



# Passport

## Polishes in Bolivia

Euromonitor International

February 2021

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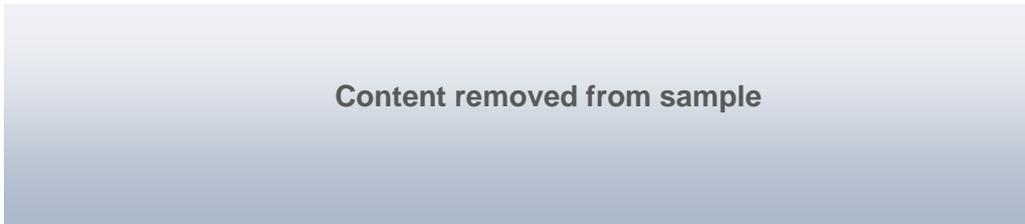
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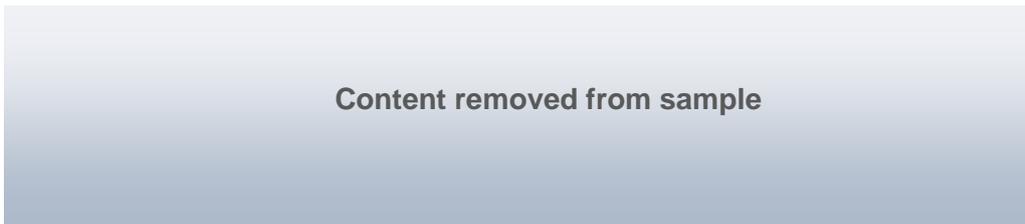
# POLISHES IN BOLIVIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

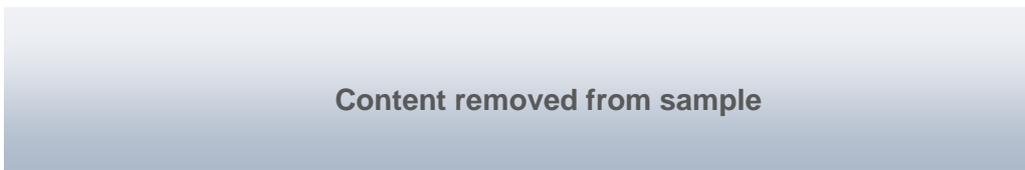


## 2020 IMPACT

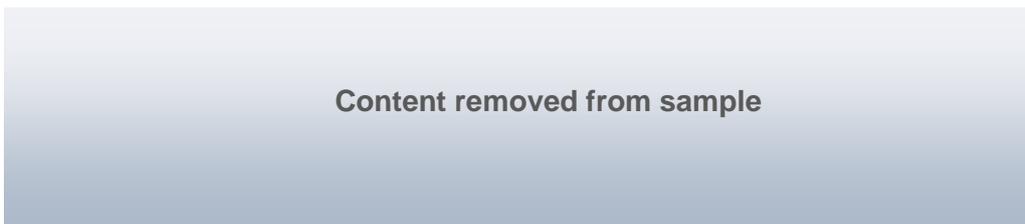
The pandemic leads to A reduction of domestic staff in Bolivian households



Cash-strapped consumers favour multi-use products such as bleach and powder detergents

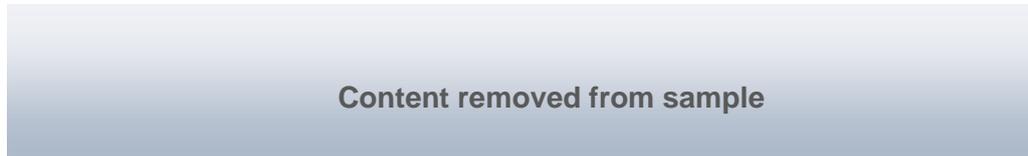


Shoe polishes suffers due to remote working and home schooling

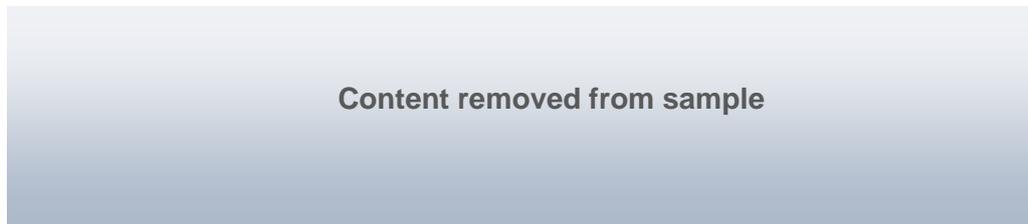


## RECOVERY AND OPPORTUNITIES

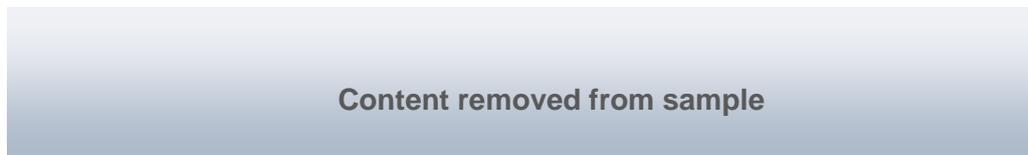
Immediate rebound for polishes as consumers return to their pre pandemic lives



Urbanisation continues to introduce new materials into homes that do not require polishes



New product developments focus on hygiene and antibacterial



## CATEGORY DATA

Table 1 Sales of Polishes by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Floor Polish	Data removed from sample					
Furniture Polish						
Metal Polish						
Shoe Polish						
Polishes						

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

Table 2 Sales of Polishes by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total

Floor Polish  
 Furniture Polish  
 Metal Polish  
 Shoe Polish  
 Polishes

**Data removed from sample**

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

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

% retail value rsp 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 Polishes: % 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 5 Forecast Sales of Polishes by Category: Value 2020-2025**

BOB million

	2020	2021	2022	2023	2024	2025
Floor Polish	<b>Data removed from sample</b>					
Furniture Polish						
Metal Polish						
Shoe Polish						
Polishes						

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

**Table 6 Forecast Sales of Polishes by Category: % Value Growth 2020-2025**

% constant value growth

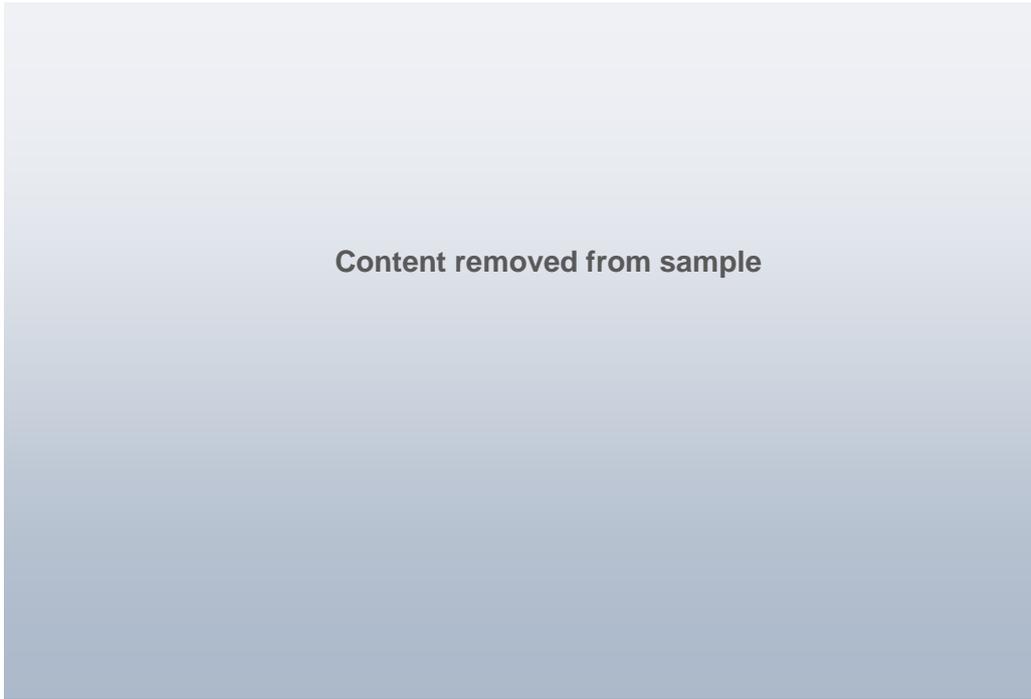
	2020/2021	2020-25 CAGR	2020/25 Total
Floor Polish	<b>Data removed from sample</b>		
Furniture Polish			
Metal Polish			
Shoe Polish			
Polishes			

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)	Data removed from sample					
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	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 9 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 10 NBO Company Shares of Home Care: % Value 2016-2020**

% retail value rsp 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 11 LBN Brand Shares of Home Care: % Value 2017-2020**

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

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

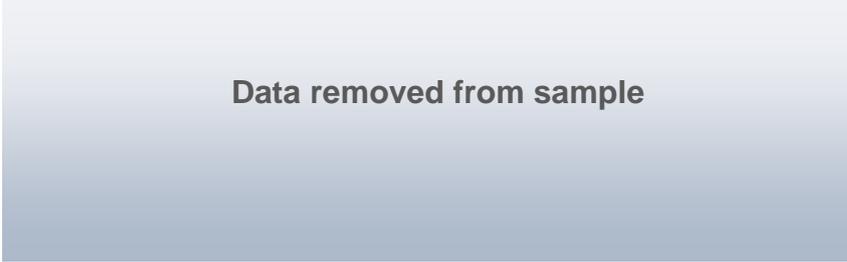
% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional 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	<b>Data removed from sample</b>					
- 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



- 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  
 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	2020/2021	2020-25 CAGR	2020/25 Total
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

## 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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