

Home Care in Estonia

Market Direction | 2025-02-06 | 51 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

Volume sales of household care are experiencing further decline in 2024. Price inflation in Estonia continues to rise, supported by the VAT increase at the beginning of the year. Coupled with the overall sluggish performance of the local economy, this price hike has impacted consumer confidence in the country. To encourage sales and maintain their positions, home care players have significantly increased promotions in the year, reaching levels seen in neighbouring markets. Despite the challenges...

Euromonitor International's Home Care in Estonia 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 2029 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 Estonia
Euromonitor International
February 2025

List Of Contents And Tables

HOME CARE IN ESTONIA

EXECUTIVE SUMMARY

Home care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for home care?

MARKET INDICATORS

Table 1 Households 2019-2024

MARKET DATA

Table 2 Sales of Home Care by Category: Value 2019-2024

Table 3 Sales of Home Care by Category: % Value Growth 2019-2024

Table 4 NBO Company Shares of Home Care: % Value 2020-2024

Table 5 LBN Brand Shares of Home Care: % Value 2021-2024

Table 6 Penetration of Private Label in Home Care by Category: % Value 2019-2024

Table 7 Distribution of Home Care by Format: % Value 2019-2024

Table 8 Distribution of Home Care by Format and Category: % Value 2024

Table 9 Forecast Sales of Home Care by Category: Value 2024-2029

Table 10 Forecast Sales of Home Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 Research Sources

LAUNDRY CARE IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation drives down volume sales in 2024

Perceived benefits of liquid products

Procter & Gamble and Henkel hold on to strong leads in 2024

PROSPECTS AND OPPORTUNITIES

Negative short-term perspective

Convenience trend to prevail

E-commerce to continue its growth trajectory

CATEGORY INDICATORS

Table 11 Household Possession of Washing Machines 2019-2024

CATEGORY DATA

Table 12 Sales of Laundry Care by Category: Value 2019-2024

Table 13 Sales of Laundry Care by Category: % Value Growth 2019-2024

Table 14 Sales of Laundry Aids by Category: Value 2019-2024

Table 15 Sales of Laundry Aids by Category: % Value Growth 2019-2024

Table 16 Sales of Laundry Detergents by Category: Value 2019-2024

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 2019-2024

Table 18 NBO Company Shares of Laundry Care: % Value 2020-2024

Table 19 LBN Brand Shares of Laundry Care: % Value 2021-2024

Table 20 □NBO Company Shares of Laundry Aids: % Value 2020-2024

Table 21 □LBN Brand Shares of Laundry Aids: % Value 2021-2024

Table 22 □NBO Company Shares of Laundry Detergents: % Value 2020-2024

Table 23 □LBN Brand Shares of Laundry Detergents: % Value 2021-2024

Table 24 □Forecast Sales of Laundry Care by Category: Value 2024-2029

Table 25 □Forecast Sales of Laundry Care by Category: % Value Growth 2024-2029

DISHWASHING IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Shift to automatic dishwashing drives growth in 2024

Increasing consumer education boosts demand for dishwashing additives

International players maintain their lead in 2024

PROSPECTS AND OPPORTUNITIES

Rising popularity of automatic dishwashing

Mayeri: a brand to watch

Deep discounts to attract price-sensitive consumers

CATEGORY INDICATORS

Table 26 Household Possession of Dishwashers 2019-2024

CATEGORY DATA

Table 27 Sales of Dishwashing by Category: Value 2019-2024

Table 28 Sales of Dishwashing by Category: % Value Growth 2019-2024

Table 29 NBO Company Shares of Dishwashing: % Value 2020-2024

Table 30 LBN Brand Shares of Dishwashing: % Value 2021-2024

Table 31 Forecast Sales of Dishwashing by Category: Value 2024-2029

Table 32 Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

SURFACE CARE IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stagnating sales with rising prices and price sensitivity

Stable window cleaners and drain openers

Waning popularity of home care disinfectants and scouring agents

PROSPECTS AND OPPORTUNITIES

Consumption impacted by further VAT increases in 2025

Environmentally-friendly products gain traction

Local brand popularity

CATEGORY DATA

Table 33 Sales of Surface Care by Category: Value 2019-2024

Table 34 Sales of Surface Care by Category: % Value Growth 2019-2024

Table 35 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024

Table 36 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024

Table 37 NBO Company Shares of Surface Care: % Value 2020-2024

Table 38 LBN Brand Shares of Surface Care: % Value 2021-2024

Table 39 Forecast Sales of Surface Care by Category: Value 2024-2029

Table 40 Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

BLEACH IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Further decline for 'old fashioned' bleach

Reduced appeal despite its low cost

Procter & Gamble's Ace dominates with little competition

PROSPECTS AND OPPORTUNITIES

Further decline as consumers switch to alternative products

Waning presence in retail stores

Ace will maintain its dominance

CATEGORY DATA

Table 41 Sales of Bleach: Value 2019-2024

Table 42 Sales of Bleach: % Value Growth 2019-2024

Table 43 NBO Company Shares of Bleach: % Value 2020-2024

Table 44 LBN Brand Shares of Bleach: % Value 2021-2024

Table 45 Forecast Sales of Bleach: Value 2024-2029

Table 46 Forecast Sales of Bleach: % Value Growth 2024-2029

TOILET CARE IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stability in a saturated market

Toilet liquids/foam remain the most popular product

Power duo: Bref and Domestos

PROSPECTS AND OPPORTUNITIES

Marginal growth of a well-established market

Waning presence of rim liquids as players focus on blocks

Potential development of greener toilet care

CATEGORY DATA

Table 47 Sales of Toilet Care by Category: Value 2019-2024

Table 48 Sales of Toilet Care by Category: % Value Growth 2019-2024

Table 49 NBO Company Shares of Toilet Care: % Value 2020-2024

Table 50 LBN Brand Shares of Toilet Care: % Value 2021-2024

Table 51 Forecast Sales of Toilet Care by Category: Value 2024-2029

Table 52 Forecast Sales of Toilet Care by Category: % Value Growth 2024-2029

POLISHES IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Decline driven by lifestyle and fashion changes

Kiwi withdrawal due to declining sales

Ritico continues to lead in 2024

PROSPECTS AND OPPORTUNITIES

Decline set to continue

Furniture and metal polishes increasingly scarce

Shoe polish may become more premium

CATEGORY DATA

Table 53 Sales of Polishes by Category: Value 2019-2024

Table 54 Sales of Polishes by Category: % Value Growth 2019-2024

Table 55 NBO Company Shares of Polishes: % Value 2020-2024

Table 56 LBN Brand Shares of Polishes: % Value 2021-2024

Table 57 Forecast Sales of Polishes by Category: Value 2024-2029

Table 58 Forecast Sales of Polishes by Category: % Value Growth 2024-2029

AIR CARE IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Air care in demand in 2024

Spray/aerosol air fresheners lead due to their affordability and convenience

Air Wick maintains its lead in 2024

PROSPECTS AND OPPORTUNITIES

Further moderate growth expected

Car air fresheners impacted by fewer smokers

Challenge of price increases and environmental concerns

CATEGORY DATA

Table 59 Sales of Air Care by Category: Value 2019-2024

Table 60 Sales of Air Care by Category: % Value Growth 2019-2024

Table 61 NBO Company Shares of Air Care: % Value 2020-2024

Table 62 LBN Brand Shares of Air Care: % Value 2021-2024

Table 63 Forecast Sales of Air Care by Category: Value 2024-2029

Table 64 Forecast Sales of Air Care by Category: % Value Growth 2024-2029

HOME INSECTICIDES IN ESTONIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Further growth in 2024, especially for convenient and effective insecticide baits

Spray/aerosols insecticides remain the most popular format

SC Johnson maintains its lead with extensive marketing

PROSPECTS AND OPPORTUNITIES

Performance highly dependent on weather

Lack of innovation dampens sales

Rising demand for greener home insecticides

CATEGORY DATA

Table 65 Sales of Home Insecticides by Category: Value 2019-2024

Table 66 Sales of Home Insecticides by Category: % Value Growth 2019-2024

Table 67 NBO Company Shares of Home Insecticides: % Value 2020-2024

Table 68 LBN Brand Shares of Home Insecticides: % Value 2021-2024

Table 69 Forecast Sales of Home Insecticides by Category: Value 2024-2029

Table 70 Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

Home Care in Estonia

Market Direction | 2025-02-06 | 51 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* | Phone* | |
| First Name* | Last Name* | |
| Job title* | | |
| Company Name* | EU Vat / Tax ID / NIP number* | |
| Address* | City* | |
| Zip Code* | Country* | |
| | Date | 2026-02-11 |
| | Signature | |

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com