

Home Care in Israel

February 2024

Table of Contents

Home Care in Israel

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Electric air fresheners continue to post strong growth

Car air fresheners benefit from greater mobility and rising number of private cars

Sano launches combination cleaning and air care line

PROSPECTS AND OPPORTUNITIES

Combination products can hinder stronger growth of air care

Government's attempt to encourage use of public transport to potentially reduce need for car air fresheners

Reckitt Benckiser likely to retain overall leadership of 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of bleach continue to decline following surge during pandemic
High number of bleach recalls following standards review
Private label gains further share from major brands

PROSPECTS AND OPPORTUNITIES

Demand for bleach set to continue declining, in line with concerns over chemical use in the home
Nascent green trend offers home care brands expansion opportunities
New brands will likely be slow to enter local market, given pessimistic outlook

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Removal of tax on disposable plasticware slows dishwashing growth
Further price rises notably impact rate of volume growth in 2023
Fairy Max Power launched in local market

PROSPECTS AND OPPORTUNITIES

Imports Reform could positively impact demand for dishwashers and automatic dishwashing
Further potential for private label as consumers look to make savings
Enduring hygiene concerns to influence demand

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continual shift away from spray/aerosol format negatively impacts home insecticides
Further price rises another negative factor hindering volumes
Innovative Raid Freeze is launched in the local market

PROSPECTS AND OPPORTUNITIES

Hot climate could ease rate of volume decline, but contractors can further reduce demand for home insecticides
Further growth potential for insecticide bates over forecast period

Exploration of green alternatives offers development opportunities

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further price rises slow demand for laundry care in 2023

Detergent tablets continue to gain momentum, driven by increasingly busy lifestyles and demand for convenience

Sano Bruno's Enterprises retains lead of laundry care

PROSPECTS AND OPPORTUNITIES

Further price rises likely, dampening stronger volume growth prospects

Polarising trends within laundry care over the forecast period

Discounters and e-commerce will continue to attract consumers

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for floor polish declines in line with busy lifestyles outside of the home

Shoe polish continues to lose ground due to casual footwear trend

Prices rise to place further pressure on demand for polishes

PROSPECTS AND OPPORTUNITIES

Further volume declines predicted, driven by changing lifestyles

Unit price increases set to gradually slow

Danshar likely to retain dominance of 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Limited opportunity for significant rise in prices of all purpose cleaning wipes

Consumers increasingly seek natural ingredients from their surface care

Scents associated with fabric softeners increasingly popular in surface care

PROSPECTS AND OPPORTUNITIES

Busy lifestyles will drive demand for convenient surface care formats

Further adoption of technology by consumers could pose threat to floor cleaners

Potential for further price rises to drive demand for multifunctional 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable demand for toilet care despite unit price increases

Toilet care wipes offer convenient alternative but toilet liquids/foam drives overall demand for toilet care

Bref expands presence in local market

PROSPECTS AND OPPORTUNITIES

Prices to further rise, but demand for toilet care will continue to grow over forecast period

Rim blocks offer further growth potential, driven by convenience

Eco-friendly trend expected to gather pace as consumers develop heightened awareness

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-israel/report.