

Home Care in Guatemala

February 2024

Table of Contents

Home Care in Guatemala

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Healthy volume growth in 2023

SC Johnson maintains clear leadership position in concentrated landscape

SC Johnson launches new Glade Scented Gel Cube air freshener

PROSPECTS AND OPPORTUNITIES

Electric air fresheners register healthy volume growth over forecast period

Private label gains value share

New product launches over forecast period

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady demand for bleach

Local brands remain strong

Outbreak of dengue fever supports sales of bleach

PROSPECTS AND OPPORTUNITIES

Small local grocers continue to lead in bleach

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

Private label gains further value share

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Gradual shift from bar to cream/paste format

Colgate-Palmolive continues to dominate

Xedex brand expands into hand dishwashing

PROSPECTS AND OPPORTUNITIES

Cream/paste poised to become dominant format in hand dishwashing

Axion retains lead over the forecast period

Greener products out of reach for most consumers

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumer demand for home insecticides remains stable, despite higher prices

SC Johnson retains strong lead

Spray/aerosol insecticides still most popular format

PROSPECTS AND OPPORTUNITIES

Further growth projected for home insecticides

SC Johnson continues to dominate

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Modest volume growth in 2023

Launch of Suavitel Apple Freshness in liquid fabric softeners

Spot and stain removers perform strongly

PROSPECTS AND OPPORTUNITIES

Steady growth over forecast period

Bar detergents continue to dominate

Local brands and private label gain value share

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value sales driven by higher-income consumers

Picasa leads polishes with the Shinola shoe polish brand

Majority of retail polish sales are in modern retail channels

PROSPECTS AND OPPORTUNITIES

Local players retain lead

More flexible cleaning products pose a threat

Continued demand for shoe polish despite changing trends

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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Muted volume growth

Colgate-Palmolive launches Floral Sensation Fabuloso

New Xedex line of products launched in surface care

PROSPECTS AND OPPORTUNITIES

Colgate-Palmolive continues to lead

Other players also gain value share

Increased segmentation within 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 Guatemala

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet care affected by inflationary pressures

Multinationals continue to dominate

Higher prices limit growth opportunities in toilet care

PROSPECTS AND OPPORTUNITIES

Broader distribution needed to boost volume sales

Continued differentiation to keep consumers engaged

Potential for development of ecological 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-guatemala/report.