

Tissue and Hygiene in New Zealand

Market Direction | 2023-03-07 | 50 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2200.00
- Multiple User License (1 Site) €4400.00
- Multiple User License (Global) €6600.00

Report description:

The major issue affecting the tissue and hygiene product area in 2022 was the high level of inflation, which caused cost-of-living pressures for consumers whilst also driving strong value sales growth. The steep increase in grocery prices observed in 2022 was the biggest annual increase since 2011 - and that was affected by a goods and services tax rise. The increasing costs of international shipping and logistics, combined with local supply chain disruptions caused by the Omicron outbreak and m...

Euromonitor International's Tissue and Hygiene in New Zealand report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2018-2022, allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they new product developments, distribution or pricing issues. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Away-from-Home Tissue and Hygiene, Retail Tissue and Hygiene, Rx/Reimbursement adult incontinence, Total Tissue and Hygiene.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Tissue and Hygiene market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Tissue and Hygiene in New Zealand
Euromonitor International
March 2023

List Of Contents And Tables

TISSUE AND HYGIENE IN NEW ZEALAND

EXECUTIVE SUMMARY

Tissue and hygiene in 2022: The big picture
2022 key trends
Competitive Landscape
Retailing developments
What next for tissue and hygiene?

MARKET INDICATORS

Table 1 Birth Rates 2017-2022
Table 2 Infant Population 2017-2022
Table 3 Female Population by Age 2017-2022
Table 4 Total Population by Age 2017-2022
Table 5 Households 2017-2022
Table 6 Forecast Infant Population 2022-2027
Table 7 Forecast Female Population by Age 2022-2027
Table 8 Forecast Total Population by Age 2022-2027
Table 9 Forecast Households 2022-2027

MARKET DATA

Table 10 □Retail Sales of Tissue and Hygiene by Category: Value 2017-2022
Table 11 □Retail Sales of Tissue and Hygiene by Category: % Value Growth 2017-2022
Table 12 □NBO Company Shares of Retail Tissue and Hygiene: % Value 2018-2022
Table 13 □LBN Brand Shares of Retail Tissue and Hygiene: % Value 2019-2022
Table 14 □Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2017-2022
Table 15 □Distribution of Retail Tissue and Hygiene by Format: % Value 2017-2022
Table 16 □Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2022
Table 17 □Forecast Retail Sales of Tissue and Hygiene by Category: Value 2022-2027
Table 18 □Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 Research Sources

SANITARY PROTECTION IN NEW ZEALAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Inflationary pressures drive value growth, causing cost-of-living pressures
Growing presence of away-from-home sanitary protection places pressure on retail volume growth
Asaleo Care continues to lead the product area with its Libra brand

PROSPECTS AND OPPORTUNITIES

Inflationary pressures expected to ease over the later stages of the forecast period
Opportunities for private label growth
Sustainability concerns likely to grow in prominence

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

CATEGORY DATA

Table 19 Retail Sales of Sanitary Protection by Category: Value 2017-2022

Table 20 Retail Sales of Sanitary Protection by Category: % Value Growth 2017-2022

Table 21 Retail Sales of Tampons by Application Format: % Value 2017-2022

Table 22 NBO Company Shares of Retail Sanitary Protection: % Value 2018-2022

Table 23 LBN Brand Shares of Retail Sanitary Protection: % Value 2019-2022

Table 24 Forecast Retail Sales of Sanitary Protection by Category: Value 2022-2027

Table 25 Forecast Retail Sales of Sanitary Protection by Category: % Value Growth 2022-2027

NAPPIES/DIAPERS/PANTS IN NEW ZEALAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Inflationary pressures drive value sales growth, placing pressure on household budgets

Competition intensifies, but Huggies continues to lead in 2022

Woolworths launches new private label brand

PROSPECTS AND OPPORTUNITIES

Financial and social responsibility driving down birth rate

Opportunities for private label growth

Sustainability concerns likely to grow in prominence

CATEGORY DATA

Table 26 Retail Sales of Nappies/Diapers/Pants by Category: Value 2017-2022

Table 27 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2017-2022

Table 28 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2018-2022

Table 29 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2019-2022

Table 30 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2022-2027

Table 31 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2022-2027

RETAIL ADULT INCONTINENCE IN NEW ZEALAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Inflationary pressures drive value sales growth

Aging population drives volume sales growth

Enjoying high levels of brand recognition, Tena, Poise and Depend continue to lead the product area

PROSPECTS AND OPPORTUNITIES

Sustainability considerations expected to become more prominent

Opportunities for private label growth

Inflationary pressures expected to ease in the later stages of the forecast period

CATEGORY DATA

Table 32 Sales of Retail Adult Incontinence by Category: Value 2017-2022

Table 33 Sales of Retail Adult Incontinence by Category: % Value Growth 2017-2022

Table 34 NBO Company Shares of Retail Adult Incontinence: % Value 2018-2022

Table 35 LBN Brand Shares of Retail Adult Incontinence: % Value 2019-2022

Table 36 Forecast Sales of Retail Adult Incontinence by Category: Value 2022-2027

Table 37 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2022-2027

WIPES IN NEW ZEALAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Wipes lose favour due to environmental concerns

Work-from-home trends see task specificity return into focus

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Inflationary pressures drive value sales growth□

PROSPECTS AND OPPORTUNITIES

Environmental concerns likely to reduce demand for wipes further

Opportunities for private label growth

Inflationary pressures expected to ease over the later stages of the forecast period

CATEGORY DATA

Table 38 Retail Sales of Wipes by Category: Value 2017-2022

Table 39 Retail Sales of Wipes by Category: % Value Growth 2017-2022

Table 40 NBO Company Shares of Retail Wipes: % Value 2018-2022

Table 41 LBN Brand Shares of Retail Wipes: % Value 2019-2022

Table 42 Forecast Retail Sales of Wipes by Category: Value 2022-2027

Table 43 Forecast Retail Sales of Wipes by Category: % Value Growth 2022-2027

RETAIL TISSUE IN NEW ZEALAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Supply shortages and cost increases drive unit price growth

ABC Tissue Products exits New Zealand

Work-from-home trends stimulate retail volume growth

PROSPECTS AND OPPORTUNITIES

Inflationary pressures expected to ease over the later stages of the forecast period.

Work-from-home trends are here to stay

Sustainability concerns likely to grow in prominence

CATEGORY DATA

Table 44 Retail Sales of Tissue by Category: Value 2017-2022

Table 45 Retail Sales of Tissue by Category: % Value Growth 2017-2022

Table 46 NBO Company Shares of Retail Tissue: % Value 2018-2022

Table 47 LBN Brand Shares of Retail Tissue: % Value 2019-2022

Table 48 Forecast Retail Sales of Tissue by Category: Value 2022-2027

Table 49 Forecast Retail Sales of Tissue by Category: % Value Growth 2022-2027

AWAY-FROM-HOME TISSUE AND HYGIENE IN NEW ZEALAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Hybrid working arrangements impact away-from-home tissue sales

Supply shortages and cost increases drive unit price growth

Asaleo Care and Kimberly-Clark continue to lead

PROSPECTS AND OPPORTUNITIES

Work-from-trends set to continue to impact away-from-home tissue sales

As inflationary pressures ease, value sales growth will be influenced by volume growth

Sustainability likely to start influencing decision making

CATEGORY DATA

Table 50 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2017-2022

Table 51 Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2017-2022

Table 52 Sales of Away-From-Home Paper Towels by Type: % Value 2017-2022

Table 53 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2017-2022

Table 54 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2022

Table 55 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2022-2027

Table 56 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2022-2027

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Tissue and Hygiene in New Zealand

Market Direction | 2023-03-07 | 50 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€2200.00
	Multiple User License (1 Site)	€4400.00
	Multiple User License (Global)	€6600.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-05"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com