From Price Hike to Value Engineering: Premiumisation in Tissue and Hygiene

January 2026

EXECUTIVE SUMMARY

Why read this report?
Key findings

INTRODUCTION

Tissue and hygiene demand is shaped by price sensitivity and wellness aspirations
Persistent inflation drives scrutiny of value
Leading tissue and hygiene players are actively shifting to higher value portfolio mix
Premiumisation isn't just about setting the top price; it's about adding value at every tier
Wellness remains as a spending priority despite consumer cutbacks
Three key pillars of premiumisation in tissue and hygiene

STATE OF PREMIUMISATION

Value-led growth is most meaningful in categories with volume weakness
Companies must tailor strategies to local market dynamics and category realities
On a product level, shoppers in developing markets exhibit stronger aspirations
Despite rising demand, income disparities dictate timing and scale of premiumisation
Amid false advertising exposés, proof, rather than promises, matters more than ever

SKIN HEALTH: NATURALLY DERIVED, CLINICALLY PROVEN

Health claims focused on skin safety and ingredient purity garner price premium
Natural positioning gains attraction, particularly in baby nappies/diapers
Discerning consumers increasingly scrutinise "natural" claims: Seek evidence backing
Freemore pursues premiumisation with microbiome-forward positioning
Coterie strengthens performance trust with science validation and radical transparency

EXPERIENTIAL ELEVATED: FROM FUNCTIONAL TO FEEL-GOOD

The three pillars of feel-good in tissue and hygiene
Fragrances instil comfort into daily self care routines
Honey Pot's new adaptogenic herb blend offers calming sensation for menstrual care
Confidence is evolving from simple reassurance to emotional empowerment
Essity's Tena Men promotes active living and discreetness for underserved men
Convenience is increasingly about effortlessness
P&G's Charmin's "forever roll" tackles bathroom restock hassle

LIFECYCLE INTEGRATION: FROM MOMENTS TO MILESTONES

Building lifelong value through lifecycle-driven premiumisation
P&G and LOLA: High-stakes life stage entry through postpartum care
Unicharm: Holistic life stage ecosystem focused on healthy ageing
Kimberly-Clark x Kenvue: Lifespan companionship
Emerging future horizon: Tech-enabled lifecycle care

CONCLUSION

Near-term activation priorities and innovation opportunities by product segment
Key recommendations and opportunities
Evolution of tissue and hygiene premiumisation
Questions we are asking

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/from-price-hike-to-value-engineering-premiumisation-in-tissue-and-hygiene/report.