

Tissue and Hygiene in Slovakia

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Away-from-home tissue impacted by economic uncertainty

Boxed facial tissues and paper tableware witness uplift in sales

Players focus on websites to build awareness, making purchasing easy

PROSPECTS AND OPPORTUNITIES

Economic upturn to boost demand for AFH tissue

Innovation in boxed facial tissue

Ageing population to drive sales of AFH hygiene

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Upbeat performance in retail adult incontinence

Essity promotes new Tena ProSkin line

Retail e-commerce channel gains traction

PROSPECTS AND OPPORTUNITIES

Stable demand despite competition from Rx/reimbursements

Innovation is central to improving performance and meeting consumers' needs

Competing substitutes could offer some threat to category 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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales remain under pressure as prices soar

Junior nappies/diapers gain appeal despite price rises

Consumers switch to affordable private label options

PROSPECTS AND OPPORTUNITIES

Moderate decline for nappies/diapers/pants overall

On-the-go shopping trend to benefit smaller grocery outlets

Consumers to look for more sustainable options

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising prices in menstrual care

Standard towels witnessed slight uplift in volume sales
Players focus on developing slim/thin/ultra-thin towels

PROSPECTS AND OPPORTUNITIES

Low and steady growth in menstrual care
Tampons to face volume sales decline
Slim/thin/ultra-thin towels to witness further innovation

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Robust demand for wipes overall
Baby wipes lead in personal wipes
Slovakians rely on all-purpose cleaning wipes

PROSPECTS AND OPPORTUNITIES

All-purpose cleaning wipes face moderate growth prospects
Baby wipes faces a bright outlook
Cosmetic wipes to see downturn in sales

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Healthy performance of toilet paper drives category growth
Weak performance in paper tableware and napkins
Metsä Tissue AS takes the lead in retail tissue

PROSPECTS AND OPPORTUNITIES

Premiumisation will drive appeal of toilet paper and paper towels
Consumers to focus on buying the most essential retail tissue products
Health and beauty specialists to gain value share

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rx/reimbursement is favoured choice for most incontinence sufferers

Sales are dominated by moderate/heavy products

Multiple stakeholders work towards driving awareness of adult incontinence

PROSPECTS AND OPPORTUNITIES

Steady pace of growth anticipated

Product innovation to focus on efficacy and comfort

Focus on the prevention of adult incontinence could challenge growth

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-slovakia/report.