

# Tissue and Hygiene in Brazil

May 2025

**Table of Contents** 

## Tissue and Hygiene in Brazil

#### **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 2019-2024
- Table 2 Infant Population 2019-2024
- Table 3 Female Population by Age 2019-2024
- Table 4 Total Population by Age 2019-2024
- Table 5 Households 2019-2024
- Table 6 Forecast Infant Population 2024-2029
- Table 7 Forecast Female Population by Age 2024-2029
- Table 8 Forecast Total Population by Age 2024-2029
- Table 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 Brazil

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Growth continues as office working returns and tourists boost demand

Players invest in different ways to stay ahead in AFH tissue and hygiene

Opportunities within the realm of digitalisation

## PROSPECTS AND OPPORTUNITIES

National fairs and trends to impact the AFH channel

Logistics, and threats at a global level

Setting the example for future innovation in AFH tissue and hygiene

## **CATEGORY DATA**

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

- Table 22 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024
- Table 23 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024
- Table 24 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029
- Table 25 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

#### Retail Adult Incontinence in Brazil

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Retail adult incontinence sees a slowing of growth from the previous year, but it remains robust Strategic moves from major players change market dynamics

Retail e-commerce finds space in retail adult incontinence, but pharmacies remains number one

#### PROSPECTS AND OPPORTUNITIES

Players in adult incontinence invest in sustainable initiatives Stronger potential for adult incontinence products in the digital world

Seeking comfort and new technologies in adult incontinence

## CATEGORY DATA

- Table 26 Sales of Retail Adult Incontinence by Category: Value 2019-2024
- Table 27 Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024
- Table 28 NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024
- Table 29 LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024
- Table 30 Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029
- Table 31 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

## Nappies/Diapers/Pants in Brazil

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Disposable pants continues to be the driving force within nappies/diapers/pants

Narrowing the gap between price ranges, and further consolidation

Retail e-commerce still accounts for a low share, but is continuously evolving

## PROSPECTS AND OPPORTUNITIES

Sustainability and premium segment to boost innovation in the forecast period

Despite constant growth for retail e-commerce, offline stores should remain dominant in the coming years Global innovations to shape and influence nappies/diapers/pants

## CATEGORY DATA

- Table 32 Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024
- Table 33 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024
- Table 34 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024
- Table 35 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024
- Table 36 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029
- Table 37 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

## Menstrual Care in Brazil

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Menstrual care maintains growth, driven mostly by pantyliners

Sustainable innovations and expansion of leading players set the tone in menstrual care Retail e-commerce gains relevance each year, but physical stores remain dominant

## PROSPECTS AND OPPORTUNITIES

Education and social activities to break down barriers in the forecast period in Brazil

Online developments should gain traction in the coming years

Empowering women by addressing health issues in menstrual care

#### CATEGORY DATA

- Table 38 Retail Sales of Menstrual Care by Category: Value 2019-2024
- Table 39 Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
- Table 40 Retail Sales of Tampons by Application Format: % Value 2019-2024
- Table 41 NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
- Table 42 LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
- Table 43 Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
- Table 44 Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

## Wipes in Brazil

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Baby wipes continues its robust growth trajectory

Price-sensitive consumers drive new strategies for wipes

Big digital players benefit from changing consumer habits

## PROSPECTS AND OPPORTUNITIES

Upcoming economic difficulties may present concerns for wipes

Embracing digitalisation to ensure leadership

Global innovations to inspire the Brazilian market

### **CATEGORY DATA**

Table 45 - Retail Sales of Wipes by Category: Value 2019-2024

Table 46 - Retail Sales of Wipes by Category: % Value Growth 2019-2024

Table 47 - NBO Company Shares of Retail Wipes: % Value 2020-2024

Table 48 - LBN Brand Shares of Retail Wipes: % Value 2021-2024

Table 49 - Forecast Retail Sales of Wipes by Category: Value 2024-2029

Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

## Retail Tissue in Brazil

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Retail tissue navigates challenges and opportunities

New entries and big acquisitions set the tone for a competitive landscape

New partnerships to boost digitalisation

## PROSPECTS AND OPPORTUNITIES

The impact of Bracell's growth on Brazilian consumers

Integrating technology to improve channel diversification and distribution

Developments anticipated to follow the premiumisation and sustainability trends

## CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2019-2024

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 53 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

#### Rx/Reimbursement Adult Incontinence in Brazil

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Overcoming challenges in Rx/reimbursement adult incontinence The transformative impact of Brazil's Farmácia Popular programme Adapting the healthcare supply chain to geopolitical challenges

#### PROSPECTS AND OPPORTUNITIES

Pioneering sustainability and innovation in adult incontinence care Expanding access and promoting social inclusion

Economic challenges will continue to force new strategies in the forecast period

#### **CATEGORY DATA**

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2019-2024

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2019-2024

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2024-2029

Table 60 - 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 focusing 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-brazil/report.