

Home Care in Brazil

February 2024

Table of Contents

Home Care in Brazil

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Electric and spray/aerosol air fresheners drive growth of air care

Three channels continue to dominate distribution of air care

New and premium options for air care consumers

PROSPECTS AND OPPORTUNITIES

Potential to increase household penetration of different formats

Brand activation campaign supports strong positioning

Aromatherapy benefits resonate with air care consumers

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

High consumer awareness favours consistent demand for bleach
Regional competition among bleach players
Challenges to offering higher specific value in bleach

PROSPECTS AND OPPORTUNITIES

Cleaning habit persistence is key to future bleach demand
Potential competition for bleach from surface care
Retailing advancements influence shopping behaviour and bleach growth

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive performance for dishwashing along with lower inflationary pressures
Regional players challenge prominent dishwashing brands
Increasing frequency of domestic chores as a positive driver

PROSPECTS AND OPPORTUNITIES

Product launch promotes higher cleaning performance
Dishwashing players will continue to leverage sustainable endeavours
Automatic dishwashing's growing popularity via social media

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive performance by spray/aerosol format supports category's growth
SBP and Raid remain leading brands in Brazil
New product launches promote efficacy and protection

PROSPECTS AND OPPORTUNITIES

Lack of sanitation will drive demand for home insecticides in impoverished cities and communities
Seasonality as a common market driver

Indirect competition is a challenge for family-friendly insecticides

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Liquid detergents and fabric softeners as consistent growth drivers

Distribution dynamics benefit laundry care's growth in Brazil

New launches offer consumers greater performance potential in laundry care

PROSPECTS AND OPPORTUNITIES

Laundry care brands target sustainable demands

New marketplace partnerships promote online presence and brand awareness

Concentrated products to offer further growth potential

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weak performance for polishes in 2023

New product claims in Brazil

Consolidated competitive landscape of polishes in Brazil

PROSPECTS AND OPPORTUNITIES

Multifunctional cleaning proposition is a threat for floor polish
Increased cleaning frequency demands home care disinfectants and floor cleaners
Category requires adaptation to an evolving market scenario

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable demand for surface care as inflationary pressures gradually ease
Leading distribution channels continue to record positive performances
Cleaning performance and surface care ingredients promote product differentiation towards premiumisation

PROSPECTS AND OPPORTUNITIES

Pet ownership to help drive future growth and opportunities
Brand awareness increasingly important in local surface care
Local competition and investments are set to influence forecast period results

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 Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive growth for toilet care as inflationary pressures ease
Retail framework influences toilet care's distribution in Brazil
High quality, low price and scents are among the most important features for local consumers

PROSPECTS AND OPPORTUNITIES

Long-term performance relates to premiumisation and habit persistence
Health concerns offer opportunities for product differentiation
Future opportunities in the sustainable space

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-brazil/report.