

Tissue and Hygiene in Peru

March 2024

Table of Contents

EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

Key trends in 2023

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 Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Away-from-home tissue and hygiene grows as consumers return to foodservice

Material costs drop in 2023, allowing competitors to gain higher margins

Distribution is a key factor as smaller players turn to retailing channels

PROSPECTS AND OPPORTUNITIES

New shopping centres open in Peru, driving sales on the AFH landscape

Low price points will limit competition in AFH tissue

AFH adult incontinence shows strong opportunity for growth

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 - Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 24 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

Retail Adult Incontinence in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising awareness of adult incontinence goods drives growth in 2023

Price is a key factor in the purchasing decisions of retail adult incontinence goods

Pharmacies lead sales as doctors and pharmacists recommend products to consumers

PROSPECTS AND OPPORTUNITIES

Communication efforts by brands aid ongoing growth across the forecast period

Players target active adults to drive sales and increase the consumer base

Brands focus on attracting new users to build a base of loyal consumers

CATEGORY DATA

Table 26 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

Nappies/Diapers/Pants in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales recover as rising birth rates and out-of-home activities drive retail volume growth

Private label grows as consumers trade down during a time of rising price points

Brands attract first-time mothers to drive retail value growth

PROSPECTS AND OPPORTUNITIES

Sustainability is slow to grow as players look to educate consumers on eco-attributes

Competitors focus on innovation to add value while birth rates decline

Product innovations focus on absorption and skin care benefits

CATEGORY DATA

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

Menstrual Care in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Standard towels grow marginally in retail volume as price points rise

Night towels drive growth as awareness and interest among consumers rises
Kimberly Clark launches the first pantyliner with a pH indicator

PROSPECTS AND OPPORTUNITIES

Awareness of eco-friendly options is increasing, however, growth will be minimal
Pricing and marketing remain key strategies for players in sanitary towels
Pantyliners continue to grow, while tampons remain a niche product

CATEGORY DATA

Table 38 - Retail Sales of Menstrual Care by Category: Value 2018-2023
Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023
Table 40 - Retail Sales of Tampons by Application Format: % Value 2018-2023
Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023
Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023
Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028
Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

Wipes in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low prices become the norm, challenging retail value growth of wipes
Small personal wipes lose relevance as the offer of baby wipes continues to grow
High levels of competition between brands, with a rising entry of smaller players

PROSPECTS AND OPPORTUNITIES

Economic brands gain further ground across the early forecast period
Wipes continue to grow as penetration improves
Cross-selling is a key marketing strategy to boost sales in wipes

CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2018-2023
Table 46 - Retail Sales of Wipes by Category: % Value Growth 2018-2023
Table 47 - NBO Company Shares of Retail Wipes: % Value 2019-2023
Table 48 - LBN Brand Shares of Retail Wipes: % Value 2020-2023
Table 49 - Forecast Retail Sales of Wipes by Category: Value 2023-2028
Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

Retail Tissue in Peru

KEY DATA FINDINGS

2023 DEVELOPMENTS

Players become more competitive, reducing price points to attract consumers
Retail volume sales of paper towels decline, considered unessential during price hikes
Paracas gains ground through low prices, while Elite Triple Hoja offers a premium option

PROSPECTS AND OPPORTUNITIES

Private label set to gain ground as consumers focus on affordable essentials
Discounters and Cash & Carry stores post strong growth over the early forecast period
Improving penetration and effective marketing strategies drive growth

CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2018-2023

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 56 - Forecast Retail Sales of Tissue by Category: % Value 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-peru/report.