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 Chile

KEY DATA FINDINGS

2022 DEVELOPMENTS

Demand for air care remains elevated in 2022, driven by spray/aerosol format
The long-term impact of the pandemic in Chile
SC Johnson & Son retains overall dominance due to popularity of its spray/aerosol brands

PROSPECTS AND OPPORTUNITIES

Air care set to remain on upward trajectory over forecast period
Expansion potential for electric air fresheners
Emergence of new technologies can help add interest

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 - Sales of Air Care by Fragrance: Value Ranking 2020-2022
Table 14 - NBO Company Shares of Air Care: % Value 2018-2022
Table 15 - LBN Brand Shares of Air Care: % Value 2019-2022
Table 16 - Forecast Sales of Air Care by Category: Value 2022-2027
Table 17 - Forecast Sales of Air Care by Category: % Value Growth 2022-2027

Bleach in Chile

KEY DATA FINDINGS
2022 DEVELOPMENTS

Further declines for bleach following pandemic-driven surge in 2020
Extraordinary circumstances of bleach growth has lasting impact on producers
Smaller and informal brands appear with pandemic before quickly exiting

PROSPECTS AND OPPORTUNITIES

Slow modernisation of bleach as players adapt to changing demands
Virutex Ilko continues to expand, with major plans for the future
Adverse economic conditions set to favour bleach in 2023

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2017-2022
Table 19 - Sales of Bleach: % Value Growth 2017-2022
Table 20 - NBO Company Shares of Bleach: % Value 2018-2022
Table 21 - LBN Brand Shares of Bleach: % Value 2019-2022
Table 22 - Forecast Sales of Bleach: Value 2022-2027
Table 23 - Forecast Sales of Bleach: % Value Growth 2022-2027

Dishwashing in Chile

KEY DATA FINDINGS

2022 DEVELOPMENTS

Following positive impact of home seclusion, demand for hand dishwashing declines in 2022
Premiumisation accelerated by pandemic and greater adoption of dishwashers
Elevated demand for dishwashing through retail e-commerce in 2022

PROSPECTS AND OPPORTUNITIES

Economic adversity will likely slow stronger adoption of dishwashers
Virutex enters dishwashing with sustainable positioning
FreeMet continues to expand through circular economy model

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2016-2021

CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2017-2022
Table 26 - Sales of Dishwashing by Category: % Value Growth 2017-2022
Table 27 - NBO Company Shares of Dishwashing: % Value 2018-2022
Table 28 - LBN Brand Shares of Dishwashing: % Value 2019-2022
Table 29 - Forecast Sales of Dishwashing by Category: Value 2022-2027
Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2022-2027

Home Insecticides in Chile

KEY DATA FINDINGS

2022 DEVELOPMENTS

Home insecticides suffers from waning impact of pandemic
Spray/aerosol remains most popular format of home insecticides in Chile
Strong volume decline for electric insecticides in line with significant unit price rise

PROSPECTS AND OPPORTUNITIES

Headwinds predicted for home insecticides over early forecast period
Empresas Demaria's Killer spray/aerosol format offers further expansion potential
Producers of home insecticides increasingly adopt green positioning

**CATEGORY DATA**

Table 31 - Sales of Home Insecticides by Category: Value 2017-2022
Table 32 - Sales of Home Insecticides by Category: % Value Growth 2017-2022
Table 33 - Sales of Spray/Aerosol Insecticides by Type: % Value 2017-2022
Table 34 - NBO Company Shares of Home Insecticides: % Value 2018-2022
Table 35 - LBN Brand Shares of Home Insecticides: % Value 2019-2022
Table 36 - Forecast Sales of Home Insecticides by Category: Value 2022-2027
Table 37 - Forecast Sales of Home Insecticides by Category: % Value Growth 2022-2027

**Laundry Care in Chile**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**
Demand for laundry care accelerates in post-pandemic environment
The direct-to-consumer model supports elevated online sales
Unilever’s continuous strive for innovation supports its overall dominance

**PROSPECTS AND OPPORTUNITIES**
The shift from powder to liquid detergents to accelerate
Premiumisation and diversification
Empresas Demaria and its investment in the circular economy

**CATEGORY INDICATORS**
Table 38 - Household Possession of Washing Machines 2017-2022

**CATEGORY DATA**
Table 39 - Sales of Laundry Care by Category: Value 2017-2022
Table 40 - Sales of Laundry Care by Category: % Value Growth 2017-2022
Table 41 - Sales of Laundry Aids by Category: Value 2017-2022
Table 42 - Sales of Laundry Aids by Category: % Value Growth 2017-2022
Table 43 - Sales of Laundry Detergents by Category: Value 2017-2022
Table 44 - Sales of Laundry Detergents by Category: % Value Growth 2017-2022
Table 45 - NBO Company Shares of Laundry Care: % Value 2018-2022
Table 46 - LBN Brand Shares of Laundry Care: % Value 2019-2022
Table 47 - NBO Company Shares of Laundry Aids: % Value 2018-2022
Table 48 - LBN Brand Shares of Laundry Aids: % Value 2019-2022
Table 49 - NBO Company Shares of Laundry Detergents: % Value 2018-2022
Table 50 - LBN Brand Shares of Laundry Detergents: % Value 2019-2022
Table 51 - Forecast Sales of Laundry Care by Category: Value 2022-2027
Table 52 - Forecast Sales of Laundry Care by Category: % Value Growth 2022-2027

**Polishes in Chile**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**
Polishes remains relatively unchanged by pandemic with demand declining throughout review period
Polishes is mostly a legacy category in Chile
Price of metal polish notably increases, negatively impacting demand

**PROSPECTS AND OPPORTUNITIES**
The need for innovation to drive polishes forward
Private label offers more affordable option
Premiumisation of shoe polish

CATEGORY DATA
Table 53 - Sales of Polishes by Category: Value 2017-2022
Table 54 - Sales of Polishes by Category: % Value Growth 2017-2022
Table 55 - NBO Company Shares of Polishes: % Value 2018-2022
Table 56 - LBN Brand Shares of Polishes: % Value 2019-2022
Table 57 - Forecast Sales of Polishes by Category: Value 2022-2027
Table 58 - Forecast Sales of Polishes by Category: % Value Growth 2022-2027

Surface Care in Chile

KEY DATA FINDINGS

2022 DEVELOPMENTS
Significant volume declines for surface care in 2022 due to greater mobility outside of the home
Supply chain and stocking issues
All purpose cleaning wipes remains a strong performer

PROSPECTS AND OPPORTUNITIES
The future for wipes and home care disinfectants
B Corp Certification and new values
Pricing will gain importance over other attributes in 2023

CATEGORY DATA
Table 59 - Sales of Surface Care by Category: Value 2017-2022
Table 60 - Sales of Surface Care by Category: % Value Growth 2017-2022
Table 61 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2017-2022
Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2017-2022
Table 63 - NBO Company Shares of Surface Care: % Value 2018-2022
Table 64 - LBN Brand Shares of Surface Care: % Value 2019-2022
Table 65 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2018-2022
Table 66 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2022
Table 67 - Forecast Sales of Surface Care by Category: Value 2022-2027
Table 68 - Forecast Sales of Surface Care by Category: % Value Growth 2022-2027

Toilet Care in Chile

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return to normality and inflation have negative impact on toilet care
SC Johnson & Son retains overall dominance of surface care in 2022
Private label is on the rise in line with increasing price sensitivity

PROSPECTS AND OPPORTUNITIES
Demand for toilet care set to remain elevated over the forecast period
Potential for growth in the longer term
Toilet care players begin to embrace the sustainability trend

CATEGORY DATA
Table 69 - Sales of Toilet Care by Category: Value 2017-2022
Table 70 - Sales of Toilet Care by Category: % Value Growth 2017-2022
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](http://www.euromonitor.com/home-care-in-chile/report).