



Tissue and Hygiene in Serbia

April 2026

Table of Contents

Tissue and Hygiene in Serbia

EXECUTIVE SUMMARY

Discounters Expand Private Label Offerings as Price Sensitivity Rises

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Discounters Expand Private Label Offerings as Price Sensitivity Rises

Chart 2 - Dm Expands Private Label Offering

Top International Brands Respond with Plastic-Free Wipes to Private Label Product Competition

Chart 3 - Pampers Offers 0% Plastic Wipes

Leading Players Promote Eco-Friendly Tissue with Natural Cellulose

Chart 4 - Value Sales 2020-2030

Chart 5 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label and Discounter Strategies to Reshape Consumer Preferences

Retail Tissue to Maintain Lead as Adult Incontinence Accelerates

Innovation and Sustainability to Drive Competitive Responses to Price Pressure

Chart 6 - Forecast Value Sales 2020-2030

Chart 7 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Dreniknd Doo Strengthens Lead through Innovation and Broad Distribution

Chart 8 - Company Shares 2025

Chart 9 - Brand Shares 2025

CHANNELS

Retailers Drive Store Visits with Affordability as Shoppers Prioritise Price

E-Commerce Stalls as Shoppers Return to Stores for Essentials

Chart 10 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 11 - Economic Context for Tissue and Hygiene

Chart 12 - Real Gdp Growth 2020-2030

Chart 13 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 14 - Consumer Context for Tissue and Hygiene

Chart 15 - Population 2020-2030

Chart 16 - Consumer Expenditure 2020-2030

Chart 17 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Away-From-Home Tissue and Hygiene in Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Fast Food Chains Boost Premium Tissue Demand with New Outlets

KEY INDUSTRY TRENDS

Chart 18 - Key Industry Trends for Away-From-Home Tissue and Hygiene

INDUSTRY PERFORMANCE

Fast Food Chains Boost Premium Tissue Demand with New Outlets

International Chains Drive Shift to Premium, Branded Tissue

Chart 19 - Value Sales 2020-2030

Chart 20 - Value Sales by Category 2025

WHAT'S NEXT?

Major Events and Hotel Investments to Drive Premium Tissue Demand

Paper Towels to Replace Air Dryers as Hygiene Focus Intensifies

Eco-Friendly Tissue Launches Accelerate as Sustainability Gains Traction

Chart 21 - Forecast Value Sales 2020-2030

Chart 22 - Forecast Value Sales by Category 2025-2030

CHANNELS

Local Manufacturers and International Brands Set Dual Standard for Horeca Supply

Chart 23 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 24 - Economic Context for Away-From-Home Tissue and Hygiene

Chart 25 - Real Gdp Growth 2020-2030

Chart 26 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 27 - Consumer Context for Away-From-Home Tissue and Hygiene

Chart 28 - Population 2020-2030

Chart 29 - Consumer Expenditure 2020-2030

Chart 30 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Adult Incontinence in Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Abena Introduces Male-Specific Innovation to Boost Product Adoption

KEY INDUSTRY TRENDS

Chart 31 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Abena Introduces Male-Specific Innovation to Boost Product Adoption

Chart 32 - Abena Launches Light Adult Incontinence Shield for Men

Premium Offerings to Meet Rising Demand for Comfort

Chart 33 - Seni Extends Assortment of Premium Adult Incontinence

Health and Beauty Specialists Win Price-Sensitive Shoppers with Aggressive Discounting

Chart 34 - Value Sales 2020-2030

Chart 35 - Volume Sales 2020-2030

Chart 36 - Value Sales by Category 2025

WHAT'S NEXT?

Manufacturers to Accelerate Innovation to Capture Demand for Discreet Comfort

Chart 37 - Forecast Value Sales 2020-2030

Chart 38 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Established Players Maintain Their Lead through Innovation and Broad Distribution

Chart 39 - Analyst Insight for Retail Adult Incontinence

Chart 40 - Company Shares 2025

Chart 41 - Brand Shares 2025

CHANNELS

Health and Beauty Specialists Expand Share by Offering Discounts and Trusted Advice

E-Commerce Gains Traction as Pharmacies Promote Online Convenience and Home Delivery

Chart 42 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 43 - Economic Context for Retail Adult Incontinence

Chart 44 - Real Gdp Growth 2020-2030

Chart 45 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 46 - Consumer Context for Retail Adult Incontinence

Chart 47 - Population 2020-2030

Chart 48 - Consumer Expenditure 2020-2030

Chart 49 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Nappies/Diapers/Pants in Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Big Brands Adapt as Birth Rates Fall and Shoppers Seek Value

KEY INDUSTRY TRENDS

Chart 50 - Key Industry Trends for Nappies/Diapers/Pants

INDUSTRY PERFORMANCE

Big Brands Adapt as Birth Rates Fall and Shoppers Seek Value

Chart 51 - Dm Widens its Private Label Range of Babylove Diapers

Retailers and Producers Drive Value through Innovation and Affordability

Chart 52 - Violeta Improves its Premium Line of Diapers

Chart 53 - Value Sales 2020-2030

Chart 54 - Volume Sales 2020-2030

Chart 55 - Value Sales by Category 2025

WHAT'S NEXT?

Retailers to Drive Volume with Discount-Led Strategies

Leading Players and Premium Pants to Offset Shrinking Nappies Base through Innovation

Shrinking Child Population and Income Pressures Reshape Purchasing Patterns

Chart 56 - Forecast Value Sales 2020-2030

Chart 57 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Dm-Drogerie Markt Leverages Value and Range to Close the Gap with Procter & Gamble

Chart 58 - Analyst Insight for Nappies/Diapers/Pants

Chart 59 - Company Shares 2025

Chart 60 - Brand Shares 2025

CHANNELS

Health and Beauty Specialists Attract Price-Sensitive Parents with Deep Discounts on Nappies

E-Commerce Stagnates as Health and Beauty Specialists Take Lead

Chart 61 - Retail Channels 2020-2025

ECONOMIC CONTEXT

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 Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Brands Expand Affordable Offerings to Meet Price Sensitivity

KEY INDUSTRY TRENDS

Chart 68 - Key Industry Trends for Menstrual Care

INDUSTRY PERFORMANCE

Brands Expand Affordable Offerings to Meet Price Sensitivity

Leading Players Innovate with Comfort, Eco Features and Premiumisation

Chart 69 - Always Launches Towels with Improved, Softer Upper Layers

Retailers Leverage Private Label Products and Premium Features to Capture Shifting Consumer Behaviour

Chart 70 - DM Offers a Wider Assortment of Private Label Menstrual Care

Chart 71 - Value Sales 2020-2030

Chart 72 - Volume Sales 2020-2030

Chart 73 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label Offerings to Expand Assortment and Price Focus, Challenging Leading Brands

Pantyliners to Sustain Robust Growth as Towels Hold Largest Share

Innovation to Fuel Premium and Value Dynamics

Chart 74 - Forecast Value Sales 2020-2030

Chart 75 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble Drives Value Share Gains through Retail Innovation

Chart 76 - Analyst Insight for Menstrual Care

Chart 77 - Company Shares 2025

Chart 78 - Brand Shares 2025

CHANNELS

Private Label Products Drive Offline Sales as Shoppers Seek Lower Prices

Online Sales Lose Momentum as Consumers Return to Offline Stores

Chart 79 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 80 - Economic Context for Menstrual Care

Chart 81 - Real Gdp Growth 2020-2030

Chart 82 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 83 - Consumer Context for Menstrual Care

Chart 84 - Population 2020-2030

Chart 85 - Consumer Expenditure 2020-2030

Chart 86 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Wipes in Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retailers Drive Private Label Expansion as Price-Sensitive Shoppers Shift Behaviour

KEY INDUSTRY TRENDS

Chart 87 - Key Industry Trends for Wipes

INDUSTRY PERFORMANCE

Retailers Drive Private Label Expansion as Price-Sensitive Shoppers Shift Behaviour

Chart 88 - dm Private Label Wipes

Leading Brands Innovate with Premium and Convenient Wipe Launches

Chart 89 - Pampers Introduces 0% Plastic Wipes

Government Price Controls and Convenience Trends Reshape Shopper Choices

Chart 90 - Value Sales 2020-2030

Chart 91 - Value Sales by Category 2025

WHAT'S NEXT?

Health and Beauty Specialists to Attract Cost-Conscious Shoppers as Value Brands Gain Ground

Personal Wipes to Expand Reach as Moist Toilet Paper Accelerates

Shoppers to Prioritise Value as Premium and Private Label Strategies Diverge

Chart 92 - Forecast Value Sales 2020-2030

Chart 93 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Established Players Defend Lead as Local Rivals Gain Ground

Chart 94 - Company Shares 2025

Chart 95 - Brand Shares 2025

CHANNELS

Health and Beauty Specialists Expand Private Label Offerings and Boost Affordability

E-Commerce Maintains Minimal Share as Shoppers Stay Offline

Chart 96 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 97 - Economic Context for Wipes

Chart 98 - Real Gdp Growth 2020-2030

Chart 99 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 100 - Consumer Context for Wipes

Chart 101 - Population 2020-2030

Chart 102 - Consumer Expenditure 2020-2030

Chart 103 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Tissue in Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Brands Boost Eco-Friendly Toilet Paper Sales by Focusing on Sustainability and Consumer Experience

KEY INDUSTRY TRENDS

Chart 104 - Key Industry Trends for Retail Tissue

INDUSTRY PERFORMANCE

Brands Boost Eco-Friendly Toilet Paper Sales by Focusing on Sustainability and Consumer Experience

Chart 105 - 100% Pure Cellulose and Unbleached Toilet Paper

Chart 106 - Zewa Offers Durable Paper Towels for Wet Cleaning

Chart 107 - Value Sales 2020-2030

Chart 108 - Volume Sales 2020-2030

Chart 109 - Value Sales by Category 2025

WHAT'S NEXT?

Discounter Chains to Expand and Drive Toilet Paper Growth

Private Label and Eco-Innovation to Reshape Consumer Preferences

Urbanisation and Ageing to Support Hygiene-Driven Demand Stability

Chart 110 - Forecast Value Sales 2020-2030

Chart 111 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Drekn? Invests in Innovation to Widen Its Lead

Chart 112 - Analyst Insight for Retail Tissue

Chart 113 - Company Shares 2025

Chart 114 - Brand Shares 2025

CHANNELS

Health and Beauty Specialists Challenge Grocery Stores with Price-Led Tissue Promotions

Aggressive Health and Beauty Specialists Pricing Slows E-Commerce Tissue Adoption

Chart 115 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 116 - Economic Context for Retail Tissue

Chart 117 - Real Gdp Growth 2020-2030

Chart 118 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 119 - Consumer Context for Retail Tissue

Chart 120 - Population 2020-2030

Chart 121 - Consumer Expenditure 2020-2030

Chart 122 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Rx/Reimbursement Adult Incontinence in Serbia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Price-Conscious Patients Prioritise Quantity over Quality as Reimbursement Caps Shape Purchasing Choices

KEY INDUSTRY TRENDS

Chart 123 - Key Industry Trends for Rx/Reimbursement Adult Incontinence

INDUSTRY PERFORMANCE

Price-Conscious Patients Prioritise Quantity over Quality as Reimbursement Caps Shape Purchasing Choices

Premium Designs Gain Traction as Producers Respond to Rising Expectations for Comfort and Dignity

Rising Elderly Population Fuels Steady Demand as Reimbursement Ensures Ongoing Access

Chart 124 - Value Sales 2020-2030

Chart 125 - Volume Sales 2020-2030

WHAT'S NEXT?

Rising Elderly Population and Reimbursement Changes Drive Product Access

Price Sensitivity and Cheaper Alternatives Reshape Purchasing Behaviour

Chart 126 - Forecast Value Sales 2020-2030

ECONOMIC CONTEXT

Chart 127 - Economic Context for Rx/Reimbursement Adult Incontinence

Chart 128 - Real Gdp Growth 2020-2030

Chart 129 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 130 - Consumer Context for Rx/Reimbursement Adult Incontinence

Chart 131 - Population 2020-2030

Chart 132 - Consumer Expenditure 2020-2030

Chart 133 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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-serbia/report.