



Tissue and Hygiene in India

April 2025

Table of Contents

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

AFH tissue experiences continued growth as establishments prioritise customer safety
AFH adult incontinence continues its growth trajectory, as notable brands continue targeting sales to healthcare facilities
Brands focus on integrating smart technology to facilitate consumer convenience and safety

PROSPECTS AND OPPORTUNITIES

AFH tissue and hygiene set for further growth as the focus on hygiene in public places and healthcare facilities grows
Businesses will look towards e-commerce to facilitate bulk purchases in the forecast period
Sustainability and technology to be further integrated into AFH tissue and hygiene products

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 India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ageing population and improved healthcare create demand for adult incontinence products

Brands focus on destigmatisation efforts and eco-friendly products

Offline retail continues to dominate, while retail e-commerce sees growth, mostly in urban areas

PROSPECTS AND OPPORTUNITIES

Adult pad type products to continue dominating over the forecast period

Retail e-commerce expected to be a primary driver of growth in the coming years

A focus on product development within retail adult incontinence in the forecast period

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 India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Product features the focus of attention within nappies/diapers/pants

MamyPoko positions itself as a premium brand thanks to continuous product advances

Convenience the leading factor for choice of distribution channel

PROSPECTS AND OPPORTUNITIES

Disposable nappies/diapers/pants likely to gain further traction

High growth expected in sales via retail e-commerce, with subscription services an expected trend

Disposable eco-friendly nappies/diapers/pants likely to gain further traction

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 India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Towels dominates menstrual care, while period poverty remains a concern

Leading brand Whisper prioritises social impact, while Stayfree focuses on product improvement
Health and beauty specialists and hypermarkets remain the primary distribution channels, while retail e-commerce grows

PROSPECTS AND OPPORTUNITIES

Sustainability and affordability will be priorities in the forecast period
Channel sales for menstrual care to be driven by hybrid model due to digitalisation
Product diversification and sustainability expected to be growing trends in the forecast period

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 India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby wipes remains the dominant category within wipes
Himalaya leads wipes as chemical-free ingredients take priority for consumers
Retail e-commerce shows growth, while traditional channels continue to dominate

PROSPECTS AND OPPORTUNITIES

Wipes set for further growth as consumers look to prioritise infant hygiene
Quick commerce set for further growth in baby wipes as consumers prioritise convenience and speed
Eco-friendly and multifunctional innovations likely to be a growing trend within wipes

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 India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Facial tissues sees demand boosted by usage in urban homes
Origami remains a major player in several retail tissue categories
Hybrid distribution model dominates retail tissue in India

PROSPECTS AND OPPORTUNITIES

Retail tissue to experience further growth as the urban population set to grow
E-commerce set to drive growth for retail tissue
Product features and their effect on health and the environment to be a priority in the forecast period

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

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-india/report.