

Home Care in China

February 2025

Table of Contents

Home Care in China

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Steady growth for air care, despite market pressures

Tackling the "stinky car" phenomenon with car air fresheners

Fragrance is a crucial factor for attracting consumers, with traditional Chinese scents increasingly popular

PROSPECTS AND OPPORTUNITIES

Car air fresheners expected to continue to drive growth in air care

Multifunctionality and affordability likely to be the future of air care products

Al-powered creation of new 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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Declining volume demand for bleach also leads to drop in value sales

Competitive landscape remains stable, with fewer new brands entering, and a lack of product innovation

The share of online purchases of bleach is increasing rapidly

PROSPECTS AND OPPORTUNITIES

Bleach expected to maintain flat sales following two years of decline

Multifunctional products may offer strong competition to bleach

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slow growth for hand dishwashing, while automatic dishwashing powders sustains stronger momentum

Liby continues to dominate hand dishwashing with its wide product portfolio

Strong brand reputation of Finish maintains its lead in automatic dishwashing

PROSPECTS AND OPPORTUNITIES

Further penetration of dishwashers likely to drive growth for automatic dishwashing

Rising awareness of hygiene and safety will ensure the popularity of products with natural ingredients

Targeting segmented consumer groups

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Continued decline for home insecticides in 2024

Natural, safe and smart are the main development trends in electric insecticides

Fragmented competitive landscape in home insecticides

PROSPECTS AND OPPORTUNITIES

Weak demand expected for home insecticides during the forecast period

Personal repellents may be a threat to growth for home insecticides

Lack of product innovation within home insecticides in the forecast period

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premiumisation slows amidst economic pressures

Rise of niche and specialised laundry care products

Explosive growth of social commerce, with the spotlight on Douyin

PROSPECTS AND OPPORTUNITIES

The high-stakes competition in detergent tablets

The rise of innovative retail partnerships and private label products

The interplay between home laundry appliances and laundry care products

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Continued decline in demand for polishes in 2024

Competitive landscape remains stable in polishes, with online brands leveraging interest-based e-commerce for further growth

A further share increase for retail e-commerce in polishes

PROSPECTS AND OPPORTUNITIES

Continued decline in demand expected for furniture polish and shoe polish

Demand for floor polish set to remain flat in the forecast period

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Surface care rebounds to growth in 2024, following decline in 2023

In addition to cleaning efficacy, added-value functions meet diverse consumer needs

Interest-based e-commerce maintains its growth momentum in 2024

PROSPECTS AND OPPORTUNITIES

Multifunctional, convenient, and fragranced products set to continue to gain traction

Diversified consumer demand expected to drive the segmentation of surface care products due to targeted cleaning needs

Shanghai Johnson maintains its lead in surface care due to a wide portfolio, and bundle sales

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hygiene awareness drives growth for toilet care

Fragrance continues to be a main trend in toilet care

Mr Muscle's wide offering and strong reputation maintains its lead in toilet care

PROSPECTS AND OPPORTUNITIES

In-cistern devices likely to continue its strong growth momentum

Slower growth for toilet liquids/foam, due to rising competition

Further penetration likely for retail e-commerce in the forecast period

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 focusing 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-china/report.