

Tissue and Hygiene in Serbia

Market Direction | 2024-03-15 | 46 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

Rising inflation has dampened volume sales of tissue and hygiene in Serbia. Higher logistical and raw material costs linked to the COVID-19 pandemic and the Russia-Ukraine war have also resulted in price increases. With the high costs of living challenging consumers, price sensitivity remains an issue for players, forcing brands to offer lower prices rather than compromise their financial health and profit margins. Many consumers are switching to the growing range of cheaper brands on offer, man...

Euromonitor International's Tissue and Hygiene in Serbia 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 Serbia
Euromonitor International
March 2024

List Of Contents And Tables

TISSUE AND HYGIENE IN SERBIA

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sanitary towels are most common option among Serbians
Procter & Gamble leads in menstrual care
Tampons gain appeal from small base

PROSPECTS AND OPPORTUNITIES

Consumers to remain price sensitive in initial years
Competition is expected to heat up
Conservative choices will drive sales of towels

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumption weakens in 2023

Price sensitivity drives the roll out of promotional offers and discounts

Disposable pants prove popular with urban parents

PROSPECTS AND OPPORTUNITIES

Nappies/diapers/pants faces steady growth prospects

Private label developments will tap into growing demand for affordable nappies/diapers/pants

Disposable pants offer strong growth opportunities

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail adult incontinence held back by this taboo issue

Light incontinence outshines other products

Essity's Tena brand leads in Serbia

PROSPECTS AND OPPORTUNITIES

Positive outlook in volume terms

Growing consumer awareness to support category sales

Innovations expected in forecast period

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary conditions encourage Rx/reimbursement interest

Qualifying for Rx/reimbursements is a complex process

Stigma of incontinence prevents consumers from seeking doctor's advice

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

PROSPECTS AND OPPORTUNITIES

Steady performance as public provisions continue

Economic downturn could bring change to government policies

Rising hygiene concerns to increase awareness of incontinence problems

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Prices rise amid inflationary pressures

Baby wipes grow despite declining birth rate

Price sensitivity stimulates price discounts

PROSPECTS AND OPPORTUNITIES

Moderate volume growth over forecast period

Price competition to remain strong

Home care wipes grow from a small base

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers focus on buying essential retail tissue products

Intense competition among brands and private label

Consumers trade down in toilet paper category

PROSPECTS AND OPPORTUNITIES

Volume sales expected to see recovery

Price sensitivity to impact Serbian consumers

Private label to gain share

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 SERBIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic lifestyles support category growth

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Price increases drive value sales in AFH hygiene

High inflation and reduced consumer visits impinge on business investment of AFH tissue

PROSPECTS AND OPPORTUNITIES

Health care providers to remain leading buyers in AFH hygiene

Horeca performance bears strong influence on AFH tissue sales

Price pressure to be felt in AFH tissue

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 Serbia

Market Direction | 2024-03-15 | 46 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="2026-02-18"/>
		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