



Euromonitor
International

Tissue and Hygiene in Kenya

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

Urbanisation and tourism drive away-from-home tissue growth
Limited growth in away-from-home adult incontinence amid low awareness
Innovation responds to demand for sustainable solutions

PROSPECTS AND OPPORTUNITIES

Continued tourism growth to drive away-from-home tissue demand
Sustainability interest to challenge cost-sensitive market
Public health awareness to drive innovation and growth

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

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

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

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

Retail Adult Incontinence in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growing awareness amidst social stigma
- Local production boosts competitive dynamics
- Retail channels evolve with consumer education and digital growth

PROSPECTS AND OPPORTUNITIES

- Educational initiatives to underpin market growth
- E-commerce channels set to drive future growth
- Innovation through education and enhanced product features

CATEGORY DATA

Table 25 - Sales of Retail Adult Incontinence by Category: Value 2019-2024

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

Table 27 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024

Table 28 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024

Table 29 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029

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

Nappies/Diapers/Pants in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Increased adoption and affordability drive growth in nappies/diapers/pants
- Local and international manufacturers gain share through innovation and affordability
- Retail evolution boosts supermarkets and small local stores; e-commerce expands

PROSPECTS AND OPPORTUNITIES

- Rising birth rates and local production to propel category growth
- E-commerce evolution to accelerate category growth
- Product innovation focused on affordability and enhanced functionality

CATEGORY DATA

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

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

Table 33 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024

Table 34 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024

Table 35 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029

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

Menstrual Care in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Increased affordability drives growth in standard towels
- Affordability boosts market share for emerging local manufacturers

Expansion of modern retail and e-commerce reshapes distribution channels

PROSPECTS AND OPPORTUNITIES

- Government initiatives and inclusivity to drive sustained growth
- Accelerating growth through e-commerce expansion
- Innovative product designs cater to sustainability and consumer needs

CATEGORY DATA

- Table 37 - Retail Sales of Menstrual Care by Category: Value 2019-2024
- Table 38 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
- Table 39 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
- Table 40 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
- Table 41 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
- Table 42 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

Wipes in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Strong demand from affluent consumers boosts baby wipes sales
- Local competition intensifies as affordability shapes market dynamics
- Expansion of supermarkets reshapes wipes distribution

PROSPECTS AND OPPORTUNITIES

- Baby wipes expected to sustain growth driven by high-income households
- E-commerce growth supported by digital adoption
- Innovation driven by multifunctional product appeal

CATEGORY DATA

- Table 43 - Retail Sales of Wipes by Category: Value 2019-2024
- Table 44 - Retail Sales of Wipes by Category: % Value Growth 2019-2024
- Table 45 - NBO Company Shares of Retail Wipes: % Value 2020-2024
- Table 46 - LBN Brand Shares of Retail Wipes: % Value 2021-2024
- Table 47 - Forecast Retail Sales of Wipes by Category: Value 2024-2029
- Table 48 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

Retail Tissue in Kenya

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rising consumer demand boosts retail tissue sales
- Competitive landscape sees growth through affordability and market penetration
- Distribution dynamics driven by proximity, convenience, and digital expansion

PROSPECTS AND OPPORTUNITIES

- Environmental regulations and consumer preferences to drive sustained growth
- Sustainability and skin care focus reshape product innovation
- Social media marketing and e-commerce redefine distribution channels

CATEGORY DATA

- Table 49 - Retail Sales of Tissue by Category: Value 2019-2024
- Table 50 - Retail Sales of Tissue by Category: % Value Growth 2019-2024
- Table 51 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 53 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 54 - 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-kenya/report.