

Tissue and Hygiene in China

March 2025

Table of Contents

Tissue and Hygiene in China

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Recovery of hospitality drives growth, but AFH tissue products remain a discretionary expense AFH adult incontinence maintains dynamic growth

PROSPECTS AND OPPORTUNITIES

Economic uncertainty and changing consumer behaviour to shape future demand Brands and manufacturers launch AFH-specific incontinence products

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 2024-2029Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

Retail Adult Incontinence in China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail adult incontinence decelerates as consumers look for cheaper alternatives More and more local brands launch light adult incontinence products Retail adult incontinence remains highly fragmented

PROSPECTS AND OPPORTUNITIES

Dynamic growth as knowledge increases and embarrassment lessens Diverse product innovations in retail adult incontinence, based on different usage scenarios and functionality Comfort makes pull-up and open-tape formats increasingly popular in China

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Declining birth rate and economic slowdown drive decline for nappies/diapers/pants Domestic brands continue to outperform Retail e-commerce is still the key distribution channel for nappies/diapers/pants

PROSPECTS AND OPPORTUNITIES

Disposable pants expected to be the main growth driver in nappies/diapers/pants Weakening of seasonality of sales in nappies/diapers/pants Further diversification in nappies/diaper/pants based on different usage scenarios and functionality

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 2019-2024

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slim/thin/ultra-thin towels are still the main driver of growth for menstrual care Menstrual care remains a fragmented category

Pant-format towels continue to see rapid growth thanks to further penetration and expansion into more usage scenarios

PROSPECTS AND OPPORTUNITIES

Slim/thin/ultra-thin towels without wings set to continue to drive growth Improving product quality will be a key strategy for menstrual care brands Private label menstrual care products emerge to provide consumers with cost-effectiveness

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

General purpose wipes maintains growth thanks to the growth of pure water wipes Moist toilet wipes maintains strong growth due to hygiene and comfort Hengan Fujian Holding maintains its lead, while Henan Yixiang rises rapidly

PROSPECTS AND OPPORTUNITIES

Falling birth rate will continue to drive decline for baby wipes Share of retail e-commerce likely to continue to rise Pocket-sized wipes to become more popular thanks to increasing activities outside the home

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 China

KEY DATA FINDINGS

2024 DEVELOPMENTS

Resilient growth despite economic challenges Shifting competitive dynamics: From price wars to strategic mergers The changing face of distribution: E-commerce and convenience stores on the rise

PROSPECTS AND OPPORTUNITIES

Innovation and premiumisation: The future of retail tissue products Private label and instant retail: The new battleground for share Technological advances set to reshape consumer preferences

CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2019-2024Table 52 - Retail Sales of Tissue by Category: % Value Growth 2019-2024Table 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-china/report.