



Home Care in Italy

February 2024

Table of Contents

Home Care in Italy

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 2018-2023

Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023

Table 4 - NBO Company Shares of Home Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Home Care by Category: % Value 2018-2023

Table 7 - Distribution of Home Care by Format: % Value 2018-2023

Table 8 - Distribution of Home Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Home Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air care sees further decline in 2023, with all category members falling in terms of volume sales

Reckitt Benckiser steals lead, while Just and Irgel extends into air care

Sustainability remains relevant

PROSPECTS AND OPPORTUNITIES

Declines will persist though potential for growth exists

Demand for air care 'solutions' set to escalate

E-Commerce continues to rise though store-based grocery retailing still dominates

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Waning interest in bleach post-pandemic
Bleach remains widely available on retailers' shelves
Shift towards softer, kinder products undermines growth in bleach

PROSPECTS AND OPPORTUNITIES

Bleach's sales prospects lie in its perception as a cheap alternative to surface care products
Increased focus on environmental impact and water disposal
Rising interest in alternatives to liquid bleach driven by online delivery issues

CATEGORY DATA

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

[Dishwashing in Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales continue to normalise post-pandemic
Additives sees slower decline in 2023, and green focus remains strong
Players push sales through promotions and partnerships

PROSPECTS AND OPPORTUNITIES

Automatic dishwashing tablets will continue to drive overall category growth
Dishwashing additives to see further falls as sustainability concerns rise
Advertising and partnerships as key growth drivers

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 Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Insects proliferate thanks to climate change though most of category remains in decline
SC Johnson continues to lead sales amid increased marketing activity by Facco
Consumers willing to spend when urgent; Conad continues to expand

PROSPECTS AND OPPORTUNITIES

Increased product visibility necessary to capitalise on growth opportunities
A need for new habits from consumers and new formulas from producers

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers focus on saving money and energy in 2023

Henkel maintains lead in laundry care, while increased socialising boosts sales in fine fabric detergents and fresheners

Dryer sheets fall thanks to reduced use of automatic dryers, and sustainability trends persist in laundry care

PROSPECTS AND OPPORTUNITIES

Environmental factors to have increased impact on trends and development

Growth forecast for automatic laundry detergents as consumers prioritise spending

Water will be increasingly scarce, with green products expanding throughout laundry care

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 Aids by Category: % Value Growth 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 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 2020-2023

Table 48 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 49 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 51 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

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 Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Polishes suffers from perception of unnecessary products

SC Johnson takes the lead, while Henkel announces new consumer brands division

Shoe polish fares better than the rest, supported by fuller social lives and checkout positioning

PROSPECTS AND OPPORTUNITIES

Negative outlook forecast though there may be potential in combining some features and products
Shoe polish set to see worsening performance
Cross-selling may offer opportunity for growth

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 Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales still falling as consumers seek out low-cost options amid inflation
Brand development still informed by pandemic experience
Procter & Gamble retains overall leadership in 2023

PROSPECTS AND OPPORTUNITIES

As overall demand falls private label will expand
Convenience and sustainability to remain central concerns
Intensifying competition between distribution channels

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 Italy](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet care falls in 2023 as consumers rationalise their budgets
Bolton Manitoba remained number one company in 2023, while new construction softened overall decline
Brands respond to evolving demand, with environmental concerns less important in toilet care than elsewhere

PROSPECTS AND OPPORTUNITIES

Volume sales to improve during forecast period, with direct selling holding some potential
In-cistern devices will fall fastest, while opportunities for overall category growth could be found with small businesses
E-Commerce will push sails in ITBs as green products expand within toilet care

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-italy/report.