

Tissue and Hygiene in Saudi Arabia

March 2024

Table of Contents

Tissue and Hygiene in Saudi Arabia

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 2018-2023Table 2 - Infant Population 2018-2023Table 3 - Female Population by Age 2018-2023Table 4 - Total Population by Age 2018-2023Table 5 - Households 2018-2023Table 6 - Forecast Infant Population 2023-2028Table 7 - Forecast Female Population by Age 2023-2028Table 8 - Forecast Total Population by Age 2023-2028Table 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 Saudi Arabia.

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive economic, social and cultural factors spur development and growth in AFH tissue AFH tissue and hygiene focuses on sustainable initiatives in accordance with Saudi Arabia's Vision 2030 Segmentation and other key trends remain robust

PROSPECTS AND OPPORTUNITIES

Strong development opportunities lie ahead Horeca is well placed to remain the strongest AFH channel Further moves towards sustainability anticipated in the forecast period

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023Table 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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing awareness and product accessibility improve sales of adult incontinence products through retail in Saudi Arabia Innovation and new product development by key players help to sustain growth trajectory Retail e-commerce continues to emerge as a significant channel for adult incontinence

PROSPECTS AND OPPORTUNITIES

Category outlook is positive as awareness and development are set to continue apace in the forecast period Key players to focus on improving their offer to win over consumers and maintain their positions Sales via e-commerce to grow in the forecast period

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation and higher raw material and production costs foster an increase in the average unit price of nappies/diapers Gradually decreasing birth rate continues to lower the target audience and limit demand for nappies/diapers Disposable pants remains the fastest-growing category while segmentation increases across nappies/diapers/pants

PROSPECTS AND OPPORTUNITIES

Sustainable material-based nappies/diapers ranges to pique consumer interest in the forecast period Innovation and e-commerce to support development and category growth The strength of the leading brands acts as a barrier to new brands

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

The offer of sustainable options increases in menstrual care

Demographic trends and awareness campaigns support menstrual care in Saudi Arabia Modern grocery retailers propel menstrual care

PROSPECTS AND OPPORTUNITIES

The offer of environmental- and skin-friendly variants to see an increase in the forecast period Intense competition to encourage continuous innovation and product upgrades Menstrual care to stay on an upward growth trajectory in the forecast period

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Favourable health, social and economic factors push the demand for wipes in Saudi Arabia Robust key trends continue to develop and grow the category at the end of the review period Key players in baby wipes continue to upgrade product quality and diversify their product offer

PROSPECTS AND OPPORTUNITIES

Key players are likely to launch sustainable and eco-friendly variants in the forecast period Multiple pack sizes a possibility in the forecast period Innovation investments to create growth prospects for wipes

CATEGORY DATA

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

Retail Tissue in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Local tissue production benefits from government stimuli Inflation and the rise in raw material costs exert upward pressure on average retail unit prices Key manufacturers keep improving products and packaging to remain competitive

PROSPECTS AND OPPORTUNITIES

Reduced dependency on imports and price promotions to help shape the category Sustainability and eco-friendly products to gain popularity Expansion of distribution to boost retail tissue in Saudi Arabia

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-saudi-arabia/report.