



# Home Care in Estonia

February 2024

Table of Contents

## Home Care in Estonia

### 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

## Air Care in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Liquid air fresheners sees volume sales increase by a fifth

Spray/aerosol air fresheners account for most volume sales

Reckitt Benckiser holds on to strong lead with Air Wick

#### PROSPECTS AND OPPORTUNITIES

Liquid air fresheners continues high growth trajectory

New launches to expand "other" air care

Environmental and health concerns impact offerings in air care

### CATEGORY DATA

Table 11 - Sales of Air Care by Category: Value 2018-2023

Table 12 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 13 - NBO Company Shares of Air Care: % Value 2019-2023

Table 14 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 15 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

## Bleach in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fall in volume sales for bleach  
Procter & Gamble retains dominance  
Bleach faces threat from alternative products such as surface and toilet care

#### PROSPECTS AND OPPORTUNITIES

Bleach registers further volume decline over forecast period  
Older consumer base remains loyal  
Ace continues to dominate competitive landscape

#### CATEGORY DATA

Table 17 - Sales of Bleach: Value 2018-2023  
Table 18 - Sales of Bleach: % Value Growth 2018-2023  
Table 19 - NBO Company Shares of Bleach: % Value 2019-2023  
Table 20 - LBN Brand Shares of Bleach: % Value 2020-2023  
Table 21 - Forecast Sales of Bleach: Value 2023-2028  
Table 22 - Forecast Sales of Bleach: % Value Growth 2023-2028

### Dishwashing in Estonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Automatic dishwashing powders register highest volume growth, due to affordability  
Reduced purchasing power drove volume growth in hand dishwashing  
Reckitt Benckiser continues to lead

#### PROSPECTS AND OPPORTUNITIES

Further growth in automatic dishwashing  
Automatic dishwashing powders registers highest volume growth  
Consumers increasingly look for eco-friendly products

#### CATEGORY INDICATORS

Table 23 - Household Possession of Dishwashers 2017-2022

#### CATEGORY DATA

Table 24 - Sales of Dishwashing by Category: Value 2018-2023  
Table 25 - Sales of Dishwashing by Category: % Value Growth 2018-2023  
Table 26 - NBO Company Shares of Dishwashing: % Value 2019-2023  
Table 27 - LBN Brand Shares of Dishwashing: % Value 2020-2023  
Table 28 - Forecast Sales of Dishwashing by Category: Value 2023-2028  
Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

### Home Insecticides in Estonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Insecticide baits register highest volume growth  
Spray/aerosols insecticides continue to be most popular format  
Kapo passes out Raid as most popular brand

#### PROSPECTS AND OPPORTUNITIES

Insecticide baits continue high growth trajectory  
Fall in volume sales for electric insecticides  
More demand for greener home insecticides over forecast period

## CATEGORY DATA

Table 30 - Sales of Home Insecticides by Category: Value 2018-2023

Table 31 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 33 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 34 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 35 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

## Laundry Care in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Muted constant value and volume growth

Colour safe laundry bleach performs well

Procter & Gamble and Henkel hold on to strong leads

#### PROSPECTS AND OPPORTUNITIES

Liquid tablet detergents register highest growth

E-commerce continues high growth trajectory

Lidl poised to emerge as serious competitor

### CATEGORY INDICATORS

Table 36 - Household Possession of Washing Machines 2018-2023

## CATEGORY DATA

Table 37 - Sales of Laundry Care by Category: Value 2018-2023

Table 38 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 39 - Sales of Laundry Aids by Category: Value 2018-2023

Table 40 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 41 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 42 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 43 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 44 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 45 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 46 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 47 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 48 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 49 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 50 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

## Polishes in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Marginal volume growth in polishes in 2023

Ritico continues to lead

Surface care products pose increasing threat

#### PROSPECTS AND OPPORTUNITIES

Further fall in constant value sales over forecast period

Little innovation as other more flexible cleaning products gain value share

Lidl poised to emerge as significant competitor

## CATEGORY DATA

Table 51 - Sales of Polishes by Category: Value 2018-2023

Table 52 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Polishes: % Value 2019-2023

Table 54 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 55 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 56 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

## Surface Care in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Multi-purpose cleaners and descalers perform strongly

Colgate-Palmolive continues to lead surface care

New product development focuses on improved formulas and convenient packaging

### PROSPECTS AND OPPORTUNITIES

Increased shift to specialised cleaners

Lidl poised to emerge as serious competitor

Gradual emergence of greener brands in surface care

## CATEGORY DATA

Table 57 - Sales of Surface Care by Category: Value 2018-2023

Table 58 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 59 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 60 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 61 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 62 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 63 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 64 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

## Toilet Care in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Toilet liquids/foam still the most popular product

Henkel continues to have strong lead

Price competition remains fierce in toilet care

### PROSPECTS AND OPPORTUNITIES

Existing dynamics continue over forecast period

Lidl poised to emerge as serious competitor

Further development of greener toilet care

## CATEGORY DATA

Table 65 - Sales of Toilet Care by Category: Value 2018-2023

Table 66 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 67 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 68 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 69 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 70 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

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