

# Tissue and Hygiene in Canada

March 2025

**Table of Contents** 

#### Tissue and Hygiene in Canada

#### **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 Canada

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Stronger volume recovery in Canada compared to the US

Long-term care bed shortages propel Canadians to seek alternative care arrangements

The future of the ultra-premium market in Canada

## PROSPECTS AND OPPORTUNITIES

Healthy performance of away-from-home tissue products over the forecast period

Potential tariffs could hinder Canadian away-from-home manufacturers exporting to the US

Further business operations to be consolidated between Canadian tissue players

#### **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 Canada

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Value growth impacted by inflation and consumer usage habits Depend brand leads the way as private label gains traction

Pull-up formats and breathability remain top priorities for consumers

#### PROSPECTS AND OPPORTUNITIES

Older adults face challenges including gaps in care and access to incontinence supplies

E-commerce continues to grow as new DTC brands prioritise sustainability

Brands highlight female life stages and work to destignatise incontinence

#### **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 Canada

#### KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Value and volume growth impacted by easing inflationary conditions and declining birth rate

Kimberly-Clark and Procter & Gamble continue to lead

Digital presence becomes an integral part of channel strategy

#### PROSPECTS AND OPPORTUNITIES

The affordability and environmental benefits of cloth diapers present a significant challenge to disposable diapers

Continued value growth expected in nappies/diapers/pants in the forecast period

Sustainability features to drive brand differentiation and new releases

#### **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 Canada

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Cost-conscious consumers shifting format preferences and wear habits

Legacy brands reaching consumers with social-impact marketing while private label undergoes mixed growth Robust government-led initiatives push for wider access to menstrual products in public spaces

#### PROSPECTS AND OPPORTUNITIES

Innovative tampon product launches promote ease of use

Fem-tech start-ups innovate with support from unifying organisations

Menopause advocacy takes centre stage

#### 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 Canada

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Strong growth for moist toilet wipes

Convenience and wellness trends influence the development of personal care wipes

Growth of e-commerce

#### PROSPECTS AND OPPORTUNITIES

Wet wipes to face increasing rivalry from eco-friendly alternatives

Legislation regarding "flushability" presents obstacles and calls for additional innovation

Innovation and sustainability to drive the category

#### **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 Canada

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Normalising economic conditions to signify softer value gains

Facial production gap in Canada benefits domestic players

Brick-and-mortar remains important for the Canadian market

#### PROSPECTS AND OPPORTUNITIES

Stable value growth expected over the forecast period

Tariffs could threaten US-Canada tissue production and export partnerships

Emphasis on sustainable practices to echo throughout 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-canada/report.