

# Tissue and Hygiene in Lithuania

March 2024

Table of Contents

## 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 Lithuania

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Stability in away-from-home adult incontinence

Away-from-home tissue slows down

Shift towards value and convenience

### PROSPECTS AND OPPORTUNITIES

Economic considerations dictate outlook

Uncertainty looms over horeca sector

Focus on home rehabilitation

## 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 Lithuania

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Impact of prescription pricing changes  
Rise of light and moderate options  
Dominance of Tena by Essity AB

#### PROSPECTS AND OPPORTUNITIES

Ageing population to drive long-term growth  
Dominance of major brands  
Education as a key driver

#### 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 Lithuania

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Demographic decline impacts category  
Rise of disposable pants driven by convenience  
Emergence of private label and local brands

#### PROSPECTS AND OPPORTUNITIES

Decline in birth rate does not bode well for nappies/diapers/pants  
Expansion of disposable pants  
Retailer strategies and private label dynamics

#### 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 Lithuania

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stable performance amidst static consumer base  
Preference for convenience-driven products

Limited innovation opportunities

## PROSPECTS AND OPPORTUNITIES

Shift towards value growth amidst stagnant consumer base

Rising demand for tampons and pantyliners

Slim towels maintain dominance

## 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 Lithuania

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Challenging year for wipes sales

Decline in baby wipe sales

Leadership of Procter & Gamble and rise of private label

## PROSPECTS AND OPPORTUNITIES

Challenges in baby wipes

Moist toilet wipes offer glimmer of hope

Growing fragmentation in facial wipes

## 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 Lithuania

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Market transitioning post-pandemic

Rise of private label

Return of seasonal colds and flu drive strong performance in facial tissues

## PROSPECTS AND OPPORTUNITIES

Stable outlook for retail tissue

Resurgence of paper towels

Seasonal demand for tissues

## 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 Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Higher Rx quotas continue to benefit the category
- Shift in consumer perception and product focus
- Continued dominance of leading brands

PROSPECTS AND OPPORTUNITIES

- Number of patients seeking Rx aid expected to rise
- Absorbing underwear presents growth potential
- Favourable economic conditions

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-lithuania/report](http://www.euromonitor.com/tissue-and-hygiene-in-lithuania/report).