

Tissue and Hygiene in the Czech Republic

March 2024

Table of Contents

Tissue and Hygiene in the Czech Republic

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 the Czech Republic](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Away-from-home tissue records positive sales development as local consumers return to pre-pandemic levels of activity

Eco-friendly trends extend to away-from-home products, but fewer products are available

Key players continue to lead the category in 2023, while some launch eco-friendly variants

PROSPECTS AND OPPORTUNITIES

Stable growth over the forecast period thanks to the ongoing resumption in society after COVID-19

Away-from-home hygiene benefits from the ageing population over the forecast period

Essity focuses on the sustainability of its away-from-home tissue products

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 - Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

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

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

Retail Adult Incontinence in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail adult incontinence continues to attract consumers among an ageing demographic

New product launches focus on segmentation and in providing high quality premium products

Essity Czech Republic sustains its lead in retail adult incontinence in 2023

PROSPECTS AND OPPORTUNITIES

Retail adult incontinence registers further growth over the forecast period

Forecast period launches of private label likely though focus remains on efficacy rather than environmental friendliness

Hypermarkets gain ground thanks to broad range of offerings

CATEGORY DATA

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

Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

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

Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

Nappies/Diapers/Pants in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales return to modest growth in 2023 after contracting in the previous year

Procter & Gamble retains the lead thanks to its broad portfolio and wide distribution of trusted brands

Disposable pants benefits from the resumption of society in the wake of the pandemic and increase in environmental friendliness

PROSPECTS AND OPPORTUNITIES

Forecast period decline for nappies/diapers/pants

Price-conscious consumers switch between brands in a bid to find the best value for money with this trend also boosting sales via retail e-commerce

Products with a low environmental impact gain popularity

CATEGORY DATA

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

Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

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

Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

Menstrual Care in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Menstrual care grows in value despite demographic challenges

Despite maintaining their lead, multinationals face growing competition from private label
Retail landscape favours modern, tech-friendly channels in 2023 while marketing campaigns focus on extending usage

PROSPECTS AND OPPORTUNITIES

Challenges ahead as key consumer base declines in the Czech Republic
More eco-friendly products emerge over the forecast period
Retail e-commerce sales continued to grow over the forecast period

CATEGORY DATA

Table 38 - Retail Sales of Menstrual Care by Category: Value 2018-2023
Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023
Table 40 - Retail Sales of Tampons by Application Format: % Value 2018-2023
Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023
Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023
Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028
Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

Wipes in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wipes records value growth across the category in 2023 thanks in part to inflationary pressure on prices
Green trends continue to characterise wipes in the Czech Republic and are garnering a wider distribution presence
The competitive landscape remains fragmented with Procter & Gamble coming close to retaking the category lead while retail e-commerce accounts for a growing share

PROSPECTS AND OPPORTUNITIES

Demand for wipes undermined by ongoing high if falling inflationary context
Baby wipes sees contraction in volume sales over the forecast period
Moist toilet wipes registers significant forecast period growth thanks to increased activity from manufacturers and retailers

CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2018-2023
Table 46 - Retail Sales of Wipes by Category: % Value Growth 2018-2023
Table 47 - NBO Company Shares of Retail Wipes: % Value 2019-2023
Table 48 - LBN Brand Shares of Retail Wipes: % Value 2020-2023
Table 49 - Forecast Retail Sales of Wipes by Category: Value 2023-2028
Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

Retail Tissue in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail tissue sees modest volume and strong value growth in 2023
Private label products prospering amid price consciousness
Fierce competition in retail tissue as players jostle for position

PROSPECTS AND OPPORTUNITIES

Category maturity dampens growth over the forecast period
Boxed facial tissues experiences increasing popularity thanks to innovation
Private label products retain a strong influence in retail tissue over the forecast period

CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2018-2023

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

Rx/Reimbursement Adult Incontinence in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Moderate growth for Rx/reimbursement adult incontinence, with the category not helped by a change in the law

Consumer embarrassment remains an obstacle to growth

Essity continues to lead the pack with its trusted Tena brand

PROSPECTS AND OPPORTUNITIES

Rx/reimbursement adult incontinence sees growing sales as awareness increases

Expenditure reduction by health companies constrains category forecast period growth

Electronic reimbursement of medical equipment, including adult incontinence products, is expected during the forecast period

CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 60 - 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-the-czech-republic/report.