



Tissue and Hygiene in Asia Pacific

May 2024

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Key findings

REGIONAL OVERVIEW

Toilet paper the biggest category in Asia Pacific tissue and hygiene

Asia Pacific expected to outperform the global averages over the forecast period

Solid if unspectacular growth expected in China and Japan in the coming years

Low birth rates negatively impacting nappies/diapers sales in some countries

Retail adult incontinence seeing dynamic growth in Indonesia

Nappies/diapers/pants in decline over 2018-2023...

...but other retail hygiene categories continue growing

Supermarkets the biggest distribution channel

E-commerce accounts for more than a quarter of retail value sales

LEADING COMPANIES AND BRANDS

Consolidated competitive landscapes in many countries in Asia Pacific

Japanese player Unicharm continues to lead Asia Pacific tissue and hygiene

Chinese top 10 players tend to only operate in their domestic market

Mamypoko moves up into third place in the brand rankings in 2023

FORECAST PROJECTIONS

Positive growth expected throughout the forecast period

Indonesia will see the most dynamic growth in the coming years

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China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

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India: Competitive and Retail Landscape

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Vietnam: Competitive and Retail Landscape

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