



# Tissue and Hygiene in Latvia

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 Latvia](#)

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Expanding demand for away-from-home toilet paper  
Rising adoption of new cleaning standards boosts demand for away-from-home wipers  
Hygiene focus drives demand for away-from-home paper towels

### PROSPECTS AND OPPORTUNITIES

Rapid surge in demand for away-from-home wipers  
Growth fuelled by the establishment of new businesses  
Benefits of away-from-home paper towels over reusable alternatives

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

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

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

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

## Retail Adult Incontinence in Latvia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising demand for light adult incontinence products  
Steady increase in moderate/heavy adult incontinence  
Leadership of Essity AB's Tena brand

#### PROSPECTS AND OPPORTUNITIES

Increased awareness to drive demand  
Rise in light adult incontinence  
Positive trend for moderate/heavy adult incontinence

#### CATEGORY DATA

Table 25 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

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

Table 27 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 28 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 29 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

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

## Nappies/Diapers/Pants in Latvia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Demographic shifts drive decline in nappies/diapers/pants  
Disposable pants gain popularity for their comfort-oriented design  
Procter & Gamble Marketing Latvia Ltd SIA leads product area with Pampers brand

#### PROSPECTS AND OPPORTUNITIES

Surge in demand for affordable disposable pants  
Decline in birth rates shapes demand for new-born nappies and diapers  
E-commerce drives growth in nappies/diapers/pants sales

#### CATEGORY DATA

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

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

Table 33 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 34 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 35 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

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

## Menstrual Care in Latvia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Surge in tampon demand driven by active lifestyles  
Continued growth of slim/thin/ultra-thin towels with wings

Brand loyalty reinforced by Procter & Gamble Marketing Latvia Ltd SIA

## PROSPECTS AND OPPORTUNITIES

Innovative packaging propels growth of slim/thin/ultra-thin towels

Active lifestyles propel growth of intimate wipes and tampons

Younger generation fuels demand for pantyliners

## CATEGORY DATA

Table 37 - Retail Sales of Menstrual Care by Category: Value 2018-2023

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

Table 39 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

Table 40 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

Table 41 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

Table 42 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

## Wipes in Latvia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rapid surge in demand for moist toilet wipes

Active lifestyle trends propel demand for facial cleansing wipes

Dominance of Johnson & Johnson Inc in wipes

### PROSPECTS AND OPPORTUNITIES

Moist toilet wipes poised for rapid volume growth

General purpose wipes to witness significant dynamics

Rise of internet retailing to transform market dynamics

## CATEGORY DATA

Table 43 - Retail Sales of Wipes by Category: Value 2018-2023

Table 44 - Retail Sales of Wipes by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Retail Wipes: % Value 2019-2023

Table 46 - LBN Brand Shares of Retail Wipes: % Value 2020-2023

Table 47 - Forecast Retail Sales of Wipes by Category: Value 2023-2028

Table 48 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

## Retail Tissue in Latvia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sustained expansion of paper towels

Rising demand for pocket handkerchiefs fuelled by hygiene awareness

Essity AB leads the product area with innovative product offerings

### PROSPECTS AND OPPORTUNITIES

Expanding horizons for paper towels

Skin care focus boosts boxed facial tissues

Active lifestyles drive pocket handkerchief sales

## CATEGORY DATA

Table 49 - Retail Sales of Tissue by Category: Value 2018-2023

Table 50 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 51 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 53 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 54 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

## Rx/Reimbursement Adult Incontinence in Latvia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising elderly population drives demand for adult incontinence products

Escalating prevalence of dementia amplifying demand

Challenges in long-term care expenditure and support systems

#### PROSPECTS AND OPPORTUNITIES

Stagnant state medical financing to impact market dynamics

Rising incidence of disabilities to boost demand for Rx/reimbursement adult incontinence products

Continued growth of elderly population fuels demand for incontinence solutions

#### CATEGORY DATA

Table 55 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 56 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 57 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 58 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 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-latvia/report](http://www.euromonitor.com/tissue-and-hygiene-in-latvia/report).