



Tissue and Hygiene in Bulgaria

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 Bulgaria](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

AFH tissue and hygiene is still to recover to pre-pandemic levels

Companies look to cut down on AFH tissue and hygiene costs even though hygiene requirements are higher

AFH toilet paper is still to return to pre-pandemic levels

PROSPECTS AND OPPORTUNITIES

AFH tissue is to witness period of positive growth

Service and shared working spaces to generate sales in AFH tissue and hygiene

Hospitality and tourism developments offer growth potential in AFH tissue and hygiene

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing issue of urinary incontinence supports growth

Cheaper brands are gaining traction in retail adult incontinence

Strong sales expansion in supermarkets

PROSPECTS AND OPPORTUNITIES

Retail adult incontinence faces strong growth amid ageing population trend

Modern retailers and e-commerce to increase share of distribution

Competitive landscape to remain fragmented as retailers develop product ranges

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bulgaria's falling birth rate undermines demand for nappies/diapers/pants

Disposable pants appeal to parents seeking convenience

Procter & Gamble Bulgaria retains leading position

PROSPECTS AND OPPORTUNITIES

Declining birth rate set to continue putting huge pressure on demand

Disposable pants offer some volume growth opportunities

Private label to expand in nappies/diapers/pants

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable performance in menstrual care

Active lifestyles support growth of pantyliners and tampons

Procter & Gamble leads with extensive product portfolio

PROSPECTS AND OPPORTUNITIES

Opportunities exist to drive value sales as consumption falls

Product innovations to harness new technologies and sustainability issue

Expansion of modern channel to extend distribution points in smaller cities

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hygiene focus and urbanisation underpins sales of wipes

Baby wipes is largest category with multi-purpose benefits

Sustainable and environmental claims rise in baby wipes

PROSPECTS AND OPPORTUNITIES

Wipes to enjoy strong period of development

Price promotions to deepen as private label makes in-roads

Multi-purpose benefits will bolster sales of 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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumption of retail tissue slumps amid price increases and population decline

Hygiene culture bolsters sales of paper towels

Out-of-home living drives sales of pocket handkerchiefs

PROSPECTS AND OPPORTUNITIES

Slowdown in retail tissue sales expected

Rising adoption of paper towels and pocket handkerchiefs offer some volume growth potential

Ficosota Syntez OOD is expected to prevail as category leader

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-bulgaria/report.