Household Cleaners Report 2020

Statista Consumer Market Outlook

December 2020

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Agenda

Household Cleaners is an important part of the Home & Laundry Care market

Market definition

- The Household Cleaners segment covers all consumables for cleaning of surfaces, windows and toilets.

- Special cleaning agents, such as beeswax, auxiliary products for cleaning such as mops and brooms, products sold in wholesale quantities and household cleaning services are not included.

- Household cleaning detergents are the second most important segment in the Home and Laundry Care market.

In scope

- Surface cleaners
- Floor care
- Toilet care
- Window cleaning products

Out of scope

- Polishes (for floor cleaning/care or furniture)
- Cleaning equipment (e.g. mops or cleaning cloths)
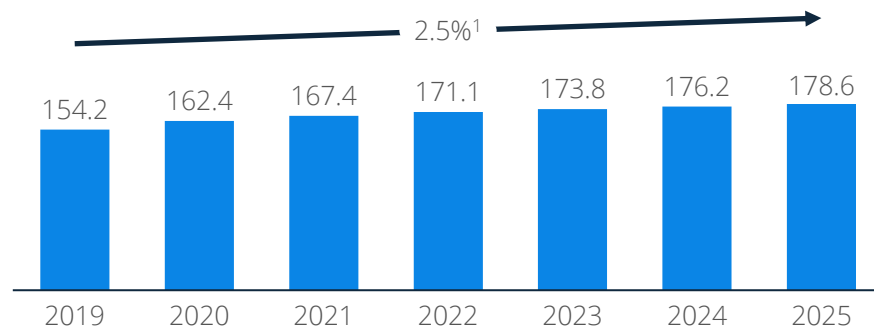- Professional products for bulk consumers (B2B)

Sources: Statista Consumer Market Outlook 2020

The Household Cleaners segment accounted for 20% of the Home & Laundry Care market revenue in 2019
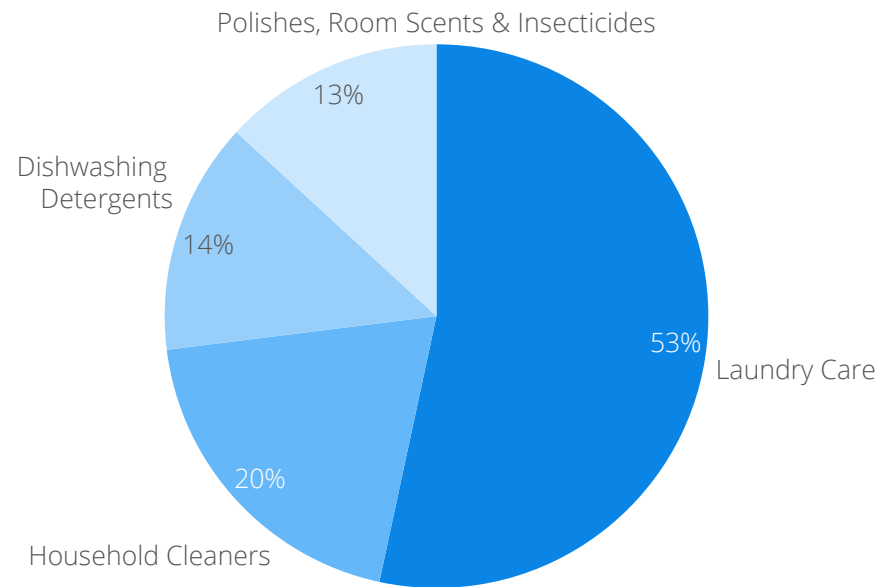
Market overview

Key takeaways

- In 2019, the Home & Laundry Care market generated a total revenue of US$154.2 billion worldwide.

- At 53%, Laundry Care was the largest segment of the Home & Laundry Care market with US$82.3 billion in revenues in 2019. The Household Cleaners segment had a market share of 20% and its revenue amounted to US$30.3 billion in 2019.

- Key players in the Home & Laundry Care market include Procter & Gamble Co., Unilever NV, L'Oréal SA, Henkel AG & Co. KGaA, and Reckitt Benckiser Group Plc.

Worldwide revenue share in 2019

Polishes, Room Scents & Insecticides 13%
Dishwashing Detergents 14%
Household Cleaners 20%
Laundry Care 53%

Worldwide Home & Laundry Care revenue in billion US$

2.5%[1]

2019	2020	2021	2022	2023	2024	2025
154.2	162.4	167.4	171.1	173.8	176.2	178.6

1: CAGR: Compound Annual Growth Rate / average growth rate per year
Sources: Statista Consumer Market Outlook 2020
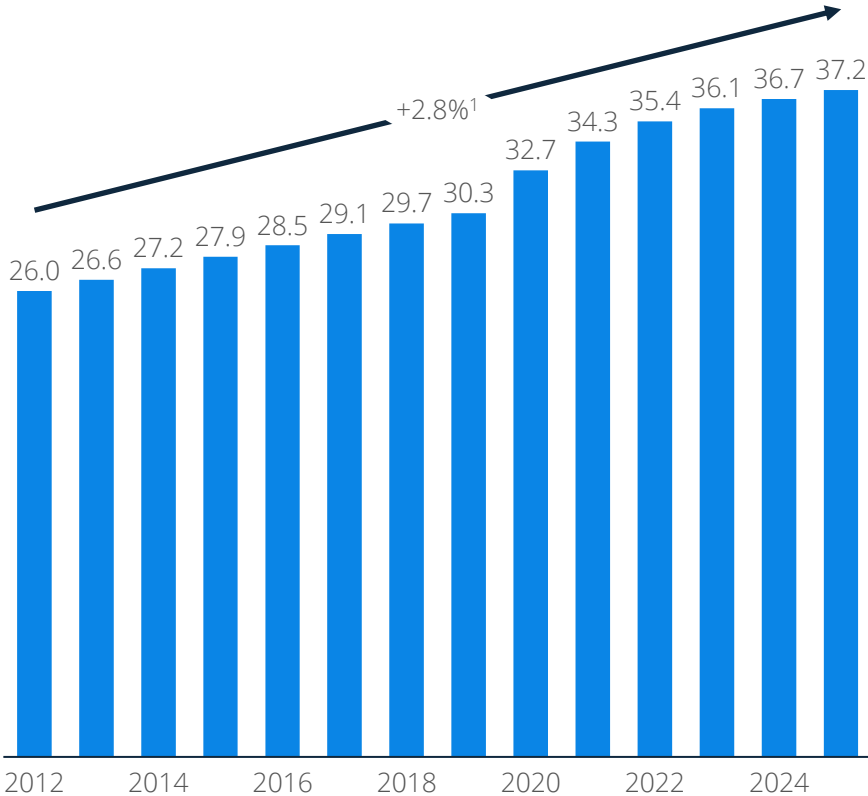
In 2019, worldwide Household Cleaners sales amounted to US$30.3 billion

Segment overview

Worldwide revenue in billion US$

Bar chart values (2012–2025):
26.0, 26.6, 27.2, 27.9, 28.5, 29.1, 29.7, 30.3, 32.7, 34.3, 35.4, 36.1, 36.7, 37.2

+2.8%[1]

Key takeaways

- The worldwide Household Cleaners revenue will increase at a CAGR[1] of 2.8% from 2012 to 2025.

- Due to COVID-19, the new 2020 forecast for the Household Cleaners segment is 6.0% higher than the original forecast.

- In the Household Cleaners segment, Switzerland (US$25.3) and Hong Kong (US$18.8) had the highest annual revenue per capita in 2019.
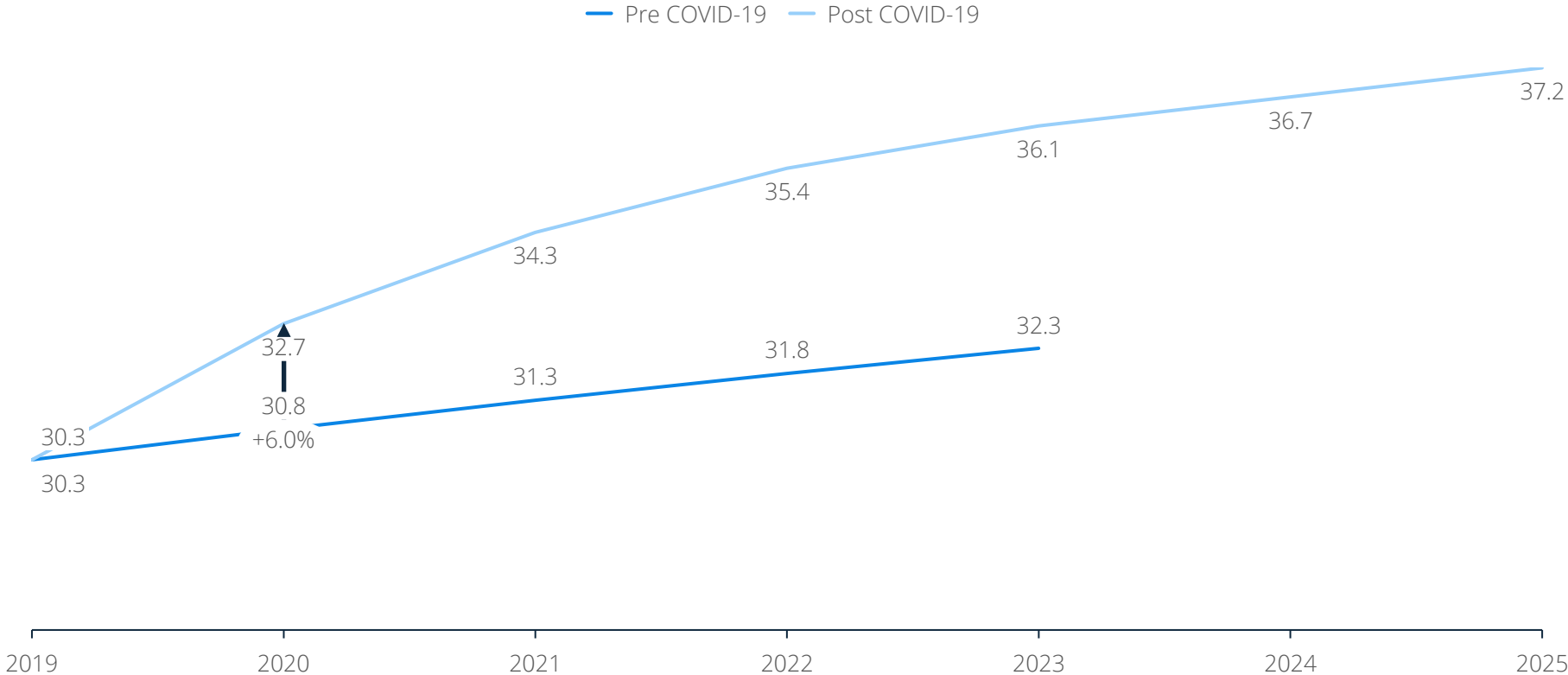
Revenue

US$30.3bn
in 2019

+2.8%
CAGR[1] 2012–2025

Due to COVID-19, the 2020 forecast for the Household Cleaners segment is 6.0% higher now

COVID-19 impact

Worldwide revenue in billion US$[1]

── Pre COVID-19   ── Post COVID-19

37.2

36.7

36.1

35.4

34.3

32.7

32.3

31.8

31.3

30.8

+6.0%

30.3

30.3

2019   2020   2021   2022   2023   2024   2025

Worldwide Household Cleaners sales will increase at a CAGR[1] of 3.5% from 2019 to 2025

Revenue and growth

Worldwide revenue in billion US$

+3.5%[1]

30.3

37.2

2019

2025

Procter & Gamble Co. had the highest total revenue of the top companies in Home & Laundry Care

Home & Laundry Care top companies by revenue

Statista Company Database

Rank	Company	Year[1]	Worldwide company revenue in billion US$	No. of employees[2]
1	Procter & Gamble Co.	2019	67.7	97
2	Unilever NV	2019	57.3	155
4	Henkel AG & Co. KGaA	2019	22.5	53
5	Reckitt Benckiser Group Plc	2019	16.3	37
6	Colgate-Palmolive Co.	2019	15.7	34
7	Kao Corp.	2019	13.8	34

Agenda

In 2019, the Swiss and people of Hong Kong spent the most on Household Cleaners

Worldwide comparison

Revenue per capita ranking in US$ in 2019

Country	Value
Switzerland	25.3
Hong Kong	18.8
Israel	18.8
United States	18.0
Luxembourg	17.6
Iceland	17.2
United Kingdom	17.2
Canada	16.5
Austria	15.6
Germany	14.9

Revenue share in 2019

Asia 33%
Americas 32%
Europe 26%
Africa 8%
Australia & Oceania 1%
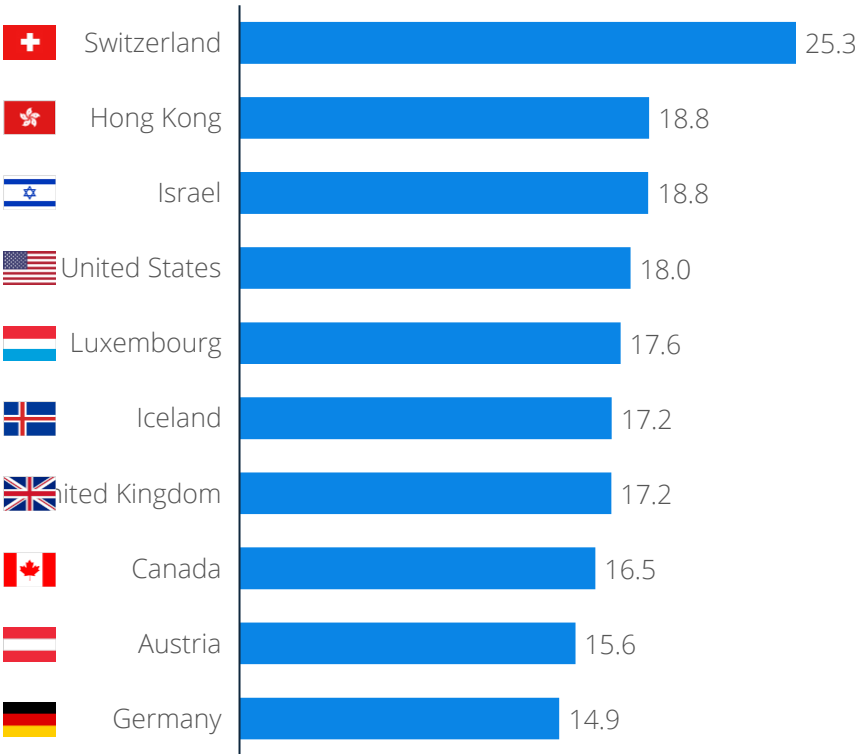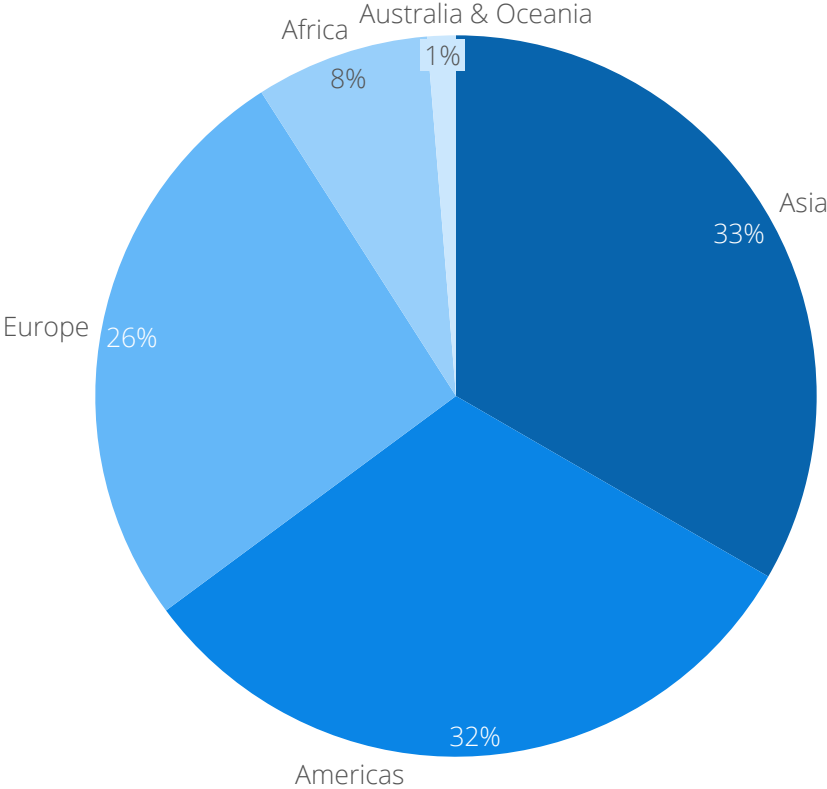
Household Cleaners sales in Europe will increase at a CAGR[1] of 2.0% from 2012 to 2025

KPI comparison – Europe (1/2)

Revenue in billion US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	34.9	35.1	35.4	35.7	36.0	36.3	36.5	36.8	38.6	39.6	40.2	40.6	40.8	41.0	1.2%
Household Cleaners	7.4	7.4	7.5	7.6	7.7	7.8	7.8	7.9	8.6	9.0	9.3	9.4	9.5	9.6	2.0%
Share of total market (in %)	21.1	21.1	21.2	21.3	21.3	21.4	21.4	21.5	22.2	22.7	23.0	23.2	23.3	23.3	0.8%

Revenue per capita in US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	42.1	42.3	42.4	42.6	42.8	43.0	43.3	43.5	45.5	46.6	47.3	47.8	48.0	48.3	1.1%
Household Cleaners	8.9	8.9	9.0	9.1	9.1	9.2	9.3	9.3	10.1	10.6	10.9	11.1	11.2	11.3	1.8%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025
Sources: Statista Consumer Market Outlook 2020

In Europe, Germany was the country with the highest revenue in the Household Cleaners segment

KPI comparison – Europe (2/2)

Revenue ranking in billion US$ in 2019

Country		Revenue
Germany	🇩🇪	1.2
United Kingdom	🇬🇧	1.2
France	🇫🇷	0.8
Italy	🇮🇹	0.8
Spain	🇪🇸	0.6

Revenue per capita ranking in US$ in 2019

US$2 ▢▢▢▢▢▢ US$25   ▢ Out of scope

Sources: Statista Consumer Market Outlook 2020
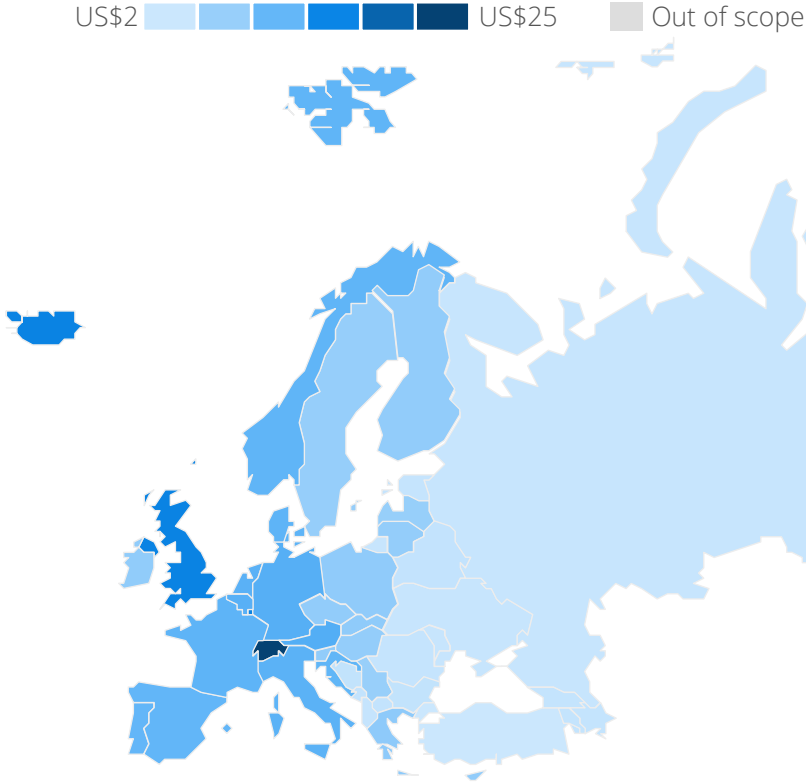
Household Cleaners sales in the Americas will increase at a CAGR[1] of 2.2% from 2012 to 2025

KPI comparison – Americas (1/2)

Revenue in billion US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	38.3	39.0	39.8	40.6	41.4	42.2	42.9	43.6	45.6	46.6	47.4	48.1	48.6	49.2	2.0%
Household Cleaners	8.3	8.5	8.7	8.9	9.1	9.3	9.4	9.6	10.2	10.5	10.7	10.9	11.0	11.1	2.2%
Share of total market (in %)	21.8	21.9	21.9	22.0	22.0	22.0	22.0	22.0	22.3	22.5	22.6	22.6	22.6	22.6	0.3%

Revenue per capita in US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	41.6	42.0	42.5	42.9	43.3	43.7	44.1	44.4	46.0	46.7	47.2	47.5	47.7	48.0	1.1%
Household Cleaners	9.1	9.2	9.3	9.4	9.5	9.6	9.7	9.8	10.3	10.5	10.7	10.7	10.8	10.8	1.4%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025
Sources: Statista Consumer Market Outlook 2020

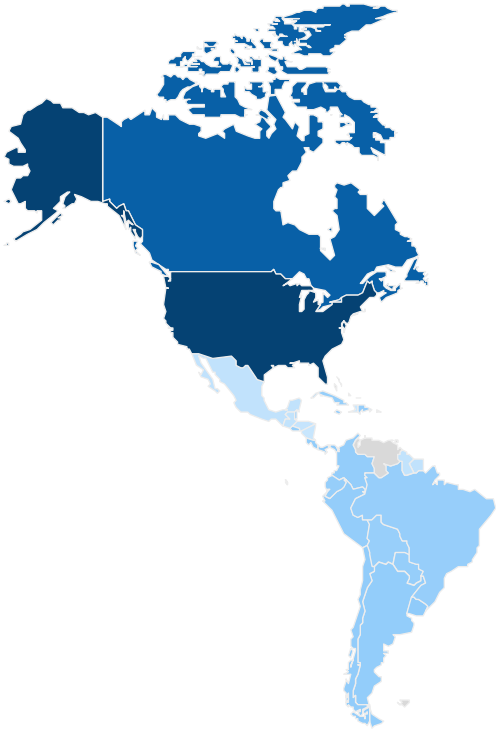# In the Americas, the U.S. was the country with the highest revenue in the Household Cleaners segment

KPI comparison – Americas (2/2)

Revenue ranking in billion US$ in 2019

Country		Revenue
United States	🇺🇸	5.9
Brazil	🇧🇷	1.0
Canada	🇨🇦	0.6
Mexico	🇲🇽	0.6
Colombia	🇨🇴	0.3

Revenue per capita ranking in US$ in 2019

US$1 ▢▢▢▢▢▢ US$18   ▢ Out of scope

Sources: Statista Consumer Market Outlook 2020

Household Cleaners sales in Asia will increase at a CAGR[1] of 3.7% from 2012 to 2025

KPI comparison – Asia (1/2)

Revenue in billion US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	47.7	49.3	51.0	52.7	54.3	55.9	57.5	58.9	62.4	64.6	66.3	67.6	68.7	69.9	3.0%
Household Cleaners	8.0	8.3	8.6	8.9	9.2	9.5	9.8	10.0	10.9	11.6	12.0	12.3	12.6	12.8	3.7%
Share of total market (in %)	16.8	16.8	16.9	16.9	16.9	17.0	17.0	17.0	17.5	17.9	18.1	18.2	18.3	18.3	0.7%

Revenue per capita in US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	11.6	11.9	12.2	12.5	12.7	13.0	13.2	13.4	14.1	14.5	14.8	14.9	15.1	15.2	2.1%
Household Cleaners	2.0	2.0	2.1	2.1	2.2	2.2	2.2	2.3	2.5	2.6	2.7	2.7	2.8	2.8	2.8%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025
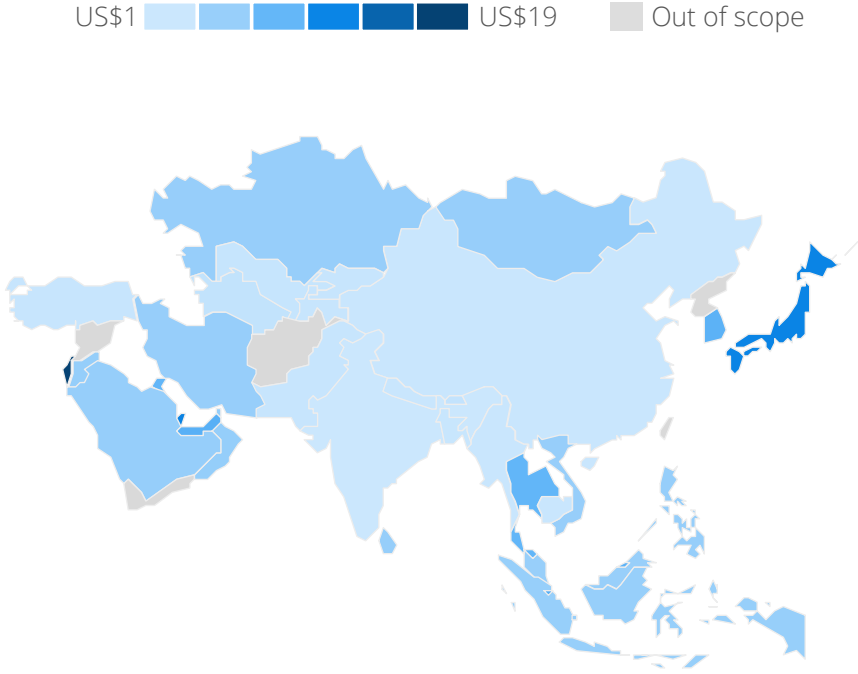Sources: Statista Consumer Market Outlook 2020

In Asia, China was the country with the highest revenue in the Household Cleaners segment

KPI comparison – Asia (2/2)

Revenue ranking in billion US$ in 2019

China	🇨🇳	2.0
Japan	🇯🇵	1.5
Indonesia	🇮🇩	1.2
India	🇮🇳	0.7
Thailand	🇸🇬	0.6

Revenue per capita ranking in US$ in 2019

US$1 ▢▢▢▢▢▢ US$19   ▢ Out of scope

Sources: Statista Consumer Market Outlook 2020

Household Cleaners sales in Africa will increase at a CAGR[1] of 4.1% from 2012 to 2025

KPI comparison – Africa (1/2)

Revenue in billion US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	10.6	10.9	11.3	11.6	11.9	12.3	12.6	13.0	13.9	14.6	15.1	15.5	16.0	16.4	3.4%
Household Cleaners	1.9	2.0	2.0	2.1	2.2	2.2	2.3	2.4	2.6	2.8	2.9	3.1	3.1	3.2	4.1%
Share of total market (in %)	18.0	18.0	18.1	18.1	18.1	18.2	18.2	18.2	18.8	19.2	19.5	19.6	19.6	19.6	0.7%

Revenue per capita in US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	11.1	11.1	11.2	11.2	11.2	11.3	11.3	11.4	11.9	12.1	12.3	12.4	12.4	12.4	0.9%
Household Cleaners	2.0	2.0	2.0	2.0	2.0	2.0	2.1	2.1	2.2	2.3	2.4	2.4	2.4	2.4	1.5%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025
Sources: Statista Consumer Market Outlook 2020

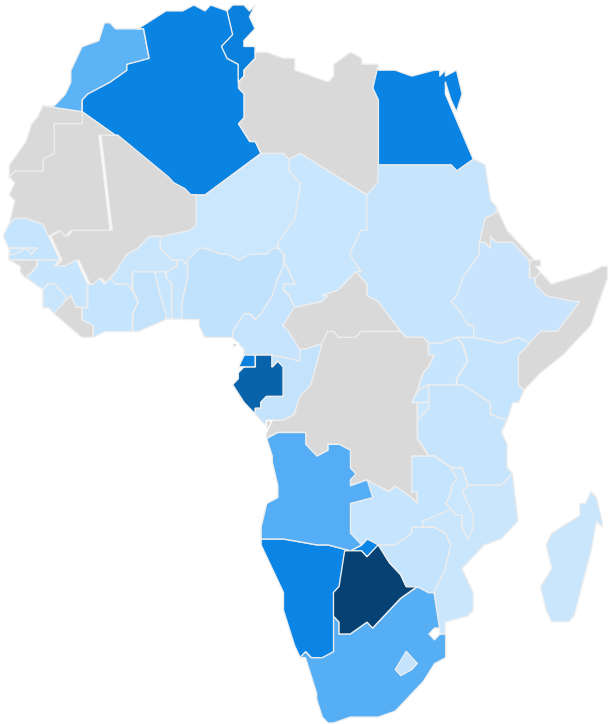# In Africa, Egypt was the country with the highest revenue in the Household Cleaners segment

KPI comparison – Africa (2/2)

Revenue ranking in billion US$ in 2019

Country		Value
Egypt	🇪🇬	0.4
Nigeria	🇳🇬	0.4
South Africa	🇿🇦	0.2
Algeria	🇩🇿	0.2
Ethiopia	🇪🇹	0.1

Revenue per capita ranking in US$ in 2019

US$1 ▭▭▭▭▭ US$6   ▭ Out of scope

Sources: Statista Consumer Market Outlook 2020

Household Cleaners sales in Australia & Oceania will increase at a CAGR[1] of 3.1% from 2012 to 2025

KPI comparison – Australia & Oceania (1/2)

Revenue in billion US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	1.6	1.6	1.6	1.7	1.7	1.8	1.8	1.8	1.9	2.0	2.1	2.1	2.1	2.2	2.5%
Household Cleaners	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	3.1%
Share of total market (in %)	21.7	21.6	21.5	21.4	21.3	21.2	21.2	21.3	21.9	22.5	22.8	23.1	23.2	23.3	0.5%

Revenue per capita in US$

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR[1]
Home & Laundry Care total	43.5	44.0	44.5	45.0	45.4	45.8	46.1	46.4	48.5	49.6	50.1	50.4	50.4	50.5	1.2%
Household Cleaners	9.4	9.5	9.5	9.6	9.7	9.7	9.8	9.9	10.6	11.1	11.4	11.6	11.7	11.7	1.7%

1: CAGR: Compound Annual Growth Rate / average growth rate per year from 2012 to 2025
Sources: Statista Consumer Market Outlook 2020

In Australia & Oceania, Australia was the country with the highest revenue in Household Cleaners

KPI comparison – Australia & Oceania (2/2)

Revenue ranking in billion US$ in 2019

Australia	🇦🇺	0.32
New Zealand	🇳🇿	0.05
Papua New Guinea	🇵🇬	0.02
Fiji	🇫🇯	0.01

Revenue per capita ranking in US$ in 2019
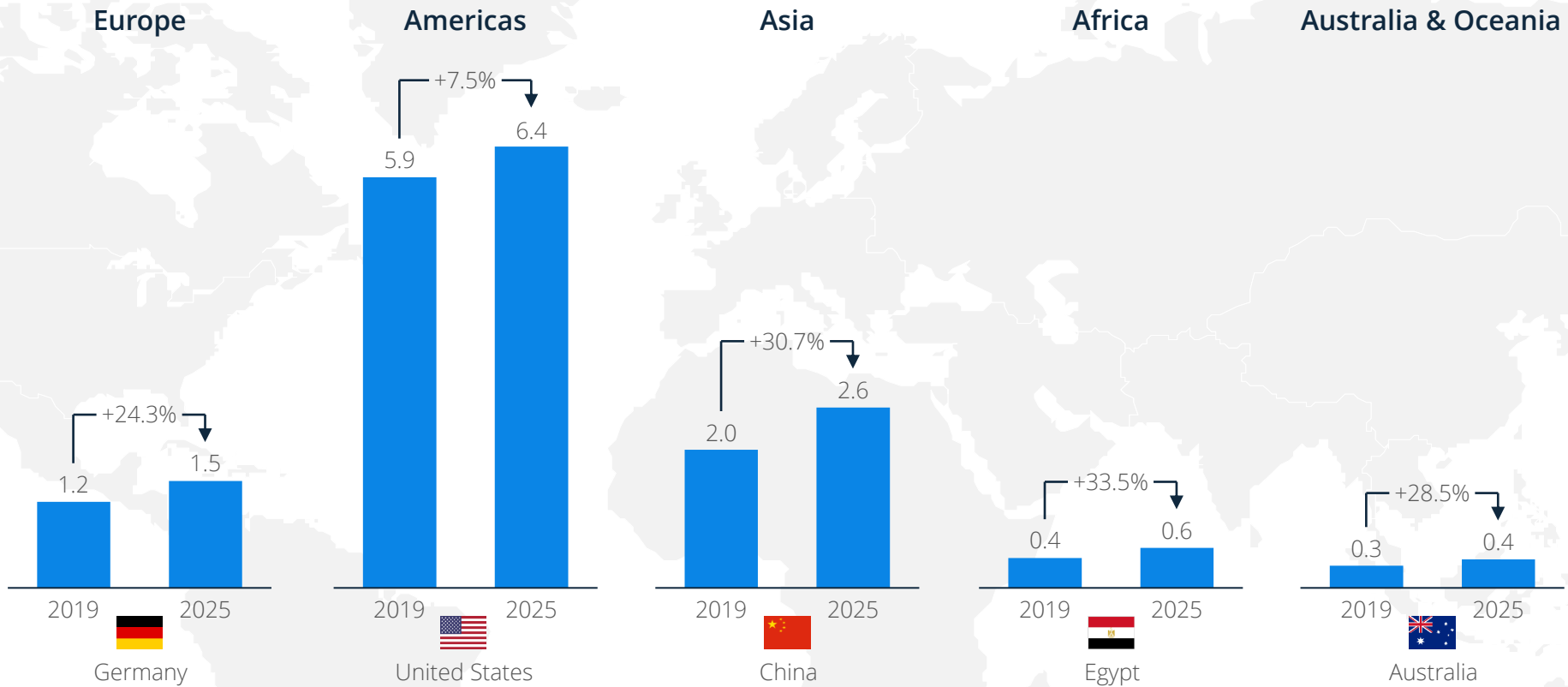
US$2 ▢▢▢▢▢▢ US$13   ▢ Out of scope

In Egypt, the Household Cleaners segment will grow by 33.5% from 2019 to 2025

Top countries by region

Revenue in the top countries in billion US$[1]

| Europe | Americas | Asia | Africa | Australia & Oceania |

Europe — Germany
- 2019: 1.2
- 2025: 1.5
- +24.3%

Americas — United States
- 2019: 5.9
- 2025: 6.4
- +7.5%

Asia — China
- 2019: 2.0
- 2025: 2.6
- +30.7%

Africa — Egypt
- 2019: 0.4
- 2025: 0.6
- +33.5%

Australia & Oceania — Australia
- 2019: 0.3
- 2025: 0.4
- +28.5%

1: Bar heights may vary due to rounded figures
Sources: Statista Consumer Market Outlook 2020

Agenda

Church & Dwight, Colgate-Palmolive Co, and Procter & Gamble are amongst the key players in this segment

Analyst opinion

Trends

- The demand for household cleaners has witnessed a rapid surge.

- The outbreak of the coronavirus pandemic has led to an increased focus on home hygiene.

- This space is witnessing much innovation: Companies launching novel products such as gel- and cream-based cleaners and aerosol sprays.

- Some of the major players in this segment include Church & Dwight, Colgate-Palmolive Co, Procter & Gamble, and Unilever.
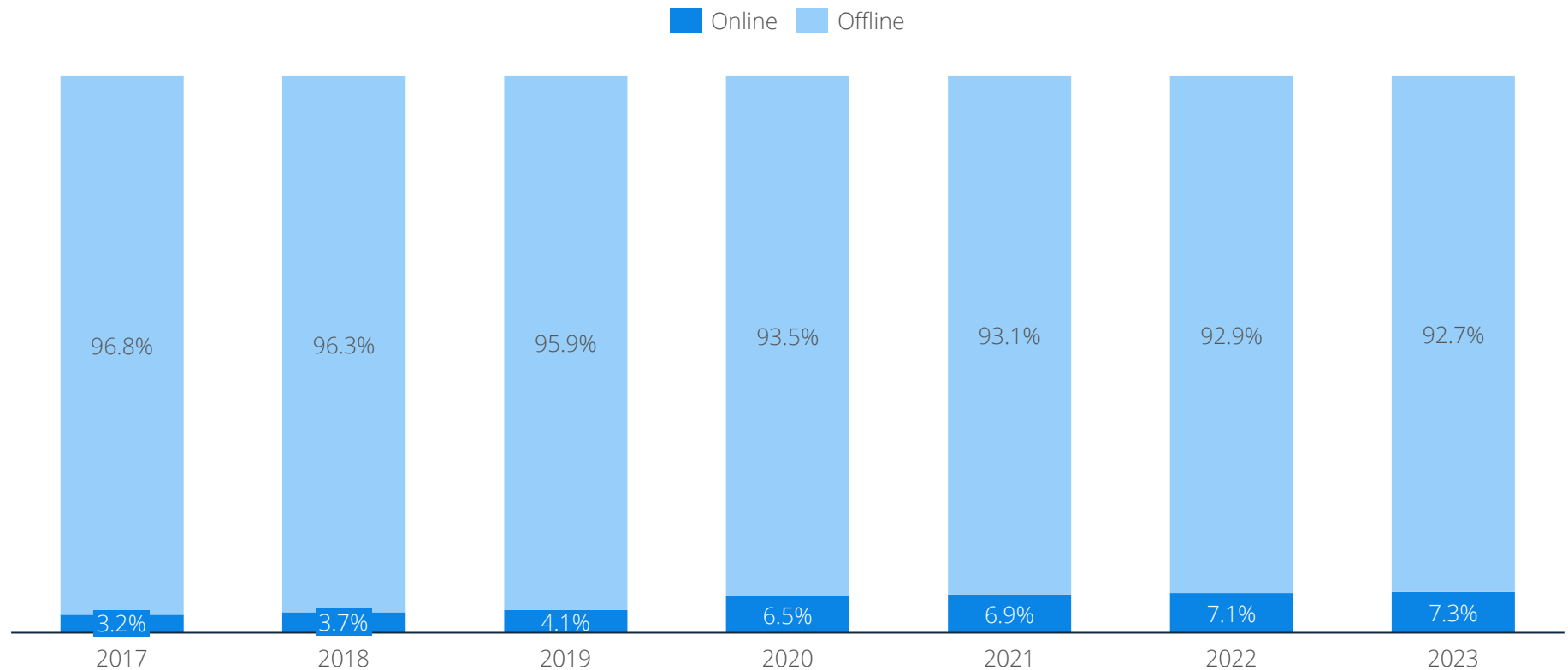
Recommended studies & reports

- Home and Laundry Care Report

- Household cleaning and laundry products market worldwide

- Cleaning products in Europe

- Church & Dwight

Online retail's share of Home & Laundry Care reached 4.1% in 2019

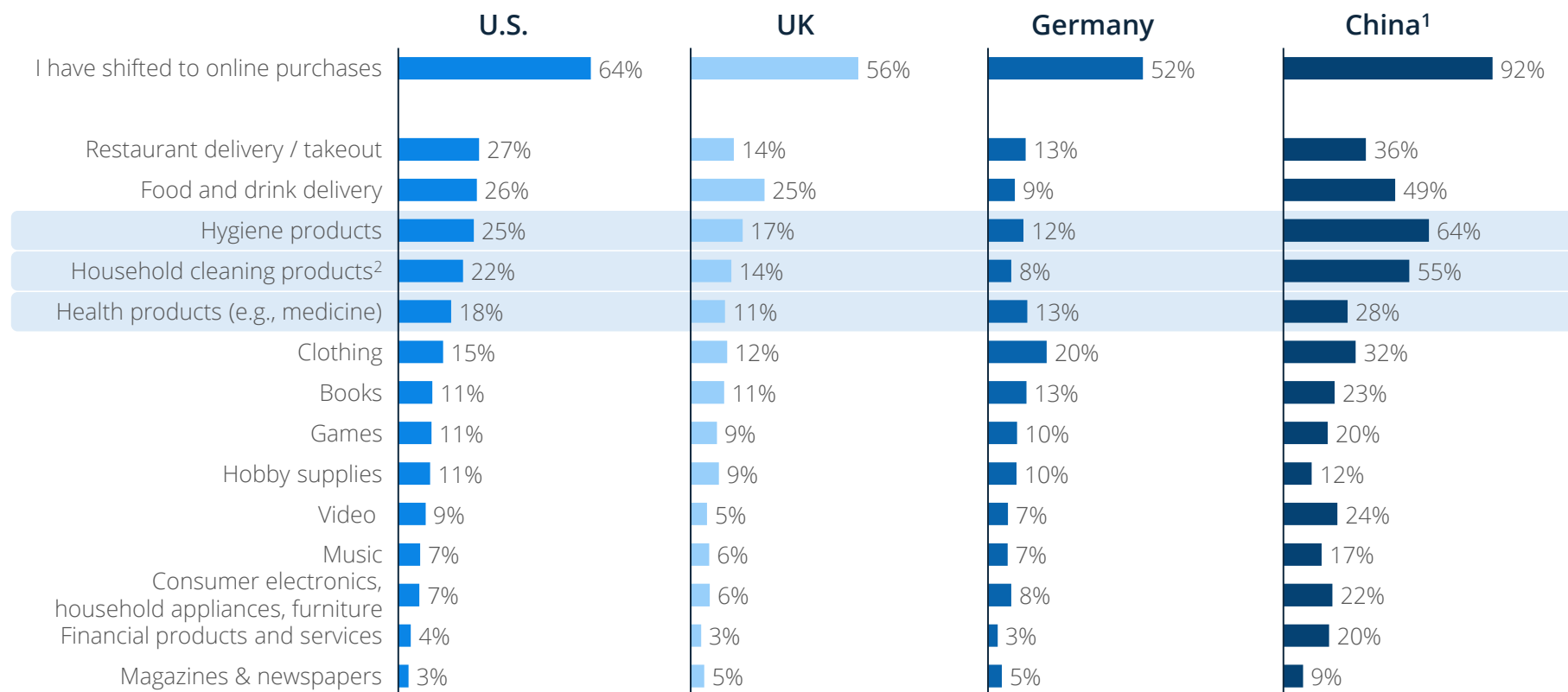Sales channels

Home & Laundry Care: worldwide revenue share

■ Online ■ Offline

Year	2017	2018	2019	2020	2021	2022	2023
Offline	96.8%	96.3%	95.9%	93.5%	93.1%	92.9%	92.7%
Online	3.2%	3.7%	4.1%	6.5%	6.9%	7.1%	7.3%

In 2020, consumers have shifted to purchasing hygiene, cleaning, and health products online

COVID-19 impact on eCommerce

Statista Global Consumer Survey

Shift from offline to online purchases related to the COVID-19 pandemic

	U.S.	UK	Germany	China[1]
I have shifted to online purchases	64%	56%	52%	92%
Restaurant delivery / takeout	27%	14%	13%	36%
Food and drink delivery	26%	25%	9%	49%
Hygiene products	25%	17%	12%	64%
Household cleaning products[2]	22%	14%	8%	55%
Health products (e.g., medicine)	18%	11%	13%	28%
Clothing	15%	12%	20%	32%
Books	11%	11%	13%	23%
Games	11%	9%	10%	20%
Hobby supplies	11%	9%	10%	12%
Video	9%	5%	7%	24%
Music	7%	6%	7%	17%
Consumer electronics, household appliances, furniture	7%	6%	8%	22%
Financial products and services	4%	3%	3%	20%
Magazines & newspapers	3%	5%	5%	9%

1: Survey period March 23, 2020 – May 3, 2020; 2: E.g., hand sanitizer, toilet paper
"Have you deliberately purchased any of these products or services online instead of offline because of the COVID-19 / Corona pandemic?";
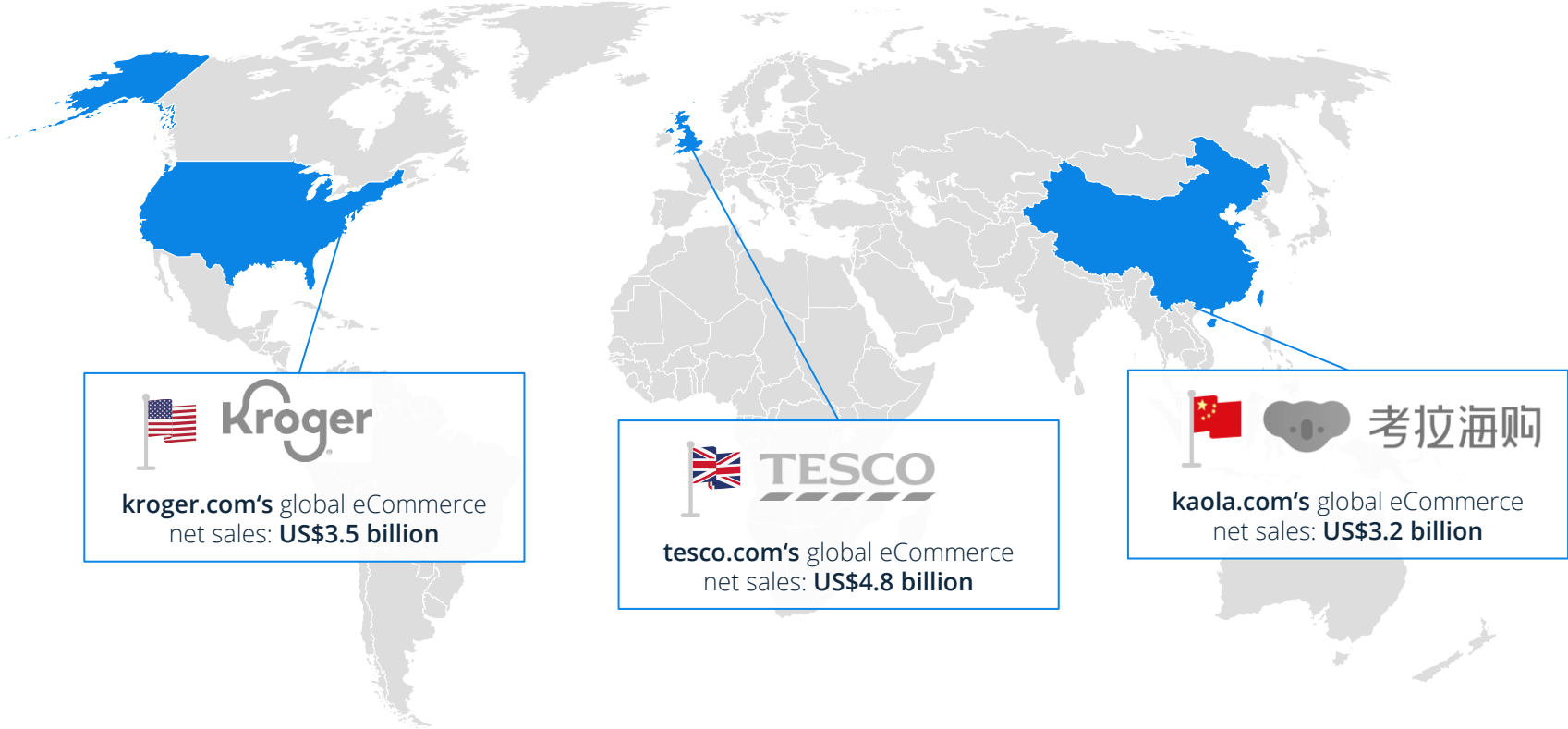multi-pick; base: n=19,259, all respondents

From a global perspective, tesco.com was the largest online retailer in Food & Personal Care in 2019

Top eCommerce stores by net sales

ecommerce DB

Biggest players with Food & Personal Care as their main product category in 2019

kroger.com's global eCommerce net sales: **US$3.5 billion**

tesco.com's global eCommerce net sales: **US$4.8 billion**

kaola.com's global eCommerce net sales: **US$3.2 billion**

Sources: eCommerceDB.com

Agenda

We use bottom-up and top-down approaches for our sizing of the markets' status quo

Methodology (1/3)

Detailed analysis of the status quo in selected core countries

We obtain the data from the Statista Consumer Market Outlook for our 46 core economies, such as the United States, China, and Germany, through an in-depth analysis of each market. To evaluate the markets, we use the latest data from various country-specific sources and industry associations, survey results from our primary research (e.g., the Statista Global Consumer Survey), third-party studies and reports, as well as our industry knowledge. Because of the considerable amount of information that is incorporated in the Statista Consumer Market Outlook and all the interpretation and analysis involved in the process, a detailed representation of the data sources for each data point is not possible.

Market sizes are determined using a bottom-up or top-down approach based on an individual logic for each market segment. Demand-side factors, such as per-capita consumption, are linked to various performance factors, such as at-home and out-of-home consumption or average customer turnover. All markets are assessed at retail prices including country- and product-specific sales taxes and excise duties. Other sources, such as household budget surveys on national levels, complement the demand-side estimates.

For detailed information regarding the methodology, please have a look at our Consumer Market Outlook Methodology.

Underlying data

Macroeconomic indicators

- Country-specific statistical offices and census data
- International organizations and associations

Market research

- Consumer profiling – the Statista Global Consumer Survey
- Exclusive representative ad hoc surveys in selected countries on specific current topics

Key player analysis & monitoring

- Company profiles and key performance indicators
- Product and price monitoring
- News and trends

Studies & third-party data

- Market analyses and analyst opinions
- Annual reports and industry analyses
- Academic studies

Sources: Statista Consumer Market Outlook 2020

We estimate the potential of non-core countries with the help of macroeconomic and infrastructural drivers

Methodology (2/3)

Driver-based transfer of market data to non-core countries

The market data for non-core countries is generated using algorithmic models. To compensate for the lack of available data and to evaluate a country's potential, we use the performance ratios of core countries with a similar infrastructure and similar development conditions as benchmark values. Then we apply an algorithm-based calculation to create market KPI estimations, using the country's key market indicators as drivers.

Over 100 driver data sets for 150 countries have been collected from a variety of sources, including the International Monetary Fund (IMF), the International Telecommunication Union (ITU), the World Bank, and many others. The data sets either include a forecast from the source or are forecast by Statista using trend analyses and prediction techniques based on historical data from 2000 to 2018. The drivers are categorized and assigned to the markets so that the top three correlating drivers can then be selected for each market segment.

The chosen drivers do not only have the best mathematical fit, but they must also have an actual influence on the performance of the markets. If specific drivers are not available for one country, they can be replaced with a set of backup economic development drivers of more general nature.

Non-core country market sizing exemplified by[1] the Hungarian Cosmetics market in 2018

Step 1: Choose reference core country[2]

	Poland (core country)	Hungary (non-core country)

Step 2: Compare key market indicators[3]

	Poland	Hungary
Population	38.1m	9.7m
Consumer spending per capita	US$8,174	US$7,542
GDP per capita	US$14,756	US$15,679
Price level index	44.0	44.8
Human development index	0.865	0.838

Step 3: Apply an algorithm to estimate market KPIs, using data from the core country as base and the country's key market indicators as drivers

Result:

	Poland (benchmark)	Hungary (KPI estimated)
Average revenue per capita	US$14.04	US$13.63

Our COVID-19 forecasts build on extensive research

Methodology (3/3)

Market environment	Market shock	Shock dissipation

Economic outlook

- Expected impact on the general economy (GDP, consumer spending, investment, etc.)
- Based on current forecasts by the IMF, statistical offices, and our analysts

Directly affected markets

- Directly impacted by quarantine measures (e.g., Travel & Tourism)
- Recession reaction modeled based on analyst assessments, benchmark forecasts, leading indicators, as well as our own surveys

- Revenues expected to return to long-term trend eventually
- Recovery scenario in V-, U-, or L-shape, depending on the market and country
- Time span needed to return to long-term trend: over 2–5 years
- Based on analyst assessments and available benchmark forecasts

Pandemic outlook

- Lockdown: phase of general quarantine (4–10 weeks)
- Stabilization: phase of local and individual quarantines, gradual reopening of the economy (12–18 months)
- Reconstruction: phase after vaccines and treatments have become widely available (from mid- to late 2021)

Indirectly affected markets

- Impacted by overall economic performance rather than by pandemic-specific events and measures (e.g., most consumer products)
- Recession reaction modeled by drawing on historical data (e.g., national accounts, household budget surveys, and similar statistics)

Sources: Statista Consumer Market Outlook 2020

About the Statista Consumer Market Outlook

200+ markets **150** countries **13** years (2012 – 2025) **50,000+** interactive statistics

The **Consumer Market Outlook** presents the key performance indicators sales, revenues, and prices of the most important consumer markets worldwide. Our specialized analysts' market calculations are based on data from validated sources.

- Revenues, volume sales, prices, and forecasts
- More than 200 product categories in up to 150 countries
- Covering the period 2012 to 2025
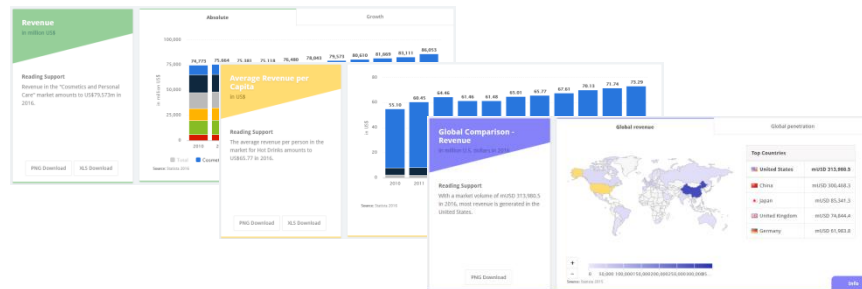
Accessories	Home & Laundry Care
Alcoholic Drinks	Hot Drinks
Apparel	Household Appliances
Consumer Electronics	Non-Alcoholic Drinks
Beauty & Personal Care	OTC Pharmaceuticals
Eyewear	Luxury Goods
Food	Tissue & Hygiene Paper
Footwear	Tobacco Products
Furniture	Toys & Hobby

Find out more on www.statista.com/outlook/consumer-markets

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About the Statista Company DB

The Company Database provides information on more than 1.5 million listed and privately held companies and contains the most important company key figures as well as in-depth analyses. Additionally, we offer a wide range of extra KPIs for listed companies. Use the Company Database as a starting point for your market assessment. It is also the perfect tool for conducting research on basic data and provides valuable insights into foreign markets.
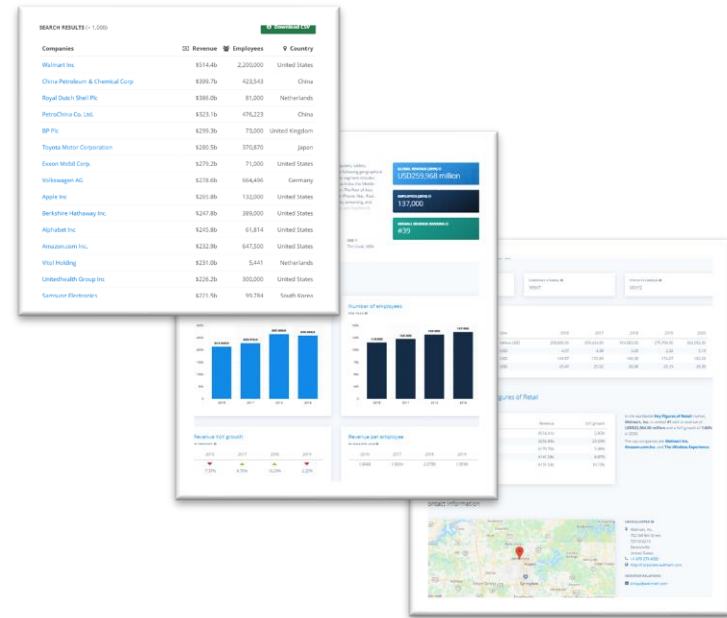
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About the ecommerceDB

ecommerceDB.com offers direct access to URL-related revenue information together with forecasts, customizable top, country, region, and category rankings, KPI analyses, and extensive eCommerce-relevant contact information for over 20,000 online stores.

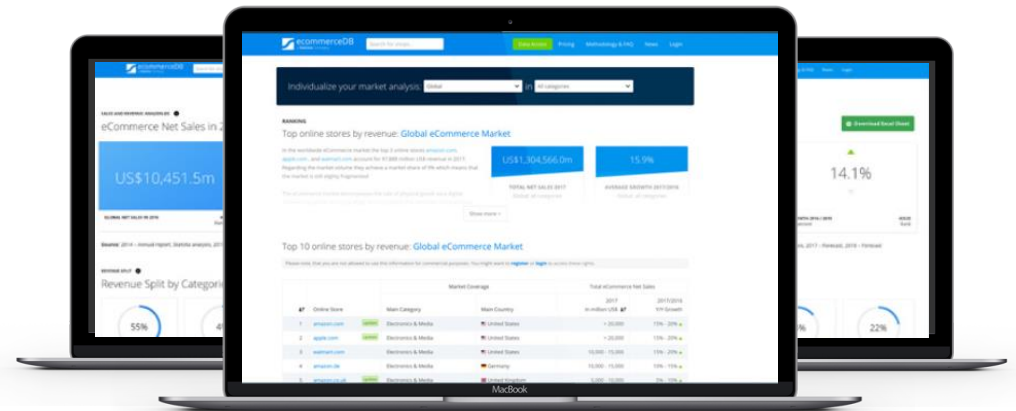In-depth analysis for over 20,000 online store URLs

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