

Tissue and Hygiene in Qatar

March 2025

Table of Contents

Tissue and Hygiene in Qatar

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

Sales of menstrual care benefit from population growth and improved education and empowerment

Always leads but faces strong competition from cheaper brands

Hypermarkets channel is the key contributor to the sales of the menstrual care products

Prospects and Opportunities

Menstrual care expected to maintain its growth momentum

E-commerce set to play a more prominent role

High purchasing power of locals should support premiumisation

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

Sales continue to grow despite Qatar's slowing birth rate

Procter & Gamble leads the nappies/diapers/pants market

Hypermarkets channel is the key contributor to the sales of the nappies/diapers/pants products

Prospects and Opportunities

Bright outlook in the short-term

E-commerce expected to play a bigger role in the market

The high incomes of locals should encourage investment in new innovations

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

Qatar's ageing population boosts sales of retail adult incontinence

Active Hygiene brand is leading the adult incontinence market

Hypermarkets and pharmacies dominate sales but e-commerce showing promise

Prospects and Opportunities

Strong growth predictions for retail adult incontinence due to Qatar's ageing population

E-commerce set to play a bigger role in the market

Qatar's wealthy local population should encourage investment in innovation

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

Sales of personal wipes benefit from focus on hygiene and convenience

Johnson & Johnson remains the leading company in personal wipes

Hypermarkets dominate sales of the personal wipes

Prospects and Opportunities

Falling birth rate likely to put the brakes on growth

E-commerce could present new growth opportunities for personal wipes

Players expected to target new innovations at Qatar's wealthy locals

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 tissue sees solid growth in 2024

Fine leads thanks to its strong reputation for quality

Hypermarkets and supermarkets lead sales of retail tissue

Prospects and Opportunities

Bright outlook for retail tissue thanks to expanding population

E-commerce expected to play a bigger role in retail tissue over the forecast period

A solid base of wealthy locals presents opportunities for 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

Sales of away-from-home tissue growing steadily

AFH Adult incontinence is witnessing a solid growth

Fine and Sanita lead sales

Prospects and Opportunities

AFH tissue and hygiene expected to see solid growth as the market expands

Investment in digital technology set to benefit e-commerce and B2B platforms

Customisation could be the key to innovation in AFH tissue

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-qatar/report.