



# Home Care in Greece

February 2024

Table of Contents

## Home Care in Greece

### 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 Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Air care manages to achieve good value and volume sales, despite economic challenges

Seasonality remains key to sales patterns in air care

Premium innovations struggle to reach mass sales

#### PROSPECTS AND OPPORTUNITIES

"Green" trends set to strongly influence developments in air care

Competition from economy alternatives will continue

Natural fragrances will drive development growth

### 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 Greece

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Despite category maturity, bleach benefits from shrinking purchasing power  
Leading brand Klinex sees its share cannibalised by private label  
Lidl grows its share, driving sales via discounters

## PROSPECTS AND OPPORTUNITIES

Bleach attracts low investment from manufacturers  
High penetration allows limited room for growth  
Sustainability may pose a threat to growth

## 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 Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Players focus on promotional discount campaigns to attract price-sensitive consumers  
Money-saving is a key consumer priority and drives product developments  
Price increases lead to fluctuations in the competitive landscape

#### PROSPECTS AND OPPORTUNITIES

The growing "green" trend will continue to drive developments  
Automatic dishwashing will be affected by low purchasing power  
Child-specific products find their way into dishwashing, opening up growth opportunities

#### 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 Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Tight competition leads to discounting activities, as brands try to boost their sales to price-sensitive consumers  
Consumers seek product trust over brand loyalty  
Hot and humid conditions required to boost demand

#### PROSPECTS AND OPPORTUNITIES

"Green" trends set to drive further developments in home insecticides  
Seasonal dependency leads to unpredictable results, while fear of the tiger mosquito creates specialised opportunities

Specialised sprays set to be key drivers in spray/aerosol insecticides

#### 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 Greece

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Laundry care sees lots of activity, despite volume sales remaining in a slump

Consumers shift to larger wash loads and cold washing, to save on energy usage and product volumes

Sustainability is the key trend driving new product developments

#### PROSPECTS AND OPPORTUNITIES

The sustainability trend is set to gather further pace over the forecast period

Liquid detergents will remain popular, while "old-fashioned" variants lose appeal

Changes in consumer habits and low purchasing power set to affect sales in discretionary categories

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

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

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

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

Table 49 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 50 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 51 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 52 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

#### Polishes in Greece

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sales slump in relatively uninteresting category

Modern living styles and trends rarely require specialist polishes

Shoe polish remains the most relevant, but still struggles to reach positive growth sales

#### PROSPECTS AND OPPORTUNITIES

Modern design and housing trends will lead to further losses for floor, metal, and furniture polishes  
Ongoing shift to casual shoes will continue to suppress demand for shoe polish  
Camel will retain its leadership thanks to overall strengths

#### CATEGORY DATA

- Table 53 - Sales of Polishes by Category: Value 2018-2023
- Table 54 - Sales of Polishes by Category: % Value Growth 2018-2023
- Table 55 - NBO Company Shares of Polishes: % Value 2019-2023
- Table 56 - LBN Brand Shares of Polishes: % Value 2020-2023
- Table 57 - Forecast Sales of Polishes by Category: Value 2023-2028
- Table 58 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

#### Surface Care in Greece

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation and price hikes take their toll upon sales  
Subcategories with private label options tempt consumers to trade down  
Price competition and discounting activities gather pace

#### PROSPECTS AND OPPORTUNITIES

Ingredients will be under the spotlight of new developments  
Category maturity and low purchasing power among consumers will hinder volume growth  
Practical factors will benefit specific categories

#### CATEGORY DATA

- Table 59 - Sales of Surface Care by Category: Value 2018-2023
- Table 60 - Sales of Surface Care by Category: % Value Growth 2018-2023
- Table 61 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023
- Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023
- Table 63 - NBO Company Shares of Surface Care: % Value 2019-2023
- Table 64 - LBN Brand Shares of Surface Care: % Value 2020-2023
- Table 65 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023
- Table 66 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023
- Table 67 - Forecast Sales of Surface Care by Category: Value 2023-2028
- Table 68 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

#### Toilet Care in Greece

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fragrance remains under the spotlight of developments in toilet care  
Multi-pack trend drives growth in ITBs  
Toilet liquids/foam volume sales somewhat skewed by players shifting from two-for-one to percentage discount offers

#### PROSPECTS AND OPPORTUNITIES

Frugal lifestyles will continue to hinder growth over the forecast period  
Private label has scope for growth as seen with Lidl, although players need to expand their portfolios  
Rim blocks will continue to attract investment and developments

#### CATEGORY DATA

- Table 69 - Sales of Toilet Care by Category: Value 2018-2023
- Table 70 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 71 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 72 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 73 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 74 - 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-greece/report](http://www.euromonitor.com/home-care-in-greece/report).