



Retail Tissue in Australia

April 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail Tissue Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail Tissue

INDUSTRY PERFORMANCE

Retail Tissue Remains Stable through Cost of Living Pressures

Affordability Drives Retail Tissue as a Cost-Of-Living Benchmark

Sorbent Leverages Sustainable Fibre to Gain an Operational Edge

Chart 2 - Sorbent's Sustainable Tissues

Chart 3 - Value Sales 2020-2030

Chart 4 - Volume Sales 2020-2030

Chart 5 - Value Sales by Category 2025

WHAT'S NEXT?

Stable Pricing and Reliable Availability to Grow Value-Driven Consumer Loyalty

National Packaging Targets Continue to Drive Sustainability

Chart 6 - Forecast Value Sales 2020-2030

COMPETITIVE LANDSCAPE

Market Remains Concentrated as Top Players Maintain Lead

Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Coles and Woolworths Secure Shopper Loyalty through Value-Led Strategies

Chart 9 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 10 - Economic Context for Retail Tissue

Chart 11 - Real Gdp Growth 2020-2030

Chart 12 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 13 - Consumer Context for Retail Tissue

Chart 14 - Population 2020-2030

Chart 15 - Consumer Expenditure 2020-2030

Chart 16 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in Australia - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 17 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Affordability Significantly Influences Tissues and Hygiene Performance

Chart 18 - Woolworth's Affordability Expansion

Sustainability Shifts From a Rising Trend to a Government Requirement Amid Eco-Regulations

Chart 19 - Essity Debuts Geothermal-Powered Tissue Production

Digital-First Hygiene Supported by the Mainstream Adoption of E-Commerce

Chart 20 - Value Sales 2020-2030

Chart 21 - Value Sales by Category 2025

WHAT'S NEXT?

Convenience, Consistency and an Ageing Population Set to Boost Incontinence Sales

Automated Replenishment and Operational Transparency to Drive Loyalty

Trust and Authenticity to Influence Thoughtful Spending Habits

Chart 22 - Analyst Insight for Tissue and Hygiene

Chart 23 - Forecast Value Sales 2020-2030

Chart 24 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Kimberly-Clark Pty Ltd Defends Lead as Challengers Gain through Digital and Sustainability

Emerging Brands Cleanlife and Kine Australia Grow Awareness through Innovation

Femlibre's Free Menstrual Care Model Reshapes Expectations

Chart 25 - Company Shares 2025

Chart 26 - Brand Shares 2025

CHANNELS

Everyday Essentials Drive Grocery Retailer Dominance

Emerging Brands and Collaborations Set New Standard, Impacting Purchasing Decisions

Chart 27 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 28 - Economic Context for Menstrual Care

Chart 29 - Real Gdp Growth 2020-2030

Chart 30 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 31 - Consumer Context for Menstrual Care

Chart 32 - Population 2020-2030

Chart 33 - Consumer Expenditure 2020-2030

Chart 34 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/retail-tissue-in-australia/report.