

# Tissue and Hygiene in Mexico

April 2025

**Table of Contents** 

## Tissue and Hygiene in Mexico

#### **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 Mexico

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

AFH toilet paper continues to lead due to its ubiquity

Ageing population drives growth for AFH adult incontinence

Fulfilling demand and maintaining competitive pricing remain most important factors

# PROSPECTS AND OPPORTUNITIES

Opportunities and challenges across categories in AFH tissue and hygiene

A move could be seen towards e-commerce

Innovation may be pursued, but price likely to remain most important

# 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 Mexico

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Demographic changes drive growth, especially for moderate/heavy products

Players will have to innovate to maintain their competitive edge

Growth remains high for retail e-commerce as this channel offers discretion

#### PROSPECTS AND OPPORTUNITIES

Expansion of the consumer base set to drive growth

Seamless digital shopping experiences will drive growth for e-commerce

Lessening the stigma of incontinence products

#### **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 Mexico

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

The falling birth rate drives decline for nappies/diapers/pants

Private label gains share, but the two leaders continue to dominate

Although e-commerce rises from a low base, grocery retailers continue to dominate

#### PROSPECTS AND OPPORTUNITIES

Continued decline anticipated, driven by the falling birth rate

Discounts available online likely to drive growth for retail e-commerce

More players likely to offer comfort and sustainability to drive growth

#### **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 Mexico

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Gradual move from standard towels to other menstrual care products

Saba continues to dominate, but Tampax excels

Grocery retailers continue to dominate due to convenience and promotions

## PROSPECTS AND OPPORTUNITIES

The move towards more discreet and comfortable products set to continue

Opportunities for growth for retail e-commerce

The need to provide eco-friendly solutions

#### 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 Mexico

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Baby wipes continues to dominate, but other types of wipes see stronger growth

Fragmentation, as different companies lead individual categories

Retail e-commerce continues to rise from a low base

## PROSPECTS AND OPPORTUNITIES

Innovation and changing habits likely to contribute to growth

Slow share growth anticipated for retail e-commerce

Innovations likely to follow the sustainability and skinification trends

#### **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 Mexico

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Toilet paper and paper towels drive growth as premiumisation is seen

Kimberly-Clark dominates, but stronger rises seen from smaller players

Grocery retailers continue to dominate

## PROSPECTS AND OPPORTUNITIES

Paper towels will continue to drive growth due to innovation and premiumisation

Opportunities in expanding online sales strategies

Innovation in products, packaging and distribution expected

# 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-mexico/report.