

Tissue and Hygiene in Ghana

March 2025

Table of Contents

Tissue and Hygiene in Ghana

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 2019-2024Table 2 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024Table 3 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024Table 4 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024Table 5 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024Table 6 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024Table 7 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024Table 8 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029Table 9 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

MENSTRUAL CARE

Key Data Findings

2024 Developments

Value sales supported by awareness campaigns and domestic brand expansion Lexta Ghana leads menstrual care while benefiting from market trust and variety Retailers drive growth as van distribution and informal trade support reach Prospects and Opportunities

Local production expected to boost accessibility and price stability

Wholesale e-commerce growth expected to outpace retail in the short term

Product innovation focuses on comfort, sensitivity, and consumer needs 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

Diaper sales continue to rise amid lifestyle shifts and brand diversification

Sunda Ghana remains the dominant and most dynamic player in nappies

Wholesalers and retailers lead, while e-commerce expands rapidly

Prospects and Opportunities

Local production holds key to growth amid currency volatility

E-commerce becomes a core channel for small-scale players

Product innovation expands to meet diverse consumer needs

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
Adult incontinence performance improves due to greater awareness and market variety
Market remains fragmented, with imported products dominating
Distribution remains focused on urban markets and traditional retailers
Prospects and Opportunities
Retail adult incontinence set to grow with improved awareness and wider availability
E-commerce plays a growing role in product accessibility
Innovation focuses on comfort, discretion and skin health
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 by Category: Value 2021-2024
Table 26 - Forecast Sales of Retail Adult Incontinence by Category: Value 2021-2024

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

WIPES

Key Data Findings

2024 Developments

Increased diversity and accessibility of baby wipes drive overall growth

Local producers gain traction in a competitive market

Retail dominates distribution while online sales grow steadily

Prospects and Opportunities

Urbanisation and rising hygiene awareness support category expansion

Digital platforms offer wider reach for small businesses

Convenient, on-the-go packaging is key to product innovation

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

Retail value sales growth driven by local production and shifting lifestyle trends

Multiple dynamic local players drive competition and innovation

Traditional retail continues to lead distribution, supported by growing e-commerce adoption

Prospects and Opportunities

Inflationary pressures may challenge growth, but hygiene awareness offers long-term opportunity

Toilet paper remains essential while paper towels and pocket tissues gain ground

Distribution and brand diversification strategies support wider market reach

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
Post-pandemic hygiene expectations raise demand for away-from-home tissue and hygiene
Health sector developments support away-from-home adult incontinence sales
Away-from-home adult incontinence offerings diversify to meet specific needs
Prospects and Opportunities
Sales expected to rise with greater awareness and local production
Distribution expands beyond traditional channels to include hospitals and online
Innovation focuses on discretion, comfort and enhanced functionality
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 Format: % Value 2019-2024
Table 42 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024
Table 43 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

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-ghana/report.