



# Tissue and Hygiene in Middle East and Africa

May 2024

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Key findings

## REGIONAL OVERVIEW

Nappies/diapers/pants the biggest category in Middle East and Africa

Middle East and Africa continues to exhibit the lowest regional per capita spend

Growth rates dip as countries struggle with high inflation and currency devaluations

Algerian tissue and hygiene market slips into decline in 2023

Retail adult incontinence the most dynamic product area over 2018-2023

Nappies/diapers/pants adds the most new sales over 2018-2023

Wipes players move from an emphasis on hygiene towards self-care properties

Small local grocers remain the leading distribution channel

Retail e-commerce share continues growing, but it remains a relatively minor channel

## LEADING COMPANIES AND BRANDS

Consolidated competitive landscapes in most countries across Middle East and Africa

Hayat gaining and Procter & Gamble losing share over 2018-2023

Saudi Arabia promoting the development of local manufacturing

Hayat's Molfix brand maintains top spot despite its losses in Nigeria

## FORECAST PROJECTIONS

Positive growth expected throughout the forecast period

South African consumers increasingly looking for products made using natural materials

## COUNTRY SNAPSHOTS

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Algeria: Competitive and Retail Landscape

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Cameroon: Competitive and Retail Landscape

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United Arab Emirates: Market Context

United Arab Emirates: Competitive and Retail Landscape

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