

Home Care in Bulgaria

February 2024

Table of Contents

Home Care in Bulgaria

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

While a focus on essential spending limits growth, home air care performs well Players focus on natural ingredients to align with consumers' rising demands Dynamic growth for e-commerce continues to support sales of air care

PROSPECTS AND OPPORTUNITIES

Products that align with home care trends drive growth across the forecast period. The use of natural ingredients is set to rise as reeds and sachets grow in popularity. International players retain the lead, focusing on natural innovations at affordable prices.

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales decline following a steep uplift during COVID-19

Consumers increasingly opt for products without aggressive odours

Procter & Gamble Bulgaria retains its lead, while local players improve share

PROSPECTS AND OPPORTUNITIES

An ongoing decline as consumers become increasingly concerned about chlorine Multi-purpose cleaners and toilet liquids with bleach became the growing preference Modern grocery outlets expand into smaller cities, boosting sales

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Convenience drives sales of automatic dishwashing tablets in 2023

Hand dishwashing declines due to the convenience and time-saving of automatic dishwashing International players led, while price sensitivity cause private label to gain ground

PROSPECTS AND OPPORTUNITIES

The ongoing need for convenience and effective cleaning drives growth Hand dishwashing focuses on effectiveness and cost-savings to drive sales Players focus on eco-friendly ingredients and packaging to drive sales

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home insecticides decline as consumers in cities use professional services Many consumers view insecticide coils as inconvenient, dampening sales Raid retains its lead through a wide offering of varied goods

PROSPECTS AND OPPORTUNITIES

Retail volume sales rise, while value sales slow as price points stabilise Health concerns lead to continued use of specialist services in Bulgaria

Electric insecticides that are harmless to the environment drive growth

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volume growth struggles due to heightened price points, with value sales grow Marketing promotions and innovations support sales of concentrated liquid detergents Consumers reach for products with multiple benefits and cost savings

PROSPECTS AND OPPORTUNITIES

The improved economy leads to positive results for laundry care
Rising trust in private label as Bulgarians continue to look for cost savings
E-commerce share grows, while supermarkets benefit from strong promotions

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Polish sales suffer as consumers cut down on non-essentials during rising inflation Metal polish faces an ongoing decline as consumers choose multi-purpose cleaners Furniture and shoe polishes benefit from a lack of substitute products

PROSPECTS AND OPPORTUNITIES

Sales of floor and metal polishes remain challenged by substitute cleaners As disposable incomes rise, sales of furniture and shoe polish increase Pronto retains its lead, however, affordable options will increase their share

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

A decline following COVID-19 partners with rising inflation to challenge sales Multi-purpose cleaners drive sales through convenience and storage optimisation Growth in bathroom cleaners driven by effective shower and faience cleaners

PROSPECTS AND OPPORTUNITIES

Disinfectants record an ongoing decline following a strong uplift during COVID-19 Players focus on eco-friendly innovations and recycled packaging to drive growth Private label lines drive growth as retail chains expand across the country

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive growth for convenient products, as in-cistern devices decline

Ease of use and pleasant scents drive sales of rim blocks and toilet liquids/foams

Drugstores and discounters record positive growth through affordable price points

PROSPECTS AND OPPORTUNITIES

Toilet liquids and ITB's drive ongoing growth through convenience

Private label offerings drive growth, with players focusing on innovation

Value growth slows in toilet care as consumers continue to look for discounts

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-bulgaria/report.