

Tissue and Hygiene in Ireland

March 2025

Table of Contents

Tissue and Hygiene in Ireland

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moderate value growth linked to recovery in post-pandemic lifestyles AFH hygiene sales increase at steady pace AFH suppliers prioritise sustainability

PROSPECTS AND OPPORTUNITIES

Hygiene standards will fuel demand for durable retail tissue products Technology will leverage greater efficiencies Product development to focus on cost savings

CATEGORY DATA

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail adult incontinence reports steady growth Competition intensifies between major brands and private label Supermarkets lead in retail adult incontinence

PROSPECTS AND OPPORTUNITIES

Rising awareness and ageing population to drive sales Dynamic prospects for the e-commerce channel Improved efficacy and sustainability will be main focus of 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 Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Challenging year pushes category sales into decline Procter & Gamble (Mfg) Ireland maintains its strong lead Modern channel maintains lead with promotional strategy

PROSPECTS AND OPPORTUNITIES

Stable outlook for nappies/diapers/pants E-commerce retailing set to grow rapidly Stronger focus on sustainability and technological enhancements in product development

CATEGORY DATA

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Menstrual care maintains steady growth despite cost of living pressures

Procter & Gamble (Mfg) Ireland solidifies its lead as private label gains share Modern channel plays a key role in menstrual care

PROSPECTS AND OPPORTUNITIES

Menstrual health awareness and innovative focus will drive category forward E-commerce channel will be supercharged by subscription-based services Sustainability will remain at forefront of innovations

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 Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wipes face value sales decline amid rising prices WaterWipes sustains its lead in wipes Distribution is evolving in wipes category

PROSPECTS AND OPPORTUNITIES

Healthy outlook for wipes as hygiene standards remain elevated E-commerce sales will continue to rise Sustainability will remain at core of product innovations

CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2019-2024Table 46 - Retail Sales of Wipes by Category: % Value Growth 2019-2024Table 47 - NBO Company Shares of Retail Wipes: % Value 2020-2024Table 48 - LBN Brand Shares of Retail Wipes: % Value 2021-2024Table 49 - Forecast Retail Sales of Wipes by Category: Value 2024-2029Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

Retail Tissue in Ireland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail tissue enjoys steady value growth Retailers lead the competitive landscape Supermarkets bolster position with aggressive promotional strategies

PROSPECTS AND OPPORTUNITIES

Sustainability and price will remain key factors for shoppers Modern channel will lead in terms of distribution Sustainability will guide product innovations

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-ireland/report.