

Tissue and Hygiene in Latvia

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Expanding demand for away-from-home toilet paper

Rising adoption of new cleaning standards boosts demand for away-from-home wipers

Hygiene focus drives demand for away-from-home paper towels

PROSPECTS AND OPPORTUNITIES

Rapid surge in demand for away-from-home wipers

Growth fuelled by the establishment of new businesses

Benefits of away-from-home paper towels over reusable alternatives

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand for light adult incontinence products
Steady increase in moderate/heavy adult incontinence
Leadership of Essity AB's Tena brand

PROSPECTS AND OPPORTUNITIES

Increased awareness to drive demand
Rise in light adult incontinence
Positive trend for moderate/heavy adult incontinence

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demographic shifts drive decline in nappies/diapers/pants
Disposable pants gain popularity for their comfort-oriented design
Procter & Gamble Marketing Latvia Ltd SIA leads product area with Pampers brand

PROSPECTS AND OPPORTUNITIES

Surge in demand for affordable disposable pants
Decline in birth rates shapes demand for new-born nappies and diapers
E-commerce drives growth in nappies/diapers/pants sales

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Surge in tampon demand driven by active lifestyles
Continued growth of slim/thin/ultra-thin towels with wings

Brand loyalty reinforced by Procter & Gamble Marketing Latvia Ltd SIA

PROSPECTS AND OPPORTUNITIES

Innovative packaging propels growth of slim/thin/ultra-thin towels
Active lifestyles propel growth of intimate wipes and tampons
Younger generation fuels demand for pantyliners

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rapid surge in demand for moist toilet wipes
Active lifestyle trends propel demand for facial cleansing wipes
Dominance of Johnson & Johnson Inc in wipes

PROSPECTS AND OPPORTUNITIES

Moist toilet wipes poised for rapid volume growth
General purpose wipes to witness significant dynamics
Rise of internet retailing to transform market dynamics

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sustained expansion of paper towels
Rising demand for pocket handkerchiefs fuelled by hygiene awareness
Essity AB leads the product area with innovative product offerings

PROSPECTS AND OPPORTUNITIES

Expanding horizons for paper towels
Skin care focus boosts boxed facial tissues
Active lifestyles drive pocket handkerchief sales

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 Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Rising elderly population drives demand for adult incontinence products
- Escalating prevalence of dementia amplifying demand
- Challenges in long-term care expenditure and support systems

PROSPECTS AND OPPORTUNITIES

- Stagnant state medical financing to impact market dynamics
- Rising incidence of disabilities to boost demand for Rx/reimbursement adult incontinence products
- Continued growth of elderly population fuels demand for incontinence solutions

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-latvia/report.