

# Tissue and Hygiene in Azerbaijan

February 2024

Table of Contents

## EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for tissue and hygiene?

## MARKET INDICATORS

Table 1 - Birth Rates 2018-2023

Table 2 - Infant Population 2018-2023

Table 3 - Female Population by Age 2018-2023

Table 4 - Total Population by Age 2018-2023

Table 5 - Households 2018-2023

Table 6 - Forecast Infant Population 2023-2028

Table 7 - Forecast Female Population by Age 2023-2028

Table 8 - Forecast Total Population by Age 2023-2028

Table 9 - Forecast Households 2023-2028

## MARKET DATA

Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2018-2023

Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2019-2023

Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2020-2023

Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2018-2023

Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023

Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2023-2028

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

[Away-From-Home Tissue and Hygiene in Azerbaijan](#)

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Sales supported by out-of-home lifestyles, yet potential has not yet been reached

Ongoing growth of restaurant trade helps to support AFH wipers

Away-from-home adult incontinence supported by drivers in retail adult incontinence

### PROSPECTS AND OPPORTUNITIES

An unchanged performance for AFH adult incontinence

AFH boxed facial tissues see positive glimpses ahead

AFH toilet paper supported by developments in hotels and hospitality

## CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 21 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 24 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

## Retail Adult Incontinence in Azerbaijan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sales in adult incontinence supported by growing consumers awareness

Well-known brands dominate due to their trustworthy reputations

Modern trade retail developments help to boost sales

#### PROSPECTS AND OPPORTUNITIES

Ongoing growth supported by baseline demand, growing education, and stronger penetration in modern retail channels

Moderate/heavy adult incontinence products are more in-demand

Stronger competition expected over the forecast period

#### CATEGORY DATA

Table 25 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 26 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 28 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 29 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

## Nappies/Diapers/Pants in Azerbaijan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers seek affordable options in the light of price hikes, albeit the global names still stand strong

Local brand Mini-Boss attracts attention thanks to its good price-to-quality ratio

Disposable pants continue to show the strongest growth

#### PROSPECTS AND OPPORTUNITIES

Sales in nappies/diapers/pants will continue to be supported by baseline demand

Competitive landscape set to remain consolidated, with an expected rise of small brands

Rising consumer demand for skin-kind and eco-friendly products

#### CATEGORY DATA

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 33 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 34 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 35 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

## Menstrual Care in Azerbaijan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflationary pressures slow down, helping to support a normalisation of sales

Competitive landscape remains consolidated, while Johnson & Johnson's return looks set to create future ripples

Consumers seek eco-friendly options and prefer towels and liners over tampons

## PROSPECTS AND OPPORTUNITIES

Ongoing growth will be supported by baseline demand

Affordable brands set to attract more attention

Consumers seek comfort and protection in their product choices

## CATEGORY DATA

Table 37 - Retail Sales of Menstrual Care by Category: Value 2018-2023

Table 38 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023

Table 39 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

Table 40 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

Table 41 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

Table 42 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

## Wipes in Azerbaijan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Shrinkflation trends seen in wipes

Baby wipes supported by birth rates, convenience, and versatility

Cosmetics wipes sees niche demand in relation to beauty trends

### PROSPECTS AND OPPORTUNITIES

An overall fragmented category with a few big names and a high number of small brands

Baby wipes set for strong competitive activity

Demand for intimate wipes will remain at a low level

## CATEGORY DATA

Table 43 - Retail Sales of Wipes by Category: Value 2018-2023

Table 44 - Retail Sales of Wipes by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Retail Wipes: % Value 2019-2023

Table 46 - LBN Brand Shares of Retail Wipes: % Value 2020-2023

Table 47 - Forecast Retail Sales of Wipes by Category: Value 2023-2028

Table 48 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

## Retail Tissue in Azerbaijan

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflationary pressures slow down and sales start to normalise

Polarisation between premium toilet paper and cheaper options

Paper towels continues to be a stagnating category

### PROSPECTS AND OPPORTUNITIES

Tablecloths set to remain insignificant with no growth potential

Cheaper options and private label in toilet paper likely to erode share from the big names

Could the brand share growth of Aura herald stronger prospects for paper towels?

## CATEGORY DATA

Table 49 - Retail Sales of Tissue by Category: Value 2018-2023

Table 50 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 51 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 53 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 54 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/tissue-and-hygiene-in-azerbaijan/report](http://www.euromonitor.com/tissue-and-hygiene-in-azerbaijan/report).