

# Where Consumers Shop for Tissue and Hygiene April 2024

**Table of Contents** 

### INTRODUCTION

Scope

Key findings

### INDUSTRY SNAPSHOT

Industry developments: Retail tissue Industry developments: retail hygiene

Demographic factors are key in identifying growth opportunities

Regional market details

The many drivers of inflation within retail tissue and hygiene

### CHANNEL SHIFTS

Retail offline dominates, but e-commerce continues to attract consumers

Digitisation has facilitated market penetration

Channel shifts to e-commerce differ at category and regional levels

For a segment of the population, no amount of enticement will bring them back into shops

## STORE-BASED CHANNELS

Store-based snapshot in 2023

Dynamic store-based channels

Low unit prices and middle-class cachet are a winning combination for warehouse clubs

Adaptability and diverse alternative brand offerings as key benefits of small local grocers

Walmart leads the way in modern grocery retailing

The pandemic and inflation surge propel private label growth in tissue and hygiene

Importance of private label by region...

...and the reasons why

# NON-STORE CHANNELS

Internet retailing by category

Companies step further into the digital space

Procter & Gamble and Kimberly-Clark continue making gains in e-commerce

Asia Pacific leading the way in e-commerce

Social marketplaces in Asia Pacific thrive with livestreaming

Grocers' implementation of hassle-free delivery further solidifies e-commerce attraction

# **FUTURE DEVELOPMENTS**

Hybrid working expected to result in higher per capita consumption

Retail hygiene charts resilient growth supported by wellness demand and user-centric innovations

Forecast channel development

US as example: top players' narrowing lead in e-commerce exposes intensifying competition

Social commerce as a low-barrier incubator for small brands seeking market breakthroughs

Influencer, social marketing helps upstarts pivot in emerging, fast-growth categories

Social commerce platform Douyin shows stronger fragmentation and local competition

Key takeaways

# About Furomonitor 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/where-consumers-shop-for-tissue-and-hygiene/report.