

# Tissue and Hygiene in Costa Rica

March 2025

**Table of Contents** 

# Tissue and Hygiene in Costa Rica

## **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 Costa Rica

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Toilet paper demand boosted by the recovery of tourism and stable inflation

Ageing of population supports sales of AFH adult incontinence

Kimberly-Clark Professional dominates with its strong brand recognition

# PROSPECTS AND OPPORTUNITIES

Post-pandemic recovery and government investment in tourism will drive growth

Kimberly-Clark to strengthen its position with new distribution centre

Premiumisation expected to increase

# **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 Costa Rica

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Volume growth fuelled by an ageing population and reduced stigma

Essity leads, whilst Walmart leaves

Local health and beauty specialists offer convenience

# PROSPECTS AND OPPORTUNITIES

Growth fuelled by a growing elderly population and increasing education

Potential VAT reduction

Rising popularity of pants

#### 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 Costa Rica

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Growth supported by price declines

Kimberly-Clark maintains its leadership, benefiting from its manufacturing site in Costa Rica

Supermarkets lead, offering a wide product range

# PROSPECTS AND OPPORTUNITIES

Future growth driven by consumers gaining greater access to more affordable options

Kimberly-Clark to maintain its lead with the opening of a new distribution centre

Pants and e-commerce appeal to higher-income consumers

# **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 Costa Rica

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Declining use of 'non-essential' pantyliners

Essity maintains its lead, using price reductions to combat rising competition from private label

Supermarkets lead, offering a wide range of brands

## PROSPECTS AND OPPORTUNITIES

Moderate growth with new offerings and education

E-commerce expansion

Major players will drive innovation and education

## **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 - I BN 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 Costa Rica

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Declining prices drive volume growth in 2024

Kimberly-Clark leads, but loses share to new market entrants

Supermarkets appreciated for their offer of a broad range of products with different price points

# PROSPECTS AND OPPORTUNITIES

Increased competition and price promotions drive growth

Intensifying competition with the influx of cheaper and unknown brands

Specialised products could drive growth

# 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 Costa Rica

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Price adjustments support volume sales in 2024

Kimberly-Clark benefits from its extensive distribution network

Modern grocery retailers lead, offering a wide range of brands and price points

# PROSPECTS AND OPPORTUNITIES

Rising competition and pressure on prices

Kimberly-Clark to strengthen its position with new distribution centre

Growth for facial tissue and tableware as new brands enter the landscape

# **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 focusing 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-costa-rica/report.