

Tissue and Hygiene in Australia

May 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

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth for AFH tissue in Australia

Players take action to deal with rising costs

Driving sustainability: Manufacturers' actions in AFH tissue and hygiene in Australia

PROSPECTS AND OPPORTUNITIES

Outlook for AFH tissue and hygiene in Australia

Navigating challenges and opportunities

The rise of eco-friendly 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 - 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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Factors fuelling growth in retail adult incontinence

Ageing population and rising awareness propel growth in retail adult incontinence

The competitive landscape of retail adult incontinence

PROSPECTS AND OPPORTUNITIES

Sustainable solutions: The rise of eco-conscious products in retail adult incontinence

Convenience of purchase to impact channel growth

Understanding consumers' needs

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Factors influencing the growth of nappies/diapers/pants

Brand partnerships: Leveraging collaborations for success

Reinforcement of affordability amidst the cost-of-living crisis

PROSPECTS AND OPPORTUNITIES

E-commerce empowerment

Affordability matters: The appeal of private label in nappies/diapers/pants

The rise of sustainable nappies/diapers/pants in Australia

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Insights into the rise of menstrual care products: Volume and value trends

Economic impact on menstrual care: Trend towards private label and washable alternatives
The rise of reusable menstrual underwear: Transforming menstrual care

PROSPECTS AND OPPORTUNITIES

From education to engagement: The evolution of menstrual apps
Sustainability: Initiatives in menstrual care
Partnering for progress: Collaborative efforts to combat period poverty

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Analysing growth factors for wipes in Australia in 2023
Innovative offerings and consumer appeal
Skin care on-the-go

PROSPECTS AND OPPORTUNITIES

Outlook for wipes in the forecast period
Sustainable innovations expected in wipes
Multifunctional products expected to gain further traction

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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Unpacking growth: Insights into the performance of retail tissue in 2023
The rise of private label products in response to economic challenges
The rise of retail e-commerce

PROSPECTS AND OPPORTUNITIES

Trends and forecasts for online shopping
Balancing affordability and sustainability
Innovations in retail tissue product packaging

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

Rx/Reimbursement Adult Incontinence in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

The impact of Continence Foundation of Australia's policy initiatives

Insights into consumers' decision-making in Rx/reimbursement adult incontinence

The growing influence of CAPS in Rx/reimbursement adult incontinence

PROSPECTS AND OPPORTUNITIES

Outlook for Rx/reimbursement adult incontinence

The role of CAPS accessibility in Rx/reimbursement adult incontinence

Trends and preferences: Consumer choice between retail and Rx/reimbursed adult incontinence products

CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 60 - 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-australia/report.