



Tissue and Hygiene in Chile

March 2024

Table of Contents

Tissue and Hygiene in Chile

EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for tissue and hygiene?

MARKET INDICATORS

Table 1 - Birth Rates 2018-2023

Table 2 - Infant Population 2018-2023

Table 3 - Female Population by Age 2018-2023

Table 4 - Total Population by Age 2018-2023

Table 5 - Households 2018-2023

Table 6 - Forecast Infant Population 2023-2028

Table 7 - Forecast Female Population by Age 2023-2028

Table 8 - Forecast Total Population by Age 2023-2028

Table 9 - Forecast Households 2023-2028

MARKET DATA

Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2018-2023

Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2019-2023

Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2020-2023

Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2018-2023

Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023

Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Away-From-Home Tissue and Hygiene in Chile](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Quality and cost-cutting in away-from-home tissue and hygiene

AFH toilet paper shows greater resilience than other formats

Softys retains leadership in away-from-home tissue and hygiene

PROSPECTS AND OPPORTUNITIES

Informal markets increasingly feature in purchasing preferences

Price as the key variable heading into the forecast period

Omnichannel: Reshaping sales strategies in the away-from-home space

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

Table 21 - Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

Table 24 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2023-2028

Retail Adult Incontinence in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shifting tides: Light versus moderate/heavy adult incontinence in 2023

Ageing demographics influence demand and consumer awareness

Cotidian remains most popular brand of retail adult incontinence in Chile

PROSPECTS AND OPPORTUNITIES

Specialisation surge to drive dynamism in retail adult incontinence

Price surge and changing channels

The symbiosis of innovation and sustainability within the category

CATEGORY DATA

Table 26 - Sales of Retail Adult Incontinence by Category: Value 2018-2023

Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2020-2023

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

Nappies/Diapers/Pants in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand returns to declining trajectory due to Chile's demographic trend

Convenience and affordability influence channel preferences

Softys leads, driven by investment and innovation

PROSPECTS AND OPPORTUNITIES

Premium segment likely to retain importance among smaller households

Larger packs gain momentum due to economic situation in Chile

Disposable pants to remain popular option among modern parents

CATEGORY DATA

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2019-2023

Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2020-2023

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

Menstrual Care in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slowdown for menstrual care in 2023, but an uptick in demand for tampons

Versatility beyond menstrual care: The role of pantyliners in diverse health needs
Innovation as Softys launches Ladysoft Power Flex

PROSPECTS AND OPPORTUNITIES

The optimistic outlook for menstrual cups
Conscious consumerism: Navigating menstrual care trends for a greener future
Rethinking menstrual care beyond traditional products

CATEGORY DATA

Table 38 - Retail Sales of Menstrual Care by Category: Value 2018-2023
Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023
Table 40 - Retail Sales of Tampons by Application Format: % Value 2018-2023
Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2019-2023
Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023
Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028
Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

Wipes in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slowing demand for wipes due to consumers prioritising expenses
Convenience reshapes distribution of wipes in Chile
Consumer habits in transition during inflationary scenario

PROSPECTS AND OPPORTUNITIES

Biodegradable wipes and the shift in consumer preferences
Private label and larger packs on the rise
Skin-deep wellness: Embracing natural ingredients in personal care wipes

CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2018-2023
Table 46 - Retail Sales of Wipes by Category: % Value Growth 2018-2023
Table 47 - NBO Company Shares of Retail Wipes: % Value 2019-2023
Table 48 - LBN Brand Shares of Retail Wipes: % Value 2020-2023
Table 49 - Forecast Retail Sales of Wipes by Category: Value 2023-2028
Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

Retail Tissue in Chile

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail tissue maintains healthy demand in 2023 despite economic challenges
From mega rolls to mini packs: A transition in tissue preference
Exponential growth of private label within retail tissue

PROSPECTS AND OPPORTUNITIES

From necessity to abundance: Per capita growth of paper towels
A resilient revival in pocket tissue demand
The “long-lasting” trend in toilet paper

CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2018-2023

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Retail Tissue: % Value 2019-2023

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2020-2023

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2023-2028

Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

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-chile/report.