

Tissue and Hygiene: Quarterly Statement Q4 2020 January 2021

Table of Contents

INTRODUCTION

Scope

Euromonitor International and Coronavirus (COVID-19): Forecasts and analysis

Tissue and hygiene COVID-19 data and research timeline

Key findings

Q4 MACROECONOMIC UPDATE

Summer was more optimistic, but second wave of pandemic hits

In our baseline view, economies start rebounding in 2021

Three scenarios examining the impact of a more severe outbreak

Our view in short

Forecast real GDP growth in 2020 under different scenarios

Q4 TISSUE AND HYGIENE UPDATE

Updated quarterly forecast for tissue: At-home demand remains high

Updated quarterly forecast for hygiene: disinfecting at-home still strong

2021 and beyond: "Tale of two worlds"

US and China: Slight upgrade in disposable hygiene sales trajectory...

... demand for consumer tissue expected to slow in 2021 onward

Downgrading India: Affordability and value for money in focus

Soft drivers: How we quantify these COVID-19-specific effects in the IFM

Impact of COVID-19 drivers diminishes in 2021 and beyond

Innovation reflects broad wellness and addresses long-term shifts

Feminine care focuses on comprehensive self care

Q3 TISSUE AND HYGIENE UPDATE

Looking into 2021 and beyond

ABOUT OUR INDUSTRY FORECAST MODEL

About Euromonitor International's Industry Forecast Model

Soft drivers and the Industry Forecast Model

Growth decomposition explained

Significance and applications for growth decomposition

Key applications for the Industry Forecast Model

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-quarterly-statement-q4-

2020/report.