

# Tissue and Hygiene in Croatia

March 2024

Table of Contents

## Tissue and Hygiene in Croatia

### 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 Croatia](#)

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Away-from-home tissue supported by a strong tourist season

Ageing population and a growing number of retirement homes benefits away-from-home hygiene

Rising importance of sustainable options in horeca establishments

#### PROSPECTS AND OPPORTUNITIES

Inflation and squeezed disposable incomes to impact foodservice sales

Many companies are looking to strengthen their sustainability strategies

Development of the tertiary sector to drive growth of away-from-home tissue and hygiene in the businesses and industry

### 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 Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Ageing population and increased product awareness support sales in 2023

Women often opt for menstrual care products due to the stigma associated with adult incontinence

Portfolio diversification to target specific consumer groups

#### PROSPECTS AND OPPORTUNITIES

Stable growth driven by an ageing population

E-commerce set to gain ground, offering discretion and advice

More sustainable products and products specifically designed for men expected

#### 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 Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Volume sales impacted by rising prices and declining birth rate

Disposable pants benefit from their comfort and convenience

Rising price-sensitivity encourages a shift to private label

#### PROSPECTS AND OPPORTUNITIES

Further slowdown in the country's birth rate will impact future demand

Sustainability concerns could see consumers switching to reusable alternatives

Private label potential in a time of economic downturn and rising inflation

#### 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 Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising prices impact volume sales in 2023

Pantyliners benefit from increased consumer awareness and wider distribution

Procter & Gamble leads; however, private label continues to gain ground

## PROSPECTS AND OPPORTUNITIES

Limited growth in a maturity product area

Rising importance of eco-friendly options

Private label to benefit from its favourable pricing and innovation

## 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 Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Wipes are a quick and convenient solution for hygiene-conscious consumers

E-commerce records further growth, offering convenience and competitive prices

Personal wipes benefit from their immaturity

### PROSPECTS AND OPPORTUNITIES

Convenience and more sustainable products will drive demand of general purpose wipes

Rising cost of living and sustainability concerns could impact future growth

New products to support growth of intimate wipes, and wipes and refills (dry electro-static)

## 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 Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising unit prices impact demand

Discounters and e-commerce benefit from offering competitive prices

Private label appeals with its wide availability and affordable prices

### PROSPECTS AND OPPORTUNITIES

Paper towels to benefit from their increased use; however, consumers will look for the most affordable options

Pocket handkerchiefs face increasing competition from wipes

Eco-friendly options increasingly demanded as the sustainability trend grows

## 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

## Rx/Reimbursement Adult Incontinence in Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

An ageing population remains the key driver of Rx/reimbursement sales in 2023

Rx/reimbursement adult incontinence limited to moderate/heavy products

Treatment delay further supports category

#### PROSPECTS AND OPPORTUNITIES

Further growth supported by an ageing population and improving awareness of the condition

Growth to slow with a rising focus on prevention over cure

Innovation to improve absorbency and comfort

#### CATEGORY DATA

Table 55 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 56 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 57 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 58 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 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-croatia/report](http://www.euromonitor.com/tissue-and-hygiene-in-croatia/report).