



Euromonitor
International

Tissue and Hygiene in Peru

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 INDICATORS

Table 1 - Birth Rates 2019-2024
Table 2 - Infant Population 2019-2024
Table 3 - Female Population by Age 2019-2024
Table 4 - Total Population by Age 2019-2024
Table 5 - Households 2019-2024
Table 6 - Forecast Infant Population 2024-2029
Table 7 - Forecast Female Population by Age 2024-2029
Table 8 - Forecast Total Population by Age 2024-2029
Table 9 - Forecast Households 2024-2029

MARKET DATA

Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024
Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024
Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024
Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024
Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024
Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024
Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024
Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029
Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

B2B sales increase but diminish value growth potential
Category is growing but is still poorly served by companies
Search for value leads to more efficient lines

PROSPECTS AND OPPORTUNITIES

AFH tissue and hygiene to grow as the population increases
B2B marketing tools will remain key to driving sales
Price and efficiency will be important claims in the short term

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024
Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024
Table 21 - Sales of Away-From-Home Paper Towels by Type: % Value 2019-2024

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 24 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

Retail Adult Incontinence in Peru

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rising consumer demand supports sales growth
- Plenitud maintains its lead as the gap between Tena and Secos narrows
- Discounters gain relevance amid cost-of-living pressures

PROSPECTS AND OPPORTUNITIES

- Night pants will support category growth
- E-commerce channel has scope to develop further
- Product development will centre on affordability to expand usage

CATEGORY DATA

Table 26 - Sales of Retail Adult Incontinence by Category: Value 2019-2024

Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024

Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024

Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029

Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

Nappies/Diapers/Pants in Peru

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Performance is affected by spending capacity
- Huggies (Kimberly-Clark) maintains its lead over BabySec (Softys)
- Pharmacy channels benefits from affordable product selection

PROSPECTS AND OPPORTUNITIES

- Falling birth rates force companies to focus on premium products
- E-commerce remains small but channel offers scope to engage with parents
- Products will focus on more resistant and absorbent diapers

CATEGORY DATA

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

Table 33 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024

Table 34 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024

Table 35 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029

Table 37 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

Menstrual Care in Peru

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Consumers seek better absorption and larger sizes

Productos Sancela del Perú SA (Essity) maintains leadership in menstrual care
Small local grocers gain relevance in menstrual care

PROSPECTS AND OPPORTUNITIES

Bright outlook for menstrual care
E-commerce sales to remain marginal
Potential to target new consumer segments

CATEGORY DATA

- Table 38 - Retail Sales of Menstrual Care by Category: Value 2019-2024
- Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
- Table 40 - Retail Sales of Tampons by Application Format: % Value 2019-2024
- Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
- Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
- Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
- Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

Wipes in Peru

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby and general-purpose wipes grow at the expense of other categories
Kimberly-Clark del Perú bolsters its leading position
Pharmacies are growing in relevance at national level

PROSPECTS AND OPPORTUNITIES

Baby wipes will continue to intensify, reducing potential for other categories
Brands will take advantage of impulse buying on e-commerce channels
Innovation in wipes focuses on sustainability

CATEGORY DATA

- Table 45 - Retail Sales of Wipes by Category: Value 2019-2024
- Table 46 - Retail Sales of Wipes by Category: % Value Growth 2019-2024
- Table 47 - NBO Company Shares of Retail Wipes: % Value 2020-2024
- Table 48 - LBN Brand Shares of Retail Wipes: % Value 2021-2024
- Table 49 - Forecast Retail Sales of Wipes by Category: Value 2024-2029
- Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

Retail Tissue in Peru

KEY DATA FINDINGS

2024 DEVELOPMENTS

Downtrading is evident across retail tissue category
Papelera Reyes increases its share in an increasingly competitive market
Small local grocers remains the primary channel for retail tissue

PROSPECTS AND OPPORTUNITIES

Paper towels and boxed facial tissues offer good growth, while napkins loses ground
Discounters and cash & carry to gain relevance
Product differentiation will be used to avoid heavy price competition

CATEGORY DATA

- Table 51 - Retail Sales of Tissue by Category: Value 2019-2024

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 53 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 54 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 55 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 56 - Forecast Retail Sales of Tissue 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-peru/report.