

Home Care in Mexico

February 2024

Table of Contents

Home Care in Mexico

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Players launch different formats to segment the consumer base

Brands add value to their products to attract different consumer groups

Price attractiveness is important to consumers in a difficult economic situation

PROSPECTS AND OPPORTUNITIES

Stable volume demand in air care over the forecast period

Private label likely to play an increasingly important role

Millennials will be an important consumer group to target in Mexico

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth is maintained, but is hampered by the popularity of surface care products

New references contribute to growth in bleach

Cloralex maintains its lead, but private label plays an increasingly important role

PROSPECTS AND OPPORTUNITIES

Brands will need to emphasise customer education and eliminate stereotypes to maintain demand

Innovations likely to continue to be seen in bleach

New distribution channels will be in the spotlight

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Customers seek efficacy, as well as cost savings through products that last longer

Increasing usage occasions with new variants in hand dishwashing

Axion and Eficaz improve their positions through product development

PROSPECTS AND OPPORTUNITIES

Eco-friendly brands likely to attract consumers

Mexicans seem more willing to purchase and use dishwashers

Catering to Millennials will be important, as well as offering price promotions

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers continue to focus on hygiene in their living environment

Brands bet on natural ingredients and scents to differentiate and attract consumers

Brands focus on their efficacy against dengue-transmitting mosquitoes as cases rise

PROSPECTS AND OPPORTUNITIES

Innovation likely to come in the form of packaging improvements

Further eco-friendly brands likely to be launched and attract customers

High potential for retail 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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Scents and segmentation are the leading trends in laundry care in 2023

Concentrated formulae offer cost-saving, while delivering an eco-friendly approach

Brands bet on multipurpose products

PROSPECTS AND OPPORTUNITIES

Liquid detergents will be increasingly popular, but new formats are also set to emerge, including sheets

Sustainability likely to be a driving force in the forecast period

Private label will play an increasingly important role

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shoe polish maintains solid growth due to normalisation of consumers' lives

Increasing segmentation, with the offer of specialised products

E-commerce marketplaces sell new brands and increase price competition

PROSPECTS AND OPPORTUNITIES

Minimal volume growth expected in a mature category
Private label lines will have an increasingly important position on shelves
Eco-friendly brands set to attract customers

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Disinfectant loses strength as a claim, while wellbeing is increasingly important
Brands bet on multipurpose products and econopacks
Smaller players compete for space in a highly consolidated landscape

PROSPECTS AND OPPORTUNITIES

Continued volume growth expected, as hygiene remains important to consumers
Sustainability set to remain a trend in both products and packaging
New channels in the spotlight

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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued growth, although toilet care remains a small category due to competition
New scents and improved formulae deliver a better experience
SC Johnson and Reckitt Benckiser dominate, despite increasing competition

PROSPECTS AND OPPORTUNITIES

Stable but modest volume growth expected, due to competition from other home care categories
Access to new products online, which may move into store-based retailers
The need to cater to Millennials with sustainable products and social networking

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-mexico/report.