



Passport

Dishwashing in Bolivia

Euromonitor International

February 2021

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Some content and data have been
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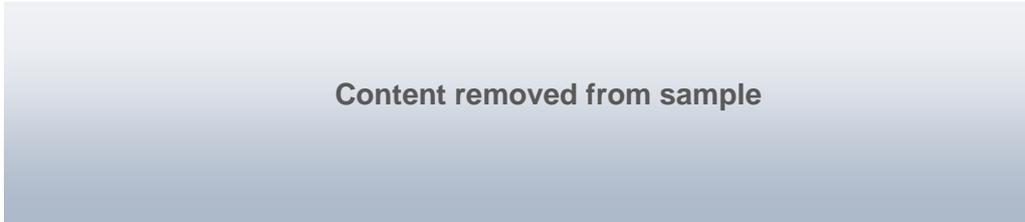
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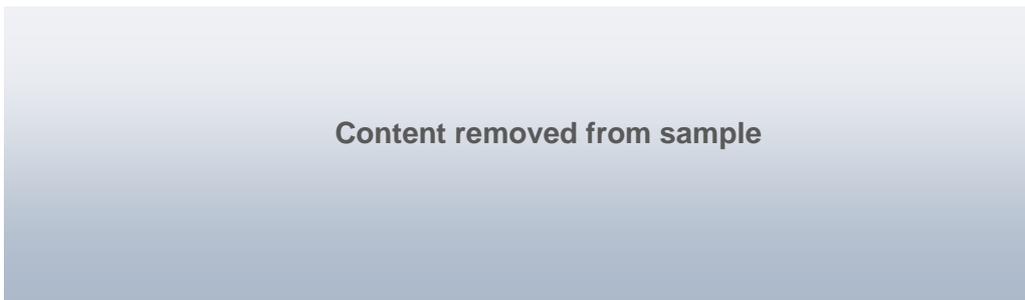
DISHWASHING IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

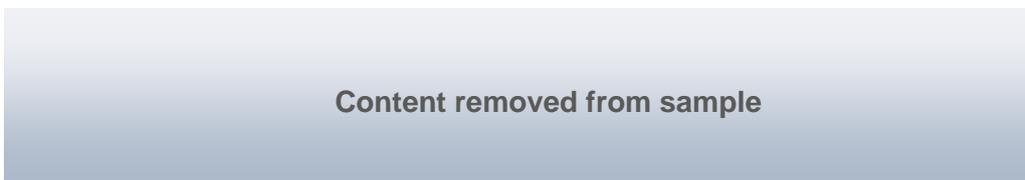


2020 IMPACT

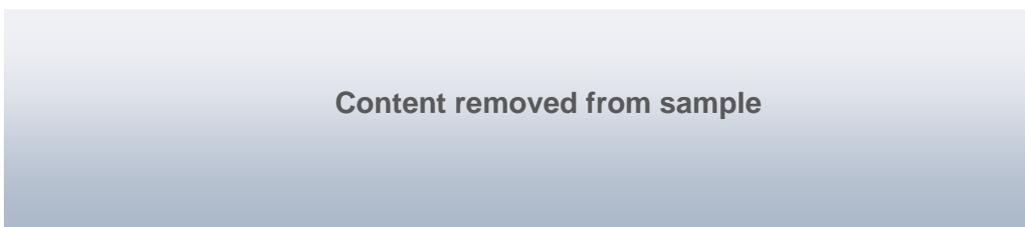
Lockdown generates more dishes to wash as consumers spend more time at home than usual



Players focus on better value for money to engage with consumers during the pandemic

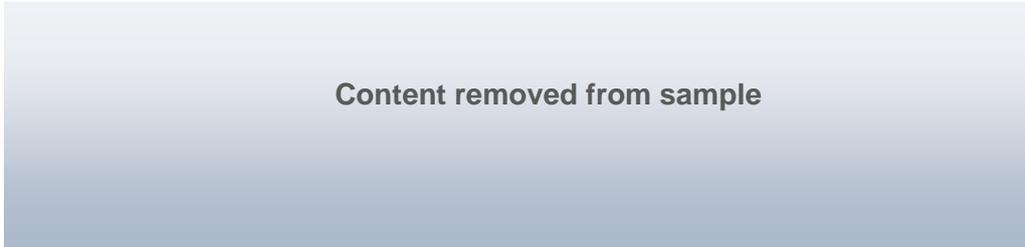


Hand dishwashing remains the only significant area in 2020



RECOVERY AN OPPORTUNITIES

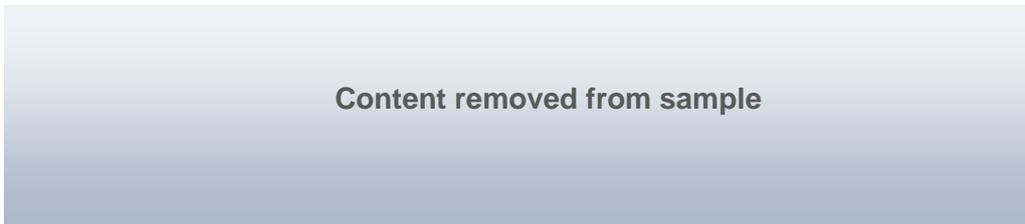
Easement of COVID-19 restrictions leads to slowed growth as consumers eat outside of the home more often



Unilever Andina plans to gain value shares in dishwashing with popular brand Surf



Innovations focus on hygiene and antibacterial qualities



CATEGORY INDICATORS

Table 1 Household Possession of Dishwashers 2015-2020

% possession of dishwasher

	2015	2016	2017	2018	2019	2020
Dishwasher	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade interviews

CATEGORY DATA

Table 2 Sales of Dishwashing by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Automatic Dishwashing	Data removed from sample					
- Automatic Dishwashing Liquids						
- Automatic Dishwashing Powders						
- Automatic Dishwashing Tablets						
- Dishwashing Additives						
Hand Dishwashing						
Dishwashing	Data removed from sample					

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

Table 3 Sales of Dishwashing by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Automatic Dishwashing	Data removed from sample		
- Automatic Dishwashing Liquids			
- Automatic Dishwashing Powders			
- Automatic Dishwashing Tablets			
- Dishwashing Additives			
Hand Dishwashing			
Dishwashing	Data removed from sample		

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

Table 4 NBO Company Shares of Dishwashing: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				
	Data removed from sample				
	Data removed from sample				
	Data removed from sample				
	Data removed from sample				
	Data removed from sample				

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

Table 5 LBN Brand Shares of Dishwashing: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Forecast Sales of Dishwashing by Category: Value 2020-2025

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

Automatic Dishwashing	Data removed from sample					
- Automatic Dishwashing Liquids						
- Automatic Dishwashing Powders						
- Automatic Dishwashing Tablets						
- Dishwashing Additives						
Hand Dishwashing						
Dishwashing	Data removed from sample					

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

Table 7 Forecast Sales of Dishwashing by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
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Automatic Dishwashing	Data removed from sample		
- Automatic Dishwashing Liquids			
- Automatic Dishwashing Powders			
- Automatic Dishwashing Tablets			
- Dishwashing Additives			
Hand Dishwashing			
Dishwashing	Data removed from sample		

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 8 Households 2015-2020

	2015	2016	2017	2018	2019	2020
Households ('000)	Data removed from sample					
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

MARKET DATA

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

BOB million	2015	2016	2017	2018	2019	2020
Air Care	Data removed from sample					
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 10 Sales of Home Care by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Air Care	Data removed from sample		
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 11 NBO Company Shares of Home Care: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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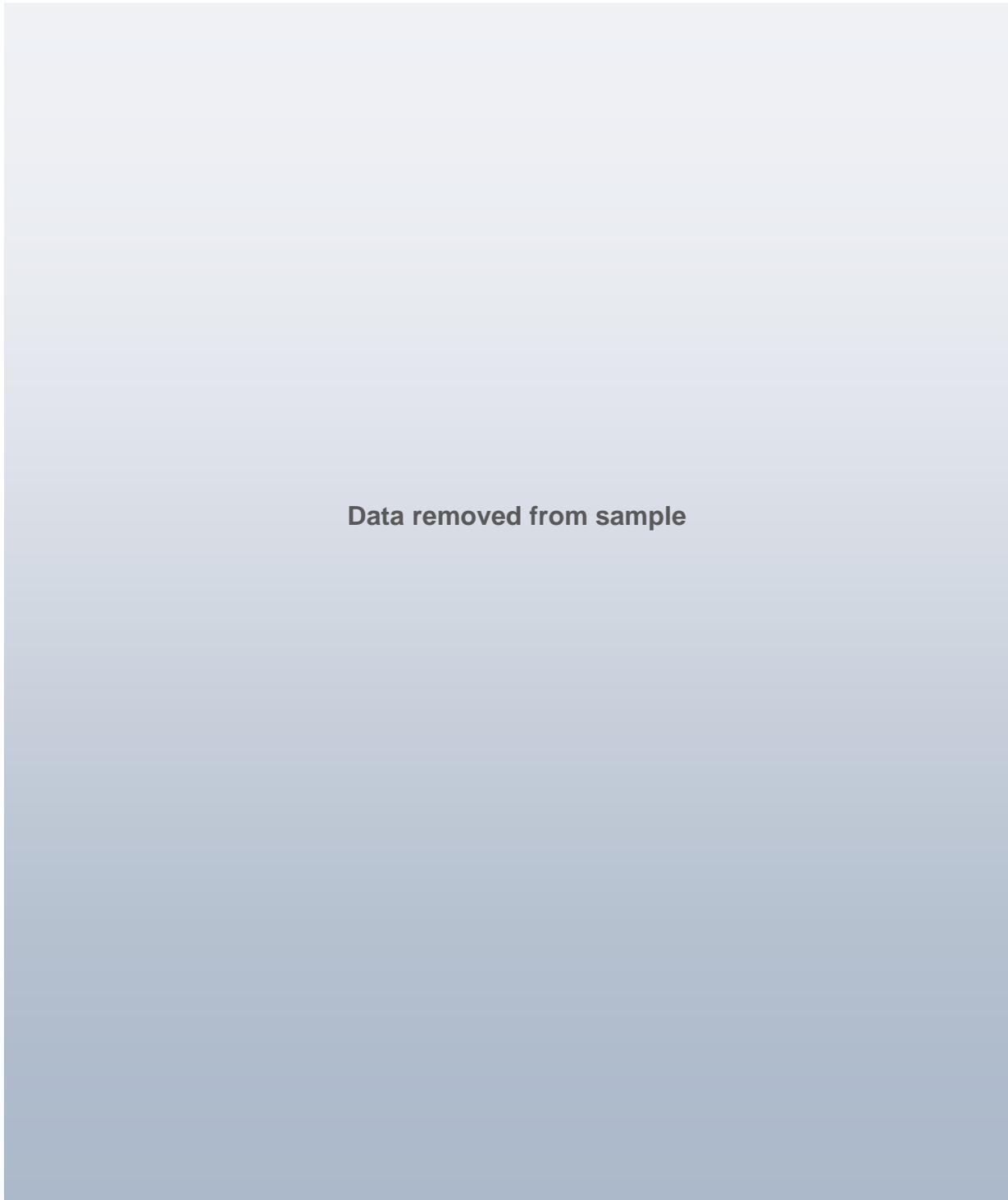
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Home Care: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample



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: % 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 14 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 15 Forecast Sales of Home Care by Category: Value 2020-2025

BOB million	2020	2021	2022	2023	2024	2025
Air Care	Data removed from sample					
Bleach						
Dishwashing						
Home Insecticides						
Laundry Care						
Polishes						
Surface Care						
Toilet Care						
Home Care						

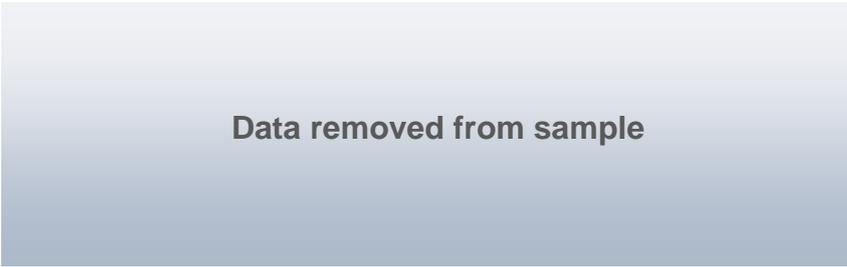
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Home Care by Category: % Value Growth 2020-2025

% constant value growth

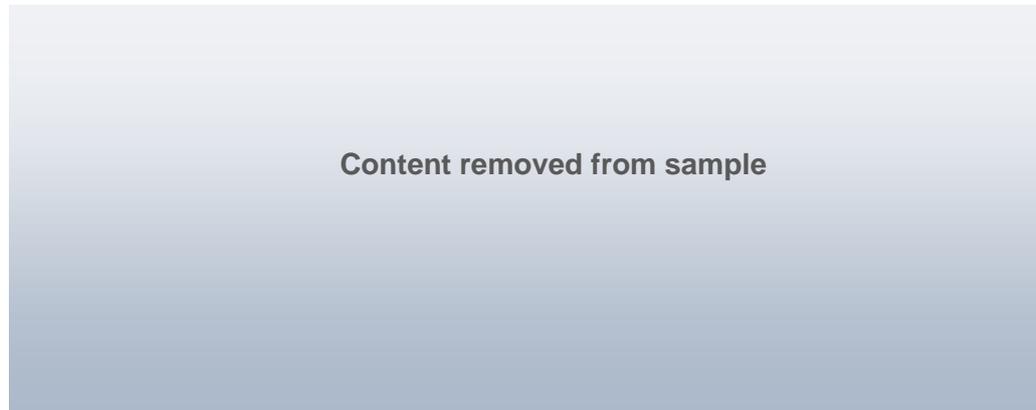
- Air Care
- Bleach
- Dishwashing
- Home Insecticides
- Laundry Care
- Polishes
- Surface Care
- Toilet Care
- Home Care

2020/2021 2020-25 CAGR 2020/25 Total

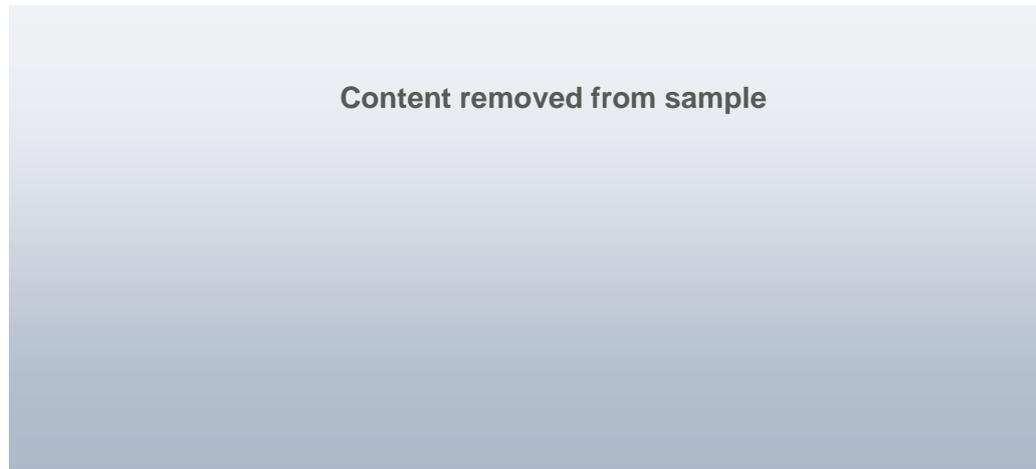


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT



GLOBAL INDUSTRY ENVIRONMENT



DISCLAIMER

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SOURCES

Sources used during research include the following:

Summary 1 Research Sources

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Source: Euromonitor International

