

Home Care in Bolivia

February 2025

Table of Contents

Home Care in Bolivia

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 Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Significant price rises dampen volume sales

Reduction in illicit sales

Reconfiguration of landscape, due to price hikes

PROSPECTS AND OPPORTUNITIES

Emerging brands gain value share over forecast period

More affordable brands in electric air fresheners boost growth

New product launches over forecast period

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

Table 14 - LBN Brand Shares of Air Care: % Value 2021-2024

Table 15 - Forecast Sales of Air Care by Category: Value 2024-2029

Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2024-2029

Bleach in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Minimal volume growth in 2024

Narrow profit margins see some brands withdraw

Some differentiation in bleach

PROSPECTS AND OPPORTUNITIES

X5 brands benefits from reduced smuggling

Bleach faces threat from alternative products such as surface and toilet care

Continuing demand for bleach

CATEGORY DATA

Table 17 - Sales of Bleach: Value 2019-2024

Table 18 - Sales of Bleach: % Value Growth 2019-2024

Table 19 - NBO Company Shares of Bleach: % Value 2020-2024

Table 20 - LBN Brand Shares of Bleach: % Value 2021-2024

Table 21 - Forecast Sales of Bleach: Value 2024-2029

Table 22 - Forecast Sales of Bleach: % Value Growth 2024-2029

Dishwashing in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Healthy volume growth in essential home care product

Relaunch of Ola brand, with lower price

Venado and Luri gain significant value share

PROSPECTS AND OPPORTUNITIES

Higher volume growth for automatic dishwashing, as well as more premium offerings in hand dishwashing

Fragrances key differentiator in hand dishwashing

Increasing focus on sustainability

CATEGORY INDICATORS

Table 23 - Household Possession of Dishwashers 2019-2024

CATEGORY DATA

Table 24 - Sales of Dishwashing by Category: Value 2019-2024

Table 25 - Sales of Dishwashing by Category: % Value Growth 2019-2024

Table 26 - NBO Company Shares of Dishwashing: % Value 2020-2024

Table 27 - LBN Brand Shares of Dishwashing: % Value 2021-2024

Table 28 - Forecast Sales of Dishwashing by Category: Value 2024-2029

Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

Home Insecticides in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Local brands make some gains

Boost for imported brands as illicit sales fall

Spray/aerosol insecticides still most popular format

PROSPECTS AND OPPORTUNITIES

Further stable growth projected for home insecticides

Local players gain further value share

More demand for greener home insecticides over forecast period

CATEGORY DATA

- Table 30 Sales of Home Insecticides by Category: Value 2019-2024
- Table 31 Sales of Home Insecticides by Category: % Value Growth 2019-2024
- Table 32 NBO Company Shares of Home Insecticides: % Value 2020-2024
- Table 33 LBN Brand Shares of Home Insecticides: % Value 2021-2024
- Table 34 Forecast Sales of Home Insecticides by Category: Value 2024-2029
- Table 35 Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

Laundry Care in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Modest volume growth in 2024 Leader Aceite launches several new products Unilever looks to increase value share

PROSPECTS AND OPPORTUNITIES

Further fall in illicit sales Larger pack sizes popular Little focus on less popular offerings

CATEGORY INDICATORS

Table 36 - Household Possession of Washing Machines 2019-2024

CATEGORY DATA

- Table 37 Sales of Laundry Care by Category: Value 2019-2024
- Table 38 Sales of Laundry Care by Category: % Value Growth 2019-2024
- Table 39 Sales of Laundry Aids by Category: Value 2019-2024
- Table 40 Sales of Laundry Aids by Category: % Value Growth 2019-2024
- Table 41 Sales of Laundry Detergents by Category: Value 2019-2024
- Table 42 Sales of Laundry Detergents by Category: % Value Growth 2019-2024
- Table 43 NBO Company Shares of Laundry Care: % Value 2020-2024
- Table 44 LBN Brand Shares of Laundry Care: % Value 2021-2024
- Table 45 NBO Company Shares of Laundry Aids: % Value 2020-2024
- Table 46 LBN Brand Shares of Laundry Aids: % Value 2021-2024
- Table 47 NBO Company Shares of Laundry Detergents: % Value 2020-2024
- Table 48 LBN Brand Shares of Laundry Detergents: % Value 2021-2024
- Table 49 Forecast Sales of Laundry Care by Category: Value 2024-2029
- Table 50 Forecast Sales of Laundry Care by Category: % Value Growth 2024-2029

Polishes in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Higher price riser for metal and shoe polishes
Multi Internacional maintains its lead
Local brands making an impact

PROSPECTS AND OPPORTUNITIES

Emerging shoe polish brand Santiago likely to gain value share Locally manufactured brands gain value share More flexible cleaning products pose a threat

CATEGORY DATA

- Table 51 Sales of Polishes by Category: Value 2019-2024
- Table 52 Sales of Polishes by Category: % Value Growth 2019-2024
- Table 53 NBO Company Shares of Polishes: % Value 2020-2024
- Table 54 LBN Brand Shares of Polishes: % Value 2021-2024
- Table 55 Forecast Sales of Polishes by Category: Value 2024-2029
- Table 56 Forecast Sales of Polishes by Category: % Value Growth 2024-2029

Surface Care in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Locally manufactured brands perform better

Unilever makes strategic adjustments to manage different trading conditions

Alicorp offers wide differentiated portfolio

PROSPECTS AND OPPORTUNITIES

Continuing demand for products with disinfectant properties

Multi-purpose cleaners will continue to shape surface care

Value for money still key driver of sales

CATEGORY DATA

- Table 57 Sales of Surface Care by Category: Value 2019-2024
- Table 58 Sales of Surface Care by Category: % Value Growth 2019-2024
- Table 59 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024
- Table 60 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024
- Table 61 NBO Company Shares of Surface Care: % Value 2020-2024
- Table 62 LBN Brand Shares of Surface Care: % Value 2021-2024
- Table 63 Forecast Sales of Surface Care by Category: Value 2024-2029
- Table 64 Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

Toilet Care in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lower volume growth, though still healthy in 2024

Some brands pull out and prioritise more profitable offerings

Price competition fierce in toilet care

PROSPECTS AND OPPORTUNITIES

Healthy constant value growth over forecast period

Continued differentiation to keep consumers engaged

Local brands innovate with larger, more cost-effective pack sizes

CATEGORY DATA

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

Table 66 - Sales of Toilet Care by Category: % Value Growth 2019-2024

Table 67 - NBO Company Shares of Toilet Care: % Value 2020-2024

Table 68 - LBN Brand Shares of Toilet Care: % Value 2021-2024

Table 69 - Forecast Sales of Toilet Care by Category: Value 2024-2029

Table 70 - 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-bolivia/report.