



Euromonitor  
International

# Tissue and Hygiene in the US

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

Growth in AFH tissue driven by quality expectations and policy changes  
Despite growth, shifting preferences in long-term care hinder growth for AFH adult incontinence  
Innovative moves by established tissue players to restructure activity

PROSPECTS AND OPPORTUNITIES

Comfort will lead innovation in AFH incontinence, and return-to-work and global warming to drive growth for AFH boxed facial tissues  
AFH tissue and hygiene expected to witness increased mergers and acquisitions activity  
Business and horeca expected to lead channel development over the forecast period

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 the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Absorbency ranks as the top concern, while campaigns encourage the discussion of incontinence

Moderate/heavy adult incontinence products in pull-up format are most desired, and brands expand colours and sizes

Retail e-commerce gains traction as crowdsourcing and expert feedback streamline the path to purchase

PROSPECTS AND OPPORTUNITIES

Skin health and plant-based materials likely to be top priorities

Brands develop marketing and products aimed at under-represented consumer demographics

Alternative treatments hold promise as a long-term solution for younger patients

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 the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Marginal improvement in volume growth rate in 2024 owing to easing inflationary conditions and uptick in birth rate

Procter & Gamble and Kimberly Clark continue to lead nappies/diapers/pants in 2024, while insurgents gain share

Ongoing financial uncertainty makes cost reduction and supply optimisation key business priorities

PROSPECTS AND OPPORTUNITIES

Disposable pants and comfort-forward options set to drive growth

Collaborative sustainability paves the way for future eco-friendly initiatives

Brand-building and value-added innovations targeting performance, skin health, and inclusivity will help solidify competitiveness

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 the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Comfort and price sensitivity shape menstrual care trends

New brands catering to tweens emphasise period education and building self-confidence  
Reusable formats bring variety, although are unlikely to overtake disposable products

PROSPECTS AND OPPORTUNITIES

Plant-based pads set to gain popularity as consumers seek natural, skin-friendly options  
Biomarker monitoring brings at-home diagnostic wearables to the market  
Corporate and community partnerships strengthen efforts to end period poverty

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 the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moist toilet wipes posts healthy growth, while baby wipes sees demand soften, and general purpose wipes rebounds to growth  
Convenience and multifunctionality influence the development of personal care wipes, but price sensitivity determines choices  
Sustainability drives further innovations and fosters healthy competition

PROSPECTS AND OPPORTUNITIES

Legislation regarding flushability, labelling, and ingredient transparency will continue to pose challenges and necessitate further innovation  
Skin health and wellness to become a key driver of innovation  
Digitalisation to gain importance in the forecast period

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 the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mixed landscape, with an improving volume performance, but softer topline value growth  
Private label continues to lead the charge of volume and value performances  
Online retail perks expected to lead to shifts in retail tissue channel distribution

PROSPECTS AND OPPORTUNITIES

Escalating growth potential for facial tissues tied to effects of global warming  
Omnichannel presence will be key to engage with consumers  
Sustainability innovation still top of consumers' minds for value

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

Rx/Reimbursement Adult Incontinence in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Medicaid disenrollment poses challenges for vulnerable populations, including older people

Florida inactive in Medicaid re-enrolment, while most states take steps to streamline re-enrolment

Updated guidelines for women's preventative health include annual incontinence screening

PROSPECTS AND OPPORTUNITIES

Streamlined Medicaid enrolment will take effect

Millions expected to lose coverage if the Affordable Care Act is repealed

Flexible Spending Accounts offer greater coverage for incontinence supplies than Medicaid

CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2019-2024

Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2019-2024

Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2024-2029

Table 60 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 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-the-us/report](http://www.euromonitor.com/tissue-and-hygiene-in-the-us/report).