

Tissue and Hygiene in China

February 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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased penetration of AFH tissue drives sustained growth

AFH adult incontinence sees a rebound in 2023

PROSPECTS AND OPPORTUNITIES

Premiumisation in away-from-home channels accelerates

Expansion of nursing facilities will drive the growth of AFH adult incontinence

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of retail adult incontinence see a solid rebound in 2023

Retail adult incontinence market remains highly fragmented in China

More and more new entrants target the light adult incontinence market

PROSPECTS AND OPPORTUNITIES

Adult incontinence products sold through e-commerce are expected to help increase penetration

Pull-ups and open-tape adult incontinence products are becoming trendy

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand declines further in 2023 despite lifting of pandemic restrictions

Domestic brands outperform the market, though with shrinking demand

Multiple factors drive down the sales of Japanese brands

PROSPECTS AND OPPORTUNITIES

Disposable pants expected to continue driving the market growth

Pessimistic forecast of future birth rate forcing brands and manufacturers to seek new growth drivers

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail value sales remain stable with slim/thin/ultra-thin towels continuing to drive the market

Raw material cost resumes normal level thus increasing menstrual care players' profitability

Pant-format towels further penetrate with more players entering this market

PROSPECTS AND OPPORTUNITIES

Private label menstrual care products emerge to provide consumers with cost-effectiveness
Manufacturers try hard to attract teenage girls to capture loyal customers

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Decline projected for general purpose wipes as pandemic restrictions subside
- Moist toilet wipes continue to see elevated penetration
- Online-first marketing strategies fuel sustained growth for local brands

PROSPECTS AND OPPORTUNITIES

- Baby wipes forecast to experience decline
- Cosmetic wipes to post healthy growth as lives return to normal

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 China

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Moderate growth for retail tissue in China
- Growth remains strong for boxed facial tissues
- Hengan Fujian gains share through stronger e-commerce sales

PROSPECTS AND OPPORTUNITIES

- Uncertainties around paper towels increase in the post-pandemic era
- Toilet paper faces elevated competition from moist toilet wipes

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-china/report.