

# Home Care in India

June 2025

Table of Contents

#### Home Care in India

#### 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 2019-2024Table 3 - Sales of Home Care by Category: % Value Growth 2019-2024Table 4 - NBO Company Shares of Home Care: % Value 2020-2024Table 5 - LBN Brand Shares of Home Care: % Value 2021-2024Table 6 - Penetration of Private Label in Home Care by Category: % Value 2019-2024Table 7 - Distribution of Home Care by Format: % Value 2019-2024Table 8 - Distribution of Home Care by Format and Category: % Value 2024Table 9 - Forecast Sales of Home Care by Category: Value 2024-2029Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2024-2029

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

#### Air Care in India

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Air care category maintains strong growth with sprays leading urban preference Dabur and Godrej dominate with innovations across home and car care formats Offline retail remains dominant, led by impulse-led grocery purchases

#### PROSPECTS AND OPPORTUNITIES

Premiumisation and fragrance customisation to shape the next wave of growth Sustainability and refillability rise as new differentiators Private label and digital-first brands challenge incumbents with smart pricing and targeting

#### 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

## Dishwashing in India

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Manual cleaning remains the norm as machine dishwashing adoption lags Unilever consolidates dominance while rivals invest in natural formulations Grocery retailers anchor distribution as offline channels dominate

#### PROSPECTS AND OPPORTUNITIES

Private label gains ground with value-driven positioning Health and sustainability concerns reshape ingredient preferences Premium formats gain traction among urban households

#### CATEGORY INDICATORS

Table 18 - Household Possession of Dishwashers 2019-2024

#### CATEGORY DATA

Table 19 - Sales of Dishwashing by Category: Value 2019-2024Table 20 - Sales of Dishwashing by Category: % Value Growth 2019-2024Table 21 - NBO Company Shares of Dishwashing: % Value 2020-2024Table 22 - LBN Brand Shares of Dishwashing: % Value 2021-2024Table 23 - Forecast Sales of Dishwashing by Category: Value 2024-2029Table 24 - Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

## Home Insecticides in India

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Electric formats drive consistent demand as usage expands beyond monsoon months Godrej maintains leadership through product diversification and natural-based innovation General trade dominates distribution with minimal e-commerce penetration

#### PROSPECTS AND OPPORTUNITIES

Natural and plant-based solutions gain favour among health-conscious households Rural market expansion driven by low-cost formats and micro-SKU innovations Smart devices and refill subscriptions tap into premium urban demand

#### CATEGORY DATA

- Table 25 Sales of Home Insecticides by Category: Value 2019-2024
- Table 26 Sales of Home Insecticides by Category: % Value Growth 2019-2024
- Table 27 Sales of Spray/Aerosol Insecticides by Type: % Value 2019-2024
- Table 28 NBO Company Shares of Home Insecticides: % Value 2020-2024
- Table 29 LBN Brand Shares of Home Insecticides: % Value 2021-2024
- Table 30 Forecast Sales of Home Insecticides by Category: Value 2024-2029
- Table 31 Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

#### Laundry Care in India

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Consumers increasingly shift from powders to liquid formats Key players invest in innovation to maintain market leadership Offline retail remains dominant despite digital gains

#### PROSPECTS AND OPPORTUNITIES

Sustainability takes centre stage in product and packaging innovation

Premiumisation creates room for specialised laundry solutions Rural markets offer untapped potential for liquid formats

#### CATEGORY INDICATORS

Table 32 - Household Possession of Washing Machines 2019-2024

#### CATEGORY DATA

Table 33 - Sales of Laundry Care by Category: Value 2019-2024 Table 34 - Sales of Laundry Care by Category: % Value Growth 2019-2024 Table 35 - Sales of Laundry Aids by Category: Value 2019-2024 Table 36 - Sales of Laundry Detergents by Category: % Value Growth 2019-2024 Table 37 - Sales of Laundry Detergents by Category: % Value Growth 2019-2024 Table 38 - Sales of Laundry Detergents by Category: % Value Growth 2019-2024 Table 39 - Sales of In-Wash Spot and Stain Removers by Type: % Value Breakdown 2019-2024 Table 40 - NBO Company Shares of Laundry Care: % Value 2020-2024 Table 41 - LBN Brand Shares of Laundry Care: % Value 2021-2024 Table 42 - NBO Company Shares of Laundry Aids: % Value 2020-2024 Table 43 - LBN Brand Shares of Laundry Aids: % Value 2021-2024 Table 43 - LBN Brand Shares of Laundry Detergents: % Value 2020-2024 Table 44 - NBO Company Shares of Laundry Detergents: % Value 2020-2024 Table 45 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024 Table 45 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024 Table 45 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024 Table 45 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024 Table 45 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024 Table 45 - LBN Brand Shares of Laundry Care by Category: Value 2024-2029 Table 46 - Forecast Sales of Laundry Care by Category: Value 2024-2029

#### Polishes in India

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Steady growth continues as evolving lifestyles reshape usage patterns Reckitt Benckiser leads with heritage brands amid limited innovation Traditional retail channels continue to dominate category sales

#### PROSPECTS AND OPPORTUNITIES

Declining leather shoe usage prompts need for category reinvention Demand rises for multipurpose and value-enhanced polish products Private label and eco-friendly offerings present disruptive potential

#### CATEGORY DATA

Table 48 - Sales of Polishes by Category: Value 2019-2024Table 49 - Sales of Polishes by Category: % Value Growth 2019-2024Table 50 - NBO Company Shares of Polishes: % Value 2020-2024Table 51 - LBN Brand Shares of Polishes: % Value 2021-2024Table 52 - Forecast Sales of Polishes by Category: Value 2024-2029Table 53 - Forecast Sales of Polishes by Category: % Value Growth 2024-2029

#### Surface Care in India

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Low brand loyalty persists due to functional overlap and price sensitivity Reckitt Benckiser leads through portfolio strength and constant innovation Grocery retailers retain dominance despite digital traction

#### PROSPECTS AND OPPORTUNITIES

Private label and value formats gain traction in cost-sensitive segments Fragrance becomes a core driver of product appeal and loyalty Multipurpose efficacy and premium experiences shape future innovation

#### CATEGORY DATA

Table 54 - Sales of Surface Care by Category: Value 2019-2024 Table 55 - Sales of Surface Care by Category: % Value Growth 2019-2024 Table 56 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024 Table 57 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024 Table 58 - NBO Company Shares of Surface Care: % Value 2020-2024 Table 59 - LBN Brand Shares of Surface Care: % Value 2021-2024 Table 60 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2024 Table 61 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2021-2024 Table 62 - Forecast Sales of Surface Care by Category: Value 2024-2029 Table 63 - Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

#### Toilet Care in India

### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Hygiene awareness boosts growth, but functionality remains the primary driver Reckitt Benckiser sustains dominance through Harpic's diversified product range Offline retail dominates distribution, led by neighbourhood grocery stores

#### PROSPECTS AND OPPORTUNITIES

Smaller pack sizes drive accessibility but limit premiumisation potential Government sanitation programmes unlock rural market potential Fragrance and ease-of-use shape the future of innovation

#### CATEGORY DATA

 Table 64 - Sales of Toilet Care by Category: Value 2019-2024

Table 65 - Sales of Toilet Care by Category: % Value Growth 2019-2024

Table 66 - NBO Company Shares of Toilet Care: % Value 2020-2024

 Table 67 - LBN Brand Shares of Toilet Care: % Value 2021-2024

 Table 68 - Forecast Sales of Toilet Care by Category: Value 2024-2029

Table 69 - 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-india/report.