

Home Care in Chile

February 2024

Table of Contents

Home Care in Chile

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 2018-2023Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023Table 4 - NBO Company Shares of Home Care: % Value 2019-2023Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023Table 6 - Penetration of Private Label in Home Care by Category: % Value 2018-2023Table 7 - Distribution of Home Care by Format: % Value 2018-2023Table 8 - Distribution of Home Care by Format and Category: % Value 2023Table 9 - Forecast Sales of Home Care by Category: Value 2023-2028Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Significant rise in unit prices impacts volume sales in 2023 Hybrid working plays a positive role in air care demand SC Johnson & Son maintains its dominant position

PROSPECTS AND OPPORTUNITIES

Spray/aerosol air fresheners to continue driving demand for air care National players are expected to gain ground, driven by affordable options Pure play e-commerce will continue to boost online sales

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 Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bleach volumes decline as use normalises after high demand during pandemic Complex economic situation mitigates the decline in bleach sales Private label gains ground, driven by more competitive prices compared to leading brands

PROSPECTS AND OPPORTUNITIES

Modernisation of bleach will boost demand Unit price increase to be driven by penetration of products offering specific value Adverse economic conditions are expected to favour the use of bleach in 2024

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2018-2023Table 19 - Sales of Bleach: % Value Growth 2018-2023Table 20 - NBO Company Shares of Bleach: % Value 2019-2023Table 21 - LBN Brand Shares of Bleach: % Value 2020-2023Table 22 - Forecast Sales of Bleach: Value 2023-2028Table 23 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand declines as consumers reduce frequency of purchase due to pressure on disposable incomes Multinationals lead hand dishwashing but local brands play a key role in traditional channel Low penetration of automatic dishwashing in modern grocery retailers

PROSPECTS AND OPPORTUNITIES

Uncertain economy will delay purchase of dishwashers with a negative impact on automatic dishwashing Pure play e-commerce will continue to gain ground with low prices and promotions Players will continue to invest in the circular economy

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 Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home insecticides records highest increase in unit price within overall home care SC Johnson & Son dominates but is losing share to smaller players National player Empresas Demaria gains ground with its brand Killer

PROSPECTS AND OPPORTUNITIES

Strong challenges are anticipated for home insecticides Spray/aerosol format is expected to remain the most popular option Players to increasingly focus on eco-friendly home insecticides

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 Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers use smaller amount of product per wash in attempt to save money Unpackaged laundry care is gaining popularity as consumers' environmental consciousness continues to grow Unilever dominates but local brands play a vital role in the traditional channel

PROSPECTS AND OPPORTUNITIES

Players will continue to invest in the circular economy Powder detergents will be increasingly replaced by modern liquid formats New laundry care options are expected in the short term

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 Detergents by Category: Value 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 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 2019-2023
Table 48 - NBO Company Shares of Laundry Aids: % Value 2019-2023
Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023
Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

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 Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Polishes continues to be replaced by other home care products Modern floors and furniture reduce the need for polishes Lack of innovation negatively impacts demand for polishes

PROSPECTS AND OPPORTUNITIES

Metal polish will remain relevant to a specific group of consumers Casual footwear and hybrid working to mitigate demand for shoe polish Retailers show limited interest in developing new private label options

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 Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation and the return to normal routines have a negative impact on demand All purpose cleaning wipes have lost their charm Private label gains ground, driven by new products and marketing campaigns

PROSPECTS AND OPPORTUNITIES

Adverse economic conditions will negatively impact demand for surface care in 2024 Local players have potential to gain ground in category Affordability and convenience will become key attributes for surface care

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 Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers choose more affordable alternatives due to economic instability Players aim to improve their profitability SC Johnson & Son retains dominance of competitive landscape

PROSPECTS AND OPPORTUNITIES

Better economic conditions will favour penetration of toilet care among Chilean households Rim blocks will continue to drive value sales of toilet care in Chile Penetration of private label is expected to remain low

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-chile/report.