

# Tissue and Hygiene in Western Europe

May 2024

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## REGIONAL OVERVIEW

Toilet paper the biggest category in Western European tissue and hygiene

Western Europe records the strongest value sales growth in 2023

Positive if modest growth expected in the coming years in Western Europe

Strong growth for retail tissue in Turkey over 2018-2023

Retail adult incontinence seeing dynamic growth in Indonesia

Toilet paper accounts for half of the new sales added in 2018-2023

Sustainability trend continues developing in Italy

Supermarkets the leading distribution channel in Western European tissue and hygiene

E-commerce continues to make gains, albeit more slowly than during the pandemic

## LEADING COMPANIES AND BRANDS

Relatively consolidated competitive landscapes in most Western European countries

Private label has the biggest share of tissue and hygiene retail value sales

Greece and Turkey are home to the only single-market top 10 players in Western Europe

Pampers continues to lead the brand rankings in 2023

## FORECAST PROJECTIONS

Positive, if modest, growth expected during the forecast period

Free reusable menstrual care products expected to become available in Cataluña

## COUNTRY SNAPSHOTS

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Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

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