

Tissue and Hygiene in the Philippines

March 2025

Table of Contents

Tissue and Hygiene in the Philippines

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increased national spending on infrastructure boosts away-from-home tissue and hygiene growth in 2024 Growth in the demand for AFH adult incontinence products in line with ageing population SCPA and Kimberly-Clark continue to serve their corporate clients with a wide range of quality AFH products

PROSPECTS AND OPPORTUNITIES

Tourism trends set to benefit sales of away-from-home tissue and hygiene in the coming years Retail competition will improve away-from-home offerings in the future Brands may expand their product offerings to boost share

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Higher disposable incomes and demographic changes boost growth in retail adult incontinence in 2024 JS Unitrade Merchandise Inc. continues to lead sales ahead of Essity Inflation and rising product prices impact consumer purchasing patterns

PROSPECTS AND OPPORTUNITIES

Ongoing ageing of the Filipino population will be a key driver of growth over the forecast period E-commerce expansion will lead to new brand emergence Gender-specific and unisex products will cater to consumer preferences

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Category expansion thanks to urbanisation and rising incomes Players are increasingly connecting with celebrity and influencer collaborations Growing popularity of diaper pants boosts online sales

PROSPECTS AND OPPORTUNITIES

Continued positive performance, led by disposable pants, although sustainability will become a more important consideration Distribution landscape will remain largely unchanged, but e-commerce will continue to gain traction, albeit from a low base Problem-solving with new technologies is likely to increase in the coming years

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Menstrual care products affected by evolving consumer spending habits in 2024

Period underwear makes an entrance in the Philippines Kotex Philippines benefits from marketing initiatives

PROSPECTS AND OPPORTUNITIES

Competition set to intensify in the years ahead amid ongoing growth for menstrual care Product quality expectations will increase in tandem with prices Opportunities for modern menstrual products to gain traction

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby wipes continue to lead category sales in 2024 Category sees diversification with the emergence of adult and men's wipes Lysol's disinfecting wipes in a variety of fragrances have broad appeal

PROSPECTS AND OPPORTUNITIES

Baby wipes will remain popular amongst local consumers in the coming years Promoting value through strategic bundling will become more prevalent in wipes Differentiation will be driven by technology and new product development

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 the Philippines

KEY DATA FINDINGS

2024 DEVELOPMENTS

Toilet paper remains dominant through multifunctionality Convenient options for on-the-go consumers boost growth in retail tissues in 2024 SCPA maintains its hold across multiple categories

PROSPECTS AND OPPORTUNITIES

Increase in disposable income and ongoing hygiene concerns will assure sustained growth for retail tissue Affordability will increasingly inform purchasing decisions Reinforced hygiene habits will lead to increased consumption in the years ahead

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-the-philippines/report.