

Tissue and Hygiene in Bolivia

March 2025

Table of Contents

Tissue and Hygiene in Bolivia

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 Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value growth is driven by price increases

Dynamism in away-from-home napkins category

Copelme SA offers customised napkins to businesses

PROSPECTS AND OPPORTUNITIES

Away-from-home tissue and hygiene sales to gain momentum

Economic constraints will result in lower business demand

Copelme SA diversifies its product offering to grow institutional sales

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

Retail Adult Incontinence in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Adult incontinence products witness falling sales

Zaimella de Bolivia's Prudential brand surges ahead of Plenitud

Health and beauty specialists enjoy growth

PROSPECTS AND OPPORTUNITIES

Market dynamics and consumer behaviour in adult incontinence amid rising prices

Rising e-commerce sales in retail adult incontinence

Innovative mid-range products target value-seeking consumers

CATEGORY DATA

- Table 25 Sales of Retail Adult Incontinence by Category: Value 2019-2024
- Table 26 Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024
- Table 27 NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024
- Table 28 LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024
- Table 29 Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029
- Table 30 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

Nappies/Diapers/Pants in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising demand for larger diapers amid economic challenges
Kimberly Bolivia SA transfers portfolio to Importadora Logmark Esapro SA
Small local grocers gain marginal share over 2024

PROSPECTS AND OPPORTUNITIES

Price fluctuations in nappies/diapers/pants to fuel value growth

Collaborations to support e-commerce growth

Affordable brands to perform well in the forecast period

CATEGORY DATA

- Table 31 Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024
- Table 32 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024
- Table 33 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024
- Table 34 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024
- Table 35 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029
- Table 36 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

Menstrual Care in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Foreign currency shortage leads to sharp price increases

Nosotras brand strengthens its lead in menstrual care as 'other' brands gain share

Distribution channels shape menstrual care

PROSPECTS AND OPPORTUNITIES

Menstrual awareness campaigns and innovation to spearhead growth

E-commerce to be supported by digital payment solutions

Direct selling brands offer innovations and holistic approaches

CATEGORY DATA

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

Wipes in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price rises in wipes underpins value growth

Surco Surco Importaciones SA has success with Babyñoño

The traditional channel stands out in wipes

PROSPECTS AND OPPORTUNITIES

Robust outlook for wipes

Growth of e-commerce in wipes supported by middle and high income groups

Innovation in cosmetic wipes amid sales decline

CATEGORY DATA

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

Retail Tissue in Bolivia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price increases encourage consumers to economise

Copelme SA strengthens its lead in retail tissue

Small local grocers take on the modern channel

PROSPECTS AND OPPORTUNITIES

Stable outlook for retail tissue

Copelme SA extends its Nacional brand

E-commerce channel has potential for growth

CATEGORY DATA

Table 49 - Retail Sales of Tissue by Category: Value 2019-2024

Table 50 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 51 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 53 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 54 - 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-bolivia/report.