



Euromonitor
International

Tissue and Hygiene in South Africa

May 2026

Table of Contents

Tissue and Hygiene in South Africa

EXECUTIVE SUMMARY

Essential Nature of Tissue and Hygiene Products Supports Strong Demand

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - 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 2 - L'il Masters: Affordable Diapers

Always Wins Trust as Parents and Women Choose Comfort over Cost

Chart 3 - Always Maxi Slim Foregrounds Comfort and Security

Chart 4 - Value Sales 2020-2030

Chart 5 - 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 6 - Analyst Insight for Tissue and Hygiene

Chart 7 - Forecast Value Sales 2020-2030

Chart 8 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

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

Chart 9 - Company Shares 2025

Chart 10 - Brand Shares 2025

CHANNELS

Supermarkets Expand Delivery Capabilities to Reinforce Consumer Loyalty

Grocery Delivery Boosts E-Commerce but Offline Retail Remains Dominant

Chart 11 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 12 - Economic Context for Tissue and Hygiene

Chart 13 - Real Gdp Growth 2020-2030

Chart 14 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 15 - Consumer Context for Tissue and Hygiene

Chart 16 - Population 2020-2030

Chart 17 - Consumer Expenditure 2020-2030

Chart 18 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Away-From-Home Tissue and Hygiene in South Africa

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Companies Leverage Local Production to Address Price Sensitivity

KEY INDUSTRY TRENDS

Chart 19 - 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 20 - Value Sales 2020-2030

Chart 21 - 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 Shape Purchasing as Cost Trumps Brand Loyalty

Institutions Set to Prioritise Sustainable Tissue for Cost and Environmental Gains

Chart 22 - Forecast Value Sales 2020-2030

Chart 23 - Forecast Value Sales by Category 2025-2030

CHANNELS

Hospitals Drive Institutional Demand as Horeca Gains Momentum

Chart 24 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 25 - Economic Context for Away-from-Home

Chart 26 - Real Gdp Growth 2020-2030

Chart 27 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 28 - Consumer Context for Away-from-Home

Chart 29 - Population 2020-2030

Chart 30 - Consumer Expenditure 2020-2030

Chart 31 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Adult Incontinence in South Africa](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Rapid Home Delivery Continues to Improve Access to Essential Care

KEY INDUSTRY TRENDS

Chart 32 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Rapid Home Delivery Continues to Improve Access to Essential Care

Super Absorbent Polymer Technology Enables Thinner and More Discreet Products

Chart 33 - Value Sales 2020-2030

Chart 34 - Volume Sales 2020-2030

Chart 35 - Value Sales by Category 2025

WHAT'S NEXT?

Ageing Population Projected to Support Category Growth

Private Label Retailers Set to Capture Value-Driven Shoppers

Chart 36 - Analyst Insight for Retail Adult Incontinence

Sustainability Expected to Become a Key Differentiating Factor

Chart 37 - Forecast Value Sales 2020-2030

Chart 38 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Household Name Brands Defend Lead as Private Label Grows

Chart 39 - Company Shares 2025

Chart 40 - Brand Shares 2025

CHANNELS

Dis-Chem and Clicks Focus on Growing Store Numbers to Drive Sales

Chart 41 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 42 - Economic Context for Retail Adult Incontinence

Chart 43 - Real Gdp Growth 2020-2030

Chart 44 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 45 - Consumer Context for Retail Adult Incontinence

Chart 46 - Population 2020-2030

Chart 47 - Consumer Expenditure 2020-2030

Chart 48 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Nappies/Diapers/Pants in South Africa](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Affordability Remains Key for Value-Focused Shoppers as Spending Power Shrinks

KEY INDUSTRY TRENDS

Chart 49 - Key Industry Trends for Nappies/Diapers/Pants

INDUSTRY PERFORMANCE

Affordability Remains Key for Value-Focused Shoppers as Spending Power Shrinks

Chart 50 - L'il Masters Produces Affordable Nappies

Premium Brands Win Trust at Night as Parents Prioritise Reliability

Chart 51 - Disposable Diapers Offer Convenience

Convenience Comes Out on Top for Busy Families

Chart 52 - Value Sales 2020-2030

Chart 53 - Volume Sales 2020-2030

Chart 54 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label Set to Narrow the Quality Gap to Challenge Premium Brands

Nappies/Diapers Set to Maintain Volume Lead as Disposable Pants Register Slow Growth

Chart 55 - Analyst Insight for Nappies/Diapers/Pants

Chart 56 - Forecast Value Sales 2020-2030

Chart 57 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Pampers and Huggies Retain Leadership as Parents Mix Brands for Value and Trust

Chart 58 - Company Shares 2025

Chart 59 - Brand Shares 2025

CHANNELS

Supermarkets Extend Reach through Delivery to Reinforce Dominance

Retail E-Commerce Gains Traction but Remains a Niche Channel

Chart 60 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 61 - Economic Context for Nappies/Diapers/Pants

Chart 62 - Real Gdp Growth 2020-2030

Chart 63 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 64 - Consumer Context for Nappies/Diapers/Pants

Chart 65 - Population 2020-2030

Chart 66 - Consumer Expenditure 2020-2030

Chart 67 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Menstrual Care in South Africa](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Grocery Retailers Accelerate E-Commerce Adoption with Loyalty Programme and On-Demand Delivery

KEY INDUSTRY TRENDS

Chart 68 - Key Industry Trends for Menstrual Care

INDUSTRY PERFORMANCE

Grocery Retailers Accelerate E-Commerce Adoption with Loyalty Programme and On-Demand Delivery

Growth Remains Constrained by Affordability Challenges

Premium Brands Adjust Innovation Strategies to Prioritise Comfort

Chart 69 - South African Consumers Value Security Over Discretion When Purchasing Sanitary Towels

Chart 70 - Value Sales 2020-2030

Chart 71 - Volume Sales 2020-2030

Chart 72 - Value Sales by Category 2025

WHAT'S NEXT?

E-Commerce Set to Continue Shaping Purchasing Behaviour for Menstrual Care Products, While Affordability Will Remain of Key Importance

Chart 73 - Analyst Insight for Menstrual Care

Pantyliners Expected to Sustain Volume Lead as Disposable Period Pants Accelerate

Chart 74 - Forecast Value Sales 2020-2030

Chart 75 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Legacy Brands Remain Strong but Face Challenges From Private Label Competitors

Chart 76 - Company Shares 2025

Chart 77 - Brand Shares 2025

CHANNELS

Supermarkets Expand Digital Delivery to Maintain Sales Leadership

Retail E-Commerce Gains Traction as Delivery Services Expand

Chart 78 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 79 - Economic Context for Menstrual Care

Chart 80 - Real Gdp Growth 2020-2030

Chart 81 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 82 - Consumer Context for Menstrual Care

Chart 83 - Population 2020-2030

Chart 84 - Consumer Expenditure 2020-2030

Chart 85 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Wipes in South Africa](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retailers Use Consumer Reliance on Promotions to Boost Sales

KEY INDUSTRY TRENDS

Chart 86 - Key Industry Trends for Wipes

INDUSTRY PERFORMANCE

Retailers Use Consumer Reliance on Promotions to Boost Sales

Pick 'N Pay App Capitalises on Mass Adoption of Online Grocery Retailing

Municipalities Challenge Flushable Claims Amid Infrastructure Issues

Chart 87 - Value Sales 2020-2030

Chart 88 - Value Sales by Category 2025

WHAT'S NEXT?

Major Retailers to Continue Using Digital Campaigns to Drive Sales Growth

Private Label Quality Expected to Improve Further as Consumers Trade Down

Chart 89 - Analyst Insight for Wipes

Kimberly-Clark Southern Africa (Holdings) Pty Ltd Leads Shift to Biodegradable Wipes as Regulatory Scrutiny Intensifies

Chart 90 - Forecast Value Sales 2020-2030

Chart 91 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Premium Brands Leverage Consumer Loyalty to Sustain Lead

Chart 92 - Company Shares 2025

Chart 93 - Brand Shares 2025

CHANNELS

Supermarkets Strengthen Lead as Home Delivery Expands Access

Grocery Delivery Apps Drive Online Share as E-Commerce Edges Higher

Chart 94 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 95 - Economic Context for Wipes

Chart 96 - Real Gdp Growth 2020-2030

Chart 97 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 98 - Consumer Context for Wipes

Chart 99 - Population 2020-2030

Chart 100 - Consumer Expenditure 2020-2030

Chart 101 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Tissue in South Africa](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Savings Mindset Drives Retail Tissue Dynamics

KEY INDUSTRY TRENDS

Chart 102 - Key Industry Trends for Retail Tissue

INDUSTRY PERFORMANCE

Savings Mindset Drives Retail Tissue Dynamics

Loyalty Cards Become Essential as Shoppers Chase Discounts and Stretch Budgets

Chart 103 - More South African Consumers Are Relying on Loyalty Cards

Chart 104 - Value Sales 2020-2030

Chart 105 - Volume Sales 2020-2030

Chart 106 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label Set to Expand Share as Consumers Prioritise Affordability and Value

E-Commerce Projected to Accelerate Repeat Purchases and Drive Subscription Adoption

Chart 107 - E-Commerce Grocery Platforms Are Witnessing Huge Growth

Sustainable Local Production Forecast to Gain Traction among Environmentally Conscious Shoppers

Chart 108 - Analyst Insight for Retail Tissue

Chart 109 - Forecast Value Sales 2020-2030

Chart 110 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Legacy Brands Maintain Lead While Private Label Grows Share

Chart 111 - Company Shares 2025

Chart 112 - Brand Shares 2025

CHANNELS

Supermarkets Leverage Delivery Expansion to Reinforce Dominance

Grocery Delivery Drives E-Commerce'S Value Share Growth

Chart 113 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 114 - Economic Context for Retail Tissue

Chart 115 - Real Gdp Growth 2020-2030

Chart 116 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 117 - Consumer Context for Retail Tissue

Chart 118 - Population 2020-2030

Chart 119 - Consumer Expenditure 2020-2030

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-south-africa/report.