



Euromonitor  
International

# Tissue and Hygiene in Canada

February 2024

Table of Contents

## Tissue and Hygiene in Canada

### 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 Canada](#)

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising consumer knowledge and growing senior population exhibit push and pull relationship with the away-from-home adult incontinence market in Canada

Manufacturing cost increases lead to streamlined business operations

Back-to-office impacts on volume consumption

#### PROSPECTS AND OPPORTUNITIES

Away-from-home paper tableware potential in Canada

Anticipated performance strongest in away-from-home napkins and away-from-home boxed facial tissues

Away-from-home market could further concentrate around key players

### 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 - Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

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

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

## Retail Adult Incontinence in Canada

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Increasing consumer education and growing senior population

Impact of inflation-based price actions

E-commerce growth post COVID-19

#### PROSPECTS AND OPPORTUNITIES

Light formats to outpace moderate/heavy counterparts

Innovation opportunities for bowel incontinence

Sustainable choices and product innovation

#### CATEGORY DATA

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

Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

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

Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

## Nappies/Diapers/Pants in Canada

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Marginal volume gains amid easing inflationary conditions

Dominance of Kimberly-Clark and Procter & Gamble

Rise of digital commerce in nappies/diapers

#### PROSPECTS AND OPPORTUNITIES

Premiumisation on the horizon

Growing popularity of cloth diapers

Focus on value positioning and sustainability

#### CATEGORY DATA

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

Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

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

Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

## Menstrual Care in Canada

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Calming economic environment spurs marginal growth  
Preference for thin products drives category growth  
Legislative advancements promote accessibility

#### PROSPECTS AND OPPORTUNITIES

Sustainable material innovation and pricing dynamics  
FemTech innovations for menopausal support  
Population growth and awareness drive long-term performance

#### CATEGORY DATA

Table 38 - Retail Sales of Menstrual Care by Category: Value 2018-2023  
Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023  
Table 40 - Retail Sales of Tampons by Application Format: % Value 2018-2023  
Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023  
Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023  
Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028  
Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

### Wipes in Canada

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Baby and moist toilet wipes sustain growth  
Rebound for general purpose wipes  
Stronger growth for private label

#### PROSPECTS AND OPPORTUNITIES

Sustainability charges further innovations and competition  
Increase in ageing population to drive personal wipes  
Where cleaning efficacy and user-friendliness meet

#### CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2018-2023  
Table 46 - Retail Sales of Wipes by Category: % Value Growth 2018-2023  
Table 47 - NBO Company Shares of Retail Wipes: % Value 2019-2023  
Table 48 - LBN Brand Shares of Retail Wipes: % Value 2020-2023  
Table 49 - Forecast Retail Sales of Wipes by Category: Value 2023-2028  
Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

### Retail Tissue in Canada

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Improving economic conditions see volume recovery in household tissues  
Profit margin prioritisation leads operational adjustments  
Continued private label consumer tissue domination in Canada

#### PROSPECTS AND OPPORTUNITIES

Made in Canada brands expected to further consolidate market share left by Kleenex void  
The future of direct-to-consumer growth in Canada  
Sustainable action for long-term stability

#### CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2018-2023

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 56 - Forecast Retail Sales of Tissue by Category: % Value 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-canada/report](http://www.euromonitor.com/tissue-and-hygiene-in-canada/report).