



Euromonitor
International

Assessing AFH Prospects Amid B2B Dynamics and Lifestyle Shifts

December 2024

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Away-from-home prospects: Three key facts in the AFH tissue industry

Away-from-home tissue products: What are they?

An index approach: Deciphering the demand drivers of the AFH tissue industry

Country rank rates AFH long-term attractiveness and identifies growth drivers

Euromonitor's AFH Tissue index: 15 holistic variables to assess AFH opportunities

UNLOCKING UNMET POTENTIAL

Emerging world leads AFH category potential with strong fundamentals and low penetration

Juxtaposing per capita penetration and past growth benchmark s market expansion timeline

Top developing markets track faster AFH demand recovery, building on low saturation

IKEA transitions into B2B in India, unlocking evolving business needs

CONSUMER LIFESTYLES ALIGNMENT

Consumer spending and lifestyle choices lay the foundation of AFH demand

Spending propensity surfaces varied horeca activities by consumers

Rise of luxury hotels supports premiumisation in China

E xpansion of Western restaurant chains in emerging world diversifies AFH occasions

CHANNEL TARGETING WITH A CONNECTED MINDSET

AFH end-user industries' performance pinpoints uneven channel strength

Which AFH channels to target across key markets?

Align B2B industry prospects and AFH end-user consumption to maximise opportunities

E-commerce provides growing leverage for AFH business development

E-commerce models foster B2B omnichannel experience, accessibility and customisation

IoT-led dispenser management offers more connected B2B ecosystem

CONCLUSION

Recommendations/Opportunities for growth

Evolution of AFH tissue

Questions we are asking

An index to assess long-term category opportunity across markets

Tissue and Hygiene Scorecard

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- **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/assessing-afh-prospects-amid-b2b-dynamics-and-lifestyle-shifts/report.