



# Passport

## Bleach in Bolivia

Euromonitor International

February 2021

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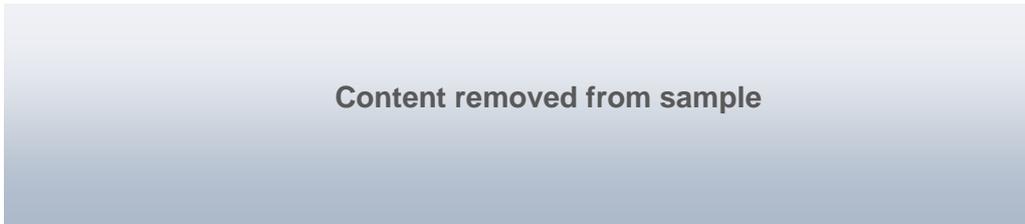
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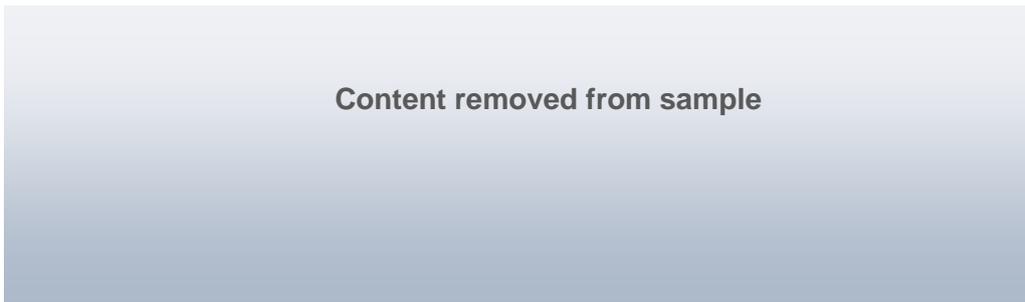
# BLEACH IN BOLIVIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

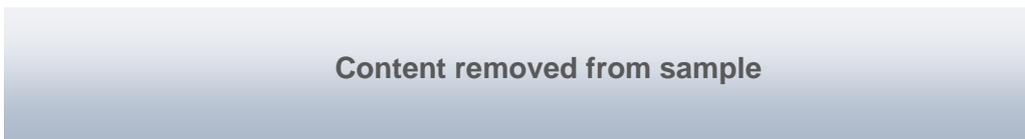


## 2020 IMPACT

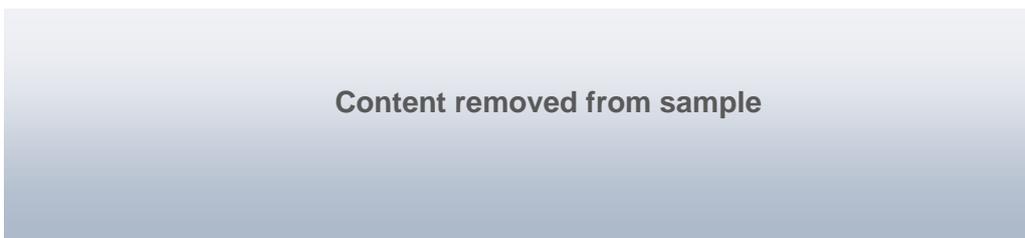
Bleach sees surging current value sales due to hygiene concerns and economising trend



The collapse of the customs office leads unit prices to surge

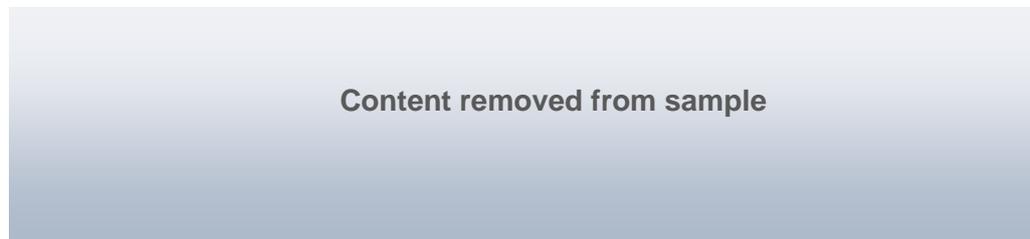


Counterfeit trade comes to A halt due to border closures, thus boosting the performance of bleach further

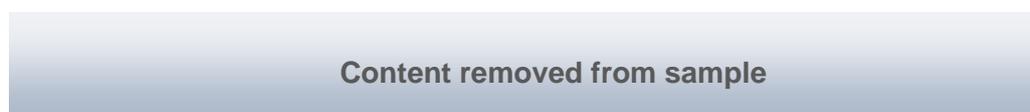


## RECOVERY AND OPPORTUNITIES

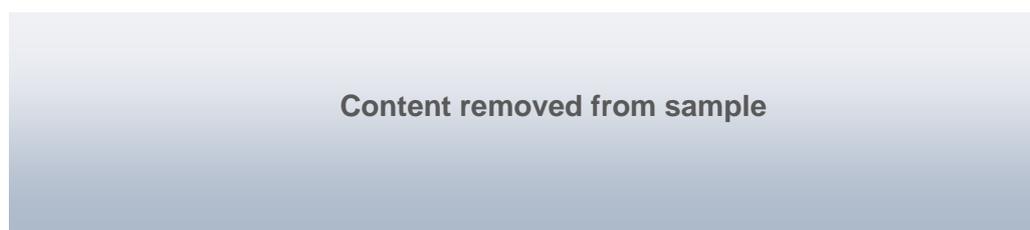
Normalisation, ongoing supply chain issues and illicit trade pose A threat to bleach at the beginning of the forecast period



Bleach records higher per-capita consumption compared to 2019



New product development focus on size and fragrance



## CATEGORY DATA

Table 1 Sales of Bleach: Value 2015-2020

| BOB million | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------|---------------------------------|------|------|------|------|------|
| Bleach      | <b>Data removed from sample</b> |      |      |      |      |      |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Bleach: % Value Growth 2015-2020

| % current value growth | 2019/20                         | 2015-20 CAGR | 2015/20 Total |
|------------------------|---------------------------------|--------------|---------------|
| Bleach                 | <b>Data removed from sample</b> |              |               |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 NBO Company Shares of Bleach: % Value 2016-2020

| % retail value rsp<br>Company | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------|------|------|------|------|------|
|-------------------------------|------|------|------|------|------|

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Bleach: % Value 2017-2020

| % retail value rsp<br>Brand (GBO) | Company (NBO) | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Sales of Bleach: Value 2020-2025

| BOB million | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------|------|------|------|------|------|------|
|-------------|------|------|------|------|------|------|

Bleach **Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 6** Forecast Sales of Bleach: % Value Growth 2020-2025

% constant value growth

2020/2021

2020-25 CAGR

2020/25 Total

Bleach

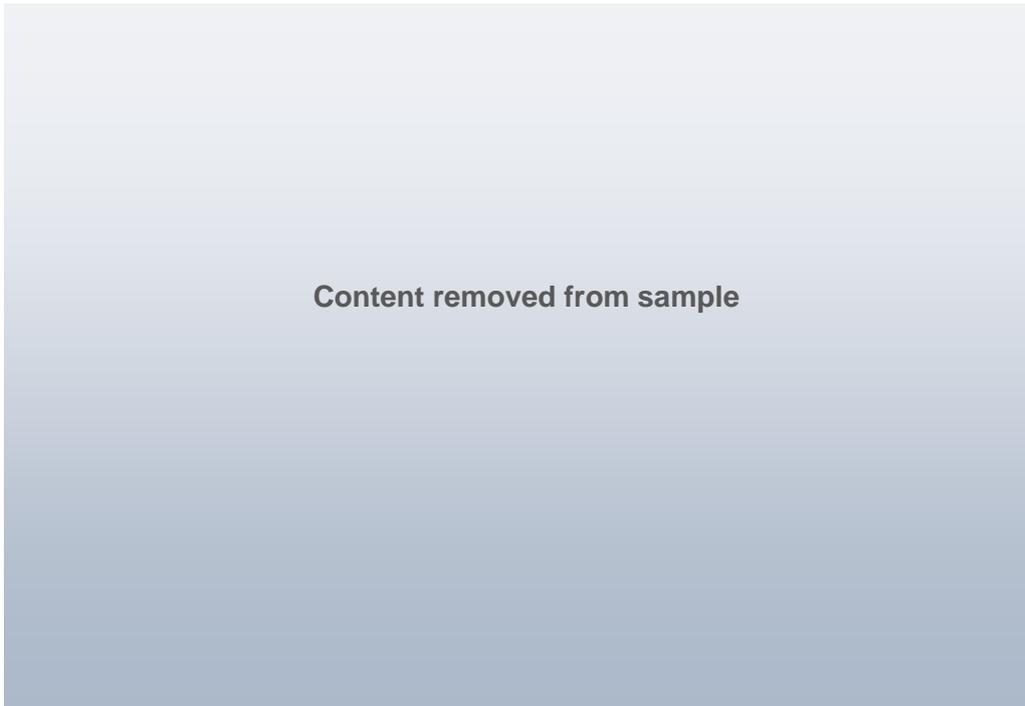
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

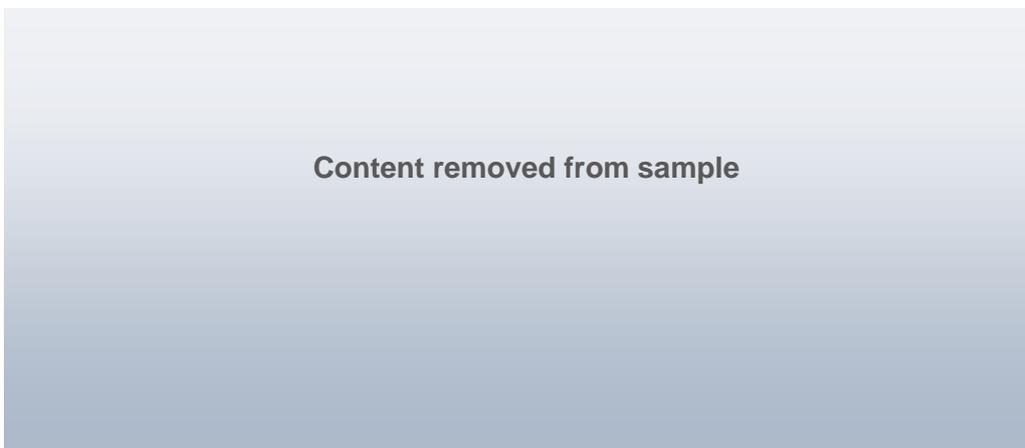
# HOME CARE IN BOLIVIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### COVID-19 impact on home care



### COVID-19 country impact



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Company response

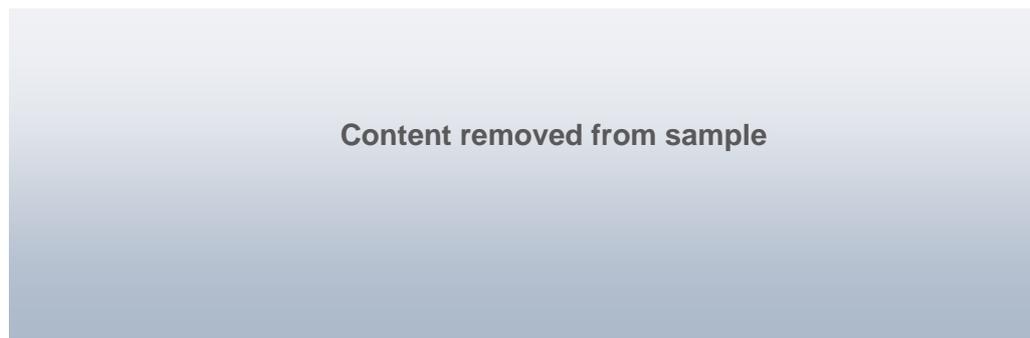
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Retailing shift

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What next for home care?

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## MARKET INDICATORS

Table 7 Households 2015-2020

|                                                    | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|----------------------------------------------------|---------------------------------|------|------|------|------|------|
| Households ('000)                                  | <b>Data removed from sample</b> |      |      |      |      |      |
| Average number of occupants per household (Number) |                                 |      |      |      |      |      |

Source: Euromonitor International from official statistics

## MARKET DATA

Table 8 Sales of Home Care by Category: Value 2015-2020

| BOB million       | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------|---------------------------------|------|------|------|------|------|
| Air Care          | <b>Data removed from sample</b> |      |      |      |      |      |
| Bleach            |                                 |      |      |      |      |      |
| Dishwashing       |                                 |      |      |      |      |      |
| Home Insecticides |                                 |      |      |      |      |      |
| Laundry Care      |                                 |      |      |      |      |      |
| Polishes          |                                 |      |      |      |      |      |
| Surface Care      |                                 |      |      |      |      |      |
| Toilet Care       |                                 |      |      |      |      |      |
| Home Care         |                                 |      |      |      |      |      |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Home Care by Category: % Value Growth 2015-2020

| % current value growth | 2019/20                         | 2015-20 CAGR | 2015/20 Total |
|------------------------|---------------------------------|--------------|---------------|
| Air Care               | <b>Data removed from sample</b> |              |               |
| Bleach                 |                                 |              |               |
| Dishwashing            |                                 |              |               |
| Home Insecticides      |                                 |              |               |

Laundry Care  
 Polishes  
 Surface Care  
 Toilet Care  
 Home Care

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10 NBO Company Shares of Home Care: % Value 2016-2020**

| % retail value rsp<br>Company | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------|------|------|------|------|------|
|-------------------------------|------|------|------|------|------|

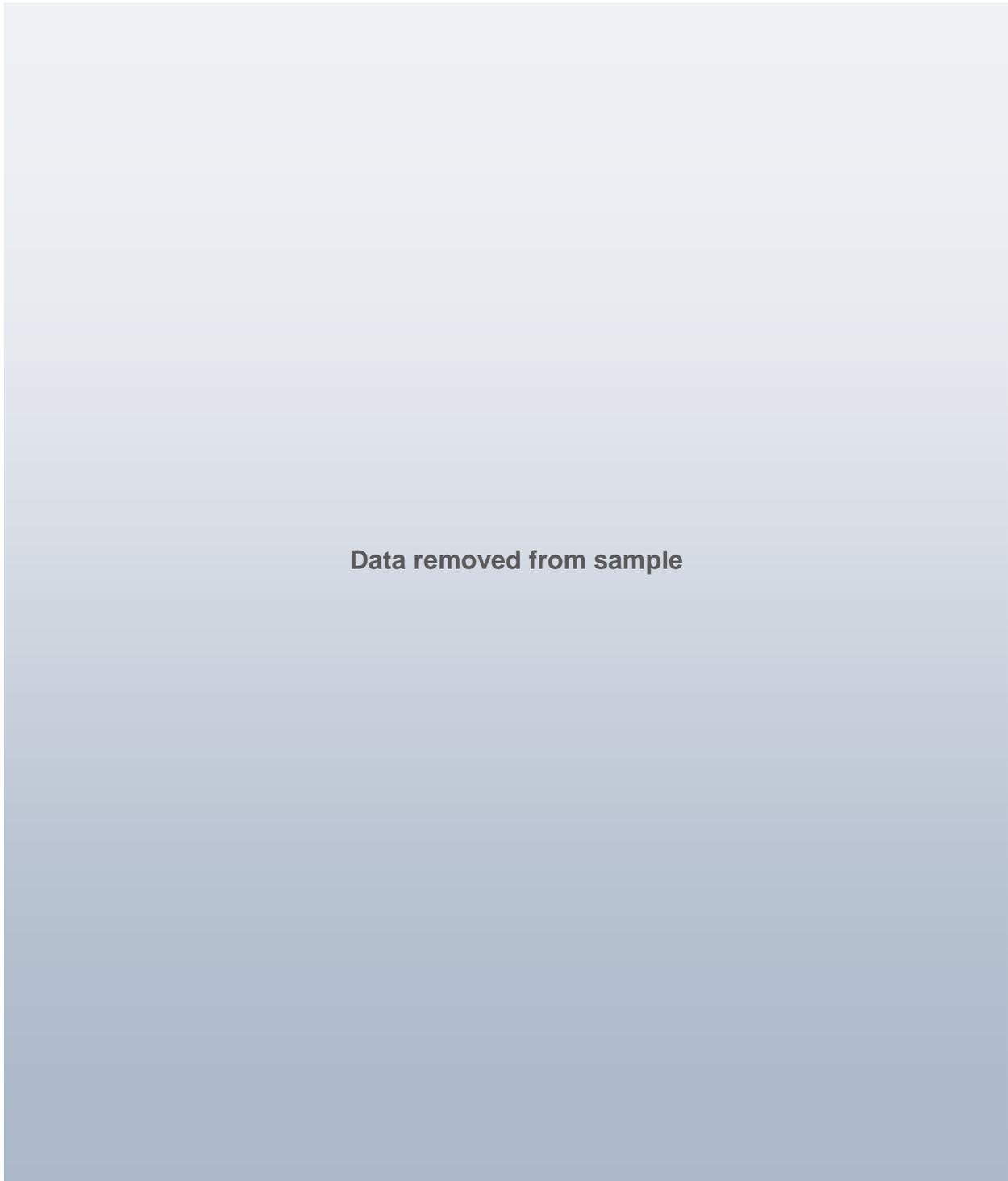
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 11 LBN Brand Shares of Home Care: % Value 2017-2020**

| % retail value rsp<br>Brand (GBO) | Company (NBO) | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

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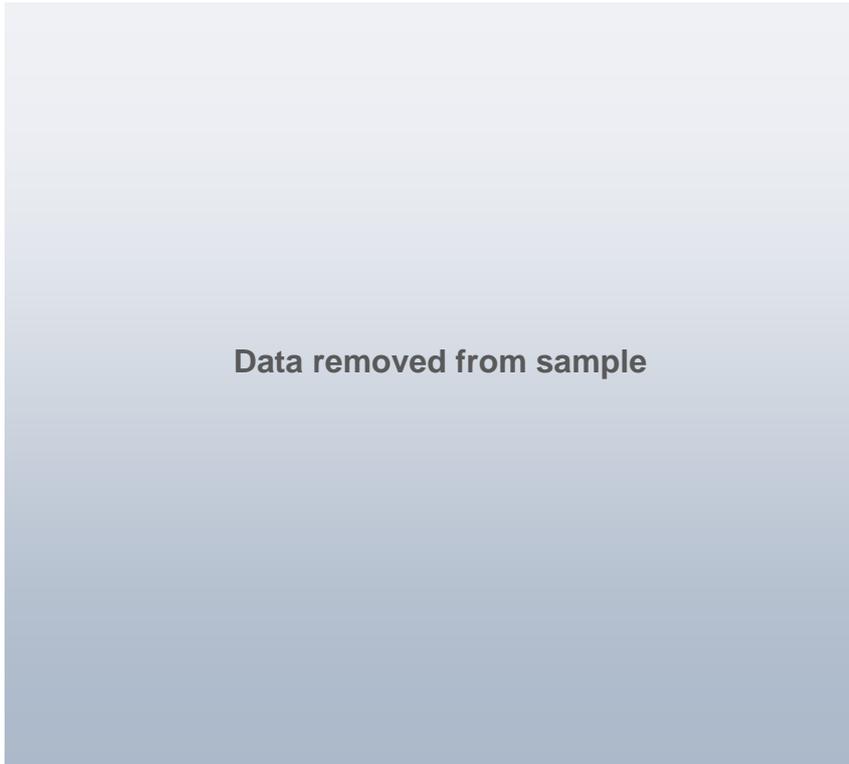


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 12**      **Distribution of Home Care by Format: % Value 2015-2020**

| % retail value rsp | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------|------|------|------|------|------|------|
|--------------------|------|------|------|------|------|------|

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other HC non-grocery retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13** Distribution of Home Care by Format and Category: % Value 2020

% retail value rsp

|                                           | AC                       | B | DW | IN | LC | PO |
|-------------------------------------------|--------------------------|---|----|----|----|----|
| Store-Based Retailing                     | Data removed from sample |   |    |    |    |    |
| - Grocery Retailers                       |                          |   |    |    |    |    |
| -- Modern Grocery Retailers               |                          |   |    |    |    |    |
| --- Convenience Stores                    |                          |   |    |    |    |    |
| --- Discounters                           |                          |   |    |    |    |    |
| --- Forecourt Retailers                   |                          |   |    |    |    |    |
| --- Hypermarkets                          |                          |   |    |    |    |    |
| --- Supermarkets                          |                          |   |    |    |    |    |
| -- Traditional Grocery Retailers          |                          |   |    |    |    |    |
| - Non-Grocery Specialists                 |                          |   |    |    |    |    |
| -- Health and Beauty Specialist Retailers |                          |   |    |    |    |    |
| -- Other HC non-grocery retailers         |                          |   |    |    |    |    |
| - Mixed Retailers                         |                          |   |    |    |    |    |
| -- Department Stores                      |                          |   |    |    |    |    |
| -- Mass Merchandisers                     |                          |   |    |    |    |    |
| -- Variety Stores                         |                          |   |    |    |    |    |
| -- Warehouse Clubs                        |                          |   |    |    |    |    |
| Non-Store Retailing                       |                          |   |    |    |    |    |
| - Direct Selling                          |                          |   |    |    |    |    |

- Homeshopping
- E-Commerce
- Vending
- Total

**Data removed from sample**

- Store-Based Retailing
  - Grocery Retailers
    - Modern Grocery Retailers
    - Convenience Stores
    - Discounters
    - Forecourt Retailers
    - Hypermarkets
    - Supermarkets
  - Traditional Grocery Retailers
- Non-Grocery Specialists
  - Health and Beauty Specialist Retailers
  - Other HC non-grocery retailers
- Mixed Retailers
  - Department Stores
  - Mass Merchandisers
  - Variety Stores
  - Warehouse Clubs
- Non-Store Retailing
  - Direct Selling
  - Homeshopping
  - E-Commerce
  - Vending
- Total

SC      TC

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: AC = air care; B = bleach; DW = dishwashing; IN = home insecticides; LC = laundry care; PO = polishes; SC = surface care; TC = toilet care

**Table 14 Forecast Sales of Home Care by Category: Value 2020-2025**

BOB million

|                   | 2020                            | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------------|---------------------------------|------|------|------|------|------|
| Air Care          | <b>Data removed from sample</b> |      |      |      |      |      |
| Bleach            |                                 |      |      |      |      |      |
| Dishwashing       |                                 |      |      |      |      |      |
| Home Insecticides |                                 |      |      |      |      |      |
| Laundry Care      |                                 |      |      |      |      |      |
| Polishes          |                                 |      |      |      |      |      |
| Surface Care      |                                 |      |      |      |      |      |
| Toilet Care       |                                 |      |      |      |      |      |
| Home Care         |                                 |      |      |      |      |      |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 15 Forecast Sales of Home Care by Category: % Value Growth 2020-2025**

% constant value growth

- Air Care
- Bleach
- Dishwashing
- Home Insecticides
- Laundry Care
- Polishes
- Surface Care
- Toilet Care
- Home Care

2020/2021      2020-25 CAGR      2020/25 Total

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

### GLOBAL MACROECONOMIC ENVIRONMENT

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### GLOBAL INDUSTRY ENVIRONMENT

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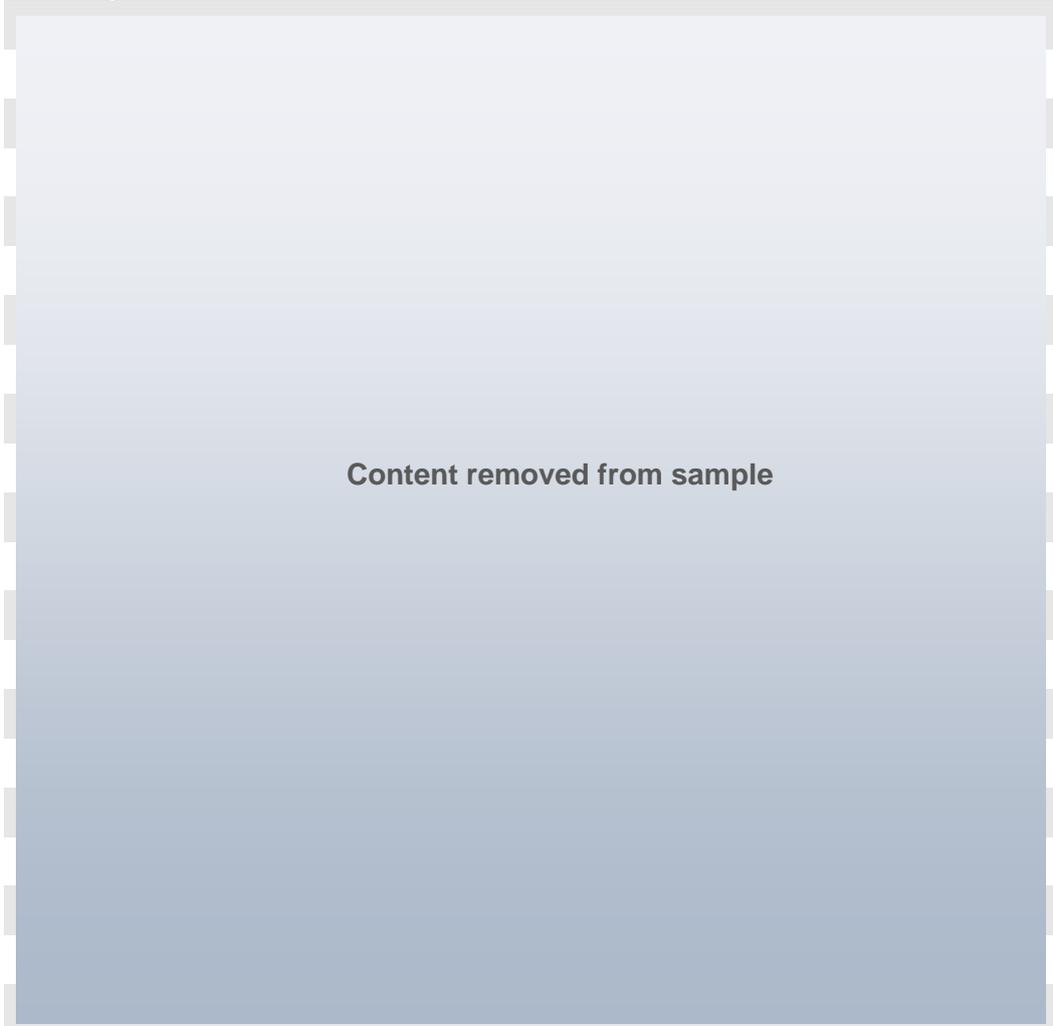
### DISCLAIMER

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## SOURCES

Sources used during research include the following:

Summary 1    Research Sources



Source: Euromonitor International