

Home Care in Peru

February 2024

Table of Contents

Home Care in Peru

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 Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air care sees steady growth overall but the different categories see mixed results

Sapolio extends its lead but private label starting to make inroads

Discounters attracting growing interest thanks to eye-catching prices

PROSPECTS AND OPPORTUNITIES

Hand-made and artisan candles and air fresheners pose a serious threat to the category

Brands could look to add more variety to win over consumers

New consumption occasions could help to generate more sales

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 Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bleach loses relevance in the market as the pandemic comes to an end

Consumers turn to affordable brands due to lack of differentiation

Consumers migrate to discounters in search of savings

PROSPECTS AND OPPORTUNITIES

Increased education on the benefits of laundry care could negatively affect demand for bleach

Price competition expected to heat up as Peru's economy struggles

Competitors could promote new consumption occasions to drive sales

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 Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Category resumes regular growth after pandemic peak

Dishwashing paste soap remains the preferred option but liquid gaining ground

Supply shortages place further pressure on prices as inflation continues to influence the market

PROSPECTS AND OPPORTUNITIES

Economic brands set to gain ground while leading players are expected to focus on encouraging Peruvians to trade up from paste to liquid

Category to become more relevant for Home Care competitors

Hand dishwashing will continue to be the dominant option in Peru

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 Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Warmer weather drives category growth as insect populations proliferate

Sapolio remains the standout brand in home insecticides

Price takes on greater relevance and incomes are squeezed

PROSPECTS AND OPPORTUNITIES

El Niño and climate change set to fuel demand for home insecticides

Consumers could turn to cheaper brands and private label as Peru enters a recession

Spray/aerosol insecticides will remain the most popular option with electric options limited to more affluent consumers

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 Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023
- Table 33 NBO Company Shares of Home Insecticides: % Value 2019-2023
- Table 34 LBN Brand Shares of Home Insecticides: % Value 2020-2023
- Table 35 Forecast Sales of Home Insecticides by Category: Value 2023-2028
- Table 36 Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Laundry detergents faces challenges and opportunities in 2023

Significant downgrade in mid-tier consumption due to economic context

Value becomes the key consumer concern as economic pressures mount

PROSPECTS AND OPPORTUNITIES

Economy brands set to gain more ground in the short term as Peru enters a recession

Liquid Fabric Softeners has great expansion potential

Companies will need to consider traditional laundry habits if they are to build stronger sales

CATEGORY INDICATORS

Table 37 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

- Table 38 Sales of Laundry Care by Category: Value 2018-2023
- Table 39 Sales of Laundry Care by Category: % Value Growth 2018-2023
- Table 40 Sales of Laundry Aids by Category: Value 2018-2023
- Table 41 Sales of Laundry Aids by Category: % Value Growth 2018-2023
- Table 42 Sales of Laundry Detergents by Category: Value 2018-2023
- Table 43 Sales of Laundry Detergents by Category: % Value Growth 2018-2023
- Table 44 NBO Company Shares of Laundry Care: % Value 2019-2023
- Table 45 LBN Brand Shares of Laundry Care: % Value 2020-2023
- Table 46 NBO Company Shares of Laundry Aids: % Value 2019-2023
- Table 47 LBN Brand Shares of Laundry Aids: % Value 2020-2023
- Table 48 NBO Company Shares of Laundry Detergents: % Value 2019-2023
- Table 49 LBN Brand Shares of Laundry Detergents: % Value 2020-2023
- Table 50 Forecast Sales of Laundry Care by Category: Value 2023-2028
- Table 51 Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Polishes continues to recover albeit not reaching pre-pandemic sales levels

Competitive landscape remains fairly consolidated due to Intradevco Industrial's broad product portfolio

Distribution landscape comes under the microscope as consumers go in search of the best deals

PROSPECTS AND OPPORTUNITIES

Flooring trends likely to influence demand over the forecast period

Casual fashion trends a serious threat to sales of shoe polish

Private label could expand as consumers become more price sensitive

CATEGORY DATA

- Table 52 Sales of Polishes by Category: Value 2018-2023
- Table 53 Sales of Polishes by Category: % Value Growth 2018-2023
- Table 54 NBO Company Shares of Polishes: % Value 2019-2023
- Table 55 LBN Brand Shares of Polishes: % Value 2020-2023
- Table 56 Forecast Sales of Polishes by Category: Value 2023-2028
- Table 57 Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Multi-purpose cleaners remains the largest and most dynamic category in 2023 as consumers focus on value and convenience Little change in the competitive landscape as the leading brands remain the most visible and widely available options Traditional cleaning habits remain an obstacle to more significant uptake of surface care

PROSPECTS AND OPPORTUNITIES

Prices likely to dictate demand for surface care with potential threat from low-cost laundry detergents

Multi-purpose cleaners set to benefit from being a convenient and effective solution to maintaining good hygiene in the home

Education could prove crucial in driving demand

CATEGORY DATA

- Table 58 Sales of Surface Care by Category: Value 2018-2023
- Table 59 Sales of Surface Care by Category: % Value Growth 2018-2023
- Table 60 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023
- Table 61 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023
- Table 62 NBO Company Shares of Surface Care: % Value 2019-2023
- Table 63 LBN Brand Shares of Surface Care: % Value 2020-2023
- Table 64 NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023
- Table 65 LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023
- Table 66 Forecast Sales of Surface Care by Category: Value 2023-2028
- Table 67 Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumer priorities changing as the pandemic comes to an end Inflation and stock shortages impact the competitive landscape Discounters gaining traction as consumers go in search of savings

PROSPECTS AND OPPORTUNITIES

Growth depends largely on greater awareness of the need for toilet cleaning New fragrances and larger packs could present growth opportunities Private label likely continue to gain ground as Peru enters a recession

CATEGORY DATA

- Table 68 Sales of Toilet Care by Category: Value 2018-2023
- Table 69 Sales of Toilet Care by Category: % Value Growth 2018-2023
- Table 70 NBO Company Shares of Toilet Care: % Value 2019-2023
- Table 71 LBN Brand Shares of Toilet Care: % Value 2020-2023

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-peru/report.