

Adult Incontinence in Middle East and Africa

August 2020

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Key findings

REGIONAL OVERVIEW

Middle East and Africa in context

Despite the COVID-19 pandemic, growth is expected for the region

Israel, Algeria and Saudi Arabia are largest markets in the region

Increased product variety and availability boost growth in MEA

Moderate/Heavy adult incontinence records stronger sales...

... because of wider availability and greater product variety

Non-grocery specialists dominates channel distribution

Israel and Egypt see an increase in e-commerce sales

LEADING COMPANIES AND BRANDS

Brand share in region mainly consolidated among top five companies

Kimberly-Clark Corp loses company share in the region

Only three players with wide regional coverage

Tena now leading in the region thanks to clever innovation

FORECAST PROJECTIONS

Impact of COVID19 pandemic on forecast...

... not significant as products remain available

Population growth expected to boost demand...

... while low awareness and social taboos may hamper growth

COUNTRY SNAPSHOTS

Egypt: Market context

Egypt: Competitive and retail landscape

Israel: Market context

Israel: Competitive and retail landscape

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