



Passport

Home Care in Bolivia

Euromonitor International

February 2021

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purposes only.

Some content and data have been
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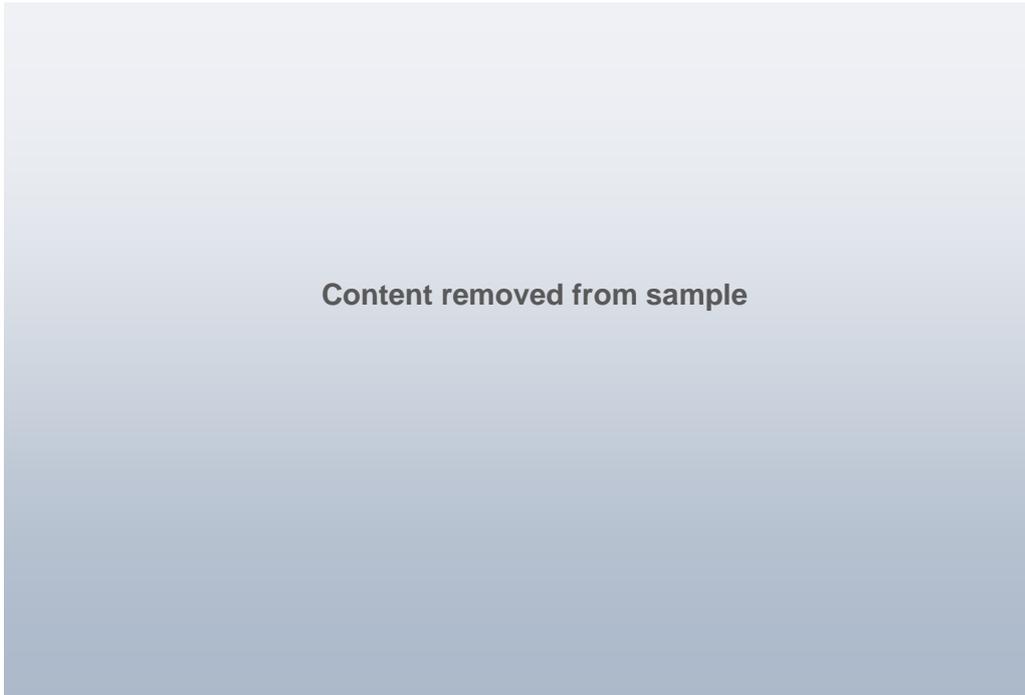
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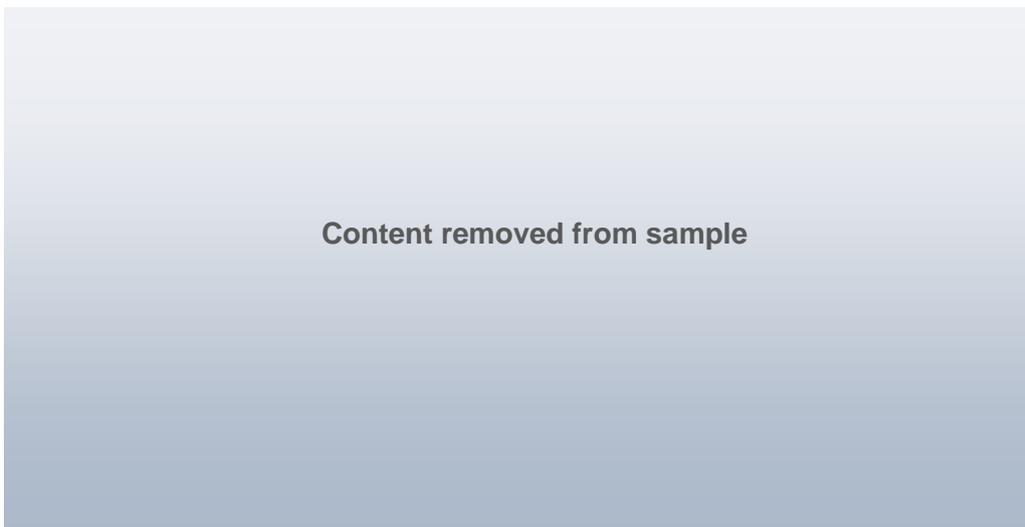
HOME CARE IN BOLIVIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on home care



COVID-19 country impact



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Company response

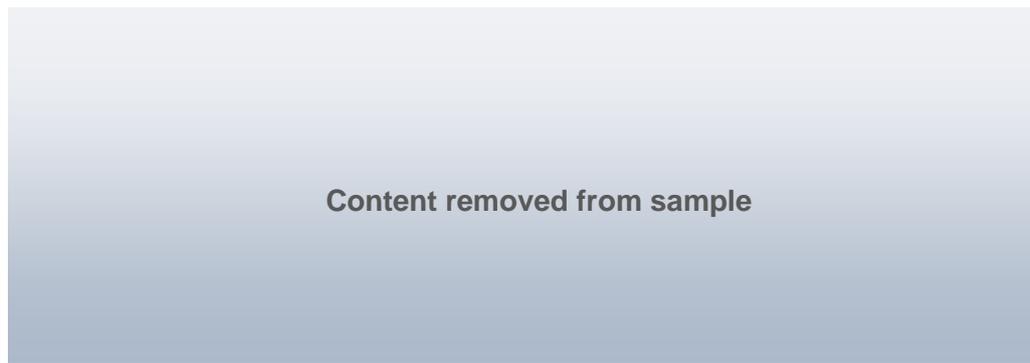
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Retailing shift

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What next for home care?

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MARKET INDICATORS

Table 1 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 2 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 3 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 4 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 5 LBN Brand Shares of Home 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 6 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 7 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

SC TC

- 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

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 8 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 9 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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AIR CARE IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Spray/aerosol air fresheners leads air care to victory admits the pandemic

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Domestic players benefit as international producers encounter shortages in 2020

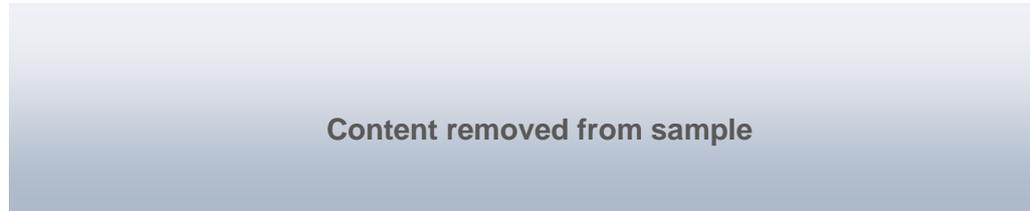
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Car air fresheners fall in demand due to travel restrictions throughout Bolivia

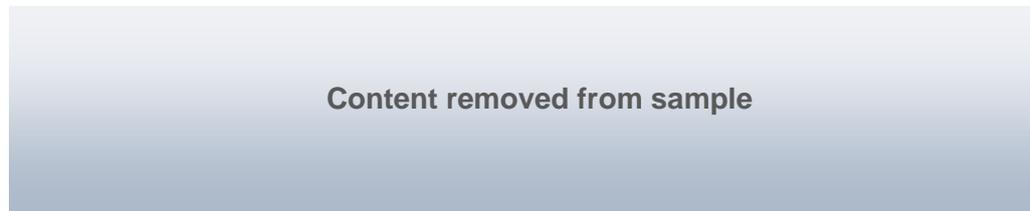
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RECOVERY AND OPPORTUNITIES

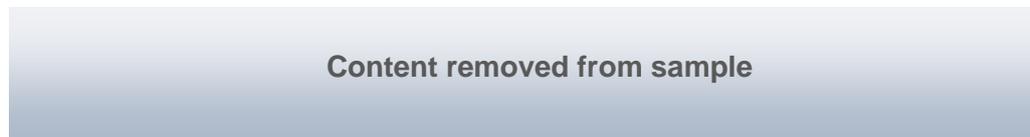
Normalisation expected at the beginning of the forecast period



Exatons of distribution and product offerings lead to strong growth over the forecast period



Retailers expected to continue expanding their shelf space for air care products



CATEGORY DATA

Table 10 Sales of Air Care by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Candle Air Fresheners	Data removed from sample					
Car Air Fresheners						
Electric Air Fresheners						
Gel Air Fresheners						
Liquid Air Fresheners						
Spray/Aerosol Air Fresheners						
Other Air Care						
Air Care						

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

Table 11 Sales of Air Care by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Candle Air Fresheners	Data removed from sample		
Car Air Fresheners			
Electric Air Fresheners			
Gel Air Fresheners			
Liquid Air Fresheners			
Spray/Aerosol Air Fresheners			
Other Air Care			
Air Care			

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

Table 12 NBO Company Shares of Air Care: % Value 2016-2020

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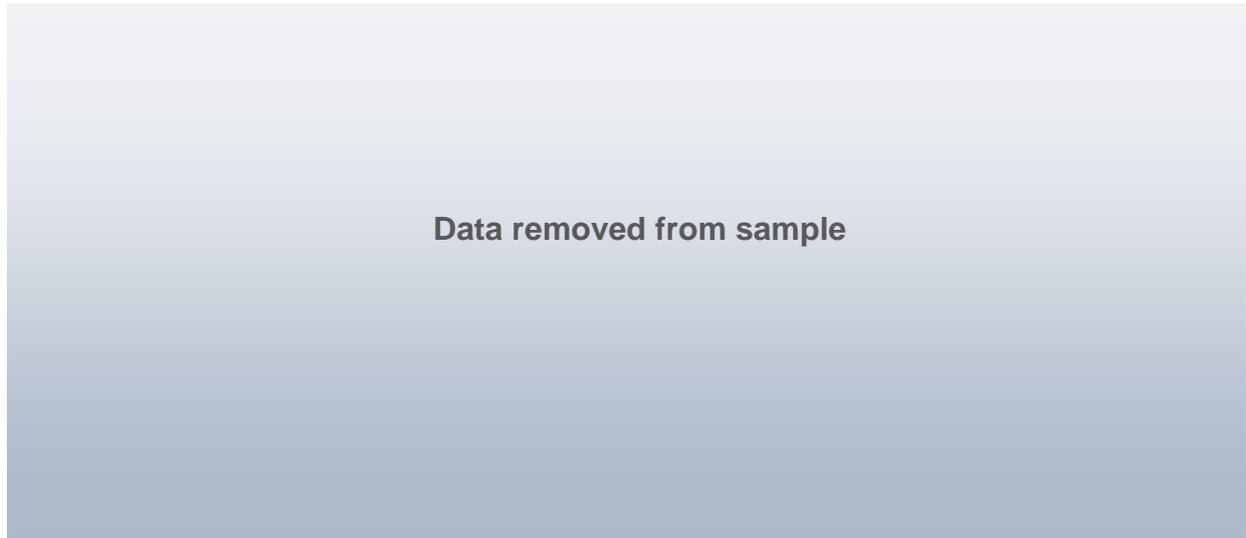
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 LBN Brand Shares of Air 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 14 Forecast Sales of Air Care by Category: Value 2020-2025

BOB million

	2020	2021	2022	2023	2024	2025
Candle Air Fresheners	Data removed from sample					
Car Air Fresheners						
Electric Air Fresheners						
Gel Air Fresheners						
Liquid Air Fresheners						
Spray/Aerosol Air Fresheners						
Other Air Care						
Air Care						

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

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

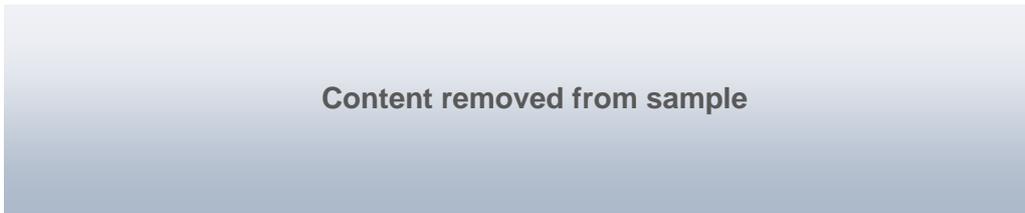
% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Candle Air Fresheners	Data removed from sample		
Car Air Fresheners			
Electric Air Fresheners			
Gel Air Fresheners			
Liquid Air Fresheners			
Spray/Aerosol Air Fresheners			
Other Air Care			
Air Care			

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

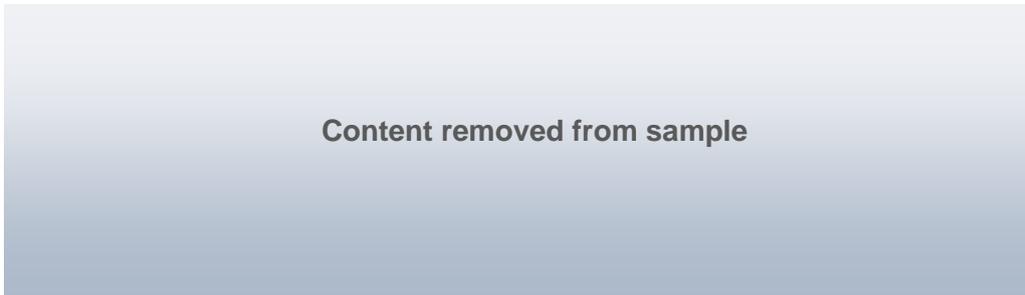
BLEACH IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

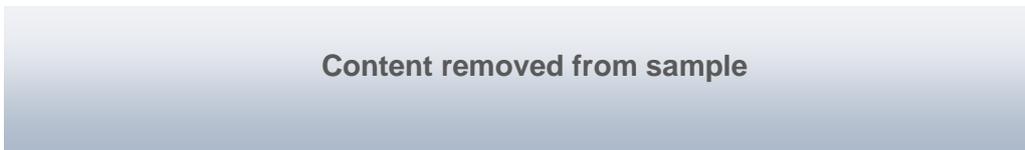


2020 IMPACT

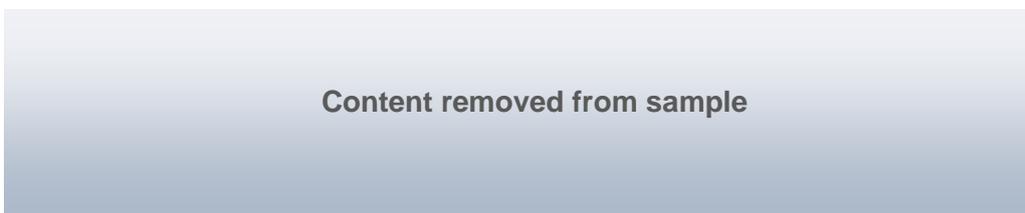
Bleach sees surging current value sales due to hygiene concerns and economising trend



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



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RECOVERY AND OPPORTUNITIES

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

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Bleach records higher per-capita consumption compared to 2019

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New product development focus on size and fragrance

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CATEGORY DATA

Table 16 Sales of Bleach: Value 2015-2020

BOB million

	2015	2016	2017	2018	2019	2020
Bleach	Data removed from sample					

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

Table 17 Sales of Bleach: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Bleach

Data removed from sample

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

Table 18 NBO Company Shares of Bleach: % 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 19 LBN Brand Shares of Bleach: % 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 20 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 21 Forecast Sales of Bleach: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

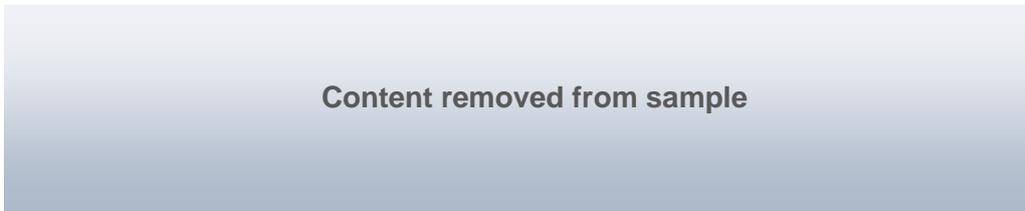
Bleach

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

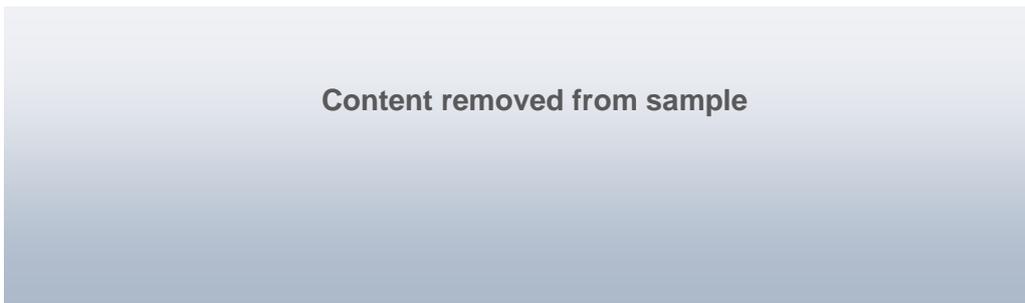
DISHWASHING IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

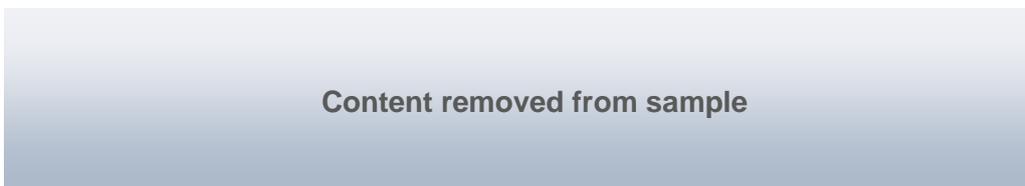


2020 IMPACT

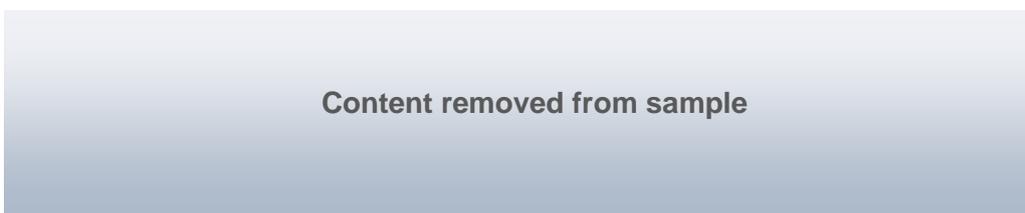
Lockdown generates more dishes to wash as consumers spend more time at home than usual



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



Hand dishwashing remains the only significant area in 2020



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RECOVERY AN OPPORTUNITIES

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

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

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Innovations focus on hygiene and antibacterial qualities

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CATEGORY INDICATORS

Table 22 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 23 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						

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

Table 24 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			

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

Table 25 NBO Company Shares of Dishwashing: % Value 2016-2020

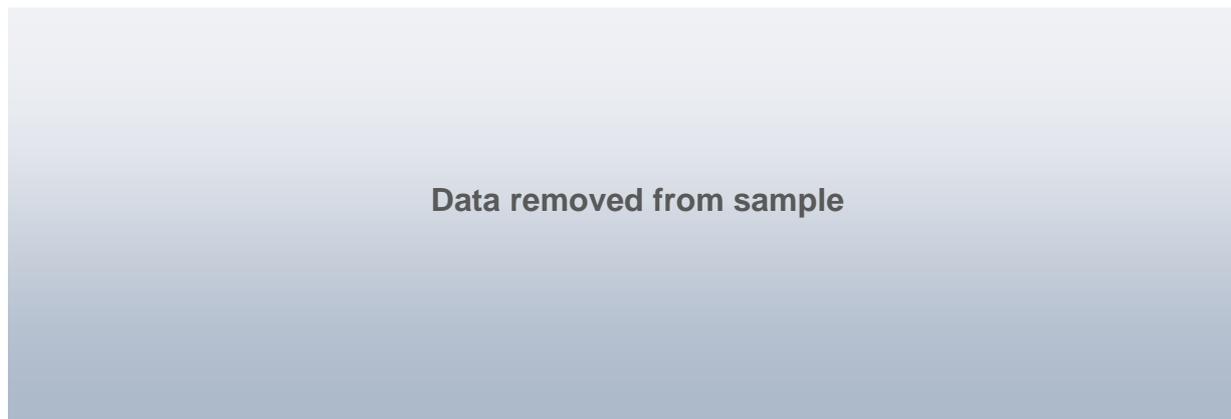
% retail value rsp

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 26 LBN Brand Shares of Dishwashing: % Value 2017-2020

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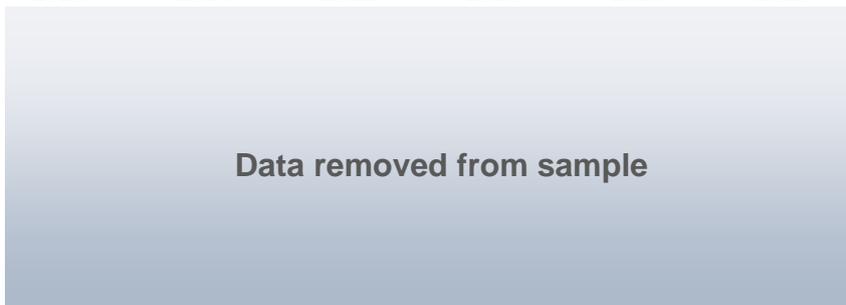


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Forecast Sales of Dishwashing by Category: Value 2020-2025

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

- Automatic Dishwashing
- Automatic Dishwashing Liquids
- Automatic Dishwashing Powders
- Automatic Dishwashing Tablets
- Dishwashing Additives
- Hand Dishwashing
- Dishwashing



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

Table 28 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
- Automatic Dishwashing Liquids
- Automatic Dishwashing Powders



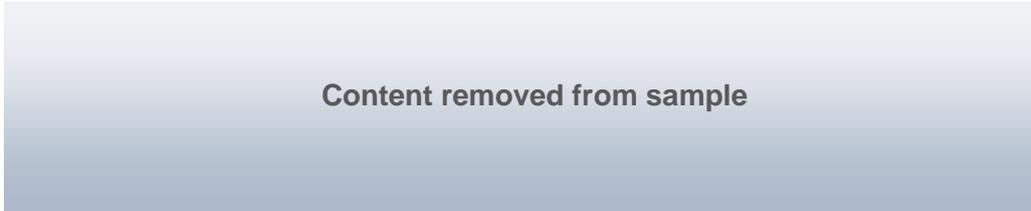
- Automatic Dishwashing Tablets
 - Dishwashing Additives
- Hand Dishwashing
Dishwashing

Data removed from sample

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

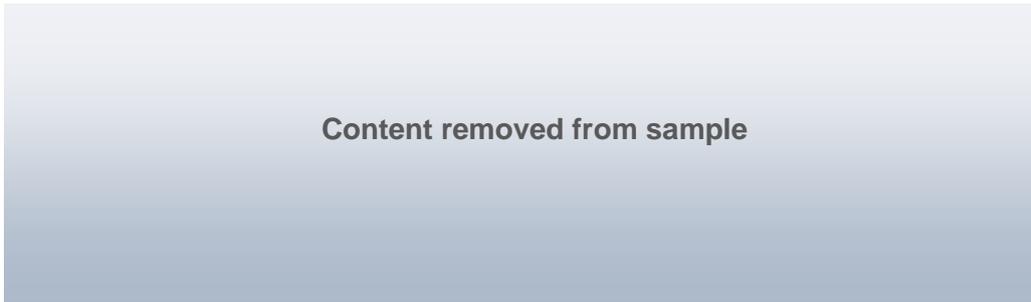
HOME INSECTICIDES IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

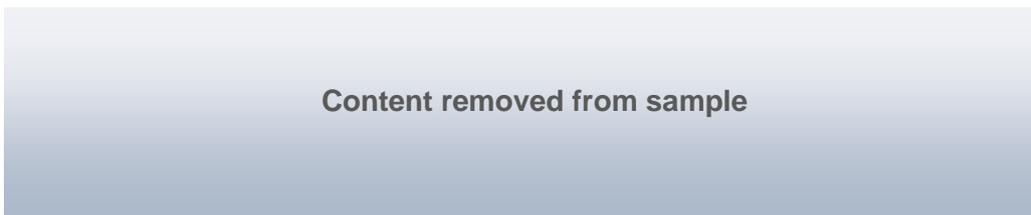


2020 IMPACT

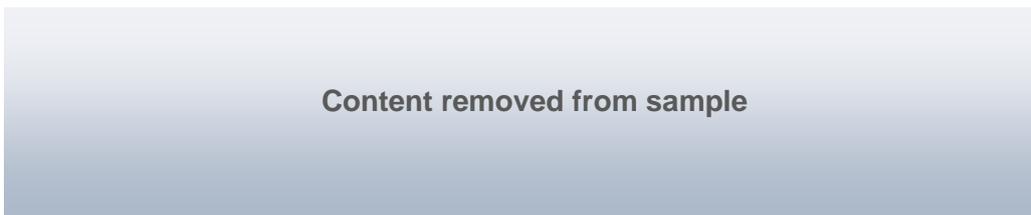
Bolivian consumers face the Dengue epidemic alongside the COVID-19 pandemic



Domestic players focus on distribution expansion

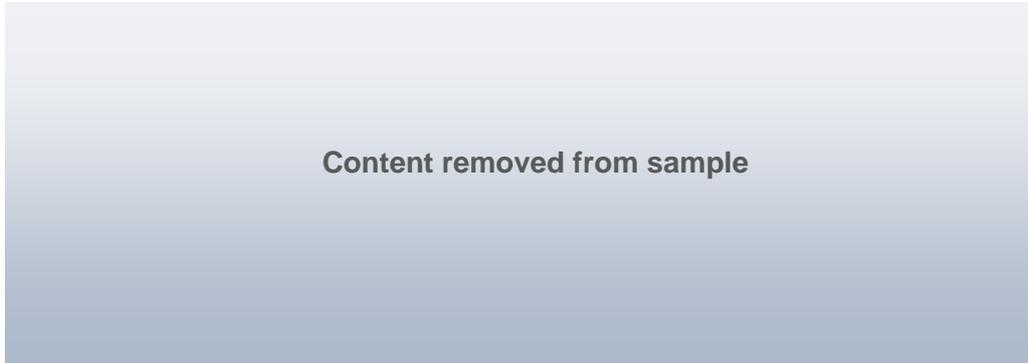


Industrias Luri launches new brand with no fragrance

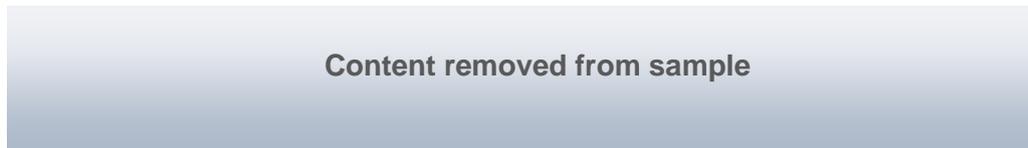


RECOVERY AND OPPORTUNITIES

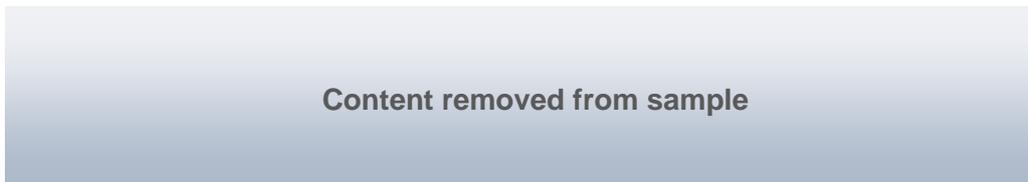
Domestic players will lead sales over the forecast period



Spray/aerosol remain the most popular format due to lower price point



As restriction ease, illicit trade re-emerges in Bolivia



CATEGORY DATA

Table 29 Sales of Home Insecticides by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Electric Insecticides	Data removed from sample					
Insecticide Baits						
Insecticide Coils						
Spray/Aerosol Insecticides						
Other Home Insecticides						
Home Insecticides						

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

Table 30 Sales of Home Insecticides by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Electric Insecticides	Data removed from sample		
Insecticide Baits			
Insecticide Coils			
Spray/Aerosol Insecticides			
Other Home Insecticides			
Home Insecticides			

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

Table 31 NBO Company Shares of Home Insecticides: % 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 32 LBN Brand Shares of Home Insecticides: % 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 33 Forecast Sales of Home Insecticides by Category: Value 2020-2025

BOB million

	2020	2021	2022	2023	2024	2025
Electric Insecticides	Data removed from sample					
Insecticide Baits						
Insecticide Coils						
Spray/Aerosol Insecticides						
Other Home Insecticides						
Home Insecticides						

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

Table 34 Forecast Sales of Home Insecticides by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Electric Insecticides	Data removed from sample		
Insecticide Baits			
Insecticide Coils			
Spray/Aerosol Insecticides			
Other Home Insecticides			
Home Insecticides			

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

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 35 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 36 Sales of Laundry Care by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
Carpet Cleaners	Data removed from sample					
Fabric Softeners						
Laundry Aids						
Laundry Detergents						
Laundry Care						

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

Table 37 Sales of Laundry Care by Category: % Value Growth 2015-2020

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

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

Table 38 Sales of Laundry Aids by Category: Value 2015-2020

BOB million	2015	2016	2017	2018	2019	2020
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 39 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 40 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 41 Sales of Laundry Detergents by Category: % Value Growth 2015-2020

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

- Automatic Detergents
 - 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 42 NBO Company Shares of Laundry Care: % Value 2016-2020

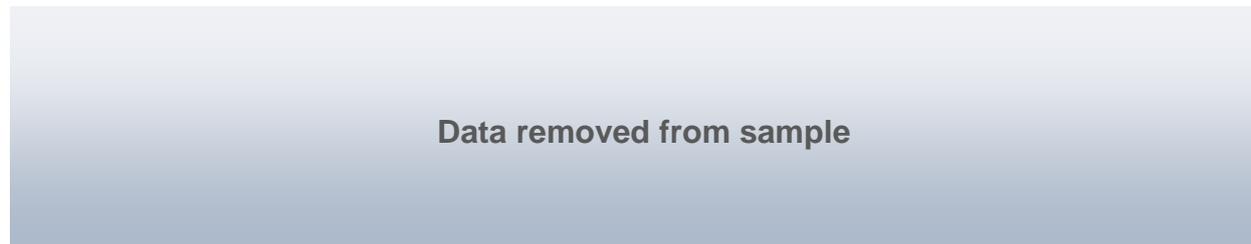
% retail value rsp Company	2016	2017	2018	2019	2020
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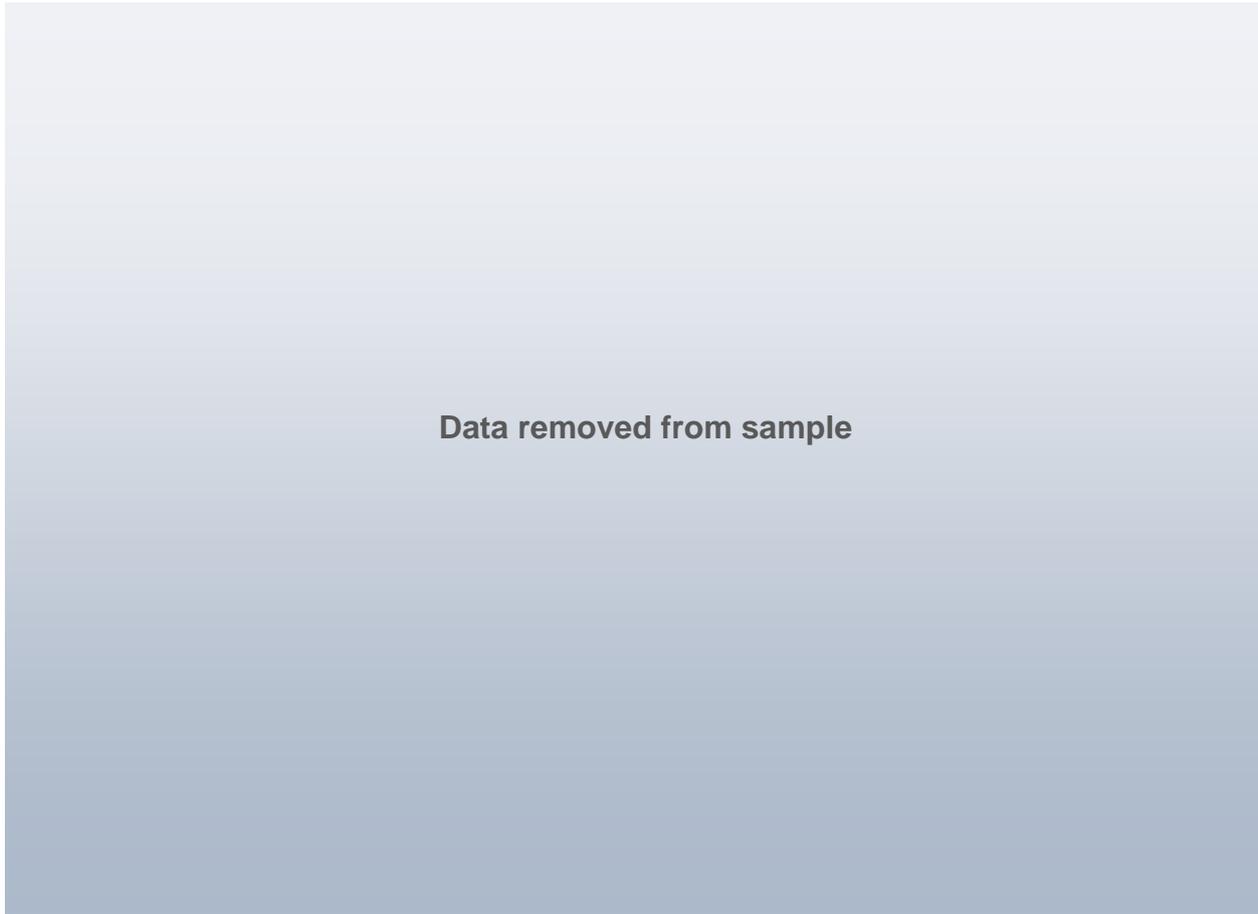


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 LBN Brand Shares of Laundry Care: % Value 2017-2020

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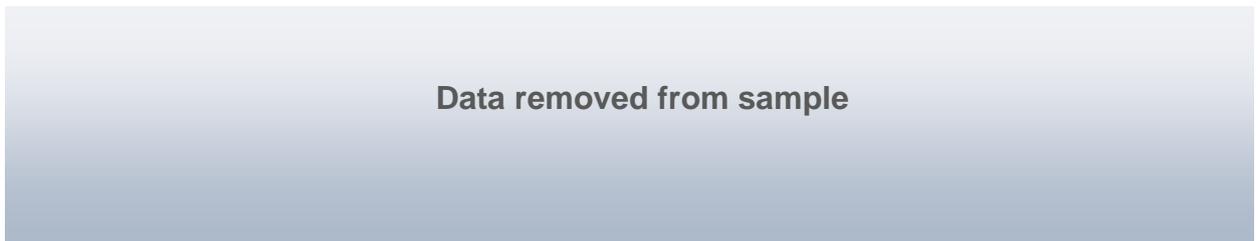




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 44 NBO Company Shares of Laundry Aids: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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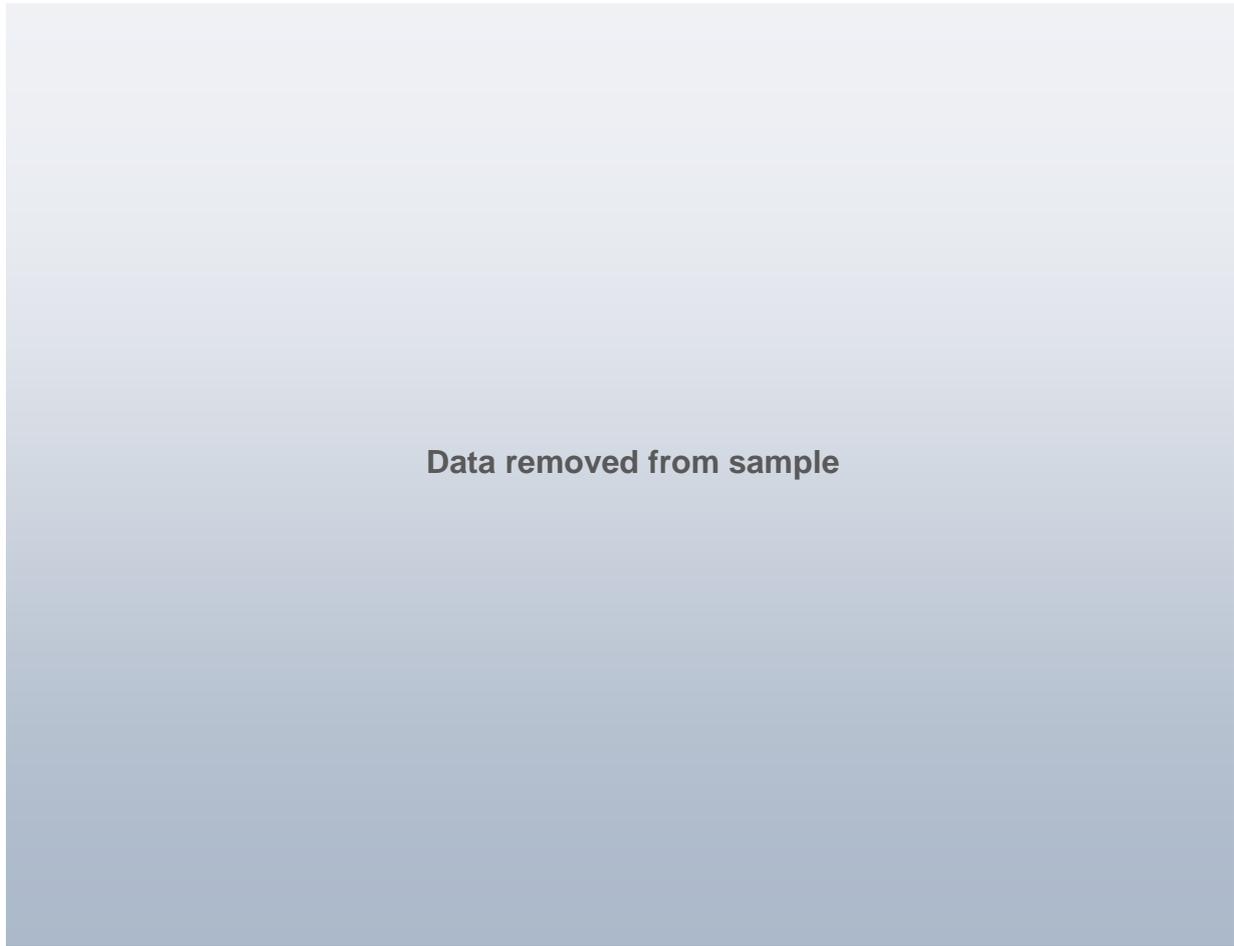


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 LBN Brand Shares of Laundry Aids: % Value 2017-2020

% retail value rsp

Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-------------	---------------	------	------	------	------



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

Table 46 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 47 LBN Brand Shares of Laundry Detergents: % 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 48 Forecast Sales of Laundry Care by Category: Value 2020-2025

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

Carpet Cleaners
Fabric Softeners
Laundry Aids
Laundry Detergents
Laundry Care

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

Table 49 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

POLISHES IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

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

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

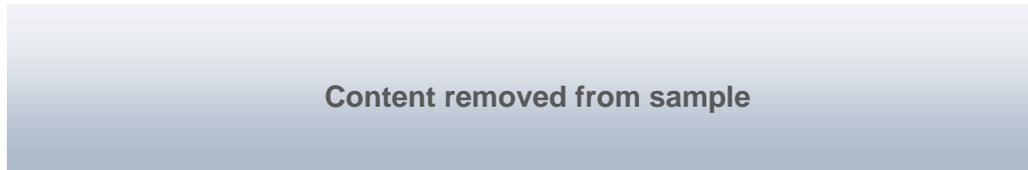
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Shoe polishes suffers due to remote working and home schooling

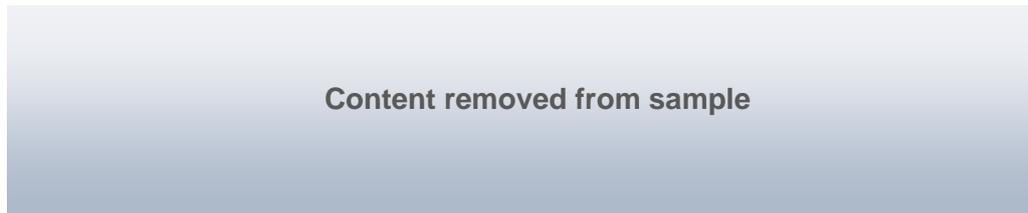
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RECOVERY AND OPPORTUNITIES

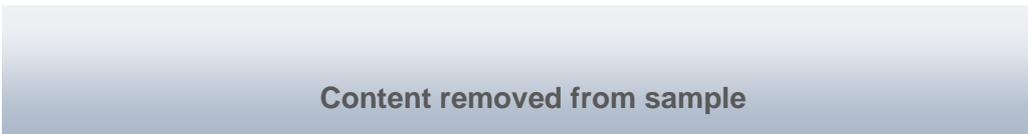
Immediate rebound for polishes as consumers return to their pre pandemic lives



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



New product developments focus on hygiene and antibacterial



CATEGORY DATA

Table 50 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 51 Sales of Polishes by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Floor Polish	Data removed from sample		
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 52 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 53 LBN Brand Shares of Polishes: % 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 54 Forecast Sales of Polishes by Category: Value 2020-2025

BOB million	2020	2021	2022	2023	2024	2025
Floor Polish	Data removed from sample					
Furniture Polish						
Metal Polish						
Shoe Polish						
Polishes						

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

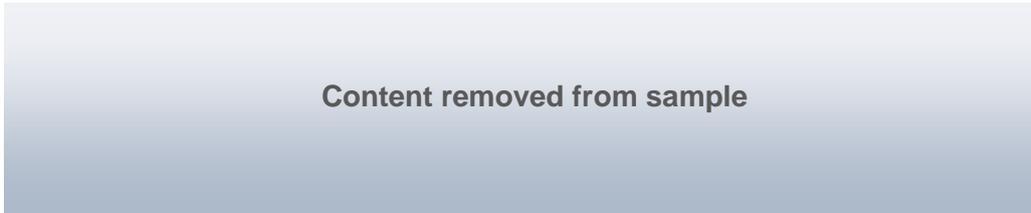
Table 55 Forecast Sales of Polishes by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Floor Polish	Data removed from sample		
Furniture Polish			
Metal Polish			
Shoe Polish			
Polishes			

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

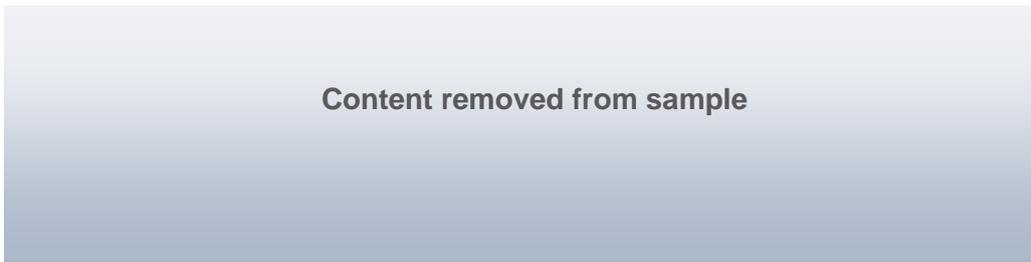
SURFACE CARE IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

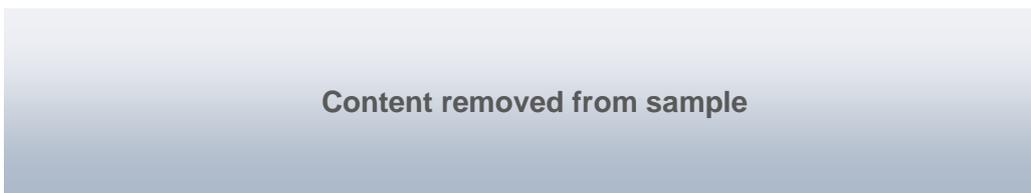


2020 IMPACT

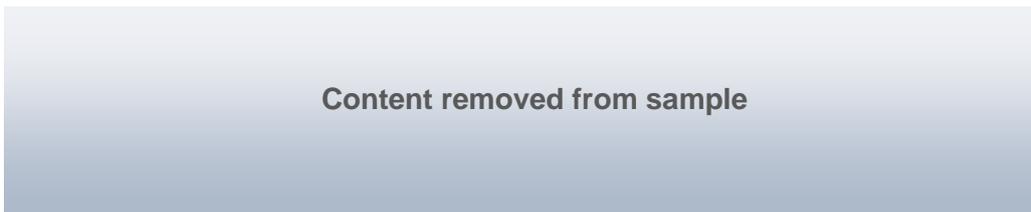
Consumers favour bleach and power detergents over home care products



Kitchen cleaners provides consumers with results that bleach and powder detergents cannot

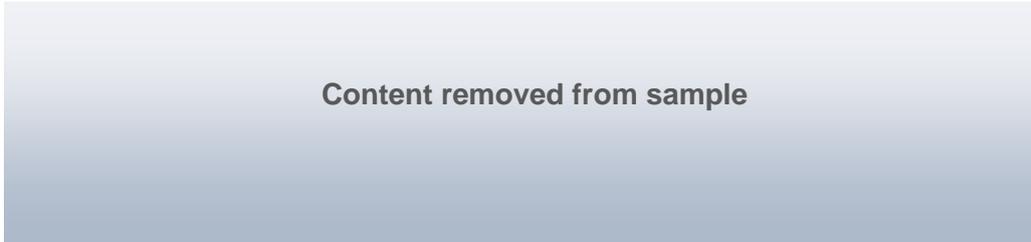


Players offer consumers free gifts as to continue boosting brand awareness

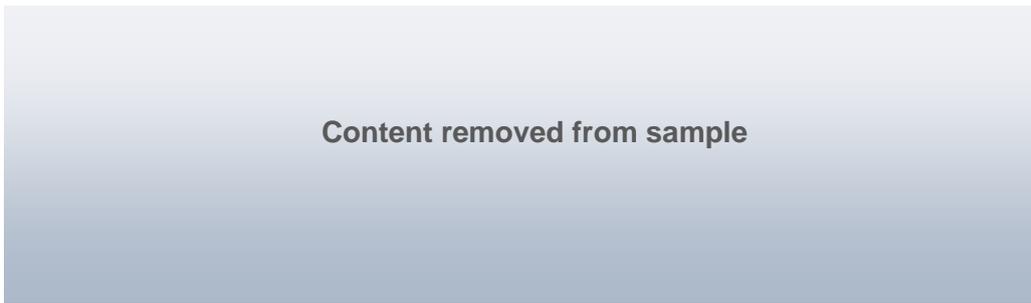


RECOVERY AND OPPORTUNITIES

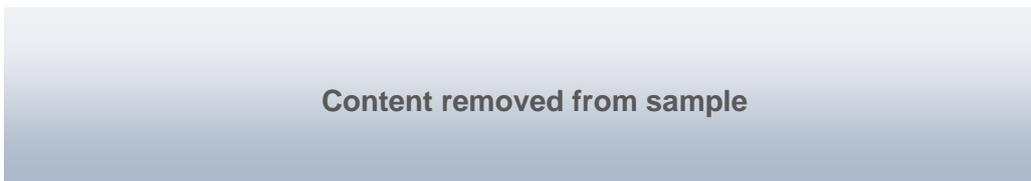
Ongoing hygiene anxieties generate demand for bathroom floor and kitchen cleaners



Consumers continually demand products with additional properties



Unilever Andina plans to gain value shares in surface care using popular brand Surf over the forecast period



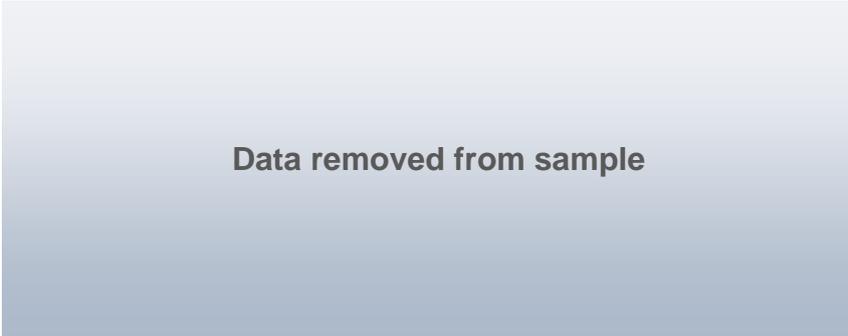
CATEGORY DATA

Table 56 Sales of Surface Care by Category: Value 2015-2020

BOB million

	2015	2016	2017	2018	2019	2020
Home Care Wipes and Floor Cleaning Systems	Data removed from sample					

- Bathroom Cleaners
- Descalers
- Drain Openers
- Floor Cleaners
- Home Care Disinfectants
- Kitchen Cleaners
- Multi-Purpose Cleaners
- Oven Cleaners
- Scouring Agents
- Window/Glass Cleaners
- Surface Care



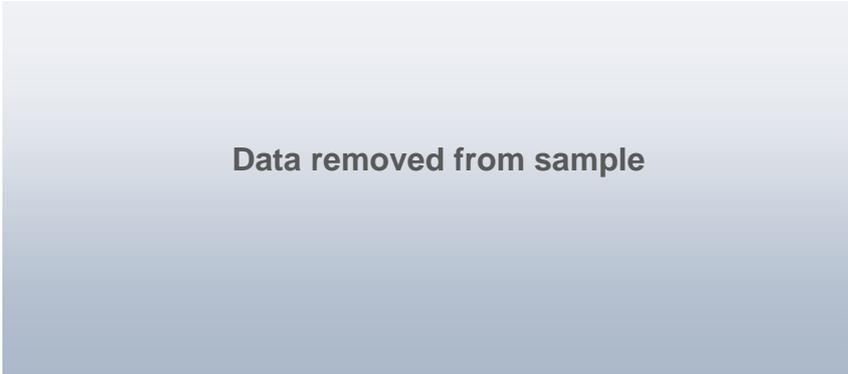
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 Sales of Surface Care by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

- Home Care Wipes and Floor Cleaning Systems
- Bathroom Cleaners
- Descalers
- Drain Openers
- Floor Cleaners
- Home Care Disinfectants
- Kitchen Cleaners
- Multi-Purpose Cleaners
- Oven Cleaners
- Scouring Agents
- Window/Glass Cleaners
- Surface Care



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

Table 58 Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2015-2020

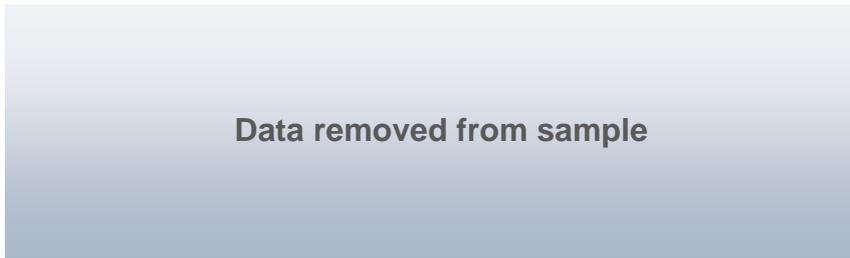
BOB '000

2015 2016 2017 2018 2019 2020

- Dry Electro-Static Wipes
- Starter Kits/Sweepers/Sticks (Dry Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes



- Toilet Care Wipes
- Window/Glass Wipes
- Other Impregnated Wipes
- Starter Kits/Sweepers/
Sticks (Excluding Wipes)
- Wipes (Excluding
Starter Kits/Sweepers/
Sticks)
- Home Care Wipes and
Floor Cleaning Systems



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

Table 59 Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2015-2020

% current value growth

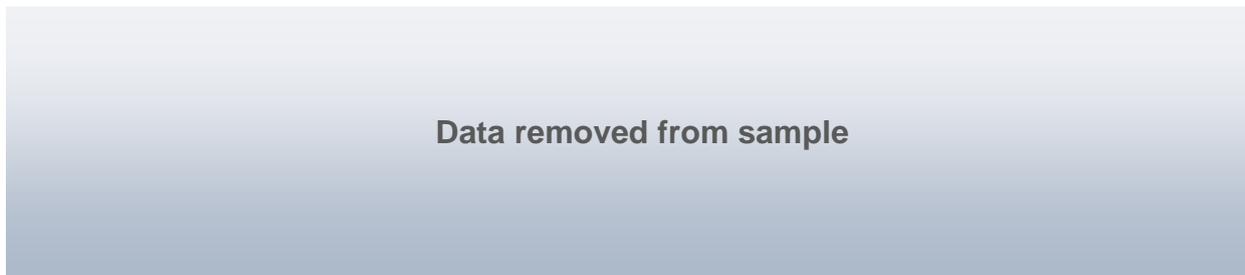
	2019/20	2015-20 CAGR	2015/20 Total
Dry Electro-Static Wipes			
- Starter Kits/Sweepers/Sticks (Dry Electro-Static)			
- Wipes and Refills (Dry Electro-Static)			
Floor Cleaning Systems			
- Refills			
-- Cleaning Solution			
-- Refill Wipes/Pads			
- Starter Kits/Trigger Device			
Impregnated Wet Wipes			
- All Purpose Cleaning Wipes			
- Furniture Polish Wipes			
- Toilet Care Wipes			
- Window/Glass Wipes			
- Other Impregnated Wipes			
Starter Kits/Sweepers/Sticks (Excluding Wipes)			
Wipes (Excluding Starter Kits/Sweepers/Sticks)			
Home Care Wipes and Floor Cleaning Systems			

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

Table 60 NBO Company Shares of Surface Care: % Value 2016-2020

% retail value rsp

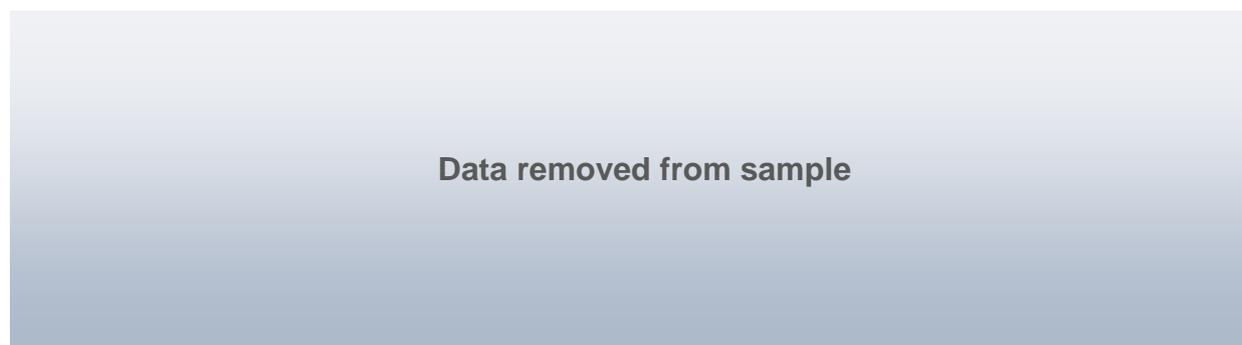
Company 2016 2017 2018 2019 2020



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

Table 61 LBN Brand Shares of Surface Care: % Value 2017-2020

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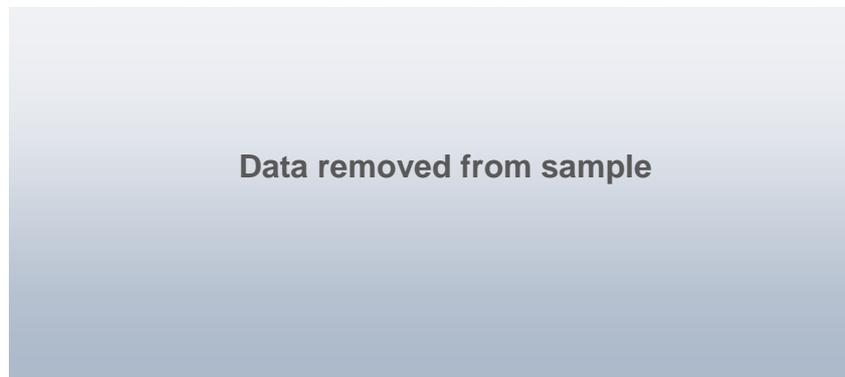


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 62 Forecast Sales of Surface Care by Category: Value 2020-2025

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

Home Care Wipes and
Floor Cleaning Systems
Bathroom Cleaners
Descalers
Drain Openers
Floor Cleaners
Home Care Disinfectants
Kitchen Cleaners
Multi-Purpose Cleaners
Oven Cleaners
Scouring Agents
Window/Glass Cleaners
Surface Care



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

Table 63 Forecast Sales of Surface Care by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
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Home Care Wipes and Floor Cleaning
Systems
Bathroom Cleaners



Descalers
Drain Openers
Floor Cleaners
Home Care Disinfectants
Kitchen Cleaners
Multi-Purpose Cleaners
Oven Cleaners
Scouring Agents
Window/Glass Cleaners
Surface Care

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

TOILET CARE IN BOLIVIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Current value sales decline as cash-strapped consumers favour more essential products

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Bleach and powder detergent prove more popular as consumers want multi-purpose products

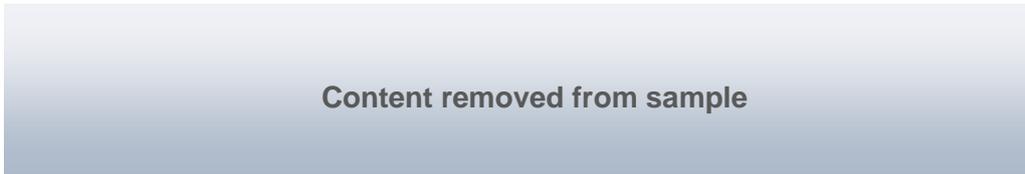
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Supply chain issues as A result of travel bans and restrictions

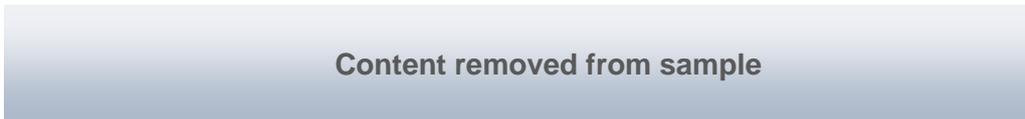
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RECOVERY AND OPPORTUNITIES

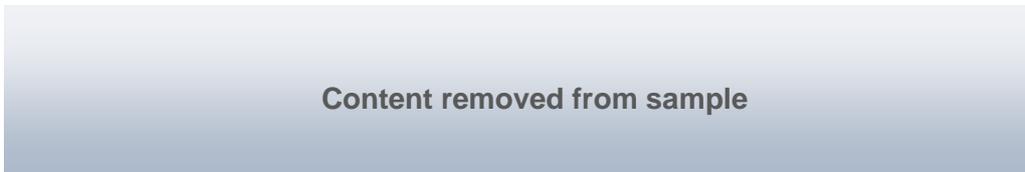
Toilet care products witnesses lower capita per consumption despite swift rebound



Domestic players benefit as international companies continue to suffer from importation issues



Players continue to focus on social media to advertise



CATEGORY DATA

Table 64 Sales of Toilet Care by Category: Value 2015-2020

BOB million

	2015	2016	2017	2018	2019	2020
In-Cistern Devices	Data removed from sample					
ITBs						
- Rim Blocks						
- Rim Liquids						
Toilet Care Tablets/ Powders						
Toilet Cleaning Systems						
Toilet Liquids/Foam						
Toilet Care						

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

Table 65 Sales of Toilet Care by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
In-Cistern Devices	Data removed from sample		
ITBs			
- Rim Blocks			
- Rim Liquids			
Toilet Care Tablets/Powders			
Toilet Cleaning Systems			
Toilet Liquids/Foam			
Toilet Care			

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

Table 66 NBO Company Shares of Toilet 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 67 LBN Brand Shares of Toilet 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 68 Forecast Sales of Toilet Care by Category: Value 2020-2025

BOB million	2020	2021	2022	2023	2024	2025
In-Cistern Devices	Data removed from sample					
ITBs						
- Rim Blocks						
- Rim Liquids						
Toilet Care Tablets/ Powders						
Toilet Cleaning Systems						
Toilet Liquids/Foam						
Toilet Care						

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

Table 69 Forecast Sales of Toilet Care by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
In-Cistern Devices	Data removed from sample		
ITBs			
- Rim Blocks			
- Rim Liquids			
Toilet Care Tablets/Powders			
Toilet Cleaning Systems			
Toilet Liquids/Foam			
Toilet Care			

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