

Tissue and Hygiene in Latvia

May 2025

Table of Contents

Tissue and Hygiene in Latvia

EXECUTIVE SUMMARY

Tissue and hygiene in 2024: The big picture 2024 key trends Competitive landscape Retail developments What next for tissue and hygiene?

MARKET INDICATORS

Table 1 - Birth Rates 2019-2024Table 2 - Infant Population 2019-2024Table 3 - Female Population by Age 2019-2024Table 4 - Total Population by Age 2019-2024Table 5 - Households 2019-2024Table 6 - Forecast Infant Population 2024-2029Table 7 - Forecast Female Population by Age 2024-2029Table 8 - Forecast Total Population by Age 2024-2029Table 9 - Forecast Households 2024-2029

MARKET DATA

 Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024

Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024

 Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024

Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024

Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024

Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024

Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029

Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Away-From-Home Tissue and Hygiene in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Away-from-home toilet paper accounts for the bulk of retail value sales An ageing population supports demand growth for away-from-home adult incontinence Intense price competition limits pace of innovation

PROSPECTS AND OPPORTUNITIES

Away-from-home toilet paper will continue to underperform E-commerce will grow in importance Away-from-home wipers and paper towels will see modest growth in retail constant value sales

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024Table 21 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2024-2029Table 24 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

Retail Adult Incontinence in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail demand is rising but remains very limited Essity AB's Tena remains the clear leader Pharmacies and grocery retailers dominate distribution

PROSPECTS AND OPPORTUNITIES

Rate of growth in constant value sales will slow significantly Purchasers of moderate/heavy adult incontinence products will seek maximum absorbency and leakage protection More specialised products will be launched

CATEGORY DATA

Table 25 - Sales of Retail Adult Incontinence by Category: Value 2019-2024
Table 26 - Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024
Table 27 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024
Table 28 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024
Table 29 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029
Table 30 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

Nappies/Diapers/Pants in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

A declining population weighs on demand Private label a growing threat to Procter & Gamble's Pampers brand Discounters grow in importance as a distribution channel

PROSPECTS AND OPPORTUNITIES

Disposable pants will remain the largest and most dynamic category Grocery retail chains will benefit from e-commerce growth Innovation will remain limited

CATEGORY DATA

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024

- Table 33 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024
- Table 34 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024
- Table 35 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029
- Table 36 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

Menstrual Care in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price rises drive moderate growth in retail current value sales Procter & Gamble remains top dog, with private label a growing presence Discounters and e-commerce increasingly important

PROSPECTS AND OPPORTUNITIES

Declining population impacts sales Grocery retailers will remain the dominant distribution channel International players will drive new product development

CATEGORY DATA

Table 37 - Retail Sales of Menstrual Care by Category: Value 2019-2024
Table 38 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
Table 39 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
Table 40 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
Table 41 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
Table 42 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

Wipes in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby wipes remain dominant, but falling birth rate limits demand growth Private label continues to gain ground Grocery retailers dominate, but e-commerce expanding rapidly

PROSPECTS AND OPPORTUNITIES

Retail constant value sales to rebound Moist toilet wipes and general purpose wipes will perform well Retailers will continue to invest in e-commerce

CATEGORY DATA

 Table 43 - Retail Sales of Wipes by Category: Value 2019-2024

Table 44 - Retail Sales of Wipes by Category: % Value Growth 2019-2024

Table 45 - NBO Company Shares of Retail Wipes: % Value 2020-2024

Table 46 - LBN Brand Shares of Retail Wipes: % Value 2021-2024

 Table 47 - Forecast Retail Sales of Wipes by Category: Value 2024-2029

Table 48 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

Retail Tissue in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increased discounting limits unit price growth Leader Essity AB faces strong private label challenge Discounters and e-commerce continue to grow in importance

PROSPECTS AND OPPORTUNITIES

A declining population and intense price competition will weigh on growth Grocery retail will remain dominate Larger pack sizes will continue to grow in popularity

CATEGORY DATA

Table 49 - Retail Sales of Tissue by Category: Value 2019-2024Table 50 - Retail Sales of Tissue by Category: % Value Growth 2019-2024Table 51 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2021-2024Table 53 - Forecast Retail Sales of Tissue by Category: Value 2024-2029Table 54 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

Rx/Reimbursement Adult Incontinence in Latvia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising incidence of dementia boosts demand Essity AB continues to lead Public expenditure on long-term care remains relatively low

PROSPECTS AND OPPORTUNITIES

Tight fiscal policy will limit growth in retail constant value sales Comfort, discretion and absorbency will remain key Distribution will become more efficient

CATEGORY DATA

Table 55 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2019-2024Table 56 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2019-2024Table 57 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2024-2029Table 58 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2024-2029

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-latvia/report.