

## **Tissue and Hygiene in South Africa**

Market Direction | 2024-03-20 | 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:**

Concerns surrounding rising interest rates, inflationary pressures, loadshedding and supply chain constraints were the focus in 2023, influencing the performance of tissue and hygiene in South Africa. However, overall inflation in the country decreased to 5.4% in June 2023, which was significantly lower than the previous year. On the other hand, persistent loadshedding, accompanied by supply chain constraints caused by back logs at key ports within the country, resulted in a harsh economic clima...

Euromonitor International's Tissue and Hygiene in South Africa 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

**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)

reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Tissue and Hygiene in South Africa  
Euromonitor International  
March 2024

List Of Contents And Tables

### **TISSUE AND HYGIENE IN SOUTH AFRICA**

#### **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 SOUTH AFRICA**

#### **KEY DATA FINDINGS**

#### **2023 DEVELOPMENTS**

Consumers turn to more affordable menstrual care amid high inflation

Menstrual care diversifies into reusable offers

Towels with wings start to gain ground from pantyliners

#### **PROSPECTS AND OPPORTUNITIES**

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

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

www.scotts-international.com

Adding specific value is key to gaining share, while category is set to see new entries

Private label options boost affordability of towels

Specialised products to account for higher sales value increases

#### 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 SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Private label gains further volume share amid inflationary pressures

Kimberly-Clark and Procter & Gamble continue to lead nappies/diapers/pants

##### PROSPECTS AND OPPORTUNITIES

Stronger growth is anticipated over the forecast period

Innovation of products will drive growth moving forward

Sales to be further supported by rising e-commerce presence

#### 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 SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Private label shows rapid growth due to inflationary pressures

Pharmacies remains the primary distribution channel

##### PROSPECTS AND OPPORTUNITIES

Awareness and effectiveness around adult incontinence set to increase

Sustainable products present key opportunities for growth

Further exploration of e-commerce as channel offers convenience and discreet purchases

#### 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 SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Discount rewards and programmes aid access to baby wipes by diverse population

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

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

www.scotts-international.com

Specific benefits are key for new consumer awareness of premium brands

Facial cleansing wipes compete with more affordable offerings

#### PROSPECTS AND OPPORTUNITIES

Eco-friendliness is key to driving greater demand for moist toilet wipes

Facial cleansing wipes add new ingredients to promote skin health

Kenvue's global presence in consumer health and related products

#### 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 SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Consumers choose affordable toilet paper options in inflationary environment

Retail tissue faces challenges in production, contributing to higher unit prices

Larger paper towels gain share as consumers look to save money

##### PROSPECTS AND OPPORTUNITIES

Paper towels to witness growth over forecast period, but high absorption is key

Private label to gain ground in retailers, while leading players will benefit from greater visibility

Virgin pulp starts to gain traction in retail tissue production

#### 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 SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Away-from-home tissue grows amid return to normality following easing of pandemic restrictions

AFH adult incontinence grows alongside private label's development

##### PROSPECTS AND OPPORTUNITIES

Lower prices of away-from-home tissue will promote growth over forecast period

Virgin pulp is emerging with business demand for away-from-home tissue demonstrating positive growth

#### 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 South Africa**

Market Direction | 2024-03-20 | 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@scott's-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@scott's-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="2026-03-10"/>
		Signature	<input type="text"/>

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

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com