand, driven by growth in electric insecticides
Spray/aerosol insecticides lead sales, viewed as being the most effective product
Garden centres increase its share of sales during 2023

PROSPECTS AND OPPORTUNITIES

Warm weather, population growth and the increasing number of households boosts sales
Brands maintain the lead of the landscape, while private label grows

The eco-friendly trend will boost innovations over the forecast period

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation forces consumers to cut back on non-essential items, dampening growth

Private label benefits from appealing, affordable price points in 2023

Environmental concerns shape new product innovations

PROSPECTS AND OPPORTUNITIES

Retail volume to be positive, however, growth will remain low level

The rising popularity of liquid detergents has a negative impact on liquid fabric softeners

Sustainability and eco-friendly trends gather pace across the forecast period

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volume sales fall as alternative cleaning products challenge polishes

Relaxed dress codes have a negative impact on sales of shoe polish

SC Johnson & Sons retains its leadership with brands Kiwi and Pledge

PROSPECTS AND OPPORTUNITIES

Floor and furniture polish face strong competition from alternative options
Fashion trends and working from home challenge sales of shoe polishes
E-commerce supports smaller brands to reach consumers in polishes

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

While rising prices challenge sales, specific cleaners drive volume growth
Leading multinationals increase their share despite rising price points
Environmental concerns support rising interest in refill solutions

PROSPECTS AND OPPORTUNITIES

Wipes focus on sustainable innovations, aligning with consumer demands
Floor cleaning systems suffer as consumers seek convenience
The rise of automated cleaners within floor and window/glass cleaning

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 Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Following the uplift during COVID-19, retail volume sales fall as price impacts growth
Private label increases its position as discounter retailers expand across the country
Harpic retains its leadership, driven by ongoing innovations

PROSPECTS AND OPPORTUNITIES

Positive growth for toilet liquids/foams, however, rim blocks challenge sales
Competition to grow in rim blocks as players focus on innovation
Players focus on sustainable innovations to align with consumers rising concerns

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-ireland/report.