



# Tissue and Hygiene in Colombia

February 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 Colombia](#)

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Away-from-home tissue records a positive recovery across 2023  
Economic difficulties lead consumers to reduce their out of home activities  
Businesses turn to more affordable retailers and products

### PROSPECTS AND OPPORTUNITIES

Cautious expenditure in AFH retail tissue over the forecast period  
Paper towels are anticipated to grow, being required in health institutions  
Low growth in AFH incontinence as hospitals and clinics do not provide these goods

## 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 Colombia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Price increases lead consumers to migrate to cheaper alternatives

Reducing the taboo of adult incontinence through strong marketing campaigns

Restricted access to Rx/Reimbursement incontinence products leads to a rise in retail sales

#### PROSPECTS AND OPPORTUNITIES

The ageing population creates a solid landscape for ongoing growth

Light incontinence products will drive growth, however, the landscape faces obstacles

New players are not set to launch; however, light incontinence options could grow

#### 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 Colombia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Private label gains ground as parents adjust their budgets in 2023

Rascal-Friends launches on the landscape, offering a premium product to parents

Sustainability and corporate social responsibility in nappies/diapers/pants

#### PROSPECTS AND OPPORTUNITIES

Slower growth anticipated as birth rates decline and private label expands

Opportunities for disposable pants as parents potty train children earlier

Reusable diapers remain a niche as parents preference affordable convenience

#### 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 Colombia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The economic landscape gains ground in line with reduced disposable incomes

Use of tampons rises, while women in Colombia prefer tampons without applicators  
Brands focus on removing the stigma of periods, opening the conversation between sexes

#### PROSPECTS AND OPPORTUNITIES

Price competition to strengthen over the forecast as economic offerings rise  
Reuseable products are emerging, but a preference for convenience challenges growth  
Discretion and convenience are key to product innovation across the forecast period

#### 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 Colombia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Prioritising expenditure during a time of reduced disposable incomes  
Versatility fails to drive sales for cosmetic and facial cleansing wipes  
Resilience of baby wipes as consumers appreciate the multi-purpose qualities

#### PROSPECTS AND OPPORTUNITIES

Challenging outlook as wipes continue to be considered unessential items  
The development of private label could boost growth for intimate wipes  
Private label drives growth in all-purpose cleaning wipes

#### 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 Colombia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Changing buying patterns as consumers migrate to smaller, more affordable units  
Paper towels benefit from an ongoing interest in health and hygiene  
Targeting single-person households to drive sales in retail tissue

#### PROSPECTS AND OPPORTUNITIES

Discounters and private label drive sales, while local grocers offer unique benefits  
Interest in sustainability is limited by consumers unwilling to pay higher prices  
Innovation in retail tissue is challenging as consumers view the products as essentials

#### 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

## Rx/Reimbursement Adult Incontinence in Colombia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rx/Reimbursement incontinence slows down as healthcare providers lacks resources

#### PROSPECTS AND OPPORTUNITIES

Uncertainty persists for the future of Rx/Reimbursement incontinence

#### CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

Table 60 - 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-colombia/report](http://www.euromonitor.com/tissue-and-hygiene-in-colombia/report).