

# Home Care in Malaysia

February 2024

Table of Contents

## Home Care in Malaysia

### 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 Malaysia

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Car air fresheners seen as a necessity by car owners, which offers opportunities

Multifunctional air care products with insect repellent feature popular amongst locals

Locals' love of fragrance aids the growth of air care, with Little Joe standing out for its collaborations

### PROSPECTS AND OPPORTUNITIES

Natural, organic, and sustainable products likely to be on the rise

Air care products with appealing designs set to gain popularity

Rising popularity of wellness diffusers

### 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 - Sales of Air Care by Fragrance: Value Ranking 2021-2023

Table 14 - NBO Company Shares of Air Care: % Value 2019-2023

Table 15 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 16 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 17 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

## Bleach in Malaysia

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Volume demand weakens as consumers adapt to the new normal post-pandemic

Concerns about health and the environment hamper growth

Value deals and twin packs appeal to local consumers

## PROSPECTS AND OPPORTUNITIES

Demand from rural states and immigrants set to maintain stable volume sales

Awareness of and demand for natural, organic and sustainable products is on the rise, and likely to prevent growth

Convenient home care disinfectant in spray bottles will be a threat to growth

## CATEGORY DATA

Table 18 - Sales of Bleach: Value 2018-2023

Table 19 - Sales of Bleach: % Value Growth 2018-2023

Table 20 - NBO Company Shares of Bleach: % Value 2019-2023

Table 21 - LBN Brand Shares of Bleach: % Value 2020-2023

Table 22 - Forecast Sales of Bleach: Value 2023-2028

Table 23 - Forecast Sales of Bleach: % Value Growth 2023-2028

## Dishwashing in Malaysia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Growth in demand is limited, as consumers spend less time at home

Festival seasons and the strong home cooking culture in rural areas help maintain growth

Offline retailers the clear contributor to sales, while e-commerce is rising

### PROSPECTS AND OPPORTUNITIES

Affordable freestanding table-top dishwashers offer opportunities in automatic dishwashing

Food delivery services pose a significant threat to growth

Natural, organic, and sustainable products set to rise

## CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2017-2022

## CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2018-2023

Table 26 - Sales of Dishwashing by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Dishwashing: % Value 2019-2023

Table 28 - LBN Brand Shares of Dishwashing: % Value 2020-2023

Table 29 - Forecast Sales of Dishwashing by Category: Value 2023-2028

Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

## Home Insecticides in Malaysia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Growth in home insecticides as the battle against dengue continues

Dual function air care and insect repellent products popular amongst locals

Electric insecticides provide round the clock protection, but there are some concerns

### PROSPECTS AND OPPORTUNITIES

Non-toxic alternatives outside the category likely to limit growth for home insecticides

Opportunities through offering natural, organic and sustainable products

Continued growth expected for e-commerce

## CATEGORY DATA

Table 31 - Sales of Home Insecticides by Category: Value 2018-2023

Table 32 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 33 - Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023

Table 34 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 35 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

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

Table 37 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

## Laundry Care in Malaysia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Powder laundry detergents offer affordability in the midst of high living costs

Value deals and refills appeal to local consumers

Extensive list of new brands offering liquid tablet detergents in their portfolios

#### PROSPECTS AND OPPORTUNITIES

Laundry scent booster beads could be a threat to fabric softeners

Offline retailers dominate, but e-commerce is set to continue to rise

More brands to offer innovations, and natural and plant-based products

### CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2018-2023

## CATEGORY DATA

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

Table 40 - Sales of Laundry Care by Category: % Value Growth 2018-2023

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

Table 42 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

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

Table 44 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 45 - Sales of In-wash Spot and Stain Removers by Type: % Value Breakdown 2018-2023

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

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

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

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

Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 51 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 52 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 53 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

## Polishes in Malaysia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Minimalist trend to undermine demand for furniture polish

Established brands clear winners across categories

Offline the clear leader, but e-commerce continues to rise

#### PROSPECTS AND OPPORTUNITIES

Shift in consumer spending behaviour bad news for non-essential polishes  
Lack of innovation and new product development set to hamper growth  
Hybrid working and less formal work attire set to limit growth in shoe polish

#### CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2018-2023

Table 55 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 56 - NBO Company Shares of Polishes: % Value 2019-2023

Table 57 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 58 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

#### Surface Care in Malaysia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Hygiene awareness paves the way for spending on home care disinfectants, especially amongst younger consumers and parents  
Elevated food prices and high living costs underpin growth of multipurpose cleaners  
Value deals and refill packs appeal to local consumers

#### PROSPECTS AND OPPORTUNITIES

Local household brand Sun Jiang expands its portfolio with new wash and wax floor cleaner  
Growth in demand for floor cleaners specifically for wet and dry vacuum cleaners  
Electric mopping is an alternative, and could threaten sales of floor cleaners

#### CATEGORY DATA

Table 60 - Sales of Surface Care by Category: Value 2018-2023

Table 61 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 63 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 64 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 65 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 66 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023

Table 67 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023

Table 68 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 69 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

#### Toilet Care in Malaysia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Hygiene awareness paves the way for spending on toilet care products  
Offline retailers the clear main contributor to sales, while e-commerce continues to rise  
In-cistern devices provide round the clock disinfecting and cleaning with each flush

#### PROSPECTS AND OPPORTUNITIES

High living costs to undermine growth, as consumers are increasingly looking for multifunctionality  
Shift in spending behaviour to intensify in the forecast period  
Private label offers affordability in in-cistern devices

#### CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2018-2023

Table 71 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 72 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 73 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 74 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 75 - 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-malaysia/report](https://www.euromonitor.com/home-care-in-malaysia/report).