



Tissue and Hygiene in Pakistan

March 2025

Table of Contents

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

AFH tissue continues to benefit from a return to out-of-home lifestyles
AFH adult incontinence gains some traction from a rise in care homes
Local manufacturers dominate AFH tissue

PROSPECTS AND OPPORTUNITIES

Napkins to post highest AFH value growth due to wide use in horeca and offices
Local wholesalers and partnerships and special offers to develop AFH distribution
Growing demand for eco-friendly and recycled materials

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 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 24 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

Nappies/Diapers/Pants in Pakistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Premiumisation trend gains traction in nappies/diapers
- The leading players leverage strong brand equity and trust but room remains for local brands
- Online and subscription sales models continue to penetrate nappies/diapers

PROSPECTS AND OPPORTUNITIES

- Rising product awareness and affordability and a growing 0-3-year-old population to push a demand for packaged options
- Urbanisation to foster shift to packaged nappies/diapers
- More affordable local and Chinese options are set to be competitive

CATEGORY DATA

Table 25 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

Table 26 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024

Table 28 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024

Table 29 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029

Table 30 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

Menstrual Care in Pakistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Standard towels lead demand while there is optimism for pantyliners
- Procter & Gamble leverages wider offer, high price points and consumer trust to gain retail value share
- Modern retail trend helps supermarkets and e-commerce gain traction

PROSPECTS AND OPPORTUNITIES

- Room for strong development and growth in menstrual care
- Practical and affordable features to drive innovation
- High prices of branded options maintain a demand for economy rivals and traditional alternatives

CATEGORY DATA

Table 31 - Retail Sales of Menstrual Care by Category: Value 2019-2024

Table 32 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024

Table 33 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024

Table 34 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024

Table 35 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029

Table 36 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

Wipes in Pakistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- High birth rates and hygiene trend push baby wipes
- A price-sensitive marketplace determines demand

E-commerce platforms like Daraz capitalise on convenience and competitive pricing

PROSPECTS AND OPPORTUNITIES

- Urbanisation and high hygiene awareness to drive development and growth
- E-commerce to continue to gain momentum in wipes
- Disinfectant wipes may reshape the category

CATEGORY DATA

- Table 37 - Retail Sales of Wipes by Category: Value 2019-2024
- Table 38 - Retail Sales of Wipes by Category: % Value Growth 2019-2024
- Table 39 - NBO Company Shares of Retail Wipes: % Value 2020-2024
- Table 40 - LBN Brand Shares of Retail Wipes: % Value 2021-2024
- Table 41 - Forecast Retail Sales of Wipes by Category: Value 2024-2029
- Table 42 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

Retail Tissue in Pakistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Urbanisation increases awareness, access and sales
- Rose Petal maintains leadership through quality and trust
- Price promotions and e-commerce add dynamism to channel competition

PROSPECTS AND OPPORTUNITIES

- Positive outlook amid strong social, economic and distribution trends
- Strong company activity is anticipated
- Local brands to continue to enjoy consumer loyalty

CATEGORY DATA

- Table 43 - Retail Sales of Tissue by Category: Value 2019-2024
- Table 44 - Retail Sales of Tissue by Category: % Value Growth 2019-2024
- Table 45 - NBO Company Shares of Retail Tissue: % Value 2020-2024
- Table 46 - LBN Brand Shares of Retail Tissue: % Value 2021-2024
- Table 47 - Forecast Retail Sales of Tissue by Category: Value 2024-2029
- Table 48 - 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-pakistan/report.