

Home Care in Belgium

February 2025

Table of Contents

Home Care in Belgium

EXECUTIVE SUMMARY

Home care in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for home care?

MARKET INDICATORS

Table 1 - Households 2019-2024

MARKET DATA

- Table 2 Sales of Home Care by Category: Value 2019-2024
- Table 3 Sales of Home Care by Category: % Value Growth 2019-2024
- Table 4 NBO Company Shares of Home Care: % Value 2020-2024
- Table 5 LBN Brand Shares of Home Care: % Value 2021-2024
- Table 6 Penetration of Private Label in Home Care by Category: % Value 2019-2024
- Table 7 Distribution of Home Care by Format: % Value 2019-2024
- Table 8 Distribution of Home Care by Format and Category: % Value 2024
- Table 9 Forecast Sales of Home Care by Category: Value 2024-2029
- Table 10 Forecast Sales of Home Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Air care in Belgium continues to face challenges due to being viewed as non-essential

Air care consumers focus on home ambiance and sustainability

Non-grocery retailers expand into premium air care offerings to capture demand

PROSPECTS AND OPPORTUNITIES

Growth is set to decline as consumers views air care products as unnatural

Consumers are expected to seek ambience above simple air freshening

The diversification of distribution channels will expand consumer access to premium and niche products

CATEGORY DATA

- Table 11 Sales of Air Care by Category: Value 2019-2024
- Table 12 Sales of Air Care by Category: % Value Growth 2019-2024
- Table 13 Sales of Air Care by Fragrance: Value Ranking 2022-2024
- Table 14 NBO Company Shares of Air Care: % Value 2020-2024
- Table 15 LBN Brand Shares of Air Care: % Value 2021-2024
- Table 16 Forecast Sales of Air Care by Category: Value 2024-2029
- Table 17 Forecast Sales of Air Care by Category: % Value Growth 2024-2029

Bleach in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

The positive performance for bleach is driven by price-sensitive behaviour in 2024

Lack of innovation continues to hinder growth potential in the bleach category

The competitive landscape for bleach faces pressure from emerging home care products

PROSPECTS AND OPPORTUNITIES

Prospects for bleach are expected to be constrained as consumer preferences change Limited innovation will negatively impact the ability to attract new consumers Increasing competition from eco-friendly and modern cleaning solutions

CATEGORY DATA

Table 18 - Sales of Bleach: Value 2019-2024

Table 19 - Sales of Bleach: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Bleach: % Value 2020-2024

Table 21 - LBN Brand Shares of Bleach: % Value 2021-2024

Table 22 - Forecast Sales of Bleach: Value 2024-2029

Table 23 - Forecast Sales of Bleach: % Value Growth 2024-2029

Dishwashing in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

A small decline in volume sales, however, premiumisation drives value growth in 2024

Automatic dishwashing tablets dominate, as smaller formats struggle in 2024

Dreft maintains its leadership through strong promotions despite stagnation in hand dishwashing

PROSPECTS AND OPPORTUNITIES

Premiumisation is expected to drive growth, despite economic challenges

Automatic dishwashing tablets are set to dominate sales by offering convenient, all-in-one formulations

Sustainability is set to remain key, with packaging and formula innovation a priority

CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2019-2024

CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2019-2024

Table 26 - Sales of Dishwashing by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Dishwashing: % Value 2020-2024

Table 28 - LBN Brand Shares of Dishwashing: % Value 2021-2024

Table 29 - Forecast Sales of Dishwashing by Category: Value 2024-2029

Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

Home Insecticides in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

A cooler summer challenges sales of home insecticides in 2024 Sustainability and innovation drive Vapona's product launches in 2024 Multi-insect solutions aim to boost value sales during a challenging year

PROSPECTS AND OPPORTUNITIES

Changing weather patterns will create both challenges and opportunities for home insecticides Sustainability is expected to drive innovation and shape consumer preferences Innovative multi-insect solutions are expected to launch across the forecast period

CATEGORY DATA

- Table 31 Sales of Home Insecticides by Category: Value 2019-2024
- Table 32 Sales of Home Insecticides by Category: % Value Growth 2019-2024
- Table 33 Sales of Spray/Aerosol Insecticides by Type: % Value 2019-2024
- Table 34 NBO Company Shares of Home Insecticides: % Value 2020-2024
- Table 35 LBN Brand Shares of Home Insecticides: % Value 2021-2024
- Table 36 Forecast Sales of Home Insecticides by Category: Value 2024-2029
- Table 37 Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

Laundry Care in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail value growth benefits from ongoing premiumisation as international brands gain ground Challenges for eco-brands amid inflation and market shifts in laundry care

Multi-task liquid tablets challenge the sales of laundry aids in 2024

PROSPECTS AND OPPORTUNITIES

Sustainability, eco-friendly packaging, and multifunctionality are expected to drive long-term retail value growth Laundry sheets has strong potential for growth across the forecast period

Retail e-commerce and non-traditional retail channels to capture a growing share of the market

CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2019-2024

CATEGORY DATA

- Table 39 Sales of Laundry Care by Category: Value 2019-2024
- Table 40 Sales of Laundry Care by Category: % Value Growth 2019-2024
- Table 41 Sales of Laundry Aids by Category: Value 2019-2024
- Table 42 Sales of Laundry Aids by Category: % Value Growth 2019-2024
- Table 43 Sales of Laundry Detergents by Category: Value 2019-2024
- Table 44 Sales of Laundry Detergents by Category: % Value Growth 2019-2024
- Table 45 Sales of In-Wash Spot and Stain Removers by Type: % Value Breakdown 2019-2024
- Table 46 NBO Company Shares of Laundry Care: % Value 2020-2024
- Table 47 LBN Brand Shares of Laundry Care: % Value 2021-2024
- Table 48 NBO Company Shares of Laundry Aids: % Value 2020-2024
- Table 49 LBN Brand Shares of Laundry Aids: % Value 2021-2024
- Table 50 NBO Company Shares of Laundry Detergents: % Value 2020-2024
- Table 51 LBN Brand Shares of Laundry Detergents: % Value 2021-2024
- Table 52 Forecast Sales of Laundry Care by Category: Value 2024-2029
- Table 53 Forecast Sales of Laundry Care by Category: % Value Growth 2024-2029

Polishes in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

The economic conditions fuel an ongoing retail volume decline for polishes In line with fashion trends, shoe polish sales struggle while trainer care gains ground Smaller brands and niche channels gain market share during 2024

Changes in style and décor are set to limit demand for polishes over the forecast period Younger consumers will increasingly view polishing as an outdated cleaning method Trainer care products are an area that provides a growth opportunity

CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2019-2024

Table 55 - Sales of Polishes by Category: % Value Growth 2019-2024

Table 56 - NBO Company Shares of Polishes: % Value 2020-2024

Table 57 - LBN Brand Shares of Polishes: % Value 2021-2024

Table 58 - Forecast Sales of Polishes by Category: Value 2024-2029

Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2024-2029

Surface Care in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Concentrated formulas leads surface care to record a retail volume decline in 2024

Surface care brands offer traditional, simple and natural ingredients to appeal to consumers

Sustainable formulas and refill products align with consumers rising demands

PROSPECTS AND OPPORTUNITIES

Retail volume is expected to decline as efficiency and DIY trends impact surface care sales Convenience, sustainability and versatility is set to shape surface care innovation Changes in the retail landscape are expected to enhance market accessibility

CATEGORY DATA

Table 60 - Sales of Surface Care by Category: Value 2019-2024

Table 61 - Sales of Surface Care by Category: % Value Growth 2019-2024

Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024

Table 63 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024

Table 64 - NBO Company Shares of Surface Care: % Value 2020-2024

Table 65 - LBN Brand Shares of Surface Care: % Value 2021-2024

Table 66 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2024

Table 67 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2021-2024

Table 68 - Forecast Sales of Surface Care by Category: Value 2024-2029

Table 69 - Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

Toilet Care in Belgium

KEY DATA FINDINGS

2024 DEVELOPMENTS

Toilet care continues to face declining demand due to consumer cutbacks

Fragrances and premium scents drive innovation in both rim blocks and liquids

Sustainability efforts advance with eco-friendly packaging and natural ingredients

PROSPECTS AND OPPORTUNITIES

Further decline expected, however, premium products could aid retail value

A focus on sustainability offers long-term growth potential for toilet care

Rim blocks is set to face challenges, however, innovation could unlock new growth

CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2019-2024

Table 71 - Sales of Toilet Care by Category: % Value Growth 2019-2024

Table 72 - NBO Company Shares of Toilet Care: % Value 2020-2024

Table 73 - LBN Brand Shares of Toilet Care: % Value 2021-2024

Table 74 - Forecast Sales of Toilet Care by Category: Value 2024-2029

Table 75 - Forecast Sales of Toilet Care by Category: % Value Growth 2024-2029

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-belgium/report.