



Passport

Wipes in Ukraine

Euromonitor International

March 2021

This sample report is for illustration.

purposes only.

Some content and data have been changed.

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WIPES IN UKRAINE - CATEGORY ANALYSIS

KEY DATA FINDINGS



2020 IMPACT

Increased hygiene concerns lead to sharp rise in demand for general purpose wipes



Facial cleansing wipes retain attraction as A convenient way to retain clear skin



Biosphere builds on strong lead thanks to large and affordable range of products



RECOVERY AND OPPORTUNITIES

Mixed fortunes predicted within personal wipes



Demand for moist toilet wipes expected to expand thanks to increased hygiene awareness



Baby wipes set for bright future despite demographic challenges



CATEGORY DATA

Table 1 Retail Sales of Wipes by Category: Value 2015-2020

| UAH million | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|------|------|------|
| Home Care Wipes and Floor Cleaning Systems | | | | | | |
| - Dry Electro-Static Wipes | | | | | | |
| -- Starter Kits/Sweepers/Sticks (Dry Electro-Static) | | | | | | |
| -- Wipes and Refills (Dry Electro-Static) | | | | | | |
| - Floor Cleaning Systems | | | | | | |
| -- Refills | | | | | | |
| --- Cleaning Solution | | | | | | |
| --- Refill Wipes/Pads | | | | | | |
| -- Starter Kits/Trigger Device | | | | | | |
| - Impregnated Wet Wipes | | | | | | |
| -- All Purpose Cleaning Wipes | | | | | | |
| -- Furniture Polish Wipes | | | | | | |
| -- Toilet Care Wipes | | | | | | |
| -- Window/Glass Wipes | | | | | | |
| -- Other Impregnated Wipes | | | | | | |
| - Starter Kits/Sweepers/Sticks (Excluding Wipes) | | | | | | |
| - Wipes (Excluding Starter Kits/Sweepers/Sticks) | | | | | | |
| Personal Wipes | | | | | | |
| - General Purpose Wipes | | | | | | |
| - Intimate Wipes | | | | | | |
| - Baby Wipes | | | | | | |
| - Cosmetic Wipes | | | | | | |
| -- Facial Cleansing Wipes | | | | | | |
| -- Deodorant Wipes | | | | | | |
| - Moist Toilet Wipes | | | | | | |



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Retail Sales of Wipes by Category: % Value Growth 2015-2020

| % current value growth | 2019/20 | 2015-20 CAGR | 2015/20 Total |
|--|---------|--------------|---------------|
| Home Care Wipes and Floor Cleaning Systems | | | |
| - Dry Electro-Static Wipes | | | |
| -- Starter Kits/Sweepers/Sticks (Dry | | | |

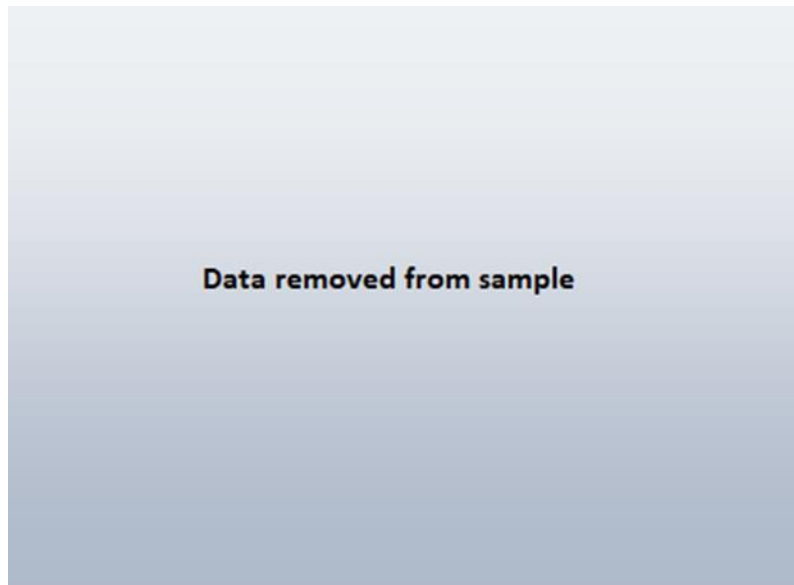
- Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes
- Toilet Care Wipes
- Window/Glass Wipes
- Other Impregnated Wipes
- Starter Kits/Sweepers/Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/Sticks)
- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes
- Wipes



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 NBO Company Shares of Retail Wipes: % Value 2016-2020

| % retail value rsp Company | 2016 | 2017 | 2018 | 2019 | 2020 |
|----------------------------|------|------|------|------|------|
|----------------------------|------|------|------|------|------|



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Retail Wipes: % Value 2017-2020

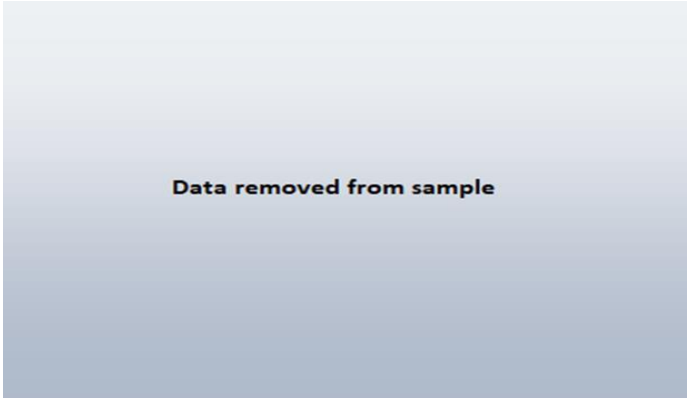
| % retail value rsp Brand (GBO) | Company (NBO) | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|---------------|------|------|------|------|
| Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Retail Sales of Wipes by Category: Value 2020-2025

| UAH million | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|---------------------------------|------|------|------|------|------|
| Home Care Wipes and Floor Cleaning Systems | Data removed from sample | | | | | |
| - Dry Electro-Static Wipes | | | | | | |
| -- Starter Kits/Sweepers/Sticks (Dry Electro-Static) | | | | | | |
| -- Wipes and Refills (Dry Electro-Static) | | | | | | |
| - Floor Cleaning Systems | | | | | | |
| -- Refills | | | | | | |
| --- Cleaning Solution | | | | | | |
| --- Refill Wipes/Pads | | | | | | |
| -- Starter Kits/Trigger Device | | | | | | |
| - Impregnated Wet Wipes | | | | | | |
| -- All Purpose Cleaning Wipes | | | | | | |
| -- Furniture Polish Wipes | | | | | | |
| -- Toilet Care Wipes | | | | | | |
| -- Window/Glass Wipes | | | | | | |
| -- Other Impregnated | | | | | | |

- Wipes
- Starter Kits/Sweepers/ Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/ Sticks)
- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes
- Wipes



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 6 Forecast Retail Sales of Wipes by Category: % Value Growth 2020-2025

% constant value growth

| | 2020/2021 | 2020-25 CAGR | 2020/25 Total |
|--|-----------|--------------|---------------|
|--|-----------|--------------|---------------|

- Home Care Wipes and Floor Cleaning Systems
- Dry Electro-Static Wipes
- Starter Kits/Sweepers/Sticks (Dry Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes
- Toilet Care Wipes
- Window/Glass Wipes
- Other Impregnated Wipes
- Starter Kits/Sweepers/Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/Sticks)
- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes
- Wipes



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

TISSUE AND HYGIENE IN UKRAINE - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

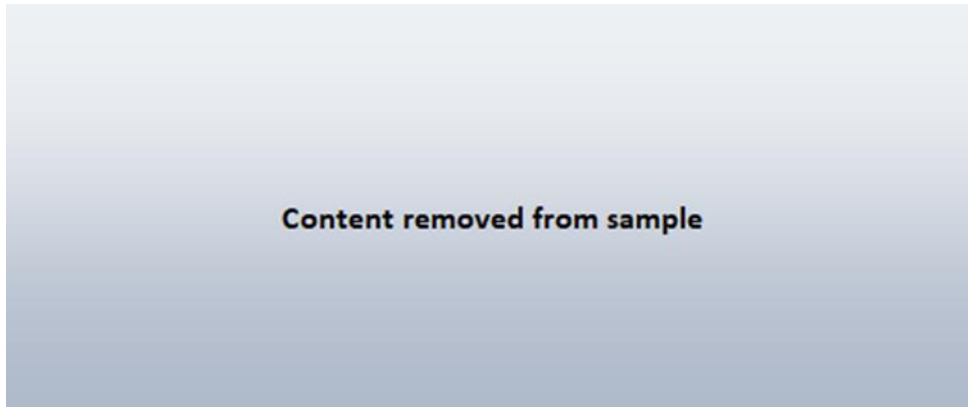
COVID-19 impact on tissue and hygiene



COVID-19 country impact



Company response



Retailing shift



What next for tissue and hygiene?

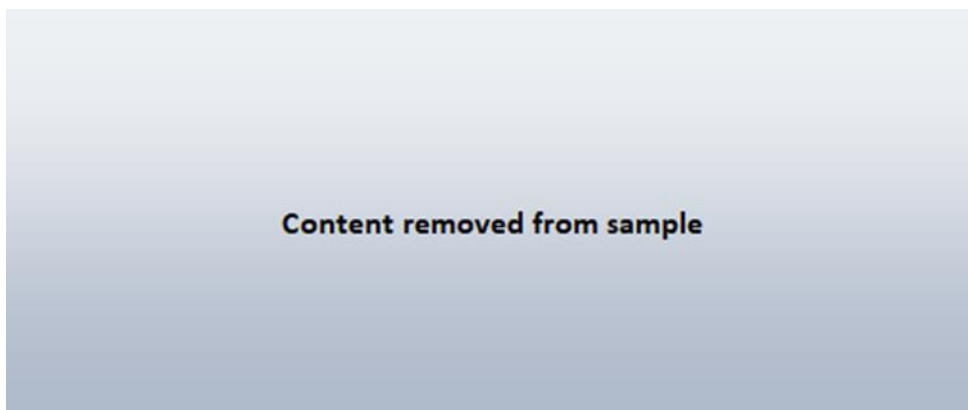
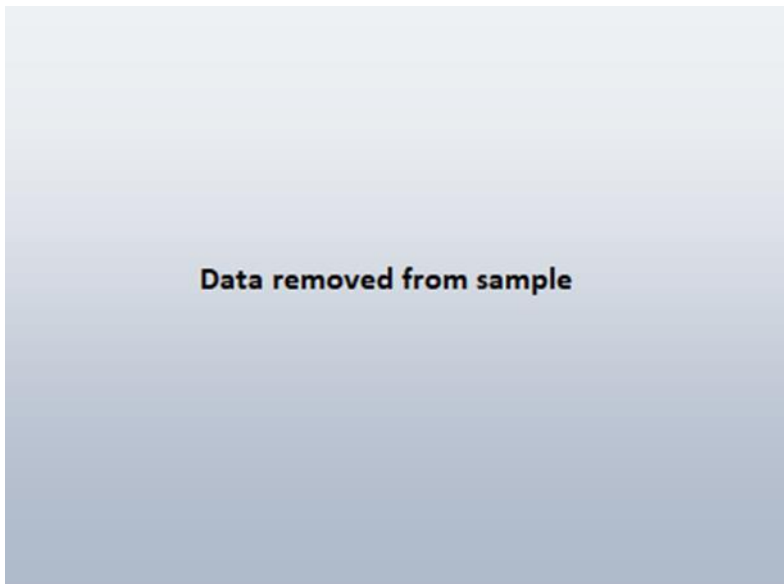
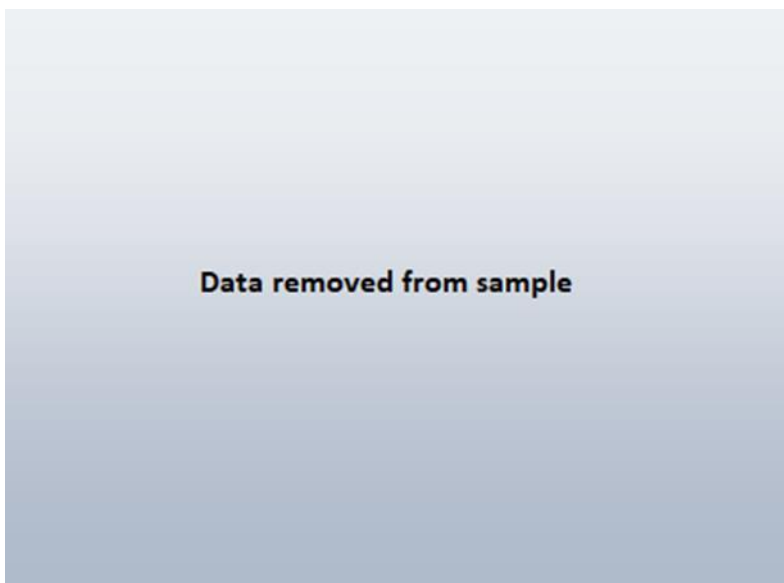


Chart 1 Tissue and Hygiene Value Sales Growth Scenarios: 2018-2025



Source: Euromonitor International Industry Forecast Model
Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Tissue and Hygiene Impact of Drivers on Value Sales: 2018-2025



Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate; 2018 figures show growth over 2017-2018

MARKET INDICATORS

Table 7 Birth Rates 2015-2020

per '000 population

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------|---------------------------------|------|------|------|------|------|
| Birth rates | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics

Table 8 Infant Population 2015-2020

'000

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|----------------|---------------------------------|------|------|------|------|------|
| 0-4 yrs female | Data removed from sample | | | | | |
| 0-4 yrs male | | | | | | |
| 0-4 yrs total | | | | | | |

Source: Euromonitor International from official statistics

Table 9 Female Population by Age 2015-2020

'000

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|---------------------------------|------|------|------|------|------|
| Female population: January 1st | Data removed from sample | | | | | |
| 0-4 yrs | | | | | | |
| 5-9 yrs | | | | | | |
| 10-14 yrs | | | | | | |
| 15-19 yrs | | | | | | |
| 20-24 yrs | | | | | | |
| 25-29 yrs | | | | | | |
| 30-34 yrs | | | | | | |
| 35-39 yrs | | | | | | |
| 40-44 yrs | | | | | | |
| 45-49 yrs | | | | | | |
| 50-54 yrs | | | | | | |
| 55-59 yrs | | | | | | |
| 60-64 yrs | | | | | | |
| 65-69 yrs | | | | | | |
| 70-74 yrs | | | | | | |
| 75-79 yrs | | | | | | |
| 80+ yrs | | | | | | |

Source: Euromonitor International from official statistics

Table 10 Total Population by Age 2015-2020

| '000 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------------------|------|------|------|------|------|------|
| Population at January 1st | | | | | | |
| 0-4 yrs | | | | | | |
| 5-9 yrs | | | | | | |
| 10-14 yrs | | | | | | |
| 15-19 yrs | | | | | | |
| 20-24 yrs | | | | | | |
| 25-29 yrs | | | | | | |
| 30-34 yrs | | | | | | |
| 35-39 yrs | | | | | | |
| 40-44 yrs | | | | | | |
| 45-49 yrs | | | | | | |
| 50-54 yrs | | | | | | |
| 55-59 yrs | | | | | | |
| 60-64 yrs | | | | | | |
| 65-69 yrs | | | | | | |
| 70-74 yrs | | | | | | |
| 75-79 yrs | | | | | | |
| 80+ yrs | | | | | | |

Source: Euromonitor International from official statistics

Table 11 Households 2015-2020

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|------|------|------|
| Households ('000) | | | | | | |
| Average number of occupants per household (Number) | | | | | | |

Source: Euromonitor International from official statistics

Table 12 Forecast Infant Population 2020-2025

| '000 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|----------------|------|------|------|------|------|------|
| 0-4 yrs female | | | | | | |
| 0-4 yrs male | | | | | | |
| 0-4 yrs total | | | | | | |

Source: Euromonitor International from official statistics

Table 13 Forecast Female Population by Age 2020-2025

| '000 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|------|------|------|------|------|------|------|
| | | | | | | |

| | | | | | | |
|--------------------|---------------------------------|----------|----------|----------|----------|----------|
| Female population: | 22,389.3 | 22,233.8 | 22,075.7 | 21,915.5 | 21,753.9 | 21,591.5 |
| January 1st | | | | | | |
| 0-4 yrs | Data removed from sample | | | | | |
| 5-9 yrs | | | | | | |
| 10-14 yrs | | | | | | |
| 15-19 yrs | | | | | | |
| 20-24 yrs | | | | | | |
| 25-29 yrs | | | | | | |
| 30-34 yrs | | | | | | |
| 35-39 yrs | | | | | | |
| 40-44 yrs | | | | | | |
| 45-49 yrs | | | | | | |
| 50-54 yrs | | | | | | |
| 55-59 yrs | | | | | | |
| 60-64 yrs | | | | | | |
| 65-69 yrs | | | | | | |
| 70-74 yrs | | | | | | |
| 75-79 yrs | | | | | | |
| 80+ yrs | | | | | | |

Source: Euromonitor International from official statistics

Table 14 Forecast Total Population by Age 2020-2025

| '000 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------------------|---------------------------------|------|------|------|------|------|
| Population at January 1st | Data removed from sample | | | | | |
| 0-4 yrs | | | | | | |
| 5-9 yrs | | | | | | |
| 10-14 yrs | | | | | | |
| 15-19 yrs | | | | | | |
| 20-24 yrs | | | | | | |
| 25-29 yrs | | | | | | |
| 30-34 yrs | | | | | | |
| 35-39 yrs | | | | | | |
| 40-44 yrs | | | | | | |
| 45-49 yrs | | | | | | |
| 50-54 yrs | | | | | | |
| 55-59 yrs | | | | | | |
| 60-64 yrs | | | | | | |
| 65-69 yrs | | | | | | |
| 70-74 yrs | | | | | | |
| 75-79 yrs | | | | | | |
| 80+ yrs | | | | | | |

Source: Euromonitor International from official statistics

Table 15 Forecast Households 2020-2025

| | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|---------------------------------|------|------|------|------|------|
| Households ('000) | Data removed from sample | | | | | |
| Average number of occupants per household (Number) | | | | | | |

Source: Euromonitor International from official statistics

MARKET DATA

Table 16 Retail Sales of Tissue and Hygiene by Category: Value 2015-2020

| UAH million | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------------------|---------------------------------|------|------|------|------|------|
| Retail Adult Incontinence | Data removed from sample | | | | | |
| Nappies/Diapers/Pants | | | | | | |
| Sanitary Protection | | | | | | |
| Wipes | | | | | | |
| Retail Hygiene | | | | | | |
| Paper Towels | | | | | | |
| Paper Tableware | | | | | | |
| Facial Tissues | | | | | | |
| Toilet Paper | | | | | | |
| Retail Tissue | | | | | | |
| Retail Tissue and Hygiene | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2015-2020

| % current value growth | 2019/20 | 2015-20 CAGR | 2015/20 Total |
|---------------------------|---------------------------------|--------------|---------------|
| Retail Adult Incontinence | Data removed from sample | | |
| Nappies/Diapers/Pants | | | |
| Sanitary Protection | | | |
| Wipes | | | |
| Retail Hygiene | | | |
| Paper Towels | | | |
| Paper Tableware | | | |
| Facial Tissues | | | |
| Toilet Paper | | | |
| Retail Tissue | | | |
| Retail Tissue and Hygiene | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 NBO Company Shares of Retail Tissue and Hygiene: % Value 2016-2020

| % retail value rsp Company | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------|---------------------------------|------|------|------|------|
| | Data removed from sample | | | | |



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 LBN Brand Shares of Retail Tissue and Hygiene: % Value 2017-2020

| % retail value rsp Brand (GBO) | Company (NBO) | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|



| | |
|--------------|--------------|
| Others Total | Others Total |
|--------------|--------------|

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2015-2020

| % retail value rsp | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------|------|------|------|------|------|------|
|--------------------|------|------|------|------|------|------|

| | |
|-----------------------|---------------------------------|
| Facial Tissues | Data removed from sample |
| Nappies/Diapers/Pants | |
| Paper Tableware | |

Paper Towels
 Retail Adult Incontinence
 Retail Hygiene
 Retail Tissue
 Retail Tissue and Hygiene
 Sanitary Protection
 Toilet Paper
 Wipes

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Distribution of Retail Tissue and Hygiene by Format: % Value 2015-2020

% retail value rsp

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|------|------|------|
|--|------|------|------|------|------|------|

Store-Based Retailing
 - Grocery Retailers
 -- Modern Grocery Retailers
 --- Convenience Stores
 --- Discounters
 --- Forecourt Retailers
 --- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Non-Grocery Specialists
 -- Health and Beauty Specialist Retailers
 -- Other HTH non-grocery retailer
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 - Vending
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2020

% retail value rsp

| | RH | RAC | NDP | SP | W | RT |
|--|----|-----|-----|----|---|----|
|--|----|-----|-----|----|---|----|

Store-Based Retailing
 - Grocery Retailers
 -- Modern Grocery Retailers
 --- Convenience Stores

Data removed from sample

- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other HTH non-grocery retailer
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



PTO PTW FT TP

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other HTH non-grocery retailer
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: RH = retail hygiene; RAC = retail adult incontinence; NDP = nappies/diapers/pants; SP = sanitary protection; W = wipes; RT = retail tissue; PTO = paper towels; PTW = paper tableware; FT = facial tissues; TP = toilet paper

Table 23 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2020-2025

UAH million

| | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---------------------------------|------|------|------|------|------|
| Retail Adult Incontinence Nappies/Diapers/Pants Sanitary Protection Wipes Retail Hygiene Paper Towels Paper Tableware Facial Tissues Toilet Paper Retail Tissue Retail Tissue and Hygiene | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2020-2025

% constant value growth

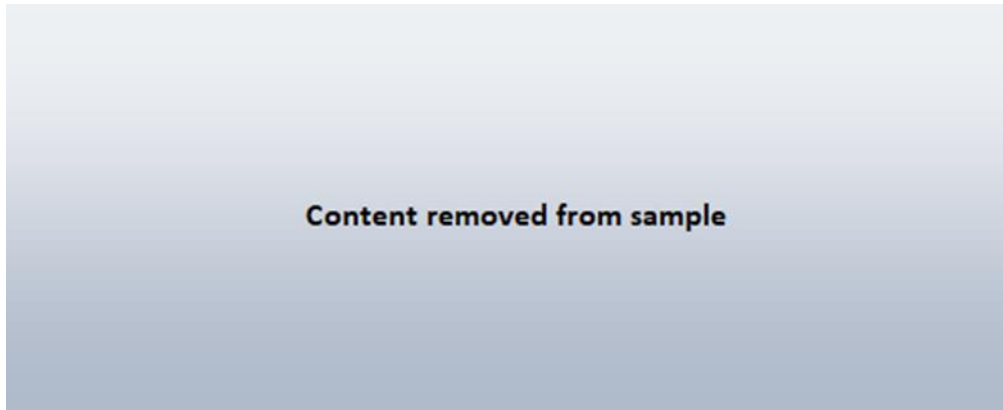
| | 2020/2021 | 2020-25 CAGR | 2020/25 Total |
|---|---------------------------------|--------------|---------------|
| Retail Adult Incontinence Nappies/Diapers/Pants Sanitary Protection Wipes Retail Hygiene Paper Towels Paper Tableware Facial Tissues Toilet Paper Retail Tissue Retail Tissue and Hygiene | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT



GLOBAL INDUSTRY ENVIRONMENT



DISCLAIMER



SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

Content removed from sample

Source: Euromonitor International