



Passport

Laundry Care in Bolivia

Euromonitor International

February 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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LAUNDRY CARE IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Consumers wash their clothes less during lockdown

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International travel bans result in custom office delays

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Players focus on new strategies to maintain consumer interest and sales

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RECOVERY AND OPPORTUNITIES

Power detergents recovers in response to players lowering unit prices

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Innovations focus on cost-effectiveness as the economy continues to dwindle

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Handwashing leads to slowed growth for laundry care as many consumers remain traditional

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CATEGORY INDICATORS

Table 1 Household Possession of Washing Machines 2015-2020

% possession of washing machine

	2015	2016	2017	2018	2019	2020
Washing Machine	Data removed from sample					

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

CATEGORY DATA

Table 2 Sales of Laundry Care by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Carpet Cleaners Fabric Softeners Laundry Aids Laundry Detergents Laundry Care	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 Laundry Care by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Carpet Cleaners Fabric Softeners Laundry Aids Laundry Detergents Laundry Care	Data removed from sample		

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

Table 4 Sales of Laundry Aids by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Colour Safe Laundry Bleach Fabric Fresheners Spot and Stain Removers - In-Wash Spot and Stain Removers - Pre-Wash Spot and Stain Removers Starch/Ironing Aids Water Softeners Other Laundry Aids Laundry Aids	Data removed from sample					

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

Table 5 Sales of Laundry Aids by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Colour Safe Laundry Bleach	Data removed from sample		
Fabric Fresheners			
Spot and Stain Removers			
- In-Wash Spot and Stain Removers			
- Pre-Wash Spot and Stain Removers			
Starch/Ironing Aids			
Water Softeners			
Other Laundry Aids			
Laundry Aids			

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

Table 6 Sales of Laundry Detergents by Category: Value 2015-2020

BOB million

	2015	2016	2017	2018	2019	2020
Automatic Detergents	Data removed from sample					
- Powder Detergents						
- Detergent Tablets						
- Liquid Detergents						
Standard Detergents						
- Standard Powder Detergents						
- Standard Liquid Detergents						
Concentrated Detergents						
- Concentrated Powder Detergents						
- Concentrated Liquid Detergents						
- Compact Powder Tablet Detergents						
- Liquid Tablet Detergents						
Other Detergents						
- Bar Detergents						
- Hand Wash Detergents						
- Fine Fabric Detergents						
Laundry Detergents						

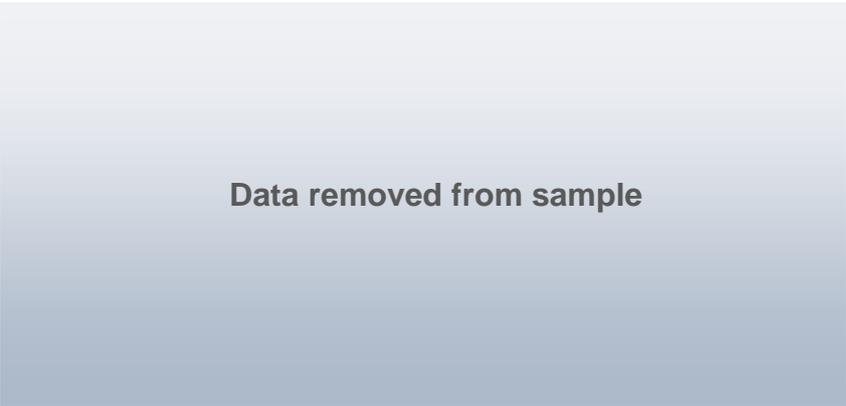
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Laundry Detergents by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Automatic Detergents	Data removed from sample		

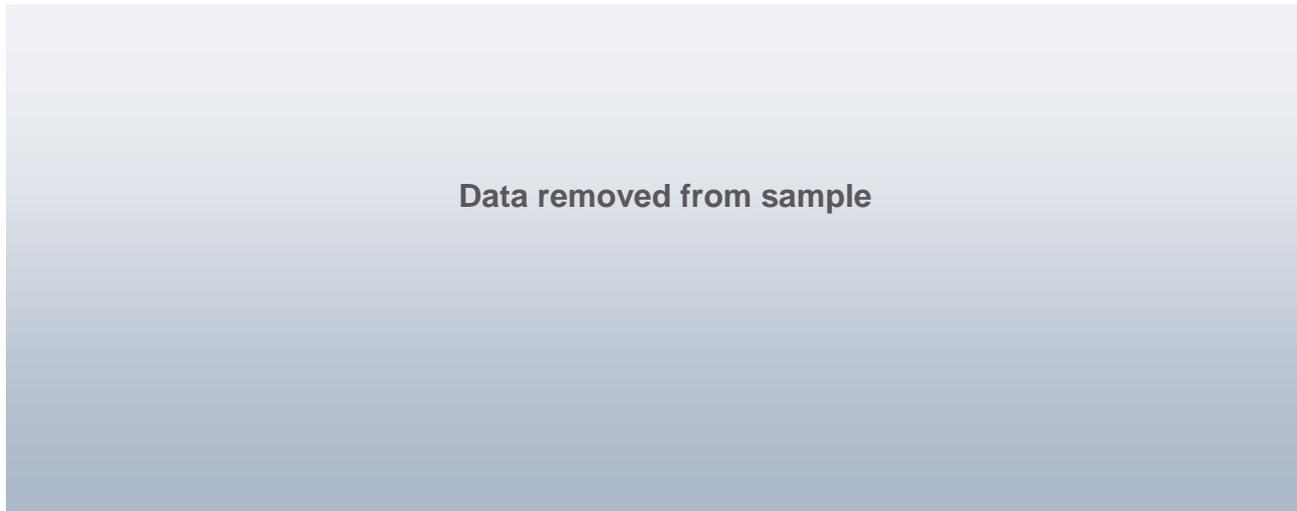
- Powder Detergents
- Detergent Tablets
- Liquid Detergents
- Standard Detergents
- Standard Powder Detergents
- Standard Liquid Detergents
- Concentrated Detergents
- Concentrated Powder Detergents
- Concentrated Liquid Detergents
- Compact Powder Tablet Detergents
- Liquid Tablet Detergents
- Other Detergents
- Bar Detergents
- Hand Wash Detergents
- Fine Fabric Detergents
- Laundry Detergents



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

Table 8 NBO Company Shares of Laundry Care: % Value 2016-2020

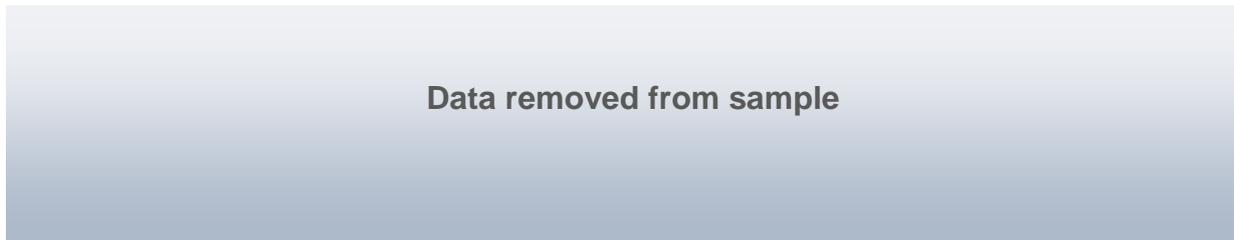
% retail value rsp Company	2016	2017	2018	2019	2020
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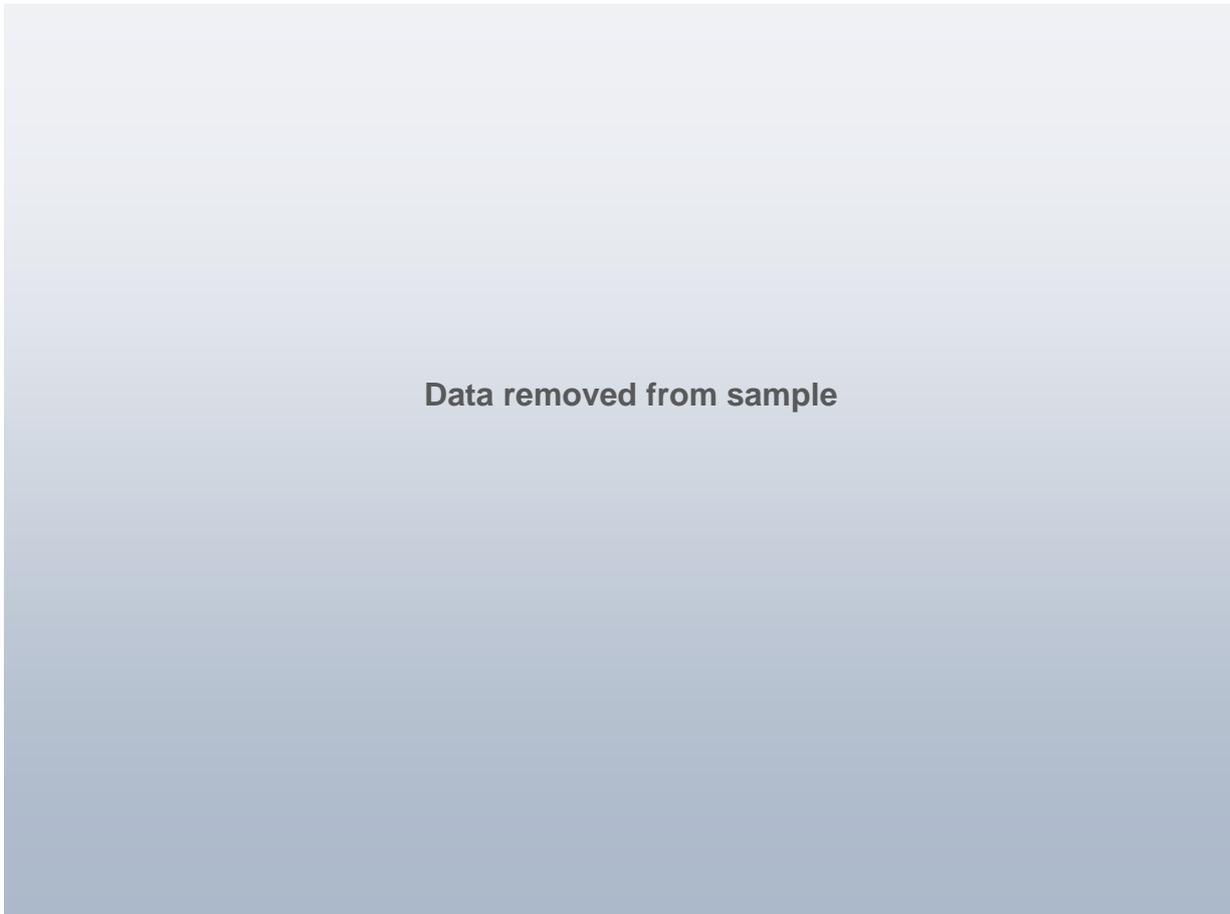


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 LBN Brand Shares of Laundry Care: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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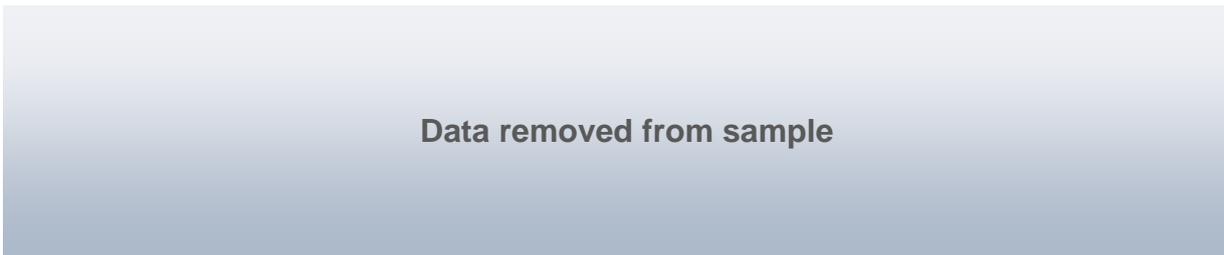




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 NBO Company Shares of Laundry Aids: % Value 2016-2020

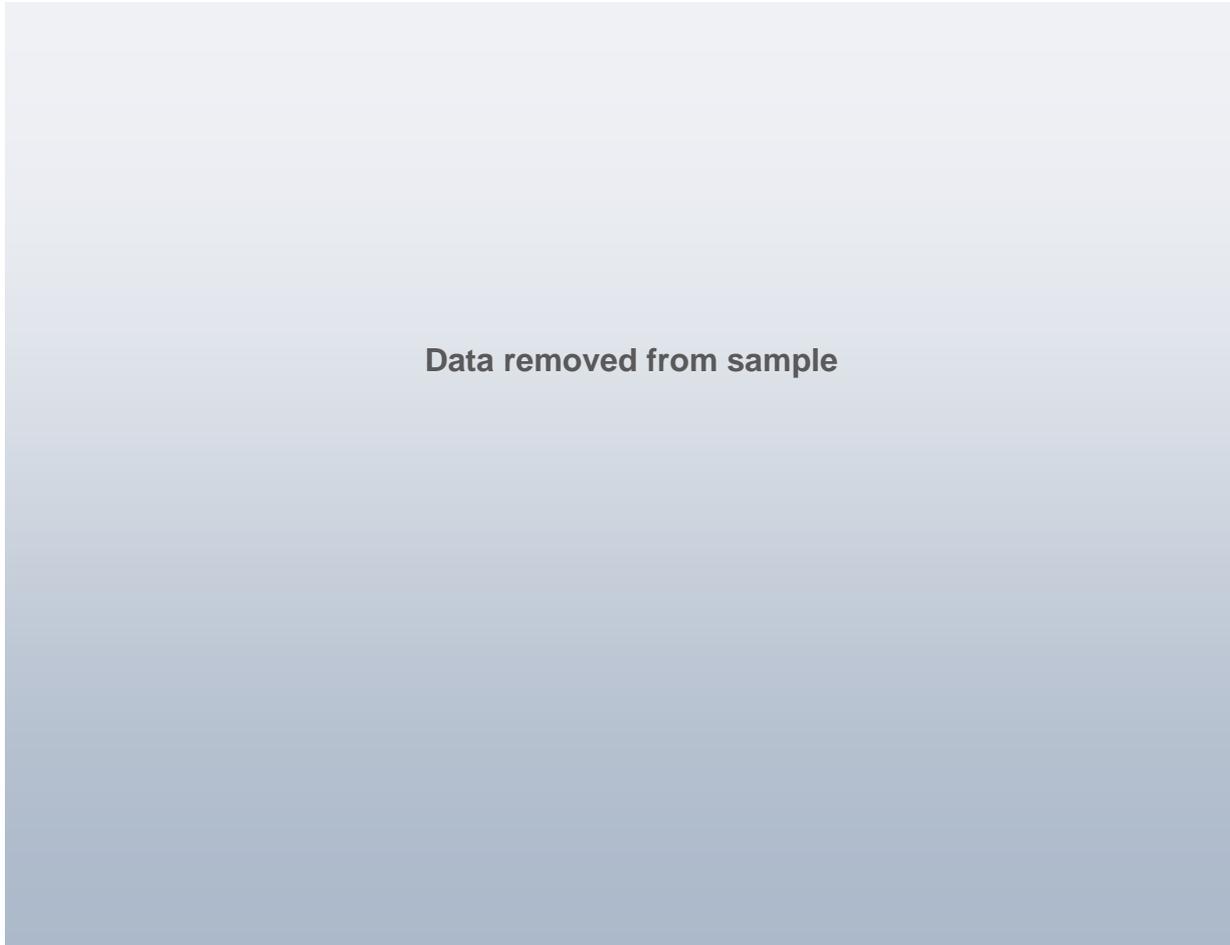
% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



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

Table 11 LBN Brand Shares of Laundry Aids: % Value 2017-2020

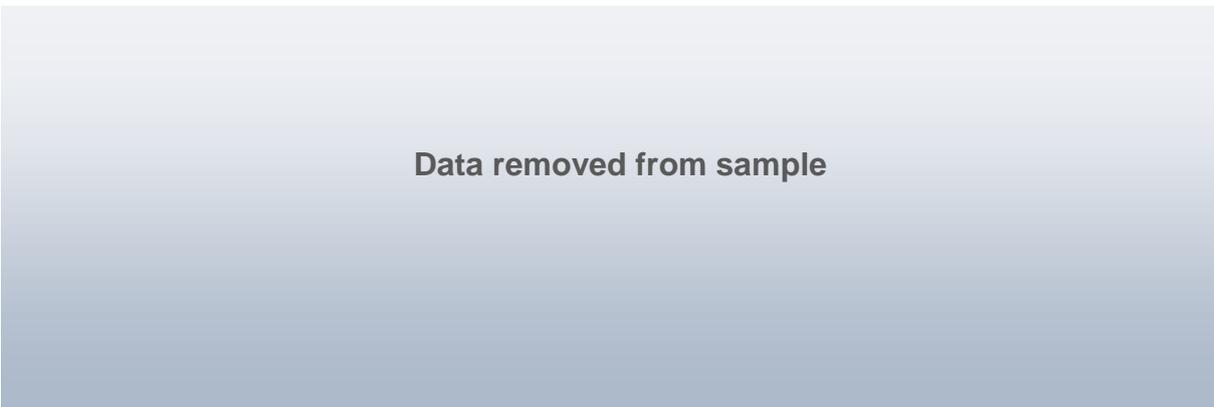
% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 NBO Company Shares of Laundry Detergents: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



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

Table 13 LBN Brand Shares of Laundry Detergents: % Value 2017-2020

% retail value rsp 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 14 Forecast Sales of Laundry Care by Category: Value 2020-2025

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

Carpet Cleaners	Data removed from sample					
Fabric Softeners						
Laundry Aids						
Laundry Detergents						
Laundry Care						

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

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

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Carpet Cleaners	Data removed from sample		
Fabric Softeners			
Laundry Aids			
Laundry Detergents			
Laundry Care			

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

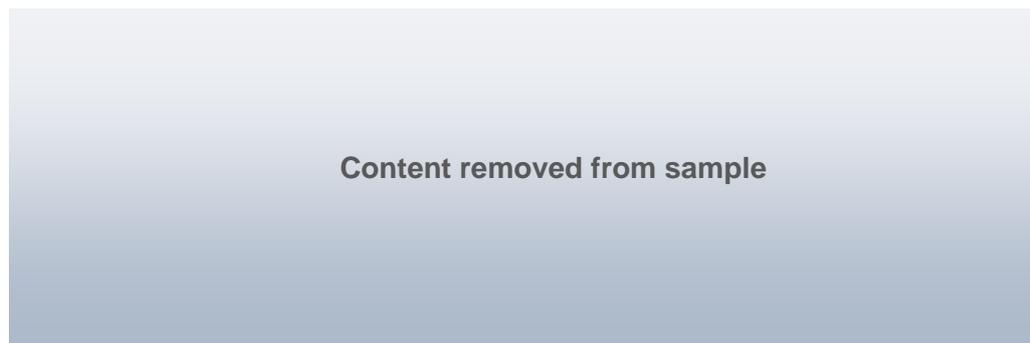
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Retailing shift

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What next for home care?

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MARKET INDICATORS

Table 16 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 17 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 18 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 19 NBO Company Shares of Home Care: % Value 2016-2020

% retail value rsp Company	2016	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 20 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

Data removed from sample

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

Table 21 Distribution of Home Care by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
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						

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

Table 22 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 23 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 24 Forecast Sales of Home Care by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
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

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

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Source: Euromonitor International

