



Away-From-Home Tissue and Hygiene in South Africa

May 2026

Away-From-Home Tissue and Hygiene in South Africa - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Companies Leverage Local Production to Address Price Sensitivity

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends Away-from-Home

INDUSTRY PERFORMANCE

Companies Leverage Local Production to Address Price Sensitivity

Domestic Brands Capitalise on Demand for Affordable Tissue Solutions

Manufacturers Embrace Pulp Innovation to Drive Sustainable Procurement

Chart 2 - Value Sales 2020-2030

Chart 3 - Value Sales by Category 2025

WHAT'S NEXT?

Hospitality and Tourism Expansion Set to Drive Volume Growth for Bulk Suppliers

Private Label Investment Expected to Shapes Purchasing as Cost Trumps Brand Loyalty

Institutions Set to Prioritise Sustainable Tissue for Cost and Environmental Gains

Chart 4 - Forecast Value Sales 2020-2030

Chart 5 - Forecast Value Sales by Category 2025-2030

CHANNELS

Hospitals Drive Institutional Demand as Horeca Gains Momentum

Chart 6 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 7 - Economic Context for Away-from-Home

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 10 - Consumer Context for Away-from-Home

Chart 11 - Population 2020-2030

Chart 12 - Consumer Expenditure 2020-2030

Chart 13 - Population by Generation 2025

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[Tissue and Hygiene in South Africa - Industry Overview](#)

EXECUTIVE SUMMARY

Essential Nature of Tissue and Hygiene Products Supports Strong Demand

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 14 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Essential Nature of Tissue and Hygiene Products Supports Strong Demand

Convenience and Affordability Remain Key Purchase Drivers for South African Parents

Chart 15 - L'il Masters: Affordable Diapers

Always Wins Trust as Parents and Women Choose Comfort over Cost

Chart 16 - Always Maxi Slim Foregrounds Comfort and Security

Chart 17 - Value Sales 2020-2030

Chart 18 - Value Sales by Category 2025

WHAT'S NEXT?

South African Consumers Expected to Become Increasingly Driven by Price-To-Value Ratio

Nappies/Diapers/Pants and Retail Adult Incontinence Set to Drive Category Growth

Chart 19 - Analyst Insight for Tissue and Hygiene

Chart 20 - Forecast Value Sales 2020-2030

Chart 21 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Legacy Brands Retain Lead in Key Categories, Despite Intensifying Value Focus

Chart 22 - Company Shares 2025

Chart 23 - Brand Shares 2025

CHANNELS

Supermarkets Expand Delivery Capabilities to Reinforce Consumer Loyalty

Grocery Delivery Boosts E-Commerce but Offline Retail Remains Dominant

Chart 24 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 25 - Economic Context for Tissue and Hygiene

Chart 26 - Real Gdp Growth 2020-2030

Chart 27 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 28 - Consumer Context for Tissue and Hygiene

Chart 29 - Population 2020-2030

Chart 30 - Consumer Expenditure 2020-2030

Chart 31 - Population by Generation 2025

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