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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DISCLAIMER

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2022 DEVELOPMENTS
Stable demand and significant value growth for laundry care in 2022
Sales boosted across convenience-oriented offerings
High possession rate of washing machines detrimental to hand wash detergents

PROSPECTS AND OPPORTUNITIES
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Sustainability remains top of mind in Germany
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Sustainability to remain key driver of future sales

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Interest in multipurpose cleaners driven by demand for versatility
Private label gains ground in task-specific cleaners

PROSPECTS AND OPPORTUNITIES
Surface care to remain relevant in post-pandemic years
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Dan Klorix remains dominant brand in bleach
Bleach not as commonly used in Germany compared to other markets

PROSPECTS AND OPPORTUNITIES
Innovation potential limited for bleach
Bleach to be negatively impacted by demand for eco-friendly alternatives
Dan Klorix projected to maintain lead

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2022 DEVELOPMENTS
Value growth for polishes attributed to inflationary effects in 2022
Hybrid working measures further impact demand for shoe polish sales
Polishes remains consolidated competitive landscape, dominated by three players

PROSPECTS AND OPPORTUNITIES
Declining demand for furniture polish due to modern furniture materials
Reduced shelf space expected to remain a challenge to future growth
Metal polish expected to remain niche format

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Polishes remains consolidated competitive landscape, dominated by three players

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Air care sales remain buoyant in Germany
Car air fresheners rebounds due to greater return to travel in 2022
Air care remains consolidated competitive landscape in 2022

PROSPECTS AND OPPORTUNITIES
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Car air fresheners to benefit from longer-term trends in car sharing
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2022 DEVELOPMENTS
Climate change supports some demand for home insecticides in 2022
As environmental concerns grow, so does demand for natural alternatives
Raid retains dominance of spray/aerosol insecticides

PROSPECTS AND OPPORTUNITIES
The EU Green Deal likely to impact home insecticides in Germany
Climate change will continue to shift consumers towards natural approaches
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