

# Home Care in Western Europe

March 2024

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## REGIONAL OVERVIEW

Western European home care market recording slow growth

Western Europe has struggled for growth since the pandemic's 2020 demand spike

Laundry care is the biggest home care category in terms of retail value sales

Liquid tablet detergents popular for their convenience, space saving and lack of mess

Strong growth for the scent booster category over 2018-2023

Dishwashing generates the most new sales in Western Europe over 2018-2023

Sustainability remains important, despite higher price sensitivity in 2022-2023

Discounters gaining share in a cost-conscious environment

E-commerce gains have slowed but its share has doubled since the start of the pandemic

## LEADING COMPANIES AND BRANDS

Big multinationals make for a relatively consolidated competitive landscape

Private label attracts price-sensitive consumers but also continues to premiumise

Spain accounts for the biggest share of private label sales in Western Europe

Skip moves back into the top 10 brand rankings

## FORECAST PROJECTIONS

Positive value growth expected over the forecast period

Convenience, fragrances and sustainability expected to be key trends

## COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

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