

Tissue and Hygiene in Nigeria

March 2024

Table of Contents

Tissue and Hygiene in Nigeria

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

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

Table 16 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

Table 17 - 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 Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Harsh economic climate hinders AFH tissue and hygiene in 2023

AFH sector turns in better performance than retail sector thanks to greater necessity

Hotels drive demand for toilet paper while napkins benefit from use in consumer foodservice

PROSPECTS AND OPPORTUNITIES

Economic recovery set to drive strong growth for away for home tissue and hygiene

Hotels expansion as major demand driver for AFH tissue

The growth of hospitality and healthcare will boost demand for all category members

CATEGORY DATA

Table 18 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

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

Table 20 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

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

Table 22 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

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

Retail Adult Incontinence in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

High inflation leads to volume sales decline in 2023

Imported brands struggle due to depreciation of local currency

Health and beauty specialists dominate retail distribution, but small local grocers see growing share

PROSPECTS AND OPPORTUNITIES

Retail adult incontinence will benefit from improved economic conditions

Rise in older consumers to boost demand

Brand competition will drive innovation

CATEGORY DATA

Table 24 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

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

Table 26 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 27 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 28 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

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

Nappies/Diapers/Pants in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

High inflation leads to falls in volume sales

Consumers trade down as unit prices rise

Cash-strapped consumers prefer to shop at small local grocers

PROSPECTS AND OPPORTUNITIES

Growth to improve as economy recovers

Increased brand competition and activity will drive consumer interest

Cloth substitutes to impact progress for junior nappies/diapers

CATEGORY DATA

Table 30 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

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

Table 32 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 33 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 34 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

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

Menstrual Care in Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

High inflation and low spending power means volume declines for menstrual care

Reduced affordability in face of sharp price rises

Tough conditions mean limited company activity, with Procter & Gamble once again ceasing local production

PROSPECTS AND OPPORTUNITIES

Strong growth anticipated for forecast period as economy recovers

Slim/thin/ultra-thin towels will drive overall growth

Intensified competition to boost demand

CATEGORY DATA

Table 36 - Retail Sales of Menstrual Care by Category: Value 2018-2023

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

Table 38 - Retail Sales of Tampons by Application Format: % Value 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 Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wipes falls in face of financial pressure

Baby wipes posts best performance, but sales suffer due to substitutes

Leading premium brands lose share as consumers shift towards more affordable alternatives

PROSPECTS AND OPPORTUNITIES

Wipes set to see strong growth during forecast period

Baby wipes will drive overall growth as birth rate rises

Niche segments to benefit from raised awareness

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 Nigeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail tissue sees volume sales dip as high inflation limits consumer spending power

Toilet paper leads growth as the most familiar and affordable product area within retail tissue

Bel Impex consolidates its lead in 2023 while Hayat Kimya struggles

PROSPECTS AND OPPORTUNITIES

Retail tissue to bounce back as Nigeria's economy recovers

Continued urbanisation will drive greater interest in convenient cleaning products

Toilet paper will drive development while niche segments benefit from rising incomes and awareness

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-nigeria/report.