

Home Care in Saudi Arabia

Market Direction | 2024-02-21 | 65 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2675.00
- Multiple User License (1 Site) €5350.00
- Multiple User License (Global) €8025.00

Report description:

Following a period of normalisation over 2021-2022, when retail volume sales of home care in Saudi Arabia declined compared to the surge witnessed in 2020 as a result of pandemic-induced home seclusion, demand for many products increased in 2023. This performance was supported by a number of factors.

Euromonitor International's Home Care in Saudi Arabia market report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (historic date range), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they new product developments, packaging innovations, economic/lifestyle influences, distribution or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Air Care, Bleach, Dishwashing, Home Insecticides, Laundry Care, Polishes, Surface Care, Toilet Care.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Home Care market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Home Care in Saudi Arabia
Euromonitor International
October 2024

List Of Contents And Tables

HOME CARE IN SAUDI ARABIA

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

LAUNDRY CARE IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Attractive price promotions and expanding workforce support laundry care's strength in home care

Players' various strategies to encourage trials of concentrated liquid detergents

National dress requires specialised laundry care to ensure correct maintenance

PROSPECTS AND OPPORTUNITIES

Concentrated liquid detergents set for further growth as consumers become increasingly aware of this format's benefits

E-commerce set to further penetrate category as players invest in online presence

Further exploration of sustainable laundry care solutions

CATEGORY INDICATORS

Table 11 Household Possession of Washing Machines 2018-2023

CATEGORY DATA

Table 12 Sales of Laundry Care by Category: Value 2018-2023

Table 13 Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 14 Sales of Laundry Aids by Category: Value 2018-2023

Table 15 Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 16 Sales of Laundry Detergents by Category: Value 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 17 Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 18 Sales of In-wash Spot and Stain Removers by Type: % Value Breakdown 2018-2023

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

Table 20 □LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 21 □NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 22 □LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 23 □NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 24 □LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 25 □Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 26 □Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

DISHWASHING IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hand dishwashing continues to dominate demand in the category

Increasing possession rate of dishwashers supports rising demand for automatic dishwashing products

Multinationals lead, while e-commerce continues to flourish

PROSPECTS AND OPPORTUNITIES

Further potential for automatic dishwashing, driven by increasingly busy lifestyles and penetration of women in the workforce

Hand dishwashing offers opportunities to explore more sustainable options

Potential for local brands and private label to increase presence in automatic dishwashing

CATEGORY INDICATORS

Table 27 Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 28 Sales of Dishwashing by Category: Value 2018-2023

Table 29 Sales of Dishwashing by Category: % Value Growth 2018-2023

Table 30 NBO Company Shares of Dishwashing: % Value 2019-2023

Table 31 LBN Brand Shares of Dishwashing: % Value 2020-2023

Table 32 Forecast Sales of Dishwashing by Category: Value 2023-2028

Table 33 Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

SURFACE CARE IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heightened hygiene awareness continues to support solid demand for surface care, but value sales remain weak

Strong demand for multi-purpose cleaners driven by convenience and cost savings

Multinational brands continue to lead surface care in Saudi Arabia

PROSPECTS AND OPPORTUNITIES

Further focus on promotions to drive volumes

Stronger potential for local brands and private label in the future

Players to continue to address rising consumer awareness of hygiene in the home

CATEGORY DATA

Table 66 Sales of Surface Care by Category: Value 2018-2023

Table 67 Sales of Surface Care by Category: % Value Growth 2018-2023

Table 68 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 69 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 70 NBO Company Shares of Surface Care: % Value 2019-2023

Table 71 LBN Brand Shares of Surface Care: % Value 2020-2023

Table 72 NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 73 LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023

Table 74 Forecast Sales of Surface Care by Category: Value 2023-2028

Table 75 □Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

BLEACH IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Competitive price, multifunctionality and heightened hygiene awareness sustain demand for bleach

Bleach retains loyal consumer base, driven by older generation

Clorox retains its dominance in bleach

PROSPECTS AND OPPORTUNITIES

Despite positive outlook, eco concerns and competition will remain relevant

Players could look to add value through scented and non-chlorine bleach

CATEGORY DATA

Table 34 Sales of Bleach: Value 2018-2023

Table 35 Sales of Bleach: % Value Growth 2018-2023

Table 36 NBO Company Shares of Bleach: % Value 2019-2023

Table 37 LBN Brand Shares of Bleach: % Value 2020-2023

Table 38 Forecast Sales of Bleach: Value 2023-2028

Table 39 Forecast Sales of Bleach: % Value Growth 2023-2028

TOILET CARE IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet liquids/foam remains most popular format, supported by convenience, ease of use and competitive pricing

Rim blocks continues to gain ground due to multiple benefits

Harpic is dominant brand, supported by wide product portfolio and attractive promotions

PROSPECTS AND OPPORTUNITIES

Rising demand likely to result in greater competition and innovation efforts

Local brands may have more of an opportunity than private label to penetrate category

Price promotions through retailers set to dampen value sales, while e-commerce offers further growth potential

CATEGORY DATA

Table 40 Sales of Toilet Care by Category: Value 2018-2023

Table 41 Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 42 NBO Company Shares of Toilet Care: % Value 2019-2023

Table 43 LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 44 Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 45 Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

POLISHES IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Improving demand for shoe polish, driven by mobility and expanding workforce

Increasing competition from more convenient and sophisticated floor cleaners

Price promotions remain relevant to drive up volumes

PROSPECTS AND OPPORTUNITIES

Full recovery for shoe polish, despite increasingly casual dress codes

Lack of innovation will challenge potential for stronger value growth

Floor polish will be one of the weaker performers due to ongoing competition

CATEGORY DATA

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 46 Sales of Polishes by Category: Value 2018-2023

Table 47 Sales of Polishes by Category: % Value Growth 2018-2023

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

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

Table 50 Forecast Sales of Polishes by Category: Value 2023-2028

Table 51 Forecast Sales of Polishes by Category: % Value Growth 2023-2028

AIR CARE IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air care struggles to recover from pandemic slump due to non-essential nature

Spray/aerosol remains dominant format of air care, driven by accessible pricing

International brands continue to dominate as new product development remains key

PROSPECTS AND OPPORTUNITIES

Positive outlook for air care as players look to innovate to drive up interest and value

Consumers expected to shift towards products with more natural image

E-commerce can help smaller, local brands gain greater visibility

CATEGORY DATA

Table 52 Sales of Air Care by Category: Value 2018-2023

Table 53 Sales of Air Care by Category: % Value Growth 2018-2023

Table 54 Sales of Air Care by Fragrance: Value Ranking 2021-2023

Table 55 NBO Company Shares of Air Care: % Value 2019-2023

Table 56 LBN Brand Shares of Air Care: % Value 2020-2023

Table 57 Forecast Sales of Air Care by Category: Value 2023-2028

Table 58 Forecast Sales of Air Care by Category: % Value Growth 2023-2028

HOME INSECTICIDES IN SAUDI ARABIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand remains high due to proliferation of insects in Saudi Arabia

Odourless options and spray format remain most demanded

Raid and Pif Paf remain the clear leaders as players look to expand their offer

PROSPECTS AND OPPORTUNITIES

Positive outlook to be driven by affordable spray/aerosol format

Regulations will make it challenging for smaller brands or private label to strongly penetrate the category

Health concerns may encourage development of more natural formulations

CATEGORY DATA

Table 59 Sales of Home Insecticides by Category: Value 2018-2023

Table 60 Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 61 Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023

Table 62 NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 63 LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 64 Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 65 Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Home Care in Saudi Arabia

Market Direction | 2024-02-21 | 65 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€2675.00
	Multiple User License (1 Site)	€5350.00
	Multiple User License (Global)	€8025.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-10"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com