



# Tissue and Hygiene in Spain

March 2025

Table of Contents

## Tissue and Hygiene in Spain

### 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 Spain](#)

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Tourism bolsters growth for AFH in 2024

Expansion of old-age care homes fuels growth for AFH adult incontinence

Price sensitivity and limited innovation seen in AFH tissue

#### PROSPECTS AND OPPORTUNITIES

Rising demand through horeca, and a sharper focus on sustainability

Horeca and healthcare as growth drivers

Sustainable innovation in tissue solutions

### 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 2024-2029

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

## Retail Adult Incontinence in Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Heightened consumer awareness pushes demand

Essity leads as private label continues to expand

Offline channels lead in terms of value share

#### PROSPECTS AND OPPORTUNITIES

Expansion through male-targeted innovation

Subscription services boost online presence

Smart, sustainable innovations set to drive development

#### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Falling birth rate continues to undermine demand in 2024

Procter & Gamble leads with Dodot brand

Supermarkets leads distribution as subscription services propel e-commerce

#### PROSPECTS AND OPPORTUNITIES

Delayed potty training set to support future growth

E-commerce will continue to expand, bolstered by a greater prevalence of subscription models

Innovation driven by rising interest in sustainability and skincare

#### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Shift towards reusable options puts downward pressure on menstrual care

Private label expands as leading player Procter & Gamble loses share  
Health and beauty specialists as only channel to rise in 2024

## PROSPECTS AND OPPORTUNITIES

Growing adoption of reusable menstrual solutions  
Steady e-commerce growth anticipated, though offline grocery retail will remain preferred distribution channel  
Transformation through sustainability and waste reduction

## 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Rising concern with hygiene and skincare supports sales in 2024  
Mercadona leads thanks while baby wipes embrace multifunctionality  
Supermarkets leads distribution, followed by discounter and hypermarkets

### PROSPECTS AND OPPORTUNITIES

Further growth and innovation forecast for wipes  
E-commerce to enjoy continued expansion  
Sustainability will drive future innovation

## CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2019-2024  
Table 46 - Retail Sales of Wipes by Category: % Value Growth 2019-2024  
Table 47 - NBO Company Shares of Retail Wipes: % Value 2020-2024  
Table 48 - LBN Brand Shares of Retail Wipes: % Value 2021-2024  
Table 49 - Forecast Retail Sales of Wipes by Category: Value 2024-2029  
Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

## Retail Tissue in Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Recovery for retail tissue in 2024  
Private label goes from strength to strength, with Lidl in the lead  
Supermarkets maintain leadership of distribution channels, with e-commerce rising fastest in 2024

### PROSPECTS AND OPPORTUNITIES

Bright future projected for retail tissue in Spain  
E-commerce and discounters to remain key channels  
Sustainable packaging innovation as central focus

## 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

## Rx/Reimbursement Adult Incontinence in Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Local infrastructure supports continued growth in 2024

Concentrated landscape with major names leading

Diversity among distribution channels

#### PROSPECTS AND OPPORTUNITIES

Demographic trends will continue to impact demand

Environmental concerns to direct product innovation

Evolution of distribution channels

#### CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2019-2024

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2019-2024

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2024-2029

Table 60 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 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-spain/report](http://www.euromonitor.com/tissue-and-hygiene-in-spain/report).