

Home Care in Egypt

February 2024

Table of Contents

Home Care in Egypt

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for air care sharply declines, driven by inflationary pressures

Local brands make gains despite overall falling demand for spray/aerosol format

Sales of local brands through e-commerce rise, despite overall drop in demand for air care

PROSPECTS AND OPPORTUNITIES

Affordability and variety of air care products will be growth drivers over forecast period

Emerging demand for natural toxin-free air care but low purchasing power will be a challenge

Stronger environmental focus could open the way for concentrated spray/aerosol air fresheners

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for bleach remains stable, supported by affordability and heightened hygiene awareness
Two brands dominate bleach, making it difficult for smaller players to enter
Bleach pouches start to lose popularity again

PROSPECTS AND OPPORTUNITIES

Further demand for bleach to be driven by conventional uses
E-commerce is expected to maintain limited contribution to bleach sales

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dominant hand dishwashing maintains growth momentum in 2023
Volume sales of automatic dishwashing plateau
E-commerce's rising penetration of dishwashing, albeit from a low base

PROSPECTS AND OPPORTUNITIES

Competition is expected to intensify for hand dishwashing
Efficiency and environmental factors to play larger roles
E-commerce set to gain further share of dishwashing over the forecast period

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales of home insecticides rise in tandem with population growth
Spray/aerosol format is most popular due to affordability and accessibility
Raid continues to dominate electric insecticides with limited competition

PROSPECTS AND OPPORTUNITIES

Urbanisation and growing insect population to stimulate sales of home insecticides
Insecticide coils offers strong growth potential despite rising safety concerns
Traditional stores and pharmacies expected to remain leading channels for home insecticides

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 - Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023

Table 33 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 34 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

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

Table 36 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Automatic detergents maintains demand, albeit with slower growth due to increasing prices

Sales volumes of powder detergents continue growing due to affordability

Sharp decline for fabric softeners due to impact of inflation on prices

PROSPECTS AND OPPORTUNITIES

Laundry care to continue growing over the forecast period

Concentrated format set to grow slowly due to lack of awareness and legislation

E-commerce's contribution to sales of laundry care set to continue growing

CATEGORY INDICATORS

Table 37 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

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

Table 39 - Sales of Laundry Care by Category: % Value Growth 2018-2023

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

Table 41 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

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

Table 43 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 44 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 45 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 46 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 47 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 48 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 49 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

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

Table 51 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

High inflation negatively impacts overall demand for polishes, with shoe polish the exception

Local brand retains leadership of shoe polish

Furniture care trend ensures furniture polish is second most popular in category

PROSPECTS AND OPPORTUNITIES

Overall demand for polishes set to marginally improve

Popularity of tiled floors and shift to economical alternatives to dampen demand for floor polish

E-commerce is expected to make limited contribution as distribution channel

CATEGORY DATA

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

Table 53 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 54 - NBO Company Shares of Polishes: % Value 2019-2023

Table 55 - LBN Brand Shares of Polishes: % Value 2020-2023

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

Table 57 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Surface care maintains demand despite rising prices due to hygiene awareness

Competition in multi-purpose cleaners is intensifying as consumers seek affordable options

Sales of surface care via e-commerce maintain positive momentum

PROSPECTS AND OPPORTUNITIES

Surface care set to maintain growth, driven by increasing hygiene awareness

Multi-purpose cleaners to benefit from practical, flexible, economy and affordability perceptions

Local brands set to focus on health and wellness claims with greater move towards natural alternatives

CATEGORY DATA

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

Table 59 - Sales of Surface Care by Category: % Value Growth 2018-2023

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

Table 61 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 62 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 63 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 64 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023

Table 65 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023

Table 66 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 67 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet care records sharp decline in demand due to price hikes and competition from alternative products

Toilet liquids/foam suffers fall as consumers shift to other home care products

E-commerce retains a limited presence in toilet care

PROSPECTS AND OPPORTUNITIES

Marginal retail volume growth to be driven by toilet liquids/foam

Manufacturers to invest in specific features and functions

E-commerce and social media to play more significant roles in toilet liquids/foam

CATEGORY DATA

Table 68 - Sales of Toilet Care by Category: Value 2018-2023

Table 69 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 70 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 71 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 72 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 73 - 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-egypt/report.