

Tissue and Hygiene in Singapore

Market Direction | 2024-02-27 | 57 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 post-pandemic shift in consumer priorities has redefined the tissue and hygiene landscape in Singapore. In 2023, this new picture depicted consumers' higher selectivity towards the improvement of hygiene, compared to a general increase in the adoption and appreciation of hygiene and cleanliness, fostered by pandemic-induced fears.

Euromonitor International's Tissue and Hygiene in Singapore report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023, 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 2028 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 Singapore
Euromonitor International
February 2024

List Of Contents And Tables

TISSUE AND HYGIENE IN SINGAPORE

EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for tissue and hygiene?

MARKET INDICATORS

Table 1 Birth Rates 2018-2023
Table 2 Infant Population 2018-2023
Table 3 Female Population by Age 2018-2023
Table 4 Total Population by Age 2018-2023
Table 5 Households 2018-2023
Table 6 Forecast Infant Population 2023-2028
Table 7 Forecast Female Population by Age 2023-2028
Table 8 Forecast Total Population by Age 2023-2028
Table 9 Forecast Households 2023-2028

MARKET DATA

Table 10 □Retail Sales of Tissue and Hygiene by Category: Value 2018-2023
Table 11 □Retail Sales of Tissue and Hygiene by Category: % Value Growth 2018-2023
Table 12 □NBO Company Shares of Retail Tissue and Hygiene: % Value 2019-2023
Table 13 □LBN Brand Shares of Retail Tissue and Hygiene: % Value 2020-2023
Table 14 □Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2018-2023
Table 15 □Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023
Table 16 □Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023
Table 17 □Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028
Table 18 □Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 Research Sources

MENSTRUAL CARE IN SINGAPORE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slim/Thin/Ultra-thin towels achieve highest value growth in 2023 due to prioritisation of convenience and mobility
Clean features continue to perform well, while herbal offerings remain unpopular
Cooling scents are popular to reduce odours, while herbal offerings remain unpopular

PROSPECTS AND OPPORTUNITIES

Security assurance remains key driver of innovation
Brands to expand portfolio with unique offerings to support feminine care and women's health
Local scene seeks to improve affordability and accessibility of menstrual care

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 Menstrual Care by Category: Value 2018-2023

Table 20 Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023

Table 21 Retail Sales of Tampons by Application Format: % Value 2018-2023

Table 22 NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

Table 23 LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

Table 24 Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

Table 25 Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

NAPPIES/DIAPERS/PANTS IN SINGAPORE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Nappies/Diapers/Pants register strong growth in 2023

Quality-seeking new parents give rise to interest in regional and local offerings

E-commerce continues to be the preferred channel post-pandemic due to price sensitivity

PROSPECTS AND OPPORTUNITIES

Slowdown in sales expected to drive value innovation

Clean products will perform well due to skin concerns, and less on sustainability

Potential to save costs on household purchases reframe outbound travel opportunities

CATEGORY DATA

Table 26 Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 27 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 28 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 29 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 30 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 31 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

RETAIL ADULT INCONTINENCE IN SINGAPORE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Ageing population leading growth driver for incontinence use

Moderate/Heavy incontinence leads volume growth due to prevailing stigma

Need for discreetness and preference for convenience continues to boost e-commerce channel's performance

PROSPECTS AND OPPORTUNITIES

Men's health and hygiene awareness remains low and an untapped market

Government subsidies support elderly, but young incontinence users suffer alone

Mobility is key to encouraging early adoption of light incontinence products

CATEGORY DATA

Table 32 Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 33 Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 34 NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 35 LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 36 Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 37 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

WIPES IN SINGAPORE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wipes continues to enjoy stronger growth than pre-pandemic era in 2023

Private label strengthens positioning to justify imminent price increases

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Emphasis on clean ingredients will lead brand expansion

PROSPECTS AND OPPORTUNITIES

Moist toilet wipes to benefit from strong forecast for retail adult incontinence

Intimate wipes a new source of innovation for menstrual care brands

Facial cleansing wipes to provide more convenience among working consumers

CATEGORY DATA

Table 38 Retail Sales of Wipes by Category: Value 2018-2023

Table 39 Retail Sales of Wipes by Category: % Value Growth 2018-2023

Table 40 NBO Company Shares of Retail Wipes: % Value 2019-2023

Table 41 LBN Brand Shares of Retail Wipes: % Value 2020-2023

Table 42 Forecast Retail Sales of Wipes by Category: Value 2023-2028

Table 43 Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

RETAIL TISSUE IN SINGAPORE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Surging demand for premium tissue products in Singapore

House brands flourish

Navigating lower costs in shipping and pulp amid economic shifts

PROSPECTS AND OPPORTUNITIES

Growing popularity of flushable toilet paper in Singapore

Bidet adoption redefining toilet hygiene practices in Singapore

CATEGORY DATA

Table 44 Retail Sales of Tissue by Category: Value 2018-2023

Table 45 Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 46 NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 47 LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 48 Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 49 Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

AWAY-FROM-HOME TISSUE AND HYGIENE IN SINGAPORE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism resurgence and flourishing F&B sector propel continued growth in AFH tissue categories

The rise of eco-friendly AFH tissue options in Singapore

Government assistance for elder healthcare keeps AFH hygiene prices low

PROSPECTS AND OPPORTUNITIES

The evolving landscape of tissue consumption in Singapore's F&B sector

Bidet adoption reshapes restroom hygiene practices

Ageing population will continue to drive demand for AFH hygiene products

CATEGORY DATA

Table 50 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 51 Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 52 Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 53 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 54 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 55 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 56 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

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 Singapore

Market Direction | 2024-02-27 | 57 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	2025-05-06
		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