



Domestic Hygiene Beyond the Pandemic in Developing/Emerging Markets

September 2022

INTRODUCTION

Scope

Key findings

OVERVIEW: DOMESTIC HYGIENE

What is this briefing about?

What do we mean by “domestic hygiene”?

Domestic hygiene: subcategory view

Developing/emerging countries historically impacted more due to communicable diseases

The pandemic further puts domestic hygiene at centre stage

Developing/emerging markets are fastest growing

Focus on hygiene to persist beyond pandemic, though comparatively lower

Re-engagement with hygiene to support growth in the forecast period

Favourable growth drivers to help the categories

Developing/emerging markets have conscious spenders

DOMESTIC HYGIENE IN SPOTLIGHT COUNTRIES

Biggest developing/emerging markets for domestic hygiene

Domestic hygiene in China

Popular domestic hygiene products in China

Case study: Dettol expanding laundry subcategory laundry sanitisers

Domestic hygiene in India

Popular domestic hygiene products in India

Case Study: Maxx Flash “killer pack”

Domestic hygiene in Brazil

Popular domestic hygiene products in Brazil

Case study: Cloralex on-the go and disinfectant wipes

Domestic hygiene in Mexico

Popular domestic hygiene products in Mexico

Case study: Cloralex on-the go and disinfectant wipes

Domestic hygiene in Indonesia

Popular domestic hygiene products in Indonesia

Case Study: So Klin Antisep

PATH TO VALUE CREATION

Strategies to target consumers in developing markets

Strategies to target consumers in developing markets: Multi-functionality

Regular cleaning routines lead to continuous demand for products

Value for money products with added benefits to remain attractive for consumers

Examples of multifunctional products

Strategies to target consumers in developing markets: Sensorial clean

Sensorial clean to make a comeback with consumer demand and new launches

Examples of products offering sensorial clean

Strategies to target consumers in developing/emerging markets: Performance claims

Performance claims becoming important in purchase decisions and new product launches

Preference for performance claims giving way to hygiene claims...

...which will open more doors for branded players

Strategies to target consumers in developing/emerging markets: Premiumisation

Consumers are willing to pay more for high-quality products that deliver on their claims

Desembala premiumising through product formulation and packaging in Brazil

Whealthfields' 4-in-1 tablet detergent aims to offer a premium and convenient experience

The Better Home's eco-friendly natural products aim to capture a niche in India

Executive summary

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