



# Passport

## Retail Adult Incontinence in Ukraine

Euromonitor International

March 2021

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purposes only.

Some content and data have been changed.

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# RETAIL ADULT INCONTINENCE IN UKRAINE - CATEGORY ANALYSIS

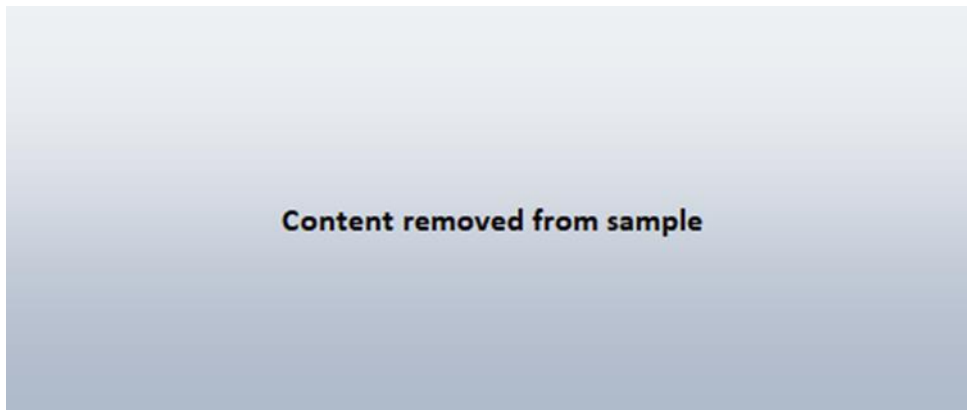
## KEY DATA FINDINGS



## 2020 IMPACT

### Sales thrive thanks to expansion of e-commerce and home seclusion

Retail adult incontinence saw dynamic growth over the review period and this continued into 2020. Consumers have become increasingly.....



### Falling prices aid the growth of light adult incontinence

Light adult incontinence was the most dynamic category in 2020....

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### Seni and Tena continue to fight for the lead

Bella-Trade TOV and Essity AB continued to dominate retail adult incontinence with their Seni and Tena brands...

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## RECOVERY AND OPPORTUNITIES

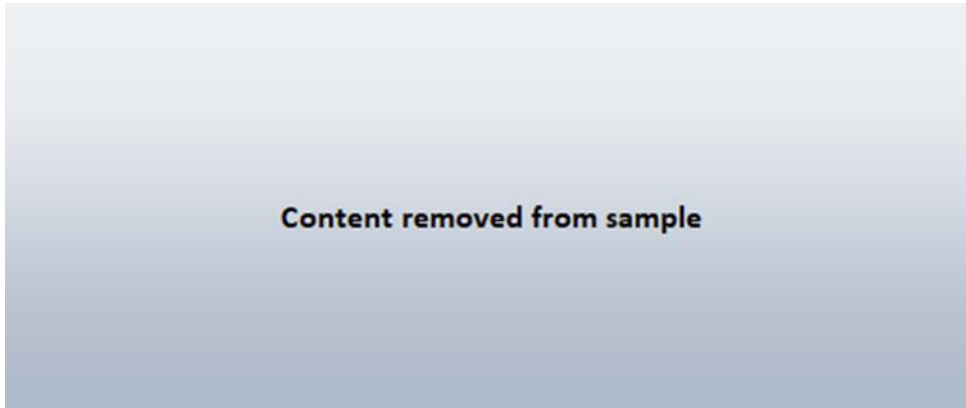
### Falling prices and an ageing population point towards the category's strong potential

Retail adult incontinence is projected to continue recording dynamic growth in retail volume terms over the forecast period...

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### Light adult incontinence expected to reach more consumers

Light adult incontinence is projected to remain the most dynamic category in retail volume terms...



### E-commerce expected to see further gains due to increased awareness of the benefits of shopping online

Health and beauty specialist retailers is likely to remain the most important distribution channel for retail adult incontinence in Ukraine...



## CATEGORY DATA

Table 1 Sales of Retail Adult Incontinence by Category: Value 2015-2020

UAH million	2015	2016	2017	2018	2019	2020
Light Adult Incontinence	<b>Data removed from sample</b>					
Moderate/Heavy Adult Incontinence						
Retail Adult Incontinence						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Retail Adult Incontinence by Category: % Value Growth 2015-2020**

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Light Adult Incontinence	<b>Data removed from sample</b>		
Moderate/Heavy Adult Incontinence			
Retail Adult Incontinence			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

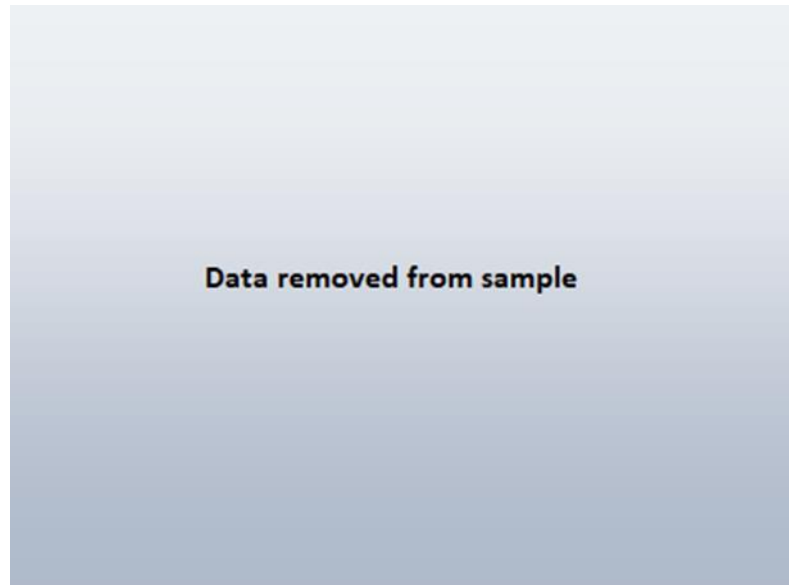
**Table 3 NBO Company Shares of Retail Adult Incontinence: % Value 2016-2020**

% retail value rsp Company	2016	2017	2018	2019	2020
Others	<b>Data removed from sample</b>				
Total					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 LBN Brand Shares of Retail Adult Incontinence: % Value 2017-2020**

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020



Others  
Total

Others  
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Forecast Sales of Retail Adult Incontinence by Category: Value 2020-2025**

UAH million	2020	2021	2022	2023	2024	2025
Light Adult Incontinence Moderate/Heavy Adult Incontinence Retail Adult Incontinence	<b>Data removed from sample</b>					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 6 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2020-2025**

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Light Adult Incontinence Moderate/Heavy Adult Incontinence Retail Adult Incontinence	<b>Data removed from sample</b>		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



# TISSUE AND HYGIENE IN UKRAINE - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### COVID-19 impact on tissue and hygiene

Following the outbreak of COVID-19 in Ukraine the government moved to impose a wide range of measures to control its spread...

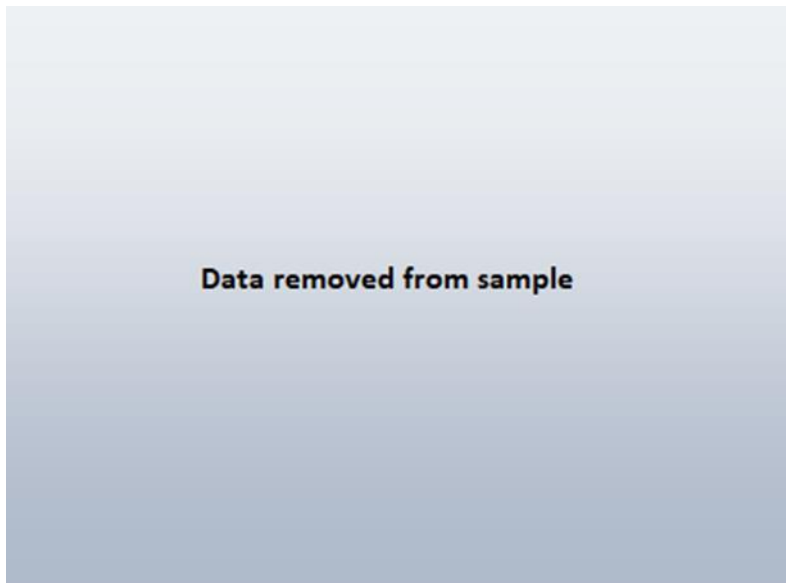
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### What next for tissue and hygiene?

Prior to the outbreak of COVID-19, the Ukrainian economy had been expanding at a steady pace...

Chart 1      Tissue and Hygiene Value Sales Growth Scenarios: 2018-2025

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Source: Euromonitor International Industry Forecast Model

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Tissue and Hygiene Impact of Drivers on Value Sales: 2018-2025



Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate; 2018 figures show growth over 2017-2018

## COVID-19 country impact

The outbreak of COVID-19 in Ukraine in early March 2020 coincided with a change of government....

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### Company response

With COVID-19 creating a range of logistical challenges, especially during the lockdown...

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### Retailing shift

The most significant shift in distribution in 2020 was towards e-commerce...

## MARKET INDICATORS

Table 7 Birth Rates 2015-2020

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per '000 population

	2015	2016	2017	2018	2019	2020
Birth rates	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics

**Table 8 Infant Population 2015-2020**

'000	2015	2016	2017	2018	2019	2020
0-4 yrs female	<b>Data removed from sample</b>					
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

**Table 9 Female Population by Age 2015-2020**

'000	2015	2016	2017	2018	2019	2020
Female population: January 1st	<b>Data removed from sample</b>					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

**Table 10 Total Population by Age 2015-2020**

'000	2015	2016	2017	2018	2019	2020
Population at January 1st	<b>Data removed from sample</b>					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						

25-29 yrs  
 30-34 yrs  
 35-39 yrs  
 40-44 yrs  
 45-49 yrs  
 50-54 yrs  
 55-59 yrs  
 60-64 yrs  
 65-69 yrs  
 70-74 yrs  
 75-79 yrs  
 80+ yrs



Source: Euromonitor International from official statistics

**Table 11** Households 2015-2020

	2015	2016	2017	2018	2019	2020
Households ('000)	<b>Data removed from sample</b>					
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

**Table 12** Forecast Infant Population 2020-2025

'000	2020	2021	2022	2023	2024	2025
0-4 yrs female	<b>Data removed from sample</b>					
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

**Table 13** Forecast Female Population by Age 2020-2025

'000	2020	2021	2022	2023	2024	2025
Female population: January 1st	<b>Data removed from sample</b>					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						

65-69 yrs 70-74 yrs 75-79 yrs 80+ yrs	<b>Data removed from sample</b>					
--	---------------------------------	--	--	--	--	--

**Table 14 Forecast Total Population by Age 2020-2025**

'000	2020	2021	2022	2023	2024	2025
Population at January 1st	<b>Data removed from sample</b>					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

**Table 15 Forecast Households 2020-2025**

	2020	2021	2022	2023	2024	2025
Households ('000)	<b>Data removed from sample</b>					
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

## MARKET DATA

**Table 16 Retail Sales of Tissue and Hygiene by Category: Value 2015-2020**

UAH million	2015	2016	2017	2018	2019	2020
Retail Adult Incontinence	<b>Data removed from sample</b>					
Nappies/Diapers/Pants						
Sanitary Protection						
Wipes						
Retail Hygiene						

Paper Towels  
 Paper Tableware  
 Facial Tissues  
 Toilet Paper  
 Retail Tissue  
 Retail Tissue and Hygiene

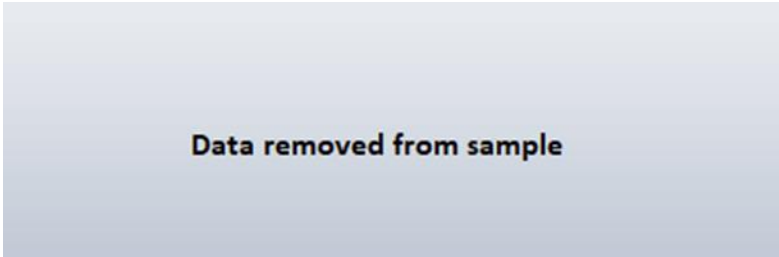


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 17 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2015-2020**

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
------------------------	---------	--------------	---------------

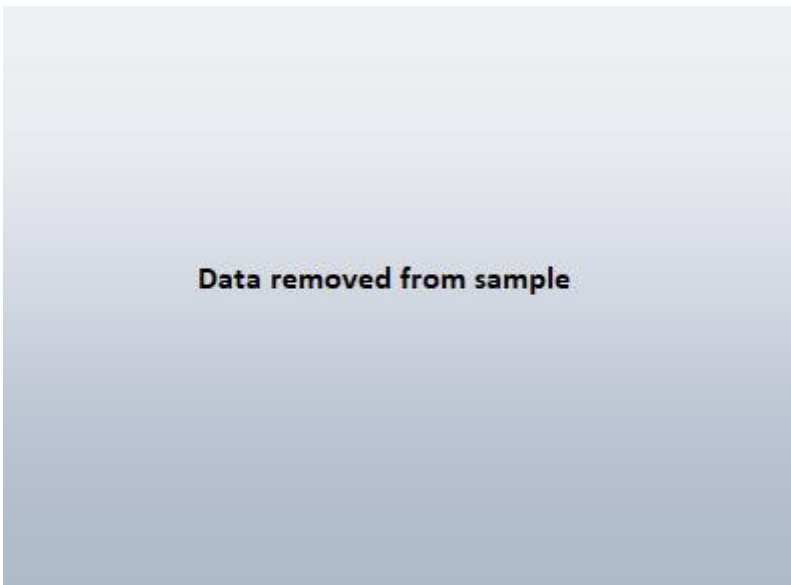
Retail Adult Incontinence  
 Nappies/Diapers/Pants  
 Sanitary Protection  
 Wipes  
 Retail Hygiene  
 Paper Towels  
 Paper Tableware  
 Facial Tissues  
 Toilet Paper  
 Retail Tissue  
 Retail Tissue and Hygiene



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18 NBO Company Shares of Retail Tissue and Hygiene: % Value 2016-2020**

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

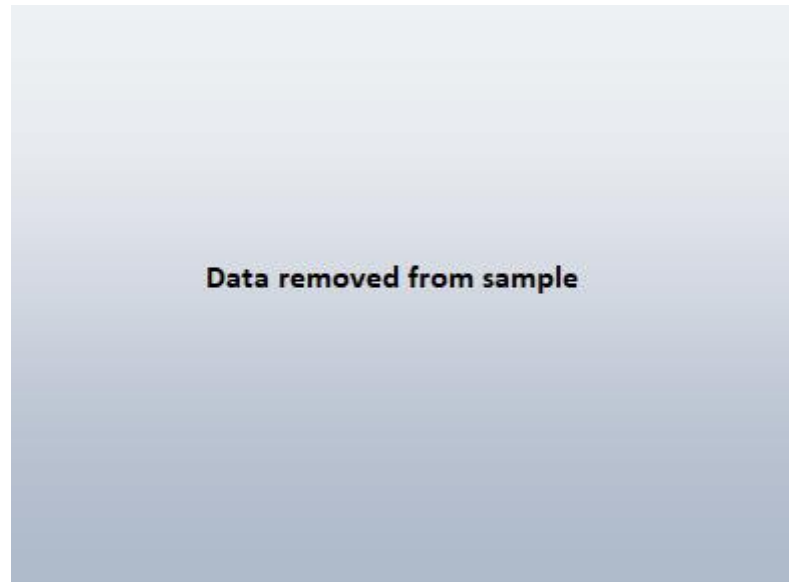


Others  
 Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19 LBN Brand Shares of Retail Tissue and Hygiene: % Value 2017-2020**

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------



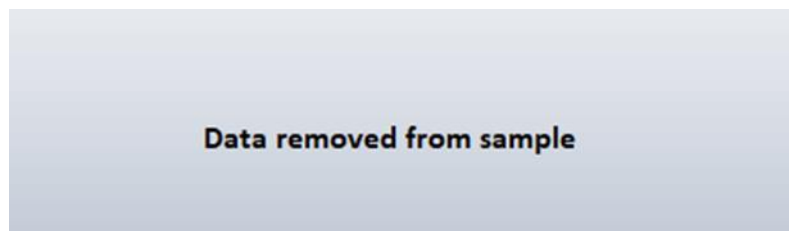
Others Total	Others Total
-----------------	-----------------

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2015-2020**

% retail value rsp	2015	2016	2017	2018	2019	2020
--------------------	------	------	------	------	------	------

Facial Tissues  
Nappies/Diapers/Pants  
Paper Tableware  
Paper Towels  
Retail Adult Incontinence  
Retail Hygiene  
Retail Tissue  
Retail Tissue and Hygiene  
Sanitary Protection  
Toilet Paper  
Wipes



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21 Distribution of Retail Tissue and Hygiene by Format: % Value 2015-2020**



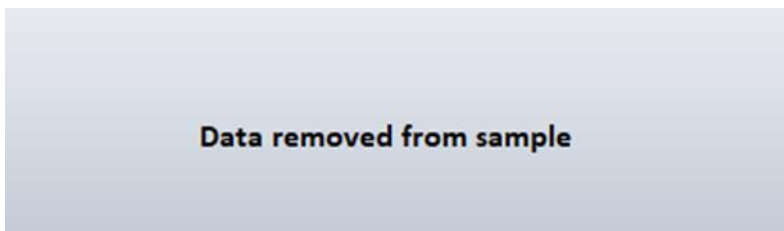
% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other HTH non-grocery retailer						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
- Vending						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2020

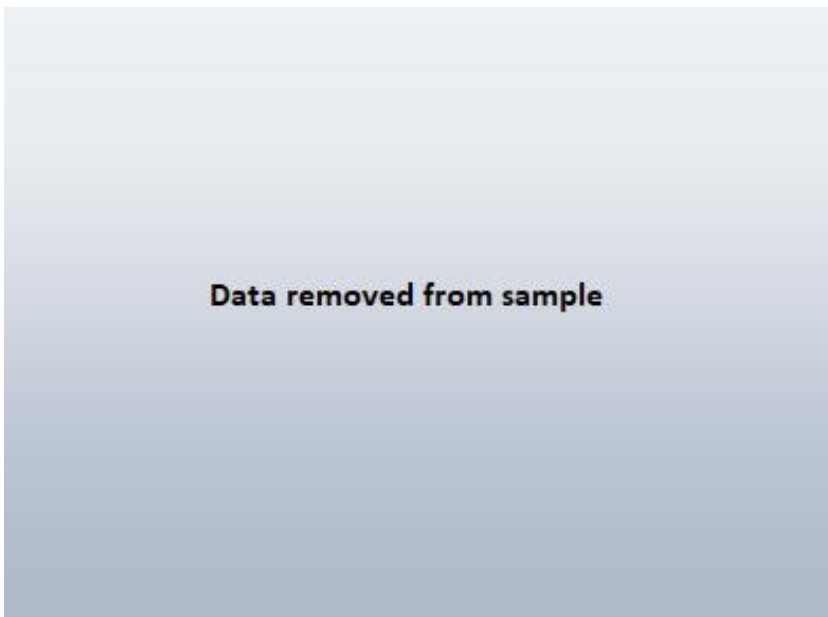
% retail value rsp	RH	RAC	NDP	SP	W	RT
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other HTH non-grocery retailer						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						

- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



PTO      PTW      FT      TP

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other HTH non-grocery retailer
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: RH = retail hygiene; RAC = retail adult incontinence; NDP = nappies/diapers/pants; SP = sanitary protection; W = wipes; RT = retail tissue; PTO = paper towels; PTW = paper tableware; FT = facial tissues; TP = toilet paper

Table 23 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2020-2025

UAH million	2020	2021	2022	2023	2024	2025
Retail Adult Incontinence	Data removed from sample					
Nappies/Diapers/Pants						
Sanitary Protection						
Wipes						
Retail Hygiene						
Paper Towels						
Paper Tableware						
Facial Tissues						
Toilet Paper						
Retail Tissue						

Retail Tissue and Hygiene

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

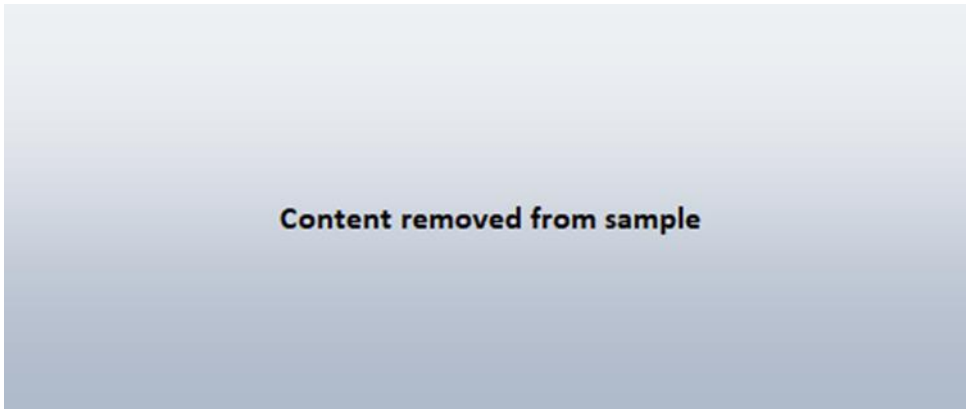
Table 24 Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Retail Adult Incontinence	<b>Data removed from sample</b>		
Nappies/Diapers/Pants			
Sanitary Protection			
Wipes			
Retail Hygiene			
Paper Towels			
Paper Tableware			
Facial Tissues			
Toilet Paper			
Retail Tissue			
Retail Tissue and Hygiene			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

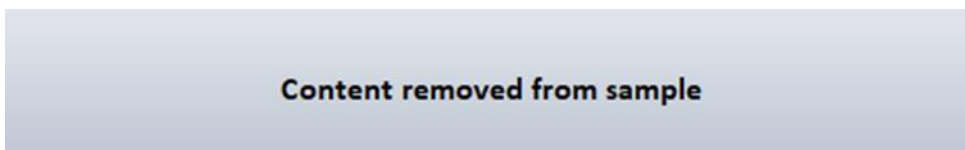
**GLOBAL MACROECONOMIC ENVIRONMENT**

- The COVID-19 pandemic has forced governments to quarantine entire countries...



**GLOBAL INDUSTRY ENVIRONMENT**

- With COVID-19 spreading globally, tissue and hygiene....



## DISCLAIMER

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## SOURCES

Sources used during the research included the following:

Summary 1    Research Sources

Trade Associations

[Redacted]

[Redacted]

Trade Press

[Redacted]

**Content removed from sample**

Source: Euromonitor International