



Passport

Surface Care in Bolivia

Euromonitor International

February 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

To purchase a full version, please visit

www.euromonitor.com

LIST OF CONTENTS AND TABLES

Surface Care in Bolivia - Category Analysis	1
KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Consumers favour bleach and power detergents over home care products.....	1
Kitchen cleaners provides consumers with results that bleach and powder detergents cannot	1
Players offer consumers free gifts as to continue boosting brand awareness	1
RECOVERY AND OPPORTUNITIES	2
Ongoing hygiene anxieties generate demand for bathroom floor and kitchen cleaners.....	2
Consumers continually demand products with additional properties	2
Unilever Andina plans to gain value shares in surface care using popular brand Surf over the forecast period	2
CATEGORY DATA.....	2
Table 1 Sales of Surface Care by Category: Value 2015-2020.....	2
Table 2 Sales of Surface Care by Category: % Value Growth 2015-2020	3
Table 3 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2015-2020.....	3
Table 4 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2015-2020	4
Table 5 NBO Company Shares of Surface Care: % Value 2016-2020	4
Table 6 LBN Brand Shares of Surface Care: % Value 2017-2020	5
Table 7 Forecast Sales of Surface Care by Category: Value 2020-2025.....	5
Table 8 Forecast Sales of Surface Care by Category: % Value Growth 2020- 2025	5
Home Care in Bolivia - Industry Overview	7
EXECUTIVE SUMMARY.....	7
COVID-19 impact on home care.....	7
COVID-19 country impact.....	7
Company response.....	8
Retailing shift	8
What next for home care?	9
MARKET INDICATORS	9
Table 9 Households 2015-2020	9
MARKET DATA.....	9
Table 10 Sales of Home Care by Category: Value 2015-2020.....	9
Table 11 Sales of Home Care by Category: % Value Growth 2015-2020.....	9
Table 12 NBO Company Shares of Home Care: % Value 2016-2020	10
Table 13 LBN Brand Shares of Home Care: % Value 2017-2020.....	10
Table 14 Distribution of Home Care by Format: % Value 2015-2020.....	12
Table 15 Distribution of Home Care by Format and Category: % Value 2020	12
Table 16 Forecast Sales of Home Care by Category: Value 2020-2025.....	13
Table 17 Forecast Sales of Home Care by Category: % Value Growth 2020- 2025	14
GLOBAL MACROECONOMIC ENVIRONMENT.....	14
GLOBAL INDUSTRY ENVIRONMENT	14
DISCLAIMER	15

SOURCES..... 15
 Summary 1 Research Sources..... 15

SURFACE CARE IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2020 IMPACT

Consumers favour bleach and power detergents over home care products

Content removed from sample

Kitchen cleaners provides consumers with results that bleach and powder detergents cannot

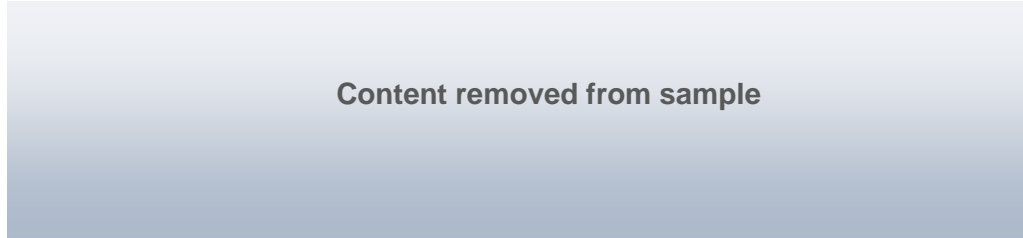
Content removed from sample

Players offer consumers free gifts as to continue boosting brand awareness

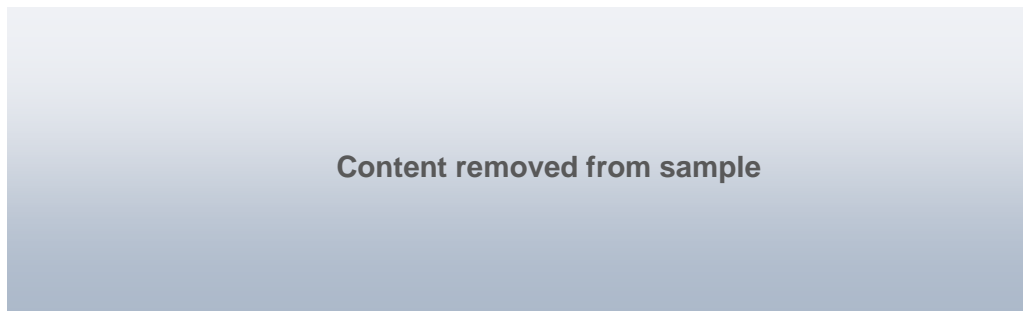
Content removed from sample

RECOVERY AND OPPORTUNITIES

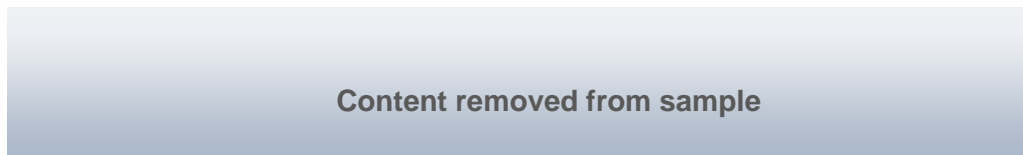
Ongoing hygiene anxieties generate demand for bathroom floor and kitchen cleaners



Consumers continually demand products with additional properties



Unilever Andina plans to gain value shares in surface care using popular brand Surf over the forecast period



CATEGORY DATA

Table 1 Sales of Surface Care by Category: Value 2015-2020

BOB million

	2015	2016	2017	2018	2019	2020
Home Care Wipes and Floor Cleaning Systems	Data removed from sample					
Bathroom Cleaners						
Descalers						
Drain Openers						
Floor Cleaners						
Home Care Disinfectants						
Kitchen Cleaners						
Multi-Purpose Cleaners						

Oven Cleaners
 Scouring Agents
 Window/Glass Cleaners
 Surface Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Surface Care by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Home Care Wipes and Floor Cleaning Systems	Data removed from sample		
Bathroom Cleaners			
Descalers			
Drain Openers			
Floor Cleaners			
Home Care Disinfectants			
Kitchen Cleaners			
Multi-Purpose Cleaners			
Oven Cleaners			
Scouring Agents			
Window/Glass Cleaners			
Surface Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2015-2020

BOB '000

	2015	2016	2017	2018	2019	2020
Dry Electro-Static Wipes	Data removed from sample					
- Starter Kits/Sweepers/ Sticks (Dry Electro-Static)						
- Wipes and Refills (Dry Electro-Static)						
Floor Cleaning Systems						
- Refills						
-- Cleaning Solution						
-- Refill Wipes/Pads						
- Starter Kits/Trigger Device						
Impregnated Wet Wipes						
- All Purpose Cleaning Wipes						
- Furniture Polish Wipes						
- Toilet Care Wipes						
- Window/Glass Wipes						
- Other Impregnated Wipes						
Starter Kits/Sweepers/ Sticks (Excluding Wipes)						
Wipes (Excluding Starter Kits/Sweepers/						

Sticks)
Home Care Wipes and
Floor Cleaning Systems

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Dry Electro-Static Wipes			
- Starter Kits/Sweepers/Sticks (Dry Electro-Static)			
- Wipes and Refills (Dry Electro-Static)			
Floor Cleaning Systems			
- Refills			
-- Cleaning Solution			
-- Refill Wipes/Pads			
- Starter Kits/Trigger Device			
Impregnated Wet Wipes			
- All Purpose Cleaning Wipes			
- Furniture Polish Wipes			
- Toilet Care Wipes			
- Window/Glass Wipes			
- Other Impregnated Wipes			
Starter Kits/Sweepers/Sticks (Excluding Wipes)			
Wipes (Excluding Starter Kits/Sweepers/Sticks)			
Home Care Wipes and Floor Cleaning Systems			

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Surface Care: % Value 2016-2020

% retail value rsp
Company

	2016	2017	2018	2019	2020

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Surface Care: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample					
---------------------------------	--	--	--	--	--

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Forecast Sales of Surface Care by Category: Value 2020-2025

BOB million	2020	2021	2022	2023	2024	2025
-------------	------	------	------	------	------	------

Home Care Wipes and Floor Cleaning Systems
 Bathroom Cleaners
 Descalers
 Drain Openers
 Floor Cleaners
 Home Care Disinfectants
 Kitchen Cleaners
 Multi-Purpose Cleaners
 Oven Cleaners
 Scouring Agents
 Window/Glass Cleaners
 Surface Care

Data removed from sample					
---------------------------------	--	--	--	--	--

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

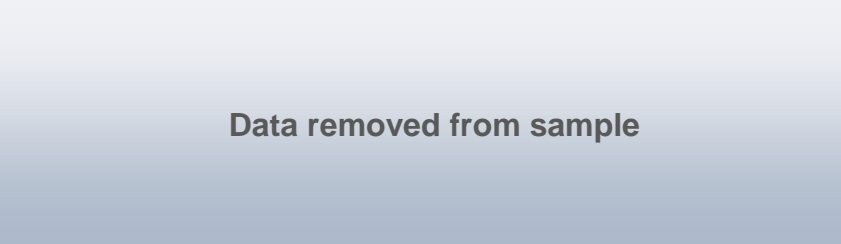
Table 8 Forecast Sales of Surface Care by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
-------------------------	-----------	--------------	---------------

Home Care Wipes and Floor Cleaning Systems
 Bathroom Cleaners
 Descalers
 Drain Openers
 Floor Cleaners

Data removed from sample		
---------------------------------	--	--

Home Care Disinfectants
Kitchen Cleaners
Multi-Purpose Cleaners
Oven Cleaners
Scouring Agents
Window/Glass Cleaners
Surface Care

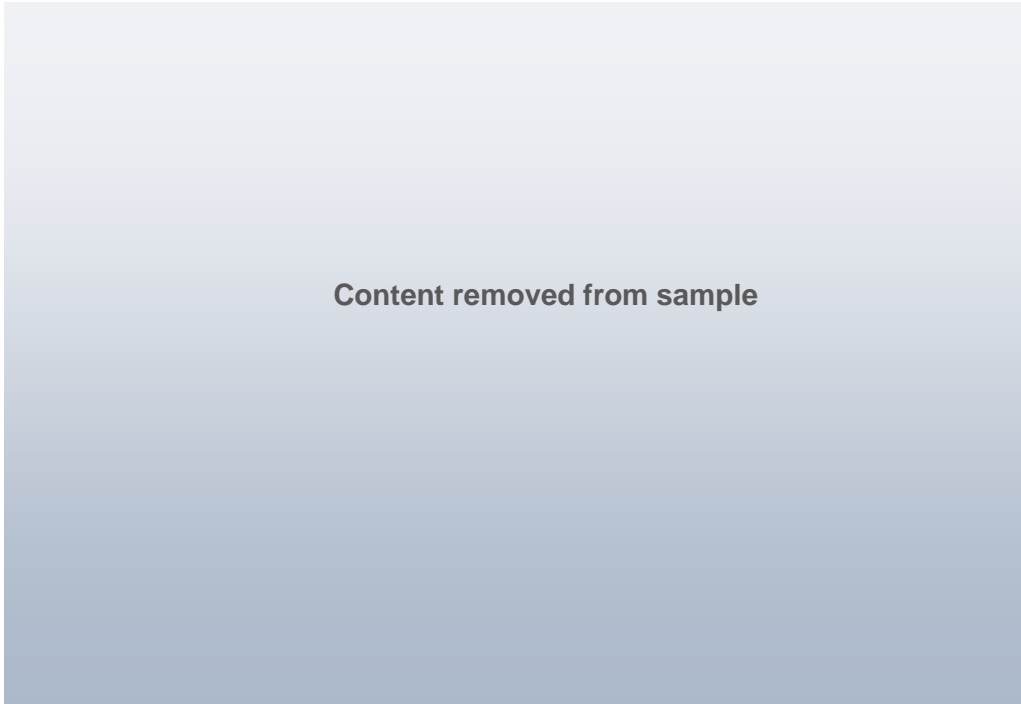


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

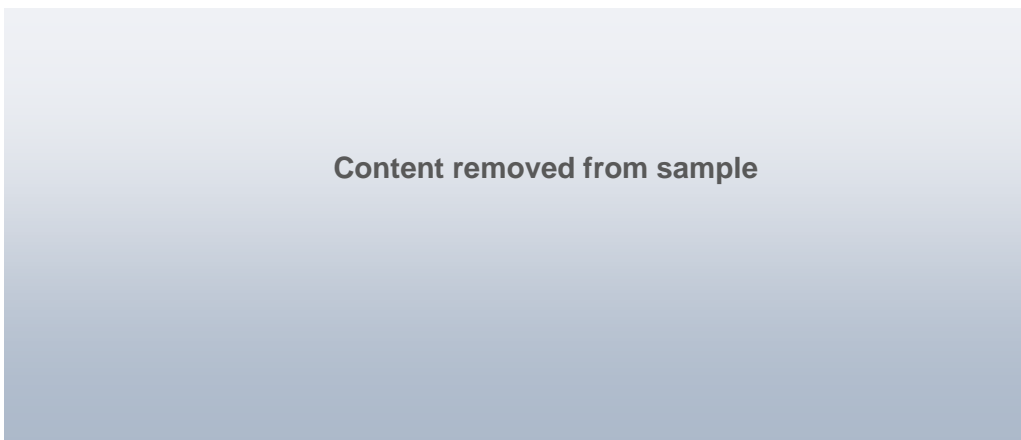
HOME CARE IN BOLIVIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on home care



COVID-19 country impact



Content removed from sample

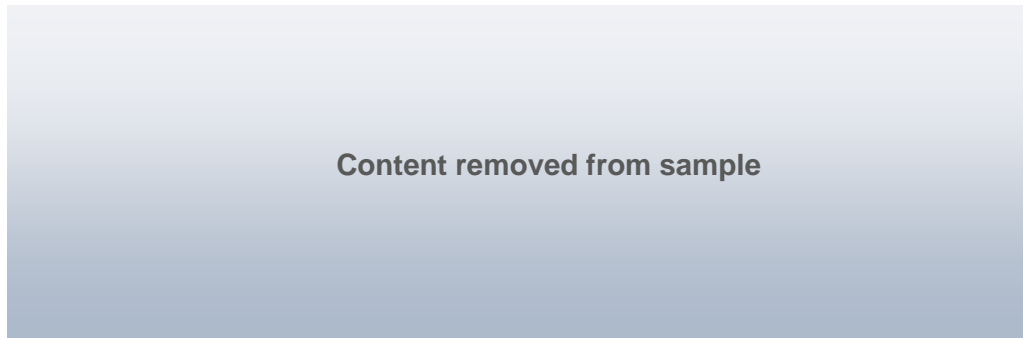
Company response

Content removed from sample

Retailing shift

Content removed from sample

What next for home care?



MARKET INDICATORS

Table 9 Households 2015-2020

	2015	2016	2017	2018	2019	2020
Households ('000)	Data removed from sample					
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

MARKET DATA

Table 10 Sales of Home Care by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Air Care	Data removed from sample					
Bleach						
Dishwashing						
Home Insecticides						
Laundry Care						
Polishes						
Surface Care						
Toilet Care						
Home Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Sales of Home Care by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Air Care	Data removed from sample		
Bleach			
Dishwashing			
Home Insecticides			
Laundry Care			
Polishes			
Surface Care			
Toilet Care			
Home Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 NBO Company Shares of Home Care: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

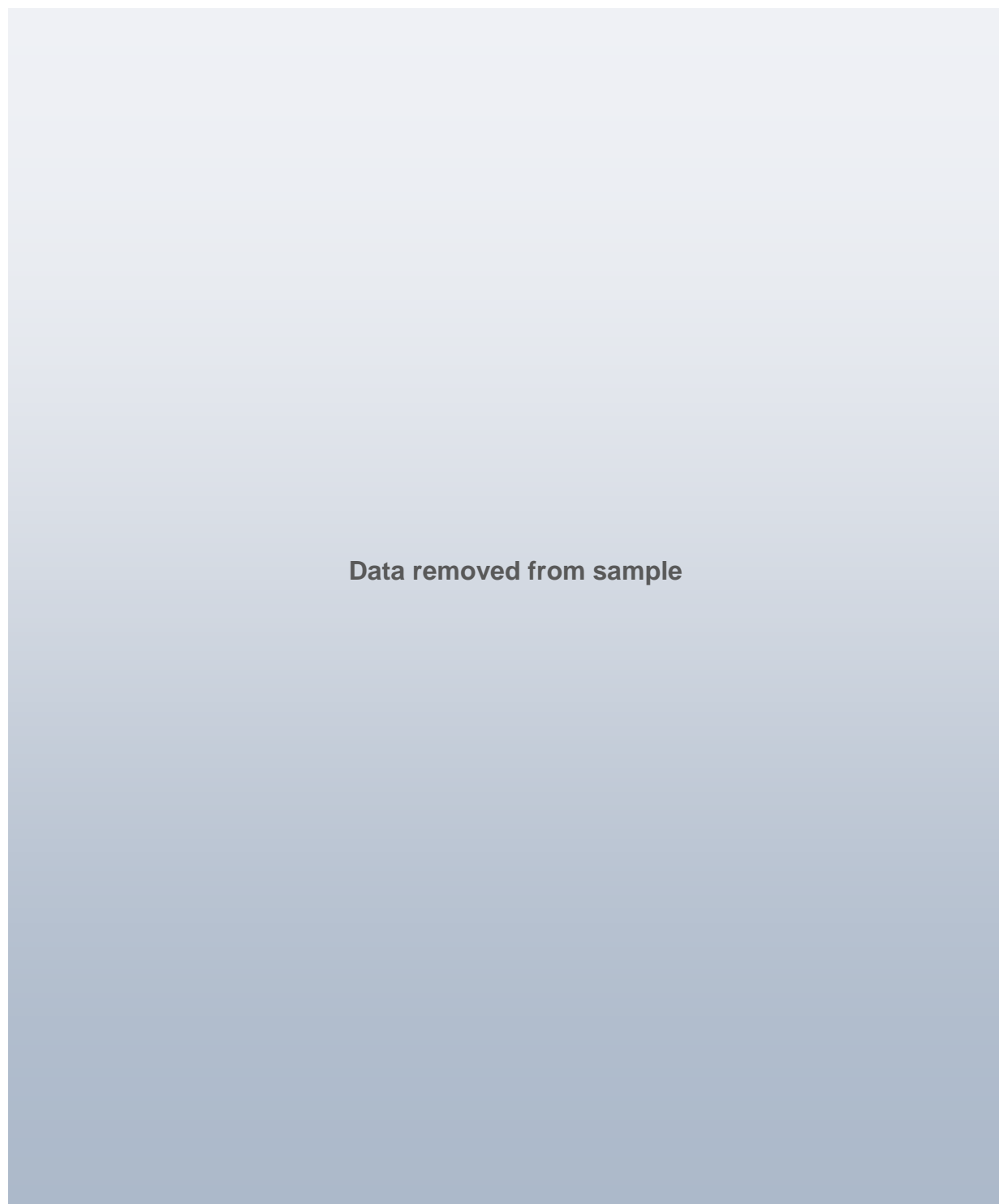
Data removed from sample					
---------------------------------	--	--	--	--	--

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 LBN Brand Shares of Home Care: % Value 2017-2020

% retail value rsp

Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Home Care by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other HC non-grocery retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
- Vending						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Distribution of Home Care by Format and Category: % Value 2020

% retail value rsp	AC	B	DW	IN	LC	PO
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other HC non-grocery retailers						

- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total

Data removed from sample

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other HC non-grocery retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total

SC TC

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: AC = air care; B = bleach; DW = dishwashing; IN = home insecticides; LC = laundry care; PO = polishes; SC = surface care; TC = toilet care

Table 16 Forecast Sales of Home Care by Category: Value 2020-2025

BOB million	2020	2021	2022	2023	2024	2025
Air Care	Data removed from sample					
Bleach						
Dishwashing						
Home Insecticides						
Laundry Care						
Polishes						
Surface Care						
Toilet Care						

Home Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

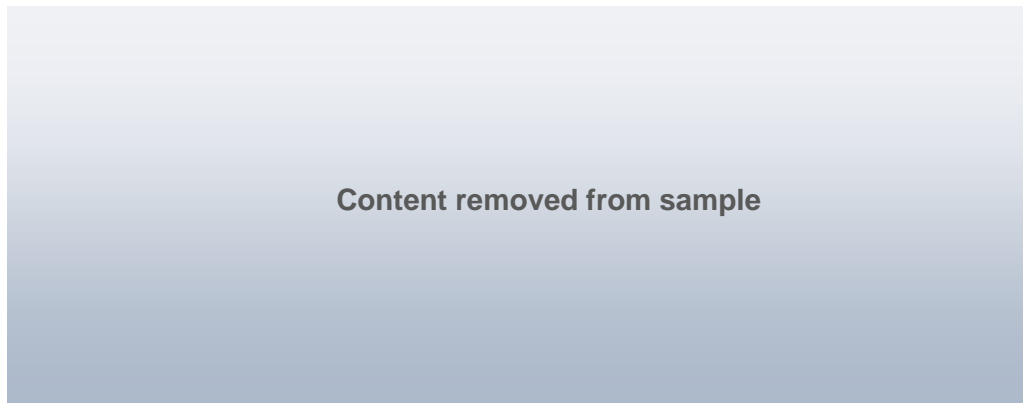
Table 17 Forecast Sales of Home Care by Category: % Value Growth 2020-2025

% constant value growth

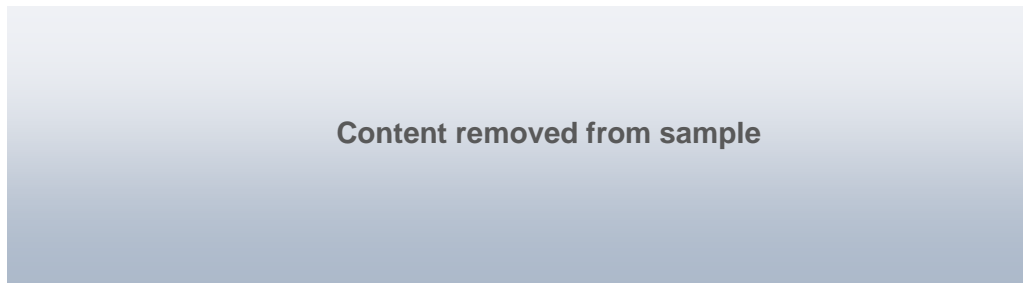
	2020/2021	2020-25 CAGR	2020/25 Total
Air Care	Data removed from sample		
Bleach			
Dishwashing			
Home Insecticides			
Laundry Care			
Polishes			
Surface Care			
Toilet Care			
Home Care			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT



GLOBAL INDUSTRY ENVIRONMENT



DISCLAIMER

Content removed from sample

SOURCES

Sources used during research include the following:

Summary 1 Research Sources

Content removed from sample

Source: Euromonitor International

