



Tissue and Hygiene in the United Kingdom

April 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Persistent Demand for Advanced Features, Comfort and Eco-Friendly Products

Chart 2 - Andrex Ultimate Fresh XL Hygiene Wipes

Demographic Trends Play a Strong and Growing Role in Tissue and Hygiene

Chart 3 - Fluus Launches in Tesco

Novelties Address Consumers' Sustainability, Hygiene and Convenience Concerns

Chart 4 - The Cheeky Panda Unveils Bamboo based Products

Chart 5 - Value Sales 2020-2030

Chart 6 - Value Sales by Category 2025

WHAT'S NEXT?

Demographic Trends to Continue to Exert a Strong Influence on Category Performances

Eco-Innovation and Premiumisation to Reshape Consumer Loyalty and Competition

Chart 7 - Forecast Value Sales 2020-2030

Chart 8 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Kimberly-Clark and Procter & Gamble Maintain Lead as Private Label Competes on Price

Chart 9 - Analyst Insight for Tissue and Hygiene

Chart 10 - Company Shares 2025

Chart 11 - Brand Shares 2025

CHANNELS

Shift From Retail Offline to Online

Subscription Models, Seamless Shopping and Broad Assortments Fuel Online Loyalty

Chart 12 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 13 - Economic Context for Menstrual Care

Chart 14 - Real Gdp Growth 2020-2030

Chart 15 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 16 - Consumer Context for Menstrual Care

Chart 17 - Population 2020-2030

Chart 18 - Consumer Expenditure 2020-2030

Chart 19 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Away-From-Home Tissue and Hygiene in the United Kingdom

KEY DATA INSIGHTS

2025 DEVELOPMENTS

KEY INDUSTRY TRENDS

Chart 20 - Key Industry Trends Away-from-Home

INDUSTRY PERFORMANCE

Population and Macroeconomic Factors Support Category Performance

Wide Use across Channels Underpins Away-From-Home Tissue

Sustainability and Technological Innovation Trends Are Shaping the Away-From-Home Environment

Chart 21 - Kimberly-Clark Professional Launches Onvation

Chart 22 - Value Sales 2020-2030

Chart 23 - Value Sales by Category 2025

WHAT'S NEXT?

Healthcare Institutions Prioritise Advanced Hygiene Solutions as the Population Ages

Sustainability Innovations Prompt Buyers to Favour Environmentally-Focused Launches

Chart 24 - Northwood Hygiene Products Launches Natural Range Made of Recycled Cardboard

Chart 25 - Forecast Value Sales 2020-2030

Chart 26 - Forecast Value Sales by Category 2025-2030

CHANNELS

Stable Distribution Patterns Persist as Channel Shifts Remain Absent

Chart 27 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 28 - Economic Context for Away-from-Home

Chart 29 - Real Gdp Growth 2020-2030

Chart 30 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 31 - Consumer Context for Away-from-Home

Chart 32 - Population 2020-2030

Chart 33 - Consumer Expenditure 2020-2030

Chart 34 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Adult Incontinence in the United Kingdom](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail Adult Incontinence Summary

KEY INDUSTRY TRENDS

Chart 35 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Demographic Trends Remain a Key Growth Avenue

Chart 36 - Tena Launches Campaign to Decrease Stigma

Light Incontinence Leads Usage While Male-Focused Innovation Accelerates Growth

Chart 37 - ViraCare Launches New Range for Men

Destigmatisation, Innovation and Convenience Provide Key Growth Drivers

Chart 38 - Tena Introduces New Tena ProSkin Pants

Chart 39 - Value Sales 2020-2030

Chart 40 - Volume Sales 2020-2030

Chart 41 - Value Sales by Category 2025

WHAT'S NEXT?

Awareness Campaigns to Continue to Give Confidence to the Underserved Male Consumer Group

Absorbency-Focused Innovation to Accelerate Growth in Moderate/Heavy Adult Incontinence

Reusable Solutions and Comfort to Reshape Consumers' Purchasing Decisions

Chart 42 - Forecast Value Sales 2020-2030

Chart 43 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Essity Strengthens Lead as Rivals Lose Ground

Chart 44 - Analyst Insight for Retail Adult Incontinence

Chart 45 - Company Shares 2025

Chart 46 - Brand Shares 2025

CHANNELS

E-Commerce Leverages Convenience and Discreetness to Outpace Offline Rivals

Chart 47 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 48 - Economic Context for Retail Adult Incontinence

Chart 49 - Real Gdp Growth 2020-2030

Chart 50 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 51 - Consumer Context for Retail Adult Incontinence

Chart 52 - Population 2020-2030

Chart 53 - Consumer Expenditure 2020-2030

Chart 54 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Nappies/Diapers/Pants in the United Kingdom](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Nappies/Diapers/Pants Summary

KEY INDUSTRY TRENDS

Chart 55 - Key Industry Trends for Nappies/Diapers/Pants

INDUSTRY PERFORMANCE

Rascals Expands Retail Reach as Premiumisation Offsets Birth Rate Decline

Chart 56 - Rascals Launches in Morrisons

Disposable Pants Brands Use Innovation and Marketing to Capture Growth

Chart 57 - Rascals "We Get It" Campaign Increases the Competition

Pura'S Recycling Initiative Shows Sustainability'S Role in Driving up Unit Prices

Chart 58 - Pura Pushes Sustainability Drive

Chart 59 - Value Sales 2020-2030

Chart 60 - Volume Sales 2020-2030

Chart 61 - Value Sales by Category 2025

WHAT'S NEXT?

Brands to Accelerate Innovation in Disposable Pants to Offset Shrinking User Base
Sustainability and Premium Features Command Price Premiums as Consumer Priorities Evolve
Chart 62 - Forecast Value Sales 2020-2030
Chart 63 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble Leverages Brand Strength to Sustain Value Lead but Private Label Advances
Chart 64 - Analyst Insight for Nappies/Diapers/Pants
Chart 65 - Company Shares 2025
Chart 66 - Brand Shares 2025

CHANNELS

Supermarkets Maintains Lead as Discounters Gains Ground
Retail E-Commerce Attracts Convenience Seekers and Subscription Buyers
Chart 67 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 68 - Economic Context for Nappies/Diapers/Pants
Chart 69 - Real Gdp Growth 2020-2030
Chart 70 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 71 - Consumer Context for Nappies/Diapers/Pants
Chart 72 - Population 2020-2030
Chart 73 - Consumer Expenditure 2020-2030
Chart 74 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Menstrual Care in the United Kingdom](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Menstrual Care Summary

KEY INDUSTRY TRENDS

Chart 75 - Key Industry Trends for Menstrual Care

INDUSTRY PERFORMANCE

Totm and Fluus Fit with the Key Trends Reshaping Consumer Preferences
Chart 76 - Menstrual Care Brand TOTM Launches in Waitrose
Slim/Thin/Ultra-Thin Towels Retains Retail Value Sales Leadership as Disposable Period Pants Surge From a Low Base
Chart 77 - Fluus Arrives in Tesco
Sustainability Claims and Ethical Sourcing Differentiate Brands and Drive Value Sales Growth
Chart 78 - The Cheeky Panda Enters with Bamboo-based, Biodegradable Pads
Chart 79 - Value Sales 2020-2030
Chart 80 - Volume Sales 2020-2030
Chart 81 - Value Sales by Category 2025

WHAT'S NEXT?

Slim Towels and Premium Launches Keep Value Ahead of Volume
Sustainability and Premiumisation Drive Business Model Shifts
Chart 82 - Forecast Value Sales 2020-2030
Chart 83 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble Defends Leadership as Private Label Remains Popular

Chart 84 - Analyst Insight for Menstrual Care

Chart 85 - Company Shares 2025

Chart 86 - Brand Shares 2025

CHANNELS

Health and Beauty Specialists Maintains Leadership as E-Commerce Accelerates

Direct-To-Consumer Brands Drive E-Commerce Expansion through Subscriptions

Chart 87 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 88 - Economic Context for Menstrual Care

Chart 89 - Real Gdp Growth 2020-2030

Chart 90 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 91 - Consumer Context for Menstrual Care

Chart 92 - Population 2020-2030

Chart 93 - Consumer Expenditure 2020-2030

Chart 94 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Wipes in the United Kingdom](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Wipes Summary

KEY INDUSTRY TRENDS

Chart 95 - Key Industry Trends for Wipes

INDUSTRY PERFORMANCE

Andrex Drives Convenience-Led Growth as Everyday Use Expands

Chart 96 - Andrex Ultimate Fresh XL Hygiene Wipes

Personal Wipes Outpace Home Care Wipes and Private Label Expands Reach

Chart 97 - Andrex Launches New Format for New Moist Toilet Wipes Range

Wipe Challenges Disposables as Eco Concerns Shift Consumer Choices

Chart 98 - Wipe Turns Toilet Paper into a Moist Toilet Wipe

Chart 99 - Value Sales 2020-2030

Chart 100 - Value Sales by Category 2025

WHAT'S NEXT?

Personal Wipes to Sustain Momentum as Innovation Shifts Value Propositions

Sustainability Concerns Reshape Consumer Habits and Product Development

E-Commerce and Channel Diversification Enable Accessible and Convenient Purchasing

Chart 101 - Forecast Value Sales 2020-2030

Chart 102 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble and Kimberly-Clark Maintain the Leading Positions as Investment and Trust Offset Share Erosion

Chart 103 - Analyst Insight for Wipes

Chart 104 - Company Shares 2025

Chart 105 - Brand Shares 2025

CHANNELS

Direct-To-Consumer Brands and Online Grocers Boost E-Commerce

Subscription Services and Omnichannel Strategies Fuel Online Sales Growth

Chart 106 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 107 - Economic Context for Wipes

Chart 108 - Real Gdp Growth 2020-2030

Chart 109 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 110 - Consumer Context for Wipes

Chart 111 - Population 2020-2030

Chart 112 - Consumer Expenditure 2020-2030

Chart 113 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Tissue in the United Kingdom](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail Tissue Summary

KEY INDUSTRY TRENDS

Chart 114 - Key Industry Trends for Retail Tissue

INDUSTRY PERFORMANCE

Waitrose Responds to Demand for Better Value for Money with Product Relaunch

Chart 115 - Waitrose Brings Back its Larger Private Label Toilet Paper

Who Gives a Crap Expands into Tesco and Drives Eco-Focused Innovation

Chart 116 - Who Gives a Crap Moves into Tesco

Toilet Paper Dominates a Mature Category

Chart 117 - Value Sales 2020-2030

Chart 118 - Volume Sales 2020-2030

Chart 119 - Value Sales by Category 2025

WHAT'S NEXT?

Brands to Prioritise Differentiation as Stable Demand Limits Volume Gains

Eco-Friendly Launches and Value-Led Strategies Shape Competitive Outcomes

Direct-To-Consumer Brands Gain Traction through Online Subscriptions

Chart 120 - Forecast Value Sales 2020-2030

Chart 121 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Kimberly-Clark Leverages Brand Strength to Resist Private Label

Chart 122 - Analyst Insight for Retail Tissue

Chart 123 - Company Shares 2025

Chart 124 - Brand Shares 2025

CHANNELS

E-Commerce Overtakes Hypermarkets as Consumers Seek Convenience and Choice
Online Retail Reshapes Competition as Subscription Models and Variety Drive Growth
Chart 125 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 126 - Economic Context for Retail Tissue
Chart 127 - Real Gdp Growth 2020-2030
Chart 128 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 129 - Consumer Context for Retail Tissue
Chart 130 - Population 2020-2030
Chart 131 - Consumer Expenditure 2020-2030
Chart 132 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Rx/Reimbursement Adult Incontinence in the United Kingdom](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

[Rx/Reimbursement Adult Incontinence Summary](#)

KEY INDUSTRY TRENDS

Chart 133 - Key Industry Trends for Rx/Reimbursement Adult Incontinence

INDUSTRY PERFORMANCE

Nhs Waiting Times Shift Consumer Behaviour
Chart 134 - Ontex Launches iD Discreet range in Europe
Ontex Launches a Key New Range and Develops an Education Initiative
Chart 135 - Ontex Academy Issues Over 2000 Certificates to Healthcare Professionals
Chart 136 - Value Sales 2020-2030
Chart 137 - Volume Sales 2020-2030

WHAT'S NEXT?

Consumers Shift to Retail Alternatives as Nhs Access Delays Persist
Chart 138 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Tena Sustains Leadership as Alternatives Lack Strong Evidence

CHANNELS

Nhs Distribution Model Leaves No Room for Retail Channel Shifts

ECONOMIC CONTEXT

Chart 139 - Economic Context for Rx/Reimbursement Adult Incontinence
Chart 140 - Real Gdp Growth 2020-2030
Chart 141 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 142 - Consumer Context for Rx/Reimbursement Adult Incontinence
Chart 143 - Population 2020-2030
Chart 144 - Consumer Expenditure 2020-2030
Chart 145 - Population by Generation 2025

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-the-united-kingdom/report.