

Tissue and Hygiene in Algeria

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 - Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

Table 15 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023

Table 16 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

Table 17 - 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 Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Foodservice is taking off, boosting away-from-home tissue sales in 2023

Growth of away-from home adult incontinence remains limited

AFH competitive landscape remains consolidated

PROSPECTS AND OPPORTUNITIES

Immaturity ensures further growth over the forecast period

Local manufacturers expected to gain significant value share

Consumer foodservice outlets and hotels upgrading their customer service quality will support away-from-home tissue

CATEGORY DATA

Table 18 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 20 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 21 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 22 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

Retail Adult Incontinence in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Ageing population supports growth in 2023

Social taboo limits growth potential of adult incontinence

Market remains highly concentrated, reflecting its immaturity

PROSPECTS AND OPPORTUNITIES

Positive outlook due to expanding consumer base and improving distribution

Ongoing challenge of social taboo and high prices

Trading down expected as disposable incomes decline

CATEGORY DATA

Table 24 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 25 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 27 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 28 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 29 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

Nappies/Diapers/Pants in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slowing birth rates start to impact demand

New born nappies/diapers rises despite persistent challenges

Star Brands SpA, distributor of Pampers, continues to struggle

PROSPECTS AND OPPORTUNITIES

Sales supported by consumers increasingly seeking hygiene and convenience

Growth slowdown is expected due to economic challenges

Rising interest in sustainability could challenge the demand for disposable nappies/diapers/pants

CATEGORY DATA

Table 30 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 33 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 34 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 35 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

Menstrual Care in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Menstrual care volume growth remains healthy in 2023

Low growth potential for small niches in the category

Procter & Gamble has lost significant ground

PROSPECTS AND OPPORTUNITIES

Rising urbanisation and more working women will support future growth
High growth potential for pantyliners due to low level of consumption
Standard towels with wings will remain the star product area

CATEGORY DATA

Table 36 - Retail Sales of Menstrual Care by Category: Value 2018-2023
Table 37 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023
Table 38 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023
Table 39 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023
Table 40 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028
Table 41 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

Wipes in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Healthy growth for an immature product area, with niche products on the rise
Local brands continue to gain significant ground
Hygienix maintains its lead in 2023

PROSPECTS AND OPPORTUNITIES

Convenience of wipes will continue to drive sales
Baby wipes set to remain the dominant category
Interest in niche products will remain limited due to declining purchasing power

CATEGORY DATA

Table 42 - Retail Sales of Wipes by Category: Value 2018-2023
Table 43 - Retail Sales of Wipes by Category: % Value Growth 2018-2023
Table 44 - NBO Company Shares of Retail Wipes: % Value 2019-2023
Table 45 - LBN Brand Shares of Retail Wipes: % Value 2020-2023
Table 46 - Forecast Retail Sales of Wipes by Category: Value 2023-2028
Table 47 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

Retail Tissue in Algeria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price more important than quality as disposable incomes decline in 2023
Changing lifestyle trends support demand for paper napkins and paper towels
Faderco continues to gain share due to import restrictions

PROSPECTS AND OPPORTUNITIES

Growth supported by population growth and an increased focus on hygiene
Toilet paper will remain the most dominant area
Affordability will drive sales of kitchen towels and facial tissues

CATEGORY DATA

Table 48 - Retail Sales of Tissue by Category: Value 2018-2023
Table 49 - Retail Sales of Tissue by Category: % Value Growth 2018-2023
Table 50 - NBO Company Shares of Retail Tissue: % Value 2019-2023
Table 51 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 52 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 53 - 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 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-algeria/report.