EXECUTIVE SUMMARY

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

MARKET INDICATORS
Table 1 - Households 2017-2022

MARKET DATA
Table 2 - Sales of Home Care by Category: Value 2017-2022
Table 3 - Sales of Home Care by Category: % Value Growth 2017-2022
Table 4 - NBO Company Shares of Home Care: % Value 2018-2022
Table 5 - LBN Brand Shares of Home Care: % Value 2019-2022
Table 6 - Penetration of Private Label in Home Care by Category: % Value 2017-2022
Table 7 - Distribution of Home Care by Format: % Value 2017-2022
Table 8 - Distribution of Home Care by Format and Category: % Value 2022
Table 9 - Forecast Sales of Home Care by Category: Value 2022-2027
Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES
Summary 1 - Research Sources

Air Care in Egypt

KEY DATA FINDINGS

2022 DEVELOPMENTS
Affordability underpins residual preference for the spray/aerosol format
Glade continues to dominate, although more affordable brands are on the rise
Spray/aerosol air fresheners and local brands penetrate e-commerce

PROSPECTS AND OPPORTUNITIES
Affordability to remain a key sales driver for air care as the variety of brands and products increases
Emerging demand for natural, toxin-free air fresheners, but consumer purchasing power remains under pressure
Stronger environmental focus could open the way for concentrated spray/aerosol air fresheners

CATEGORY DATA
Table 11 - Sales of Air Care by Category: Value 2017-2022
Table 12 - Sales of Air Care by Category: % Value Growth 2017-2022
Table 13 - NBO Company Shares of Air Care: % Value 2018-2022
Table 14 - LBN Brand Shares of Air Care: % Value 2019-2022
Table 15 - Forecast Sales of Air Care by Category: Value 2022-2027
Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2022-2027

Bleach in Egypt

KEY DATA FINDINGS

2022 DEVELOPMENTS
Bleach’s versatility ensures demand in 2022
Local brands dominate bleach
Pouch packaging revives

PROSPECTS AND OPPORTUNITIES
Conventional use and demographic trends to favour bleach
E-commerce suffers from a lack of competitive advantages
Inflation and raw material costs to exert upward pressure on prices

CATEGORY DATA
Table 17 - Sales of Bleach: Value 2017-2022
Table 18 - Sales of Bleach: % Value Growth 2017-2022
Table 19 - NBO Company Shares of Bleach: % Value 2018-2022
Table 20 - LBN Brand Shares of Bleach: % Value 2019-2022
Table 21 - Forecast Sales of Bleach: Value 2022-2027
Table 22 - Forecast Sales of Bleach: % Value Growth 2022-2027

Dishwashing in Egypt

KEY DATA FINDINGS

2022 DEVELOPMENTS
Demand for hand dishwashing regains momentum
Promotions help automatic dishwashing maintain positive retail volume sales trajectory
E-commerce emerges in hand dishwashing and automatic dishwasher detergents

PROSPECTS AND OPPORTUNITIES
Efficiency and environmental factors to play a larger role
The competition is expected to intensify in hand dishwashing
Automatic dishwashing to continue to gain traction via e-commerce

CATEGORY INDICATORS
Table 23 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA
Table 24 - Sales of Dishwashing by Category: Value 2017-2022
Table 25 - Sales of Dishwashing by Category: % Value Growth 2017-2022
Table 26 - NBO Company Shares of Dishwashing: % Value 2018-2022
Table 27 - LBN Brand Shares of Dishwashing: % Value 2019-2022
Table 28 - Forecast Sales of Dishwashing by Category: Value 2022-2027
Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2022-2027

Home Insecticides in Egypt

KEY DATA FINDINGS

2022 DEVELOPMENTS
The demand for home insecticides stabilises while rising prices spur retail value growth
Raid dominates electric insecticides as the competition fades away
Insecticides coils continues to grow demand although safety concerns remain

PROSPECTS AND OPPORTUNITIES
Urbanisation and a growing insect population to stimulate sales of home insecticides
Spray/aerosol to dominate as consumers appreciate its effectiveness against a broad spectrum of insects
Proximity of store-based retailers and lack of price advantage hinder e-commerce
CATEGORIES

DATA

Table 30 - Sales of Home Insecticides by Category: Value 2017-2022
Table 31 - Sales of Home Insecticides by Category: % Value Growth 2017-2022
Table 32 - Sales of Spray/Aerosol Insecticides by Type: % Value 2017-2022
Table 33 - NBO Company Shares of Home Insecticides: % Value 2018-2022
Table 34 - LBN Brand Shares of Home Insecticides: % Value 2019-2022
Table 35 - Forecast Sales of Home Insecticides by Category: Value 2022-2027
Table 36 - Forecast Sales of Home Insecticides by Category: % Value Growth 2022-2027

KEY DATA FINDINGS

2022 DEVELOPMENTS

Automatic detergents sees retail volume sales continue to grow at the expense of hand wash detergents
Liquid detergents continues to gain traction
Fabric softeners sees retail volume growth despite price increases

PROSPECTS AND OPPORTUNITIES

E-commerce's contribution to sales of laundry products is set to rise
The use of concentrated detergents may be slowed by price and legislation
Automatic detergents to continue to make gains from hand wash detergents

CATEGORIE INDICATORS

Table 37 - Household Possession of Washing Machines 2017-2022

DATA

Table 38 - Sales of Laundry Care by Category: Value 2017-2022
Table 39 - Sales of Laundry Care by Category: % Value Growth 2017-2022
Table 40 - Sales of Laundry Aids by Category: Value 2017-2022
Table 41 - Sales of Laundry Aids by Category: % Value Growth 2017-2022
Table 42 - Sales of Laundry Detergents by Category: Value 2017-2022
Table 43 - Sales of Laundry Detergents by Category: % Value Growth 2017-2022
Table 44 - NBO Company Shares of Laundry Care: % Value 2018-2022
Table 45 - LBN Brand Shares of Laundry Care: % Value 2019-2022
Table 46 - NBO Company Shares of Laundry Aids: % Value 2018-2022
Table 47 - LBN Brand Shares of Laundry Aids: % Value 2019-2022
Table 48 - NBO Company Shares of Laundry Detergents: % Value 2018-2022
Table 49 - LBN Brand Shares of Laundry Detergents: % Value 2019-2022
Table 50 - Forecast Sales of Laundry Care by Category: Value 2022-2027
Table 51 - Forecast Sales of Laundry Care by Category: % Value Growth 2022-2027

Polishes in Egypt

KEY DATA FINDINGS

2022 DEVELOPMENTS

The category maintains positive retail volume sales growth due to the performances of shoe and furniture polishes
Furniture care trend ensures residual demand for furniture polish but high prices and import constraints hit metal polish
Popularity of tiled floors and shift to economical alternatives reduce potential demand for floor polish

PROSPECTS AND OPPORTUNITIES

Demographic trends and environmental and lifestyle factors to push sales of furniture polish and shoe polish
E-commerce to remain a weak channel for polishes
Polishes face competition from alternatives

**CATEGORY DATA**

- Table 52 - Sales of Polishes by Category: Value 2017-2022
- Table 53 - Sales of Polishes by Category: % Value Growth 2017-2022
- Table 54 - NBO Company Shares of Polishes: % Value 2018-2022
- Table 55 - LBN Brand Shares of Polishes: % Value 2019-2022
- Table 56 - Forecast Sales of Polishes by Category: Value 2022-2027
- Table 57 - Forecast Sales of Polishes by Category: % Value Growth 2022-2027

### Surface Care in Egypt

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

- Surface care sees retail volume sales growth despite elevated prices
- Kitchen cleaners benefit from multi-use potential, while other categories grow more organically
- E-commerce gains momentum as an alternative channel for local brands and consumers

**PROSPECTS AND OPPORTUNITIES**

- Upward retail sales trajectory anticipated
- Multi-purpose cleaners to benefit from practical, flexible, economy and affordability perceptions
- Heightened health and hygiene awareness to push a demand for more natural, less toxic options

**CATEGORY DATA**

- Table 58 - Sales of Surface Care by Category: Value 2017-2022
- Table 59 - Sales of Surface Care by Category: % Value Growth 2017-2022
- Table 60 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2017-2022
- Table 61 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2017-2022
- Table 62 - NBO Company Shares of Surface Care: % Value 2018-2022
- Table 63 - LBN Brand Shares of Surface Care: % Value 2019-2022
- Table 64 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2018-2022
- Table 65 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2022
- Table 66 - Forecast Sales of Surface Care by Category: Value 2022-2027
- Table 67 - Forecast Sales of Surface Care by Category: % Value Growth 2022-2027

### Toilet Care in Egypt

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

- Toilet care’s performance is restricted as consumers prioritise purchases in a tough economic climate
- Toilet liquids/foam players leverage affordability and availability to grow retail volume sales
- E-commerce remains a marginal channel in toilet care

**PROSPECTS AND OPPORTUNITIES**

- Health awareness, affordability and population growth to be the main sales drivers of toilet care products
- E-commerce and social media to play more significant roles in toilet liquids
- Manufacturers to invest in added-value features and functions

**CATEGORY DATA**

- Table 68 - Sales of Toilet Care by Category: Value 2017-2022
- Table 69 - Sales of Toilet Care by Category: % Value Growth 2017-2022
- Table 70 - NBO Company Shares of Toilet Care: % Value 2018-2022
- Table 71 - LBN Brand Shares of Toilet Care: % Value 2019-2022
Table 72 - Forecast Sales of Toilet Care by Category: Value 2022-2027
Table 73 - Forecast Sales of Toilet Care by Category: % Value Growth 2022-2027

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.