

Home Care in Italy

February 2025

Table of Contents

Home Care in Italy

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

Air Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Focus on indoor air quality helps sustain demand for air care despite the challenging economic situation Instant release products show mixed results Drugstores and e-commerce thriving thanks to wide product offer while global players continue to dominate sales

PROSPECTS AND OPPORTUNITIES

Air care players expected to focus on the wellbeing market while also looking to increase their visibility in stores and online Air care faces new challenges and opportunities as consumers look to keep their home environment as pleasant as possible Air care could undergo a period of polarisation with designer brands eyeing the market while private label players are also looking to expand

CATEGORY DATA

- Table 11 Sales of Air Care by Category: Value 2019-2024
- Table 12 Sales of Air Care by Category: % Value Growth 2019-2024
- Table 13 Sales of Air Care by Fragrance: Value Ranking 2022-2024
- Table 14 NBO Company Shares of Air Care: % Value 2020-2024
- Table 15 LBN Brand Shares of Air Care: % Value 2021-2024
- Table 16 Forecast Sales of Air Care by Category: Value 2024-2029
- Table 17 Forecast Sales of Air Care by Category: % Value Growth 2024-2029

Bleach in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Bleach sales under pressure due to increasingly negative perceptions of the category Ace remains on top but faces mounting competition from private label Bleach tabs receive growing interest

PROSPECTS AND OPPORTUNITIES

Rising pet population presents growth opportunities for bleach Using bleach outdoors could open up potential new areas for growth Private label expected to make further gains but bleach faces a bleak future

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2019-2024Table 19 - Sales of Bleach: % Value Growth 2019-2024Table 20 - NBO Company Shares of Bleach: % Value 2020-2024Table 21 - LBN Brand Shares of Bleach: % Value 2021-2024Table 22 - Forecast Sales of Bleach: Value 2024-2029Table 23 - Forecast Sales of Bleach: % Value Growth 2024-2029

Dishwashing in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

All-in-one solutions welcomed while private label sales benefit from the challenging economic environment Automatic dishwashing benefits from new product development and increased sales of dishwashers Deco aiming for a fairer world with products that are kinder to the environment

PROSPECTS AND OPPORTUNITIES

Direct selling losing relevance as e-commerce comes to the fore New technology and advertising will be key in encouraging consumers to switch to using dishwashers Brands from adjacent industries venturing into dishwashing but established global players likely to retain their lead

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2019-2024

CATEGORY DATA

- Table 25 Sales of Dishwashing by Category: Value 2019-2024
- Table 26 Sales of Dishwashing by Category: % Value Growth 2019-2024
- Table 27 NBO Company Shares of Dishwashing: % Value 2020-2024
- Table 28 LBN Brand Shares of Dishwashing: % Value 2021-2024
- Table 29 Forecast Sales of Dishwashing by Category: Value 2024-2029
- Table 30 Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

Home Insecticides in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of moth proofers rise sharply while sales of electric insecticides benefit from efforts to tackle insect infestations Spray/aerosol insecticides remain popular but environmental concerns put a dent in the category's sales SC Johnson and Henkel retain a stronghold over sales of home insecticides with trusted brands

PROSPECTS AND OPPORTUNITIES

Home insecticides expected to face increased competition from outside the category Insecticide coils rapidly falling out of fashion in the war on mosquitoes Mosquitoes present a real threat to health as climate change takes its toll

CATEGORY DATA

- Table 31 Sales of Home Insecticides by Category: Value 2019-2024
- Table 32 Sales of Home Insecticides by Category: % Value Growth 2019-2024
- Table 33 Sales of Spray/Aerosol Insecticides by Type: % Value 2019-2024
- Table 34 NBO Company Shares of Home Insecticides: % Value 2020-2024
- Table 35 LBN Brand Shares of Home Insecticides: % Value 2021-2024
- Table 36 Forecast Sales of Home Insecticides by Category: Value 2024-2029
- Table 37 Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

Laundry Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

More premium home laundry appliances in the market thanks to government stimulus programme Colour safe laundry bleach has become a staple but financial pressures limit demand for some other types of laundry aids Consumers looking to increase the lifespan of their apparel as sustainability concerns grow

PROSPECTS AND OPPORTUNITIES

Consumers looking for greater convenience Packaging coming under the microscope as sustainability concerns grow Laundry care players could tap into the wellness trend

CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2019-2024

CATEGORY DATA

Table 39 - Sales of Laundry Care by Category: Value 2019-2024
Table 40 - Sales of Laundry Care by Category: % Value Growth 2019-2024
Table 41 - Sales of Laundry Aids by Category: Value 2019-2024
Table 42 - Sales of Laundry Aids by Category: % Value Growth 2019-2024
Table 43 - Sales of Laundry Detergents by Category: Value 2019-2024
Table 44 - Sales of Laundry Detergents by Category: % Value Growth 2019-2024
Table 45 - Sales of Laundry Detergents by Category: % Value Growth 2019-2024
Table 45 - Sales of In-Wash Spot and Stain Removers by Type: % Value Breakdown 2019-2024
Table 46 - NBO Company Shares of Laundry Care: % Value 2020-2024
Table 47 - LBN Brand Shares of Laundry Aids: % Value 2020-2024
Table 49 - LBN Brand Shares of Laundry Aids: % Value 2021-2024
Table 50 - NBO Company Shares of Laundry Detergents: % Value 2020-2024

Table 52 - Forecast Sales of Laundry Care by Category: Value 2024-2029

Table 53 - Forecast Sales of Laundry Care by Category: % Value Growth 2024-2029

Polishes in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Modern surfaces need less polishing E-commerce and drugstores benefit from offering a broader range of products Leather polishes get more appreciation at specialists' retailers stores

PROSPECTS AND OPPORTUNITIES

Shoe polish unlikely to bounce back despite signs of some positive trends Modern flooring requires less polishing Furniture polish can improve look of older products

CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2019-2024Table 55 - Sales of Polishes by Category: % Value Growth 2019-2024Table 56 - NBO Company Shares of Polishes: % Value 2020-2024Table 57 - LBN Brand Shares of Polishes: % Value 2021-2024Table 58 - Forecast Sales of Polishes by Category: Value 2024-2029Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2024-2029

Surface Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of home care disinfectants decline as financial pressures take their toll on sales Drain openers and scouring agents two bright spots in surface care as consumers focus on home maintenance Procter & Gamble extends its lead in surface care in 2024 but private label the big winner

PROSPECTS AND OPPORTUNITIES

Concerns around the environmental and health impact of using surface care likely to influence demand Improve quality and lifetime of surface care tabs, or make smaller packages Clean floors likely to remain a priority but economic and demographic factors likely to put pressure on overall sales of surface care

CATEGORY DATA

 Table 60 - Sales of Surface Care by Category: Value 2019-2024

- Table 61 Sales of Surface Care by Category: % Value Growth 2019-2024
- Table 62 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024
- Table 63 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024
- Table 64 NBO Company Shares of Surface Care: % Value 2020-2024
- Table 65 LBN Brand Shares of Surface Care: % Value 2021-2024
- Table 66 NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2024
- Table 67 LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2021-2024
- Table 68 Forecast Sales of Surface Care by Category: Value 2024-2029
- Table 69 Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

Toilet Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Limited editions bring new novelties to toilet care but price remains the key consumer concern Standard bleach seen as an effective and affordable replacement for toilet care Henkel streamlines its portfolio while WC Net loses share to private label

PROSPECTS AND OPPORTUNITIES

Fulcron could look to expand into toilet care but private label likely to remain the big winner More paper packaging welcomed as consumers focus more on the environment Promotional activity likely to remain low with players under pressure to give consumers more for their money

CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2019-2024

Table 71 - Sales of Toilet Care by Category: % Value Growth 2019-2024

Table 72 - NBO Company Shares of Toilet Care: % Value 2020-2024

 Table 73 - LBN Brand Shares of Toilet Care: % Value 2021-2024

 Table 74 - Forecast Sales of Toilet Care by Category: Value 2024-2029

Table 75 - Forecast Sales of Toilet Care by Category: % Value Growth 2024-2029

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.