

Tissue and Hygiene in Portugal

March 2025

Table of Contents

Tissue and Hygiene in Portugal

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 Portugal

KEY DATA FINDINGS

2024 DEVELOPMENTS

Tourism continues to drive growth in AFH tissue

Adult incontinence is supported by shifting demographics

Financial pressures limit investment and acceleration of sustainable options

PROSPECTS AND OPPORTUNITIES

Growth of AFH tissue will be dependent on tourist industry

New legislation will impact on AFH adult incontinence

Sustainability and efficiency will be key drivers of innovation

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 Portugal

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail adult incontinence remains dynamic

Private label stabilises after period of rapid growth

Supermarkets continue as main distribution channel

PROSPECTS AND OPPORTUNITIES

Light incontinence represents key growth opportunity
E-commerce will grow at a slow pace
Absorbency and skin comfort to drive innovation

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 Portugal

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demographic shifts hamper nappy/diaper sales, while disposable pants continue to make gains P&G leads the market, but private label retains a strong presence

Supermarkets continue to dominate, while e-commerce has strong presence

PROSPECTS AND OPPORTUNITIES

Demographics will continue to impact performance

Online sales will gain traction

Sustainability will drive innovation but price will remain crucial factor

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 Portugal

KEY DATA FINDINGS

2024 DEVELOPMENTS

Prices rises support value growth

P&G continues to dominate the market

Supermarkets represent preferred retail channel

PROSPECTS AND OPPORTUNITIES

Challenges and opportunities lie head for menstrual care

E-commerce will show slow recovery as physical retail continues to dominate

Sustainability concerns will impact new product development

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 Portugal

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moist toilet wipes lead growth in 2024

P&G continues as leading player

Supermarkets strengthen their market dominance

PROSPECTS AND OPPORTUNITIES

Wipes will see slower growth over forecast period

New store openings will hamper online expansion

Value-for-money and sustainability will be key growth drivers

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 Portugal

KEY DATA FINDINGS

2024 DEVELOPMENTS

Toilet paper continues to lead sales

Brands step up investment in innovation to offset competition from private label

Frequent purchases and small basket sizes contribute to supermarkets' dominance

PROSPECTS AND OPPORTUNITIES

Retail tissue market will see greater premiumisation

Mercadona will continue to drive growth in supermarkets channel

Sustainability gains importance as consumers look for eco-friendly options

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-portugal/report.