

## **Tissue and Hygiene in the United Kingdom**

Market Direction | 2023-03-07 | 55 pages | Euromonitor

### **AVAILABLE LICENSES:**

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

### **Report description:**

Overall demand for retail hygiene remained stable in 2022, while retail tissue experienced a marginal decline, although volume sales remained higher than pre-pandemic levels. Many categories continued to normalise following stockpiling during the first year of the pandemic, due to home seclusion and fears of shortages on retailers' shelves. This was particularly noticeable for retail tissue such as toilet paper as entire households spent prolonged time at home, while away-from-home tissue record...

Euromonitor International's Tissue and Hygiene in United Kingdom 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](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## **Table of Contents:**

Tissue and Hygiene in the United Kingdom  
Euromonitor International  
March 2023

### List Of Contents And Tables

#### TISSUE AND HYGIENE IN THE UNITED KINGDOM

##### 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 THE UNITED KINGDOM

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Stable demand for sanitary protection but high value growth is driven by inflation  
Period Products Act introduced in Scotland  
Unit prices increase across the category in 2022

##### PROSPECTS AND OPPORTUNITIES

A positive, albeit undynamic, performance predicted for the forecast period  
The ongoing rise of leakproof apparel  
Sustainability to remain a theme for sanitary protection

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://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 THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Stable demand in 2022, but elevated value growth driven by inflation

Private label grows as consumers attempt to save money

Procter & Gamble retains overall leadership despite pressure from private label

### PROSPECTS AND OPPORTUNITIES

Subdued performance expected over the forecast period

Pandemic sparks a "baby bust"

Premiumisation expected over the forecast period

## 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 THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Demand for retail adult incontinence continues to grow in line with wider usage and awareness

Prices surge for raw materials

Consolidated competitive landscape, dominated by Essity AB

### PROSPECTS AND OPPORTUNITIES

Strong performance predicted over the forecast period

Acceptance and awareness of incontinence to increase over the forecast period

Obesity levels and an ageing population to support further use over 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

## RX/REIMBURSEMENT ADULT INCONTINENCE IN THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

2022 sees further volume decline, but high value growth

Consumers increasingly turn to retail as NHS waiting lists increase

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## PROSPECTS AND OPPORTUNITIES

Both volume and value sales to register declines over the forecast period

Consumers likely to further switch to retail adult incontinence products

Development of wearable technology expected within adult incontinence

## CATEGORY DATA

Table 38 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2017-2022

Table 39 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2017-2022

Table 40 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2022-2027

Table 41 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2022-2027

## WIPES IN THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Heightened hygiene awareness supports further demand for wipes in 2022

UK retailers ban wipes containing plastic

Top three players retain strength in wipes but private label gains further share

## PROSPECTS AND OPPORTUNITIES

Established hygiene habits and demand for convenience to continue to support demand for wipes over the forecast period

Sustainability concerns to gain momentum over the forecast period

New product launches shift consumers away from wipes entirely

## CATEGORY DATA

Table 42 Retail Sales of Wipes by Category: Value 2017-2022

Table 43 Retail Sales of Wipes by Category: % Value Growth 2017-2022

Table 44 NBO Company Shares of Retail Wipes: % Value 2018-2022

Table 45 LBN Brand Shares of Retail Wipes: % Value 2019-2022

Table 46 Forecast Retail Sales of Wipes by Category: Value 2022-2027

Table 47 Forecast Retail Sales of Wipes by Category: % Value Growth 2022-2027

## RETAIL TISSUE IN THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Despite declines, demand for retail tissue remains higher than pre-pandemic levels

Brands commit to sustainability in response to increasing consumer demands

Unchanged at the top, with private label strengthening its position overall

## PROSPECTS AND OPPORTUNITIES

Stable demand for retail tissue predicted over the forecast period

Consumers to continue switching to private label due to cost-cutting measures

Retail e-commerce sales likely to increase over the forecast period

## CATEGORY DATA

Table 48 Retail Sales of Tissue by Category: Value 2017-2022

Table 49 Retail Sales of Tissue by Category: % Value Growth 2017-2022

Table 50 NBO Company Shares of Retail Tissue: % Value 2018-2022

Table 51 LBN Brand Shares of Retail Tissue: % Value 2019-2022

Table 52 Forecast Retail Sales of Tissue by Category: Value 2022-2027

Table 53 Forecast Retail Sales of Tissue by Category: % Value Growth 2022-2027

## AWAY-FROM-HOME TISSUE AND HYGIENE IN THE UNITED KINGDOM

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Away-from-home registers stable volume growth in line with greater mobility outside of the home

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Overall demand for away-from-home tissue remains below pre-pandemic levels

Significant increases for raw materials push up unit prices

#### PROSPECTS AND OPPORTUNITIES

Away-from-home volumes set to further increase over the forecast period

Hybrid working to remain relevant in the coming years

Sustainability to remain key development area

#### CATEGORY DATA

Table 54 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2017-2022

Table 55 Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2017-2022

Table 56 Sales of Away-From-Home Paper Towels by Type: % Value 2017-2022

Table 57 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2017-2022

Table 58 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2022

Table 59 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2022-2027

Table 60 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](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Tissue and Hygiene in the United Kingdom

Market Direction | 2023-03-07 | 55 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="2025-05-03"/>
		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