



Euromonitor
International

Home Care in Kenya

March 2024

Table of Contents

Home Care in Kenya

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 Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising middle-class consumer base provides captive audience for air care

Heightened marketing input maintains local brand Tropicak's leading position

Manufacturers continue to target consumers through price promotions

PROSPECTS AND OPPORTUNITIES

Health-conscious consumers set to restrict growth potential in the forecast period

The gel format to gain traction as a perceived safer and more affordable option

Surge in car ownership to fuel the demand for car air fresheners

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 - NBO Company Shares of Air Care: % Value 2019-2023

Table 14 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 15 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

Bleach in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Affordable smaller packs make bleach accessible to more consumers

A shift towards gentler alternatives

Players use price promotions and discounts to win over consumers

PROSPECTS AND OPPORTUNITIES

Jik is expected to remain the leading brand despite growing competition

Demand among low-income consumers is expected to remain limited

Growing middle-class consumer base and urbanisation to boost the demand for bleach

CATEGORY DATA

Table 17 - Sales of Bleach: Value 2018-2023

Table 18 - Sales of Bleach: % Value Growth 2018-2023

Table 19 - NBO Company Shares of Bleach: % Value 2019-2023

Table 20 - LBN Brand Shares of Bleach: % Value 2020-2023

Table 21 - Forecast Sales of Bleach: Value 2023-2028

Table 22 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Larger players continue to target consumers with promotions amid strong competition from home-made alternatives

Consumers prefer hand dishwashing liquids

Specialised dishwashing products continue to gain traction

PROSPECTS AND OPPORTUNITIES

Growing penetration of dishwashers to increase the demand for automatic dishwashing

Technology to hinder the development of hand dishwashing soap

Multi-purpose alternatives to entice budget-constrained consumers

CATEGORY INDICATORS

Table 23 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 24 - Sales of Dishwashing by Category: Value 2018-2023

Table 25 - Sales of Dishwashing by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Dishwashing: % Value 2019-2023

Table 27 - LBN Brand Shares of Dishwashing: % Value 2020-2023

Table 28 - Forecast Sales of Dishwashing by Category: Value 2023-2028

Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

Home Insecticides in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing middle-class consumer base spurs demand

Urbanisation increases the demand base for home insecticides in Kenya

Household budget constraints drive a shift towards more affordable insecticides

PROSPECTS AND OPPORTUNITIES

Urban demand is set to shift to spray/aerosol and electric insecticides

Innovations in insecticide coils to boost uptake

Retail e-commerce emerges but faces challenges to progress in home insecticides

CATEGORY DATA

Table 30 - Sales of Home Insecticides by Category: Value 2018-2023

Table 31 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 33 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 34 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 35 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

LG unveils first commercial laundry shop in Mombasa

Brand owners target more consumers with promotions

Affordable options lead the way

PROSPECTS AND OPPORTUNITIES

Concentrated detergents to gain traction amid sustainability concerns

Pricing remains the primary challenge

Consumers set to prefer cheaper brands

CATEGORY INDICATORS

Table 36 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

Table 37 - Sales of Laundry Care by Category: Value 2018-2023

Table 38 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 39 - Sales of Laundry Aids by Category: Value 2018-2023

Table 40 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 41 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 42 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 43 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 44 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 45 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 46 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 47 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 48 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 49 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 50 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shoe polish continues to dominate polishes in Kenya

Chandaria Industries launches new Velvex stainless steel polish in Kenya

Home consumption of shoe polish faces competition from local shoeshine stations

PROSPECTS AND OPPORTUNITIES

Modernisation trends to continue to reduce the demand for standard floor and furniture polishes

Modernisation offers opportunities for new and innovative launches

Population growth to continue to drive the demand for shoe polish

CATEGORY DATA

Table 51 - Sales of Polishes by Category: Value 2018-2023

Table 52 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Polishes: % Value 2019-2023

Table 54 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 55 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 56 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Chandaria Industries launches new Velvex oven cleaner in the market

Multi-purpose cleaners leverages affordability and versatility to register fast retail volume and current value growth

Ebbing of the COVID-19 threat slows home care disinfectants

PROSPECTS AND OPPORTUNITIES

Rising demand for specialised surface cleaners amid urbanisation

Economic constraints set to continue to impact surface care

Rising demand for eco-friendly products to add dynamism to the offer

CATEGORY DATA

Table 57 - Sales of Surface Care by Category: Value 2018-2023

Table 58 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 59 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 60 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 61 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 62 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 63 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 64 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Kenya

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rim blocks and liquids struggle to gain traction in toilet care despite urbanisation

Urbanisation and hygiene trends drive demand for innovative and eco-friendly products

Harpic remains the most visible and leading brand in toilet care

PROSPECTS AND OPPORTUNITIES

Rising awareness and modern facilities to propel toilet care in the forecast period

Population growth to boost the demand for toilet care

Improved living standards and conditions to boost toilet care

CATEGORY DATA

Table 65 - Sales of Toilet Care by Category: Value 2018-2023

Table 66 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 67 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 68 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 69 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 70 - 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-kenya/report.