

Home Care in Nigeria

February 2024

Table of Contents

Home Care in Nigeria

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 Distribution of Home Care by Format: % Value 2018-2023
- Table 7 Distribution of Home Care by Format and Category: % Value 2023
- Table 8 Forecast Sales of Home Care by Category: Value 2023-2028
- Table 9 Forecast Sales of Home Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Affordable air care solutions continue to drive retail volume growth in 2023 Car air fresheners decline as car sales stall during a time of rising price points Air Wick maintains its lead despite losing share to affordable alternatives

PROSPECTS AND OPPORTUNITIES

Rising employment and ongoing affordability drives retail volume growth Domestic players become increasingly competitive, offering affordable prices The evolving retail industry is set to improve consumer awareness

CATEGORY DATA

Table 10 - Sales of Air Care by Category: Value 2018-2023

Table 11 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Air Care: % Value 2019-2023

Table 13 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 14 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 15 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

Bleach in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

The essential, multi-purpose nature of bleach drives strong retail value and volume growth

Competition from other home care products rises among higher-income consumers Hypo retains its lead with over half of the competitive landscape share

PROSPECTS AND OPPORTUNITIES

Ongoing retail volume and value growth driven by the multi-purpose qualities of bleach Hypo and Jik focus on innovation and price points to gain share

Economic recovery and the boost in e-commerce sales drives growth in bleach

CATEGORY DATA

Table 16 - Sales of Bleach: Value 2018-2023

Table 17 - Sales of Bleach: % Value Growth 2018-2023

Table 18 - NBO Company Shares of Bleach: % Value 2019-2023

Table 19 - LBN Brand Shares of Bleach: % Value 2020-2023

Table 20 - Forecast Sales of Bleach: Value 2023-2028

Table 21 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hand dishwashing drives growth as consumers eat at home to save costs. The migration to cheaper brands leads top players to lose market share. Lack of dishwashers leads to hand dishwashing dominating sales.

PROSPECTS AND OPPORTUNITIES

Major players innovate as many aim to recover share across the forecast period Growth for automatic dishwashing tablets, however, dishwasher ownership remains low Rising purchasing power and population growth support ongoing sales

CATEGORY INDICATORS

Table 22 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 23 - Sales of Dishwashing by Category: Value 2018-2023

Table 24 - Sales of Dishwashing by Category: % Value Growth 2018-2023

Table 25 - NBO Company Shares of Dishwashing: % Value 2019-2023

Table 26 - LBN Brand Shares of Dishwashing: % Value 2020-2023

Table 27 - Forecast Sales of Dishwashing by Category: Value 2023-2028

Table 28 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

Home Insecticides in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising prices lead to positive retail value growth, with home insecticides considered essential Major players lose volume sales as consumers opt for more affordable options

Reckitt Benckiser partners with Spar to raise awareness of Malaria

PROSPECTS AND OPPORTUNITIES

Positive growth due to affordable price points and multi-purpose offerings Consumers become increasingly concerned about toxic ingredients Traditional retailers drive sales through close proximity and affordable prices

CATEGORY DATA

- Table 29 Sales of Home Insecticides by Category: Value 2018-2023
- Table 30 Sales of Home Insecticides by Category: % Value Growth 2018-2023
- Table 31 Sales of Spray/Aerosol Insecticides by Type: % Value 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 Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volume growth for essentials such as bar soap and hand wash detergents Consumers seek affordable price points, driving growth in smaller pack sizes Eko Supreme Nigeria retains its lead, while Unilever records a loss

PROSPECTS AND OPPORTUNITIES

Lower prices and innovation to drive retail growth over the forecast period

Busier lifestyles aid sales of washing machines, boosting growth of standard powder detergents

Handwash detergents drive innovation while automatic detergents struggle

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 Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volume declines as consumers consider polish unessential Major players lose share to affordable options during rising inflation High importation costs lead to a lack of international players on shelves

PROSPECTS AND OPPORTUNITIES

Price stabilisation and the growing working population drive retail volume sales Potential for floor polish with the increasing use of tiles and modern floors International players return to shelves while e-commerce drives growth

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 Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Essential surface care products record positive volume growth despite rising prices
Leading brand Dettol launches hygiene initiatives to drive awareness across Nigeria
Consumers focus on preventative hygiene drives demand for home care disinfectants

PROSPECTS AND OPPORTUNITIES

Retail volume growth recovers, boosted by the popularity of multi-purpose cleaners Price remains the key factor in the purchasing decision for surface care Growth is set to be driven by the increasing availability of cheaper domestic brands

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 NBO Company Shares of Surface Care: % Value 2019-2023
- Table 60 LBN Brand Shares of Surface Care: % Value 2020-2023
- Table 61 Forecast Sales of Surface Care by Category: Value 2023-2028
- Table 62 Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toilet care benefits from being considered an essential cleaning product Government initiatives supports growth of toilet care through education Leading players focus on community programmes to drive awareness

PROSPECTS AND OPPORTUNITIES

Rising affordability and government initiatives support ongoing growth in toilet care Affordability makes toilet liquids/foams the most popular product Innovations focus on appealing scents and fragrance to boost value growth

CATEGORY DATA

- Table 63 Sales of Toilet Care by Category: Value 2018-2023
- Table 64 Sales of Toilet Care by Category: % Value Growth 2018-2023
- Table 65 NBO Company Shares of Toilet Care: % Value 2019-2023
- Table 66 LBN Brand Shares of Toilet Care: % Value 2020-2023
- Table 67 Forecast Sales of Toilet Care by Category: Value 2023-2028
- Table 68 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-nigeria/report.