



Tissue and Hygiene in Slovenia

March 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 Slovenia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bulk purchases of away-from-home toilet paper

Surging demand for away-from-home adult incontinence products

E-commerce facilitates away-from-home product procurement

PROSPECTS AND OPPORTUNITIES

Economic growth and urbanisation to drive demand

Tourism boom as a catalyst for growth

Surge in demand for away-from-home paper towels

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 Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand driven by ageing population

Tena Brand retains dominance amidst increasing competition

Continued growth in light adult incontinence products

PROSPECTS AND OPPORTUNITIES

Lifestyle factors to drive growth

Addressing the needs of younger consumers

Rise of e-commerce channels

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 Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining birth rates and eco-friendly alternatives

Fragmented competitive landscape and growing popularity of private label

Bulk purchases and convenience

PROSPECTS AND OPPORTUNITIES

Declining birth rates and changes in nappy preferences

Rise of disposable pants and convenience

Changing retail landscape and e-commerce growth

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 Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand for menstrual care products

Procter & Gamble continues to dominate with the Always brand

Consumers' increasing price sensitivity boosts demand for private label

PROSPECTS AND OPPORTUNITIES

Focus on teenagers and younger females

Embracing sustainability

E-commerce and technological integration

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 Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth in demand for wipes driven by hygiene awareness

Brand dominance amidst rising private label popularity

Preference for bulk buying amidst inflationary pressures

PROSPECTS AND OPPORTUNITIES

Diversification through soothing ingredients

E-commerce poised for gradual expansion

Heightened hygiene awareness to boost demand for cleaning wipes

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 Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hygiene awareness and urbanisation drive growth

Rising demand for facial tissues amidst changing lifestyles

Paloma maintains dominance through continuous innovation

PROSPECTS AND OPPORTUNITIES

Cost-effective product innovations

Embracing the premiumisation trend

Continued growth of e-commerce

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 Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing demand in healthcare settings

Urbanisation drives awareness and diagnosis

Impact of inflation and economic crisis on healthcare seeking behaviour

PROSPECTS AND OPPORTUNITIES

Expanding product area driven by demographic shifts

Innovations in treatment options

Challenges in healthcare access

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-slovenia/report.