



# Tissue and Hygiene in Estonia

March 2024

Table of Contents

## Tissue and Hygiene in Estonia

### EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What's 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 Estonia](#)

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Increased population drives demand for away-from-home toilet paper

Rising tourism spurs demand for away-from-home napkins

Growing hygiene awareness boosts demand for away-from-home paper towels

#### PROSPECTS AND OPPORTUNITIES

Away-from-home tissue and hygiene set to grow

Business/industry to surpass horeca

Away-from-home napkins to lead in demand

### 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 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 24 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

## Retail Adult Incontinence in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rise in demand for light adult incontinence products

Increased incidence of urinary incontinence driving sales

Known for the superior quality of its products, Essity AB maintains dominant position in retail adult incontinence

#### PROSPECTS AND OPPORTUNITIES

Actively lifestyles to boost demand for light adult incontinence products

Sustained growth in moderate/heavy adult incontinence thanks to ageing population

Convenience and privacy to drive sales through e-commerce

#### CATEGORY DATA

Table 25 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 26 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 28 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 29 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

## Nappies/Diapers/Pants in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Declining birth rate negatively affects nappies/diapers/pants sales

New-born nappies/diapers show resilience

Leadership of Kimberly-Clark SA

#### PROSPECTS AND OPPORTUNITIES

Growing emphasis on comfort set to boost demand for disposable pants

Impact of falling birth rates on new-born nappies/diapers

Increase in nappies/diapers/pants sales through e-commerce

#### CATEGORY DATA

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 33 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 34 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 35 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

## Menstrual Care in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Growing popularity of slim/thin/ultra-thin towels with wings

Growing demand for pantyliners fuelled by hygiene and comfort

Sanitex Estonia OÜ takes the lead

## PROSPECTS AND OPPORTUNITIES

With consumers seeking comfort and convenience, slim/thin/ultra-thin towels is poised for further growth

Rising demand for pantyliners, fuelled by younger generations

Tampons set for growth amid active lifestyle trend

## CATEGORY DATA

Table 37 - Retail Sales of Menstrual Care by Category: Value 2018-2023

Table 38 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023

Table 39 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

Table 40 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

Table 41 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

Table 42 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

## Wipes in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Growing emphasis on personal hygiene boosts demand for intimate wipes

Facial cleansing wipes thrive amidst active lifestyles

With its brands enjoying strong brand recognition, Kodupaber AS maintains its leadership position

### PROSPECTS AND OPPORTUNITIES

Growing awareness of moist toilet wipes will drive demand

Expanding market for facial cleansing wipes

Surge in internet retailing

## CATEGORY DATA

Table 43 - Retail Sales of Wipes by Category: Value 2018-2023

Table 44 - Retail Sales of Wipes by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Retail Wipes: % Value 2019-2023

Table 46 - LBN Brand Shares of Retail Wipes: % Value 2020-2023

Table 47 - Forecast Retail Sales of Wipes by Category: Value 2023-2028

Table 48 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

## Retail Tissue in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Growing emphasis on personal care boosts demand for boxed facial tissues

Growing demand for pocket handkerchiefs

Essity AB's maintains leadership position with its diverse portfolio of products

### PROSPECTS AND OPPORTUNITIES

Expanding application of paper towels drives growth

Rising demand for boxed facial tissues amidst skin care trends

Active lifestyle trend fuels sales growth of pocket handkerchiefs

## CATEGORY DATA

Table 49 - Retail Sales of Tissue by Category: Value 2018-2023

Table 50 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 51 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 53 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 54 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

## Rx/Reimbursement Adult Incontinence in Estonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sustained growth in Rx/reimbursement adult incontinence

Changing attitudes and increased awareness drive demand

Stable market setup with potential for policy changes

#### PROSPECTS AND OPPORTUNITIES

Rising demand driven by increasing disability rates

Anticipated growth among younger demographics

Rise in demand for nursing home placements

#### CATEGORY DATA

Table 55 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 56 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 57 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 58 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 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-estonia/report](http://www.euromonitor.com/tissue-and-hygiene-in-estonia/report).