

Tissue and Hygiene in Israel

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 Israel](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Challenging period for consumer foodservice

Rise in government spending on army

Leaders leverage vast sales teams and large economies of scale

PROSPECTS AND OPPORTUNITIES

Rising demand for AFH adult incontinence

Continued uncertainty ahead

Hospitals/healthcare to remain strong, and gradual re-emergence of sustainability trend

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price rises dampen demand, but increase in number of older consumers supports growth

Kimberly-Clark remains dominant

Rising e-commerce sales

PROSPECTS AND OPPORTUNITIES

Super-Pharm invests in targeting older consumers

Moderate/heavy adult incontinence to remain dominant

Opportunities amongst younger consumers

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reform does not lead to lower prices

Promotional activity targets consumers hit by rising cost of living

Kimberly-Clark remains dominant despite share decline

PROSPECTS AND OPPORTUNITIES

Contracting consumer base, but limited threat from reusables

Competition set to increase

Pilot offers hope of extended geographic reach

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reform benefits importers, but not consumers

Prices continue to rise

Call for menstrual care to be included in Health Basket

PROSPECTS AND OPPORTUNITIES

Growing emphasis on sustainability

Expansion of reusable options poses threat to disposable menstrual care products

Price reductions could boost sales

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising prices boost demand for private label products

Carrefour struggling to take off

Huggies aims to become fashionable in face of growing private label competition

PROSPECTS AND OPPORTUNITIES

Environmental awareness may impact demand

Declining birth rates pose threat to baby wipes

Obstacles to the development of personal 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price rises weaken demand

Private label eats into share of leading brands

Sano Sushi launches longer paper towels

PROSPECTS AND OPPORTUNITIES

Potential of Carrefour's private label offer remains unclear

Opportunities for broader private label segment, as well as premium developments

Increasing interest in sustainability

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

Rx/Reimbursement Adult Incontinence in Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Welfare allowance sometimes used on adult incontinence

Ageing population supports demand

PROSPECTS AND OPPORTUNITIES

Rx/reimbursement adult incontinence set to see continued growth

Players must tender to provide Rx/reimbursement products

CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 60 - 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-israel/report.