



Competitor Strategies in Retail Tissue and Hygiene

August 2024

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STATE OF PLAY

Companies at a glance

Categories' essential positioning provides market momentum for growth

Most top players grapple with share stagnation or declines despite sales increase

Top players remain focused on core portfolio of strength

Leading players' active category shares stand firm, with Softys and Hengan gaining shares

Developing markets continue to show prospects, though leading players tread with caution

K-C's re-organisation indicates sharpened focus on high-growth markets and categories

Market fragmentation escalates in APAC and MEA, driven by agile local rivals

Narrowing quality gap and value sustain private label's foothold in well-situated markets...

...while additional growth momentum is gaining in emerging Latin America and Turkey

Private label's pricing advantage supports notable volume share growth in Latin America

Local fragmentation most notable in APAC, predominantly driven by China

E-commerce provides a competitive lever for insurgent players

Social commerce Douyin catalyses small brand growth in China

Chinese top 10 players tend to only operate in their domestic market

Local manufacturing support and downtrading challenge leading multinationals in MEA

Businesses seek adjacent pivots for long-term growth and resilience

KEY TRENDS AND BUSINESS STRATEGIES

Businesses' growth plans hinge on company offerings and consumers

Macroeconomic challenges reinforce an uphill battle to value creation through back-to-basics

Key themes shaping business strategies in tissue and hygiene

Consumers striving to do more with less demands back-to-basics value redefine

Most desired features coincide with largest desire-pay gap, indicating higher expectation

Durability upgrade and use occasion targeting improve cost-benefit equation in tissue

P&G strengthens value-tier Luvs nappies/diapers with added leak protection, alongside refund offer

Natural demand rises as the wellness link tightens

Natural positioning increasingly adopted by brands, with APAC early in adoption curve

Claim fatigue and lack of regulation in certain markets drive claim diversification

Top players adopt natural positioning but diversifying into functional, skin-forward claims

Popi taps beauty-inspired ingredients to drive skinification in facial tissues

Lifestyle compatibility at the forefront of consumer loyalty building

Kimberly-Clark and Edgewell Personal Care add multi-fluid pads and liners for mothers

Unicharm's one-sided baby nappy/diaper pants improve change efficiency and safety

Diversity of women's health concerns across life stages inspire ecosystem, adjacency play

Exploring further converging spaces and synergies between femcare and adjacencies

Essity taps partnership to address sleep and stress issues for menopausal women

Rael elevates holistic cycle care with cycle-syncing skin care assortment

Key findings

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