

Tissue and Hygiene in Mexico

April 2025

Table of Contents

Tissue and Hygiene in Mexico

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

Away-From-Home Tissue and Hygiene in Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

AFH toilet paper continues to lead due to its ubiquity

Ageing population drives growth for AFH adult incontinence

Fulfilling demand and maintaining competitive pricing remain most important factors

PROSPECTS AND OPPORTUNITIES

Opportunities and challenges across categories in AFH tissue and hygiene

A move could be seen towards e-commerce

Innovation may be pursued, but price likely to remain most important

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demographic changes drive growth, especially for moderate/heavy products

Players will have to innovate to maintain their competitive edge

Growth remains high for retail e-commerce as this channel offers discretion

PROSPECTS AND OPPORTUNITIES

Expansion of the consumer base set to drive growth

Seamless digital shopping experiences will drive growth for e-commerce

Lessening the stigma of incontinence products

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

The falling birth rate drives decline for nappies/diapers/pants

Private label gains share, but the two leaders continue to dominate

Although e-commerce rises from a low base, grocery retailers continue to dominate

PROSPECTS AND OPPORTUNITIES

Continued decline anticipated, driven by the falling birth rate

Discounts available online likely to drive growth for retail e-commerce

More players likely to offer comfort and sustainability to drive growth

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Gradual move from standard towels to other menstrual care products

Saba continues to dominate, but Tampax excels

Grocery retailers continue to dominate due to convenience and promotions

PROSPECTS AND OPPORTUNITIES

The move towards more discreet and comfortable products set to continue

Opportunities for growth for retail e-commerce

The need to provide eco-friendly solutions

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby wipes continues to dominate, but other types of wipes see stronger growth

Fragmentation, as different companies lead individual categories

Retail e-commerce continues to rise from a low base

PROSPECTS AND OPPORTUNITIES

Innovation and changing habits likely to contribute to growth

Slow share growth anticipated for retail e-commerce

Innovations likely to follow the sustainability and skinification trends

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Toilet paper and paper towels drive growth as premiumisation is seen

Kimberly-Clark dominates, but stronger rises seen from smaller players

Grocery retailers continue to dominate

PROSPECTS AND OPPORTUNITIES

Paper towels will continue to drive growth due to innovation and premiumisation

Opportunities in expanding online sales strategies

Innovation in products, packaging and distribution expected

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-mexico/report.