

Tissue and Hygiene in Latin America

May 2024

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Toilet paper the biggest category in Latin American tissue and hygiene

Latin America ranks fourth regionally for sales and per capita spend

The healthy growth seen in 2022 and 2023 is expected to continue in the coming years

Low birth rates impacting demand for nappies/diapers/pants in Mexico

Strong growth for wipes in Mexico over 2018-2023

Nappies/diapers/pants record a disappointing performance over 2018-2023

Retail adult incontinence the most dynamic category over the review period

Small local grocers remain the leading distribution channel

Supermarkets/hypermarkets gaining share in recent years

LEADING COMPANIES AND BRANDS

Consolidated competitive landscapes in most countries across Latin America

Kimberly-Clark loses share but continues to lead in Latin America

Only Tecnoquímicas does not have Mexico or Brazil as its biggest market

Tena benefits from the dynamism of the retail adult incontinence category

FORECAST PROJECTIONS

Positive growth expected throughout the forecast period

Brazil will help drive regional growth in the coming years

COUNTRY SNAPSHOTS

Argentina: Market Context

Argentina: Competitive and Retail Landscape

Bolivia: Market Context

Bolivia: Competitive and Retail Landscape

Brazil: Market Context

Brazil: Competitive and Retail Landscape

Chile: Market Context

Chile: Competitive and Retail Landscape

Colombia: Market Context

Colombia: Competitive and Retail Landscape

Costa Rica: Market Context

Costa Rica: Competitive and Retail Landscape

Dominican Republic: Market Context

Dominican Republic: Competitive and Retail Landscape

Ecuador: Market Context

Ecuador: Competitive and Retail Landscape

Guatemala: Market Context

Guatemala: Competitive and Retail Landscape

Mexico: Market Context

Mexico: Competitive and Retail Landscape

Peru: Market Context

Peru: Competitive and Retail Landscape

Uruguay: Market Context

Uruguay: Competitive and Retail Landscape

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-latin-america/report.