

Tissue and Hygiene in Greece

March 2024

Table of Contents

Tissue and Hygiene in Greece

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 Greece

KEY DATA FINDINGS

2023 DEVELOPMENTS

Horeca operators cut down spending on away-from-home tissue supplies

Trading down is stronger within healthcare and public sectors

The slow performance of tourism has a negative impact on AFH tissue sales

PROSPECTS AND OPPORTUNITIES

Reduced footfall in horeca impacts the overall performance of the landscape

Trends in foodservice and lodgings will be unfavourable for ongoing growth

Sustainability to have a modest impact on the AFH landscape

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 Greece

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fluctuations in private label share vary by product type in retail adult incontinence Demographics remain favourable to the performance of adult incontinence products The competition between menstrual care brands is gathering pace

PROSPECTS AND OPPORTUNITIES

Growth in branded products is driven by light incontinence goods

Advertising budgets to remain high as players focus on raising consumer awareness

The competitive landscape for heavy/moderate incontinence products has room for growth

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 Greece

KEY DATA FINDINGS

2023 DEVELOPMENTS

The increase in prices does not contribute to private label growth

Larger pack sizes gain ground, promoted online and through instore retailers

The rising demand for eco-friendly brands as Naty nappies gain shelf space

PROSPECTS AND OPPORTUNITIES

As demographics remain unfavourable, companies explore alternatives

E-commerce is set to gain market share as consumers appreciate convenience

Developments reflect the ongoing polarisation on the landscape

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 Greece

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price increases impact product developments on the menstrual care landscape

Eco-friendly menstrual products gain ground in Greece
Sustainability drives innovation and product developments in menstrual care

PROSPECTS AND OPPORTUNITIES

Competition with alternative menstrual products is set to gather pace

Tampons remains seasonal as sales peak in the summer months

Demographics are unfavourable to the performance of menstrual care products

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 Greece

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baby wipes drive retail volume growth as consumers appreciate versatility Sustainability shapes innovation and new product developments in wipes Multipacks and large value packs gain market share during rising inflation

PROSPECTS AND OPPORTUNITIES

Domestic brands dominate sales of personal wipes across the forecast period Multinationals lead in home care wipes, with Azax, Swiffer and Dettol driving sales Ingredients and packaging remain the focus of ongoing innovation

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 Greece

KEY DATA FINDINGS

2023 DEVELOPMENTS

Private label gains ground as prices continue to rise in 2023 Sustainability drives packaging developments in retail tissue Changes in consumer behaviour amidst decline in disposable incomes

PROSPECTS AND OPPORTUNITIES

Short term developments focus on affordable products
Sustainability to drive developments in the packaging of retail tissue
Opportunities for premium products remains limited as private label grows

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 focusing 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-greece/report.