

Tissue and Hygiene in Estonia

Market Direction | 2024-03-05 | 48 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

In 2023, tissue and hygiene witnessed substantial growth across both retail and away-from-home segments, propelled by various influential factors. Firstly, heightened consumer awareness, particularly regarding adult incontinence items, emerged as a significant driving force. Secondly, the trend towards an active lifestyle significantly bolstered categories like tampons, facial cleansing wipes, and boxed facial tissues. Thirdly, an increased emphasis on personal hygiene contributed notably to mar...

Euromonitor International's Tissue and Hygiene in Estonia 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.

Table of Contents:

Tissue and Hygiene in Estonia

Euromonitor International

March 2024

List Of Contents And Tables

TISSUE AND HYGIENE IN ESTONIA

EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What's 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 ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing popularity of slim/thin/ultra-thin towels with wings

Growing demand for pantyliners fuelled by hygiene and comfort

Sanitex Estonia OU takes the lead

PROSPECTS AND OPPORTUNITIES

With consumers seeking comfort and convenience, slim/thin/ultra-thin towels is poised for further growth

Rising demand for pantyliners, fuelled by younger generations

Tampons set for growth amid active lifestyle trend

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

Table 22 LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

Table 23 Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

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

NAPPIES/DIAPERS/PANTS IN ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining birth rate negatively affects nappies/diapers/pants sales

New-born nappies/diapers show resilience

Leadership of Kimberly-Clark SA

PROSPECTS AND OPPORTUNITIES

Growing emphasis on comfort set to boost demand for disposable pants

Impact of falling birth rates on new-born nappies/diapers

Increase in nappies/diapers/pants sales through e-commerce

CATEGORY DATA

Table 25 Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

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

Table 27 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 28 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 29 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

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

RETAIL ADULT INCONTINENCE IN ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rise in demand for light adult incontinence products

Increased incidence of urinary incontinence driving sales

Known for the superior quality of its products, Essity AB maintains dominant position in retail adult incontinence

PROSPECTS AND OPPORTUNITIES

Actively lifestyles to boost demand for light adult incontinence products

Sustained growth in moderate/heavy adult incontinence thanks to ageing population

Convenience and privacy to drive sales through e-commerce

CATEGORY DATA

Table 31 Sales of Retail Adult Incontinence by Category: Value 2018-2023

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

Table 33 NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 34 LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 35 Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

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

RX/REIMBURSEMENT ADULT INCONTINENCE IN ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sustained growth in Rx/reimbursement adult incontinence

Changing attitudes and increased awareness drive demand

Stable market setup with potential for policy changes

PROSPECTS AND OPPORTUNITIES

Rising demand driven by increasing disability rates

Anticipated growth among younger demographics

Rise in demand for nursing home placements

CATEGORY DATA

Table 37 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 38 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 39 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 40 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2023-2028

WIPES IN ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing emphasis on personal hygiene boosts demand for intimate wipes

Facial cleansing wipes thrive amidst active lifestyles

With its brands enjoying strong brand recognition, Kodupaber AS maintains its leadership position

PROSPECTS AND OPPORTUNITIES

Growing awareness of moist toilet wipes will drive demand

Expanding market for facial cleansing wipes

Surge in internet retailing

CATEGORY DATA

Table 41 Retail Sales of Wipes by Category: Value 2018-2023

Table 42 Retail Sales of Wipes by Category: % Value Growth 2018-2023

Table 43 NBO Company Shares of Retail Wipes: % Value 2019-2023

Table 44 LBN Brand Shares of Retail Wipes: % Value 2020-2023

Table 45 Forecast Retail Sales of Wipes by Category: Value 2023-2028

Table 46 Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

RETAIL TISSUE IN ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing emphasis on personal care boosts demand for boxed facial tissues

Growing demand for pocket handkerchiefs

Essity AB's maintains leadership position with its diverse portfolio of products

PROSPECTS AND OPPORTUNITIES

Expanding application of paper towels drives growth

Rising demand for boxed facial tissues amidst skin care trends

Active lifestyle trend fuels sales growth of pocket handkerchiefs

CATEGORY DATA

Table 47 Retail Sales of Tissue by Category: Value 2018-2023

Table 48 Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 49 NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 50 LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 51 Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 52 Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

AWAY-FROM-HOME TISSUE AND HYGIENE IN ESTONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased population drives demand for away-from-home toilet paper

Rising tourism spurs demand for away-from-home napkins

Growing hygiene awareness boosts demand for away-from-home paper towels

PROSPECTS AND OPPORTUNITIES

Away-from-home tissue and hygiene set to grow

Business/industry to surpass horeca

Away-from-home napkins to lead in demand

CATEGORY DATA

Table 53 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 54 Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 55 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 56 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 57 Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 58 Sales of Forecast 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 Estonia

Market Direction | 2024-03-05 | 48 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	2026-02-08
	Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com