



Euromonitor
International

Tissue and Hygiene in Paraguay

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 DATA

Table 1 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024

Table 2 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 3 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024

Table 4 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024

Table 5 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024

Table 6 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024

Table 7 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024

Table 8 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029

Table 9 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

MENSTRUAL CARE

Key Data Findings

2024 Developments

Towels leads category growth thanks to its strong popularity

Strong level of competition between foreign players

Small local grocers and convenience stores perform best

Prospects and Opportunities

Strong potential for growth of menstrual care over the forecast period

Modern retailers on the rise with convenience stores benefiting from expansion of the Biggie chain

The entry of Softys boosts innovation

Category Data

Table 10 - Retail Sales of Menstrual Care by Category: Value 2019-2024

Table 11 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024

Table 12 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024

Table 13 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024

Table 14 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029

Table 15 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

NAPPIES/DIAPERS/PANTS

Key Data Findings

2024 Developments

Multifactor drivers boost sales

Kimberly-Clark retains its unrivalled lead

Convenience stores and small local grocers perform the best

Prospects and Opportunities

Acceleration in the declining birth rate likely over the forecast period

Hypermarkets and convenience stores present the most promissory outlook

Innovation is increasingly focused on premiumisation

Category Data

Table 16 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

Table 17 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024

Table 18 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024

Table 19 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024

Table 20 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029

Table 21 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

RETAIL ADULT INCONTINENCE

Key Data Findings

2024 Developments

Lifestyle and economic drivers boost sales of retail adult incontinence

OA Import SA leads the category with its private label Biodisolvent

Health and beauty specialists remains the outright leading distribution channel for retail adult incontinence

Prospects and Opportunities

Increased awareness determines forecast period expansion of retail adult incontinence

Strong growth potential for modern grocery retailers

Innovation important in differentiating retail adult incontinence from menstrual care products

Category Data

Table 22 - Sales of Retail Adult Incontinence by Category: Value 2019-2024

Table 23 - Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024

Table 24 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024

Table 25 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024

Table 26 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029

Table 27 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

WIPES

Key Data Findings

2024 Developments

Economic growth and reduction in smuggling activity boost sales of wipes

Huggies extends its strong lead in nappies/diapers to baby wipes

Health and beauty specialists and small local grocers benefit the most from reduced smuggling activity

Prospects and Opportunities

Despite significant growth potential, sales growth slows over the forecast period

Health and beauty specialists remains the main distribution channel

Innovation in skin care protection in wipes becomes the most appreciated product attribute

Category Data

Table 28 - Retail Sales of Wipes by Category: Value 2019-2024

Table 29 - Retail Sales of Wipes by Category: % Value Growth 2019-2024

Table 30 - NBO Company Shares of Retail Wipes: % Value 2020-2024

Table 31 - LBN Brand Shares of Retail Wipes: % Value 2021-2024

Table 32 - Forecast Retail Sales of Wipes by Category: Value 2024-2029

Table 33 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

RETAIL TISSUE

Key Data Findings

2024 Developments

Toilet paper responsible for much of retail tissue's strong expansion

Low-priced Brazilian brands are the big winners in 2024

Retail tissue is distributed across a range of channels

Prospects and Opportunities

Positive performance for retail tissue over the forecast period

Supermarkets and convenience stores develop at the expense of small local grocers

Low-priced brands discourage leading brands from investing in innovation

Category Data

Table 34 - Retail Sales of Tissue by Category: Value 2019-2024

Table 35 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 36 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 37 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 38 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 39 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

AWAY-FROM-HOME TISSUE AND HYGIENE

Key Data Findings

2024 Developments

Economic growth, more tourists and reduced smuggling drive moderate growth

Ageing population shapes AFH adult incontinence

Modern dispensers in the horeca channel on the rise

Prospects and Opportunities

Low-priced Brazilian brands prove an obstacle to stronger growth

Horeca gains share due to a bigger influx of Argentinean tourists

Low penetration of innovative products in the country

Category Data

Table 40 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024

Table 41 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 42 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 43 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 44 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 45 - Forecast Sales of Away-From-Home Tissue and Hygiene 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-paraguay/report.