

Home Care in Greece

February 2025

Table of Contents

Home Care in Greece

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price drops fail to reignite interest in air care

Seasonality determines demand

Deflated market deters investors

PROSPECTS AND OPPORTUNITIES

Sustainability to affect developments

Limited edition fragrances could add value to air care

Seasonality likely to inform new fragrances with a focus on winter warmers

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price normalisation leads to declining value sales

Category maturity negatively impacts volume sales

Packaging under the spotlight of new product development

Lidl continues to gain share thanks to affordable prices

PROSPECTS AND OPPORTUNITIES

Lack of developments amidst low value growth potential

Sustainability could pose a threat to growth

Limited room for volume growth due to maturity

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hand dishwashing sales decline in 2024 despite strong investment in new product development

Dishwashing additives drives value growth in automatic dishwashing

Penetration of green products is on the rise

PROSPECTS AND OPPORTUNITIES

Positive prospects for automatic dishwashing

Fragrance and packaging likely to be at the heart of innovation

Pricing will continue to affect consumer purchasing decisions

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price hikes continue but warmer weather supports demand for home insecticides

MEC and dual use products proving popular in spray/aerosol insecticides

Warm weather patterns favour sales of home insecticides

PROSPECTS AND OPPORTUNITIES

Weather set to remain favourable to the performance of home insecticides

Private label unlikely to make significant inroads

Manufacturers expected to continue investing in home insecticides

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price per wash stabilises as the government intervenes Private label on the rise as incomes are squeezed

Green claims remain under the spotlight

PROSPECTS AND OPPORTUNITIES

Liquid detergents to remain the best performing format

Quick and cold wash formulations set to drive new product development and innovation

Consumer price sensitivity should continue to benefit private label sales

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Polishes continues on a downward spiral

Shoe polish remains the largest and most resilient category

Sarantis leads sales of polishes

PROSPECTS AND OPPORTUNITIES

Polishes faces a bleak future with further declines predicted

Fashion trends taking a toll on sales of shoe polish

Changes in consumer habits spells bad news for the future of polishes

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume sales on the path to recovery as the government introduces price regulation

Specialised products driving growth

Price drops hinder the growth of private label

PROSPECTS AND OPPORTUNITIES

Innovation likely to be focused on delivery format

Sustainability set to remain a key influence on the development of surface care

The shift to specialised products should open up new growth opportunities

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 Greece

KEY DATA FINDINGS

2024 DEVELOPMENTS

Maturity negatively affects the performance of ITBs

Competition with other home care products hinders the growth of toilet liquids/foam

Lack of innovation impedes the growth of toilet care but benefits private label

PROSPECTS AND OPPORTUNITIES

Maturity to remain the challenge

In-cistern devices set to benefit from home renovations

Fragrance likely to remain a key focus of new product development

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-greece/report.