



Euromonitor
International

Tissue and Hygiene in Germany

March 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

Away-From-Home Tissue and Hygiene in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

More frequent return to the office and greater mobility ensure solid demand for away-from-home tissue
Germany's ageing population supports solid demand for AFH adult incontinence
Players address increasing concerns over environmental impact

PROSPECTS AND OPPORTUNITIES

Future growth of tourism industry and strong return to business activities to support demand for away-from-home tissue and hygiene
Two channels to remain important for away-from-home options
Players to consider technological innovation and sustainability as part of new product development

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ageing population and rising awareness support positive performance by retail adult incontinence

Essity retains dominance with established presence of Tena

Many local consumers prefer physical stores for their adult incontinence needs

PROSPECTS AND OPPORTUNITIES

Despite marginal decline, overall demand will remain high as consumers look to live independently for as long as possible

Players to address sustainability issues relating to disposable items

Increasing digitalisation in everyday lives

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Declining birth rate starts to impact performance of nappies/diapers/pants

Procter & Gamble strengthens leadership but private label makes gains in unstable economy

Health and beauty specialists benefits from development of private label lines

PROSPECTS AND OPPORTUNITIES

Falling sales but search for higher quality will help retain some category value

The further rise of retail e-commerce

Players to explore more eco-friendly products and packaging

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Use of alternative methods places pressure on menstrual care in Germany

Johnson & Johnson strengthens leadership with established brands and marketing campaigns
Retail e-commerce regains momentum post-pandemic

PROSPECTS AND OPPORTUNITIES

Slim/thin/ultra-thin towels with wings to buck declining trend
Integration of AI to drive further development of retail e-commerce
Environmental concerns will continue to push innovation within 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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wipes remain essential hygiene item for many local consumers
Procter & Gamble strengthens leadership of wipes, while Hipp grows from low base
Despite dominance of specialists, retail e-commerce makes gains

PROSPECTS AND OPPORTUNITIES

Wipes will continue to appeal to consumers seeking convenience
Sustainability trend to drive demand for more ecological options
Issues relating to flushing of wipes cause increasing concern among Germans

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Solid demand for retail tissue as consumers maintain regular habits post-pandemic
Private label retains dominance but branded players offer solid competition
Discounters remains leading distribution channel due to popularity of German chains

PROSPECTS AND OPPORTUNITIES

Positive outlook with potential for adding value through specific features
E-commerce can adapt to consumers' busy lifestyles
Eco-conscious consumers look to reduce retail tissue usage

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Germany's ageing population is main consumer base for rx/reimbursement adult incontinence
- Challenge of diagnosis and reimbursement process
- Category experiences increasing competition from retail adult incontinence

PROSPECTS AND OPPORTUNITIES

- Rising pressure on category from retail and away-from-home channels
- Waning stigma surrounding incontinence to support consumers seeking help
- Rise of digitalisation and government support for lower-income consumers

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 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-germany/report.