EXECUTIVE SUMMARY
Home care in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for home care?

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MARKET DATA
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DISCLAIMER

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Air Care in Italy

KEY DATA FINDINGS

2022 DEVELOPMENTS
Despite air quality remaining of paramount importance, demand for air care products continues to fall, as consumers turn away from non-essential products.
Metal containers demonstrate sustainability credentials
SC Johnson continues to lead air care amid increasing competition

PROSPECTS AND OPPORTUNITIES
Reduction in home cleaning, combined with an increase in car commuting could impact sales of air care products
New fragrances based on forest therapy and collaboration with manufacturers of smart appliances represent opportunities for leading air care players
Further growth expected for e-commerce, but grocery retailers will continue to dominate air care sales

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Bleach in Italy

KEY DATA FINDINGS
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Bleach continues to suffer from old-fashioned image
Environmental concerns hinder sales
Ace brand leads sales, amid increasing competition from private label

**PROSPECTS AND OPPORTUNITIES**

Bleach will remain a low-cost option for cash-strapped consumers
Wastewater management will become a crucial issue
Spillage issues will need to be addressed, if manufactures are to capitalise on growth in e-commerce

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**Dishwashing in Italy**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Return to pre-pandemic out-of-home socialising habits dampens demand, although inflationary pressures restrict number of dining out occasions
Green products grow in popularity
Finish continues to lead sales, in context of decline in promotional activity by leading players

**PROSPECTS AND OPPORTUNITIES**

Consumers will become more mindful of their water use, in line with sustainability trends
Advancements in appliance technology could harm sales of dishwashing products
Last expected to grow following acquisition

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**Home Insecticides in Italy**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Extreme weather temperatures contribute to spreading sales of home insecticides, while environmental concerns are hard to uphold in this context
SC Johnson continues to lead sales amid increased marketing activity by Facco SpA
Conad grows its presence

**PROSPECTS AND OPPORTUNITIES**

Expected increase in home-based activity will present an opportunity for manufacturers, but increased product visibility is needed
Climate change is expected to fuel insect problems
Demand for more natural products set to increase

CATEGORY DATA

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Laundry Care in Italy

KEY DATA FINDINGS

2022 DEVELOPMENTS
Rising energy costs lead to decline in number of washing cycles, although scent boosters gain traction amongst consumers
Sustainability grows in importance
Henkel retains its lead, while appliance manufacturers focus on introducing their own laundry care lines

PROSPECTS AND OPPORTUNITIES
Environmental concerns will play a key role, with appliance manufacturers and laundry care players working together to produce optimal laundry care solutions
Difficult economic conditions will restrict sales of non-essential products, with smaller packaging sizes expected to grow in importance
Large brands to build critical mass in production of green products

CATEGORY INDICATORS

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CATEGORY DATA

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Polishes in Italy

KEY DATA FINDINGS

2022 DEVELOPMENTS
Evolution of consumer habits reduces use of polishes
Shoe polish benefits from increased availability via shoe retailers, although casualisation trends restrict sales to some extent
Sutter Industries overtakes SC Johnson to become leading player in 2022
PROSPECTS AND OPPORTUNITIES

Unfavourable outlook for polishes
Return to office working wills- support sales of shoe polish
E-commerce represents an opportunity for low-rotation products

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Surface Care in Italy

KEY DATA FINDINGS

2022 DEVELOPMENTS

Demand for surface care products remains higher than pre-pandemic
Continued hygiene concerns prompt manufacturers to expand their product portfolios, including those formerly operating in the professional space
Unilever continues to lead sales, while Nuncas increases its store presence

PROSPECTS AND OPPORTUNITIES

Disinfectant lines look to build brand awareness
Design innovation to focus on convenience
Sustainability will remain a key trend

CATEGORY DATA

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Toilet Care in Italy

KEY DATA FINDINGS

2022 DEVELOPMENTS

Soaring inflation and waning concerns over COVID-19 hit consumer spending on toilet care,
SC Johnson innovates in the form of Duck Fresh Stickers, but category remains notable by its absence of ‘green’ alternatives
Bolton Manitoba grows share amid rising pressure from private label products

PROSPECTS AND OPPORTUNITIES

Manufacturers and retailers set to capitalise on ongoing hygiene concerns
Green products will grow in prominence
Innovations in sanitary ware will have an impact on toilet care, although smart toilets will remain a niche area

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