

Retail Disposable Hygiene Global Industry Overview

June 2020

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INTRODUCTION

Scope Examining five trends shaping disposable hygiene Highlights of COVID-19 impact on disposable hygiene industry

THE INDUSTRY PRE-COVID-19

Positive growth globally in 2019 and beyond Tissue and hygiene industry in the context of other FMCG Adult incontinence products see strong demand across regions COVID-19 demand adds to already healthy incontinence products growth Unlocking opportunities across adult incontinence product formats Asia Pacific still leads, with China approaching high consumption levels Omnichannel distribution on the agenda as e-commerce surges ahead Insurgent brands example: From DTC-only to focus on omnichannel

LEADING COMPANIES AND BRANDS

FMCG a relative safe haven in the COVID-19 environment Global leaders face challenges across products and price segments Tight competition erodes global share for the leaders Tailoring innovation to consumer preferences Agility in response to consumers has supported growth of smaller players From basic product conversation to a lifestyle brand COVID-19 case: Lyv Life – managing demand and engagement

TOP FIVE TRENDS SHAPING THE INDUSTRY

Understanding key broad COVID-19-driven themes Examining five trends shaping disposable hygiene Affordability and value for money in developing regions On path to redefining premium: relating to brand value Insurgent brands facilitate shifts in innovation and communication Conveying value of natural and sustainable Effective and seamless omnichannel experience

GLOBAL OUTLOOK

2020 impact of COVID-19 and beyond Soft drivers: COVID-19-specific effects on retail hygiene forecast Looking beyond COVID-19: Long-term potential in developing regions

MARKET SNAPSHOTS

Regional snapshot of Asia Pacific Regional snapshot of Australasia Regional snapshot of Eastern Europe Regional snapshot of Latin America Regional snapshot of Middle East and Africa Regional snapshot of North America

MARKET SHAPSHOT

Regional snapshot of Western Europe

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