



# Home Care in South Africa

February 2025

Table of Contents

## Home Care in South Africa

### 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 South Africa

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Mood-enhancing wellness products see increased popularity

Spray/aerosol air fresheners remains the format of choice

SC Johnson & Son leads with its Glade brand

### PROSPECTS AND OPPORTUNITIES

Working from home expected to increase demand for air care products

Spray/aerosol air fresheners will maintain its dominance

Promotions set to increase sales of air care products

### 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 South Africa

### KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Growth in demand for bleach remains stable in 2024  
Domestos retains its lead in bleach, but sees challenges  
Value offerings from brands support demand for bleach

## PROSPECTS AND OPPORTUNITIES

Stable but slower growth expected for bleach as inflation eases  
Private label set to continue to enjoy popularity due to lower prices  
Potential for spikes in sales if outbreaks of cholera recur

## CATEGORY DATA

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

## [Dishwashing in South Africa](#)

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Hand dishwashing continues to dominate  
Low dishwasher penetration rate hinders growth of automatic dishwashing  
Private label gains further share in hand dishwashing amid inflationary pressures

#### PROSPECTS AND OPPORTUNITIES

Affordability is expected to limit automatic dishwashing's penetration  
Refill sachets to offer greater value to consumers  
Sunlight's diversity will ensure it remains the leader

#### 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 South Africa](#)

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Demand for home insecticides remains stable  
Spray/aerosol insecticides remains dominant  
Tiger Consumer Brands continues to lead home insecticides

#### PROSPECTS AND OPPORTUNITIES

Desire for pest control will ensure home insecticides sees growth  
Chemicals associated with insecticide coils are raising concern amongst consumers

A continued consolidated landscape

## 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 South Africa

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Affordability challenges place pressure on laundry care

Increasing popularity of cold wash cycles as energy prices soar

Standard powder detergents remains popular

#### PROSPECTS AND OPPORTUNITIES

Further solid growth for laundry care over the forecast period

Demand for fabric softeners to stay strong as consumers buy mood-enhancing products

Private label offers further growth potential

### 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 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 Care: % Value 2021-2024

Table 48 - NBO Company 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 51 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024

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 South Africa

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Demand for polishes is suppressed by low consumer affordability

School children keep demand for shoe polishes stable

Mr Min and Kiwi dominate furniture polish and shoe polish respectively

#### PROSPECTS AND OPPORTUNITIES

Restricted consumer spending will put pressure on demand for polishes  
Corporate culture and dress codes will increasingly move away from formal wear  
Opportunity for share gain through bulk packaging

#### CATEGORY DATA

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

Table 55 - Sales of Polishes by Category: % Value Growth 2019-2024

Table 56 - NBO Company Shares of Polishes: % Value 2020-2024

Table 57 - LBN Brand Shares of Polishes: % Value 2021-2024

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

Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2024-2029

### Surface Care in South Africa

#### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Multi-purpose cleaners remains resilient in value terms in 2024  
Private label products remain popular amongst cash-strapped shoppers  
Consumers remain interested in fragrances

#### PROSPECTS AND OPPORTUNITIES

Bulk purchases set to drive growth for surface care  
Grocery delivery platforms will continue to provide shoppers with convenience  
Opportunities for task-specific surface care products despite the competition

#### 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 South Africa

#### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Hygiene awareness supports growth for toilet care  
Toilet liquids/foam shows slower growth in 2024  
Stable competitive landscape, with SC Johnson maintaining its lead

#### PROSPECTS AND OPPORTUNITIES

Toilet care expected to continue growing  
In-cistern devices and ITBs will struggle to achieve volume growth due to low consumer affordability  
Fragrance likely to be increasingly important

#### 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-south-africa/report](http://www.euromonitor.com/home-care-in-south-africa/report).