

# Tissue and Hygiene in Italy

March 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

## Away-From-Home Tissue and Hygiene in Italy

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Trends in hospitals and healthcare services influence AFH tissue and hygiene

Customers' reviews determine choices

Technology and data help to improve customer experiences

### PROSPECTS AND OPPORTUNITIES

Increased care home admissions will challenge the healthcare system and provide opportunities for private options

Supported living options also expected to rise

New EU packaging regulations offer an 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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Italy's ageing population helps to support sales in retail adult incontinence

Education around and acceptance of adult incontinence issues continue to develop

Independence and physical activities remain a must for wellbeing

#### PROSPECTS AND OPPORTUNITIES

A recursive purchase represents an opportunity for new business models

Private insurance programmes set to support challenges in later life

Preventative methods set to attract further attention

#### 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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Huggies engages with consumers through educational communications

Lillydoo continues to carve out its share through strong customer engagement activities

Non-profits collect essentials for price-sensitive parents, while some consider washable options

#### PROSPECTS AND OPPORTUNITIES

Good quality private label options tipped to see success

Non-food discounters could see stronger opportunities through better quality products

Sustainable and washable options will continue to attract attention

#### 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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Pharmacies rise as "information hubs" in Italy

Ups and downs of VAT on menstrual care continue  
Essity targets specific needs, while sustainability trend maintains an influence

## PROSPECTS AND OPPORTUNITIES

Increasing importance of data to support patients' health  
Progressive decline of women of menstrual age lowers volume demand  
Online sales for pharmacies and parapharmacies to develop, while discounters appeal to price-sensitive consumers

## 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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers seek economy wipes through discounter channels and private label  
Personal wipes sees both prospects and opportunities  
Dry electro-static wipes attract attention

## PROSPECTS AND OPPORTUNITIES

Consumers set to remain price sensitive and seek bargains  
Sustainability trends will continue to pose a challenge to non-biodegradable wipes  
Impulse purchase wipes could see opportunities through online platforms

## 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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

High production costs reverberate into unit price hikes, with domestic and private label brands popular  
Sustainability trends influence retail tissue  
Seasonal viruses and off-season allergies prove positive for facial tissues

## PROSPECTS AND OPPORTUNITIES

Ongoing sustainability efforts will create challenges as well as opportunities  
Retail paper towels would benefit further from innovation and modernisation  
Kits present an option for more convenient purchases

## 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 Italy

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Budget cuts continue to create challenges for Rx/reimbursement adult incontinence

Digital and reputable growth of pharmacies and parapharmacies support Rx/reimbursement options

Rx/reimbursement mainly focussed on heavy adult incontinence

#### PROSPECTS AND OPPORTUNITIES

Retail brand loyalty seen among higher-income consumers

Subscription models set new standards and expectations

A wider range of options expected, to suit different genders and needs

#### 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-italy/report](https://www.euromonitor.com/tissue-and-hygiene-in-italy/report).