

# World Market for Retail Tissue and Hygiene

April 2024

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## INTRODUCTION

### Scope

Five trends shaping retail tissue and hygiene

## STATE OF THE INDUSTRY

2023 sees further demand recovery in retail tissue and hygiene

Inflation extends gap between volume and nominal value growth in 2023

Retail tissues leads incremental growth in 2023, while retail hygiene shows divergent performance

MEA leads forecast growth driven by positive population trends and low saturation

Income-spending gap signals MEA's affordability priority and APAC's premiumisation trend

## STATE OF THE INDUSTRY

Facial tissues' growth solidifies APAC's leadership in retail tissue

Toilet paper tracks sustained per capita volume growth, despite transforming toilet routines

Businesses tie innovations to evolving use occasions and need gaps to differentiate

Disposable facial cloths, a growth adjacency, gain popularity in APAC

AFH tissue sales below historical levels, echoing travel and foodservice recovery patterns

Toilet paper leads AFH gains, driven by Horeca recovery and back-to-office enforcement

Retail adult incontinence charts fastest growth in retail hygiene across regions

Retail to lead growth of all channels, with moderate/heavy segment outperforming

Absorbency, fit, skin health and convenience underpin key incontinence innovations

Retail incontinence performance can be further shaped by public policies and Rx schemes

Developed markets lead retail adult incontinence consumption, building on income strength

Slim towels a key growth driver for menstrual care, mainly driven by APAC demand

Pant format leads menstrual care penetration in China

India to replace the US as the second largest market in menstrual care by 2028

Diapers witness continued shift towards pants, led by APAC

Improved accessibility, size diversification and feature localisation support pants' expansion

Skin health, gender inclusivity and specific occasion care form key pillars of diaper innovation

Indonesia to replace Brazil as the third largest market in nappies/diapers/pants

Baby wipes drive bulk of gains in disposable wet wipes, while moist toilet wipes lead growth

Top growth market China witnessing a bathroom renaissance

Clean and antibacterial health attributes drive baby wipes' expansion across markets

Key baby wipes forecast growth markets deep dive: Mexico to lead forecast incremental growth

Inflation remains a key, yet diminishing, effect on nominal retail tissue and hygiene growth

Growth decomposition shows stronger fundamentals in APAC vs. macro headwinds in LatAm

Unmet potential indicates varied penetration timeline among developing markets

E-commerce shows tapered yet continued growth

E-commerce expansion carries local characteristics

## LEADING COMPANIES AND BRANDS

Market fragmentation escalates in APAC and MEA, driven by agile local rivals

Softys and Hengan sustain tissue share gains supported by channel and supply chain strength

Hygiene sees stronger foothold among top players

Western Europe leads private label penetration and historic period growth

Private label further attracts consumers across Western Europe with sustainability initiatives

Chinese Shanghai Xier capitalises on consumer-centric localised innovations and holistic care approach

## TOP FIVE TRENDS SHAPING THE INDUSTRY

Five trends shaping tissue and hygiene

Businesses growth plans hinge on company offerings and consumers

Key themes shaping innovations in tissue and hygiene

Quality, comfort and value for money lead spending priorities

Consumers continue to opt for alternative hygiene formats

Essity diversifies product options across hygiene symptoms and life occasions

Unicharm carves out a femtech category with bio-based fertility liner

Daye and Dyper step into diagnostics and telehealth to broaden accessibility to self care

Pay gap demands tangible benefits to incentivise sustainability participation

TerraCycle's tiniest Biome service brings a wellness incentive for nappy/diaper recycling

## MARKET SNAPSHOTS

Global snapshot of Retail Tissue

Regional snapshot of Retail Tissue in Asia Pacific

Regional snapshot of Retail Tissue in Australasia

Regional snapshot of Retail Tissue in Eastern Europe

Regional snapshot of Retail Tissue in Latin America

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Global snapshot of Retail Hygiene

Regional snapshot of Retail Hygiene in Asia Pacific

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Regional snapshot of Retail Hygiene in Western Europe

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