

Tissue and Hygiene in Italy

Market Direction | 2023-03-07 | 61 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

Sales of tissue and hygiene products in Italy were strongly impacted by the increasing cost of raw materials, energy, and labour in 2022 as the country was hit by elevated inflation in the wake of Russia's invasion of Ukraine. Furthermore, supply chain disruptions led to difficulties in components reaching manufacturers at the beginning of the year. The summer holidays were instrumental as they allowed manufacturers the opportunity to take a break in production, allowing them the opportunity to...

Euromonitor International's Tissue and Hygiene in Italy 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.

Table of Contents:

Tissue and Hygiene in Italy Euromonitor International March 2023

List Of Contents And Tables

TISSUE AND HYGIENE IN ITALY **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 ITALY **KEY DATA FINDINGS** 2022 DEVELOPMENTS Sustainability concerns driving sales of washable and reusable products More social life implies more changes VAT on sanitary protection reduced for the second time in a year in Italy's PROSPECTS AND OPPORTUNITIES Low-cost sanitary protection could win favour as economic challenges mount, while an ongoing decline in the female population set to limit sales Opportunities remain that chemists/pharmacies could exploit

Menstruations at work no longer a taboo 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 ITALY **KEY DATA FINDINGS** 2022 DEVELOPMENTS Inflation hits on parents Sustainability a growing influence on nappies/diapers/pants Pampers and Huggies continue to dominate while the rise of e-commerce opens the door to new opportunities PROSPECTS AND OPPORTUNITIES As prices rise players could seek out new opportunities Birth rate in Italy will continue to slow, despite Government support Italy reduces VAT on nappies/diapers 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 ITALY **KEY DATA FINDINGS** 2022 DEVELOPMENTS Consumers more acquainted with buying incontinence products Soaring energy bills and high inflation puts pressure on disposable income to the benefit of private label Consumers focus on quality PROSPECTS AND OPPORTUNITIES Repeat purchases an opportunity for brands and retailers Players may need to innovate to prevent commoditisation Further opportunities available in the distribution of retail adult incontinence with e-commerce set for further gains 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 ITALY KEY DATA FINDINGS** 2022 DEVELOPMENTS

Distribution varies between regions, while sales suffer due to spending review

Sales continue to decline despite ageing population Environmental sustainability not a priority PROSPECTS AND OPPORTUNITIES RX/reimbursement scheme guarantees footfall in stores Public expenditure set to be further squeezed thus limiting the supply of Rx/reimbursement adult incontinence Better guality products needed to prevent waste CATEGORY DATA Table 57 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2017-2022 Table 58 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2017-2022 Table 59 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2022-2027 Table 60 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2022-2027 WIPES IN ITALY **KEY DATA FINDINGS** 2022 DEVELOPMENTS Sustainability concerns and the declining birth rate continue to have a detrimental effect on demand for wipes Retailers increase their distribution share with private label sales flourishing Lillydoo partners with OVS to give a physical distribution presence to its range of baby products PROSPECTS AND OPPORTUNITIES Players could target the elderly as Italy's birth rate declines Wipes likely target more specific user groups Sustainability a growing concern for consumers 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 ITALY KEY DATA FINDINGS** 2022 DEVELOPMENTS Tissue industry at the forefront of environment sustainability Italy increases local pulping facilities Volume sales stagnate as prices rise in line with elevated inflation levels PROSPECTS AND OPPORTUNITIES Facial tissues will continue to grow while players may need to look for new raw materials to meet the demand for sustainable products Mixed fortunes predicted within retail tissue with the maturity of toilet paper likely to limit growth opportunities Paper towels offers potential growth and development opportunities thanks to multifunctionality 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 ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Players focus on sustainability and e-commerce to grow their businesses

Summer learning activities boost demand while the horeca channel posts a strong recovery

Smart working reduces use of AFH paper in offices

PROSPECTS AND OPPORTUNITIES

The high cost of energy and raw materials presents a big challenge to producers of AFH tissue

Serviced apartments present new opportunities for AFH tissue brands

Community hospitals could present new sales opportunities, but fewer residents in nursing homes likely to impact sales of AFH adult incontinence

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



Tissue and Hygiene in Italy

Market Direction | 2023-03-07 | 61 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*	Phone*	
First Name*	Last Name*	
Job title*		
Company Name*	EU Vat / Tax ID / NIP number*	
Address*	City*	
Zip Code*	Country*	
	Date	2025-06-24
	Signature	

Scotts International. EU Vat number: PL 6772247784

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