

# 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

## 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](http://www.euromonitor.com/home-care-in-australia/report).