Euromonitor International

The World Market for Retail Tissue and Hygiene

May 2026

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THE WORLD MARKET FOR RETAIL TISSUE AND HYGIENE

Our expert’s view of Retail Tissue and Hygiene in 2026
Retail Tissue and Hygiene snapshot

THE WORLD MARKET FOR RETAIL TISSUE AND HYGIENE

Key findings

INTRODUCTION

Key facts to share
Top five trends in Retail Tissue and Hygiene
Top five trends uncovered
Drivers of consumer markets and impact on Retail Tissue and Hygiene
Adjacent industries and how they impact Retail Tissue and Hygiene

STATE OF THE INDUSTRY

The global market growth remains fragile amid socioeconomic headwinds
Retail tissue witnesses slight demand improvement supported by China demand
Beyond retail, AFH tissue shifts from recovery to structural growth
Retail hygiene demand is hindered by birth decline but remains resilient overall
Category growth polarises as affordability and premium play divergent roles
Growth diverges globally: Incontinence anchors the West, tissue leads the East
Menstrual care and incontinence lead growth as wellness and longevity gain recognition
Lifestyle-adaptive thin, pants formats are key drivers of hygiene demand
State of adult incontinence: Retail-led growth, supported by AFH and R x
Destigmatisation and lifestyle needs are rewriting incontinence format choices
APAC and MEA power future growth of global tissue and hygiene
Despite temporary slowdown, outlook is set to improve across most leading markets

COMPANIES AND PRODUCTS

Global giants under pressure as regional players win with value and efficiency
Private label ascends: From price fighter to proactive trend setter
Local upstarts lead growth by scaling accessible premium experience
Global leaders accelerate portfolio reset as scale alone no longer delivers margins

CHANNELS

Despite supermarkets' dominance, e-commerce rises to the second largest channel
US and China drive e-commerce gains through fast discovery and frictionless refills
From shelf to screen: Social commerce is rewriting the rules of scale

FUTURE OUTLOOK

As China growth slows, developing Latin America and Asia rise in prominence
Growth decomposition unpacks unique local growth levers
Geopolitical and trade volatility poses a persistent cost and demand risk
Unmet potential is highly concentrated in developing Asia, but unevenly actionable
Washable formats remain an integral part of the broader intimate hygiene habit
From disposable to daily wear : Essity broadens the incontinence playbook

CONCLUSION

Challenges and opportunities for Retail Tissue and Hygiene
Opportunities for growth

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/the-world-market-for-retail-tissue-and-hygiene/report.