



Home Care in the United Arab Emirates

January 2023

Table of Contents

Home Care in the United Arab Emirates

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Innovation supports demand for spray/aerosol air fresheners

Players focus on scent and ingredients to attract consumers

Retail e-commerce continues to penetrate air care in 2022

PROSPECTS AND OPPORTUNITIES

Despite growth prospects, air care could see competition from substitute products

Spray/aerosol air fresheners expected to retain overall popularity

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Demand for bleach continues to be driven by heightened hygiene awareness despite concerns over chemicals
Variety of pack types and prices appeal to wide target audience
Targeted marketing and more convenient formats to attract consumers as surface care offers competition

PROSPECTS AND OPPORTUNITIES

Shifting consumer preferences expected to slow growth of bleach over forecast period
Consumers expected to trade up due to scented variants such as Clorox Scentiva

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Growing demand for automatic dishwashing in line with greater penetration of dishwashers
Increasing demand for private label and local brands
Consumers gravitate towards retail e-commerce, boosting category sales

PROSPECTS AND OPPORTUNITIES

Dishwashing additives expected to experience increasing demand
Automatic dishwashing likely to remain dominated by international brands
Manufacturers will continue to rely heavily on discounts and bulk deals

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2017-2022

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Increasing product diversity and price reductions support volume growth in 2022
Inflation bites electric insecticides and insecticide baits
Further penetration of retail e-commerce as consumers search for more competitive prices

PROSPECTS AND OPPORTUNITIES

Urbanisation and hot weather expected contribute to further demand
Private label expected to emerge in category over the forecast period
The launch of more natural products expected to boost value growth in line with increasing eco-consciousness amongst consumers

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Laundry care maintains solid growth aided by stable economy and strong penetration of washing machines

Retail e-commerce and promotions boost category sales

Solid sales growth for private label within laundry care

PROSPECTS AND OPPORTUNITIES

Increasing awareness expected to drive demand for liquid detergents

Growing consumer interest in sustainable brands

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Slow performance amid inflation as polishes considered non-essential purchase

Greater consumer spend on lifestyle products combined with new product innovation drives demand for furniture polish

Floor polish suffers from new flooring materials and alternative home care products

PROSPECTS AND OPPORTUNITIES

Low furniture replacement cycles could positively impact polish sales, while demand for shoe polish is expected to improve in line with greater mobility

Demand for luxury furniture expected to boost metal polish

Opportunities to explore new formats for furniture polish players

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Heightened hygiene awareness and hybrid working drive demand for surface care

Players target consumers with promotions and discounts

Multi-purpose options remain popular, although a shift to task-specific products is emerging

PROSPECTS AND OPPORTUNITIES

Surface care offers further potential for expansion

Local players set to increase their presence as further price increases are expected

Return to stronger growth for window/glass cleaners

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 the United Arab Emirates

KEY DATA FINDINGS

2022 DEVELOPMENTS

Product innovation fuels growth, particularly in toilet liquids/foam

Players target consumers via retail e-commerce

Promotions and price discounts remain a key focus for players

PROSPECTS AND OPPORTUNITIES

Pandemic's lingering effects to continue supporting demand for toilet care

Consumer lifestyle changes are anticipated to fuel growth over the forecast period

Convenient rim blocks set to return to growth in the coming years

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

Table 71 - NBO Company Shares of Toilet Care: % Value 2018-2022

Table 72 - LBN Brand Shares of Toilet Care: % Value 2019-2022

Table 73 - Forecast Sales of Toilet Care by Category: Value 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.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/home-care-in-the-united-arab-emirates/report.