

Tissue and Hygiene in Egypt

March 2024

Table of Contents

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

Away-From-Home Tissue and Hygiene in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rise in healthcare facility consumption

Expansion in horeca channels

Fine Solutions' remarkable growth

PROSPECTS AND OPPORTUNITIES

The tourism industry is set to rise across the forecast period, boosting sales

Volume sales of away-from-home adult incontinence will only slightly improve

Customers are unwilling to become brand loyal as they seek the best prices

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 21 - Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 24 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

Retail Adult Incontinence in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand shifts towards local and low-price Turkish brands

Change in demand towards incontinence diapers

Sales channel preferences: Pharmacies and e-commerce rise

PROSPECTS AND OPPORTUNITIES

The landscape faces further price rises across the forecast period

Sales are set to increase, driven by the ageing population in the country

Players focus on reducing the stigma of products to boost retail volume sales

CATEGORY DATA

Table 26 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

Nappies/Diapers/Pants in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Persistent sales amidst pricing challenges

Leading players navigate pricing challenges through strategic manoeuvres and product innovation

E-commerce emergence in diaper sales

PROSPECTS AND OPPORTUNITIES

Continued expansion driven by birth rate and urbanisation

Rising e-commerce contribution to diaper sales

Intense competition presents challenges for new entrants

CATEGORY DATA

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

Menstrual Care in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued demand despite price increases

Resilience in the face of price hikes

Tourism boosts tampon sales and awareness

PROSPECTS AND OPPORTUNITIES

Retail sales volume of sanitary products is boosted by population growth

Tampons are expected to continue showing positive sales growth

Consumers migrate to e-commerce to obtain the best deals and discounts

CATEGORY DATA

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

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

Table 40 - Retail Sales of Tampons by Application Format: % Value 2018-2023

Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

Wipes in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift towards more affordable alternatives

Rise of local brands in baby wipes

E-commerce sales on the rise

PROSPECTS AND OPPORTUNITIES

Wipes to continue showing a positive performance due to health awareness

E-commerce continues to gain ground as consumers migrate to the online channel

Quality remains key for parents when choosing baby wipes

CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2018-2023

Table 46 - Retail Sales of Wipes by Category: % Value Growth 2018-2023

Table 47 - NBO Company Shares of Retail Wipes: % Value 2019-2023

Table 48 - LBN Brand Shares of Retail Wipes: % Value 2020-2023

Table 49 - Forecast Retail Sales of Wipes by Category: Value 2023-2028

Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

Retail Tissue in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift towards bulk purchases and promotions

Decline in toilet paper sales volume

Resilience of paper towels amidst inflation

PROSPECTS AND OPPORTUNITIES

E-commerce set to expand, playing a larger role in the sale of retail tissues

Retail sales volume is set to regain growth across the forecast period

Lasting hygiene concerns have an ongoing impact on purchasing patterns

CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2018-2023

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/tissue-and-hygiene-in-egypt/report.