

Tissue and Hygiene in Sweden

March 2025

Table of Contents

Tissue and Hygiene in Sweden

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

A positive performance seen from AFH tissue and hygiene in 2024

Adult incontinence on the rise

Innovation focuses on comfort and protection

PROSPECTS AND OPPORTUNITIES

Challenges remain within AFH tissue and hygiene despite positive outlook

Distribution landscape unlikely to see any significant movements

Digitalisation could become a more prominent feature of the market

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Light adult incontinence continues to dominate sales

Tena loses share to private label as consumers become more price sensitive

Distribution shifts online as consumers seek convenience and discretion

PROSPECTS AND OPPORTUNITIES

Outlook

E-commerce still full of potential

Innovation likely to focus on comfort, discretion and sustainability

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales decline as Sweden's birth rate continues to fall

Essity leads but LidI the big mover as consumers look for the best value

Distribution shifts towards discounters and e-commerce as consumers look for value and convenience

PROSPECTS AND OPPORTUNITIES

Players likely to focus on adding value as Sweden's birth rate falls

E-commerce set to play a more important role in nappies/diapers/pants

Innovation will remain key to standing out in the market

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Pantyliners remain on top thanks to everyday usage

Essity remains on top while Lidl benefits from its value positioning Distribution shifts towards more affordable channels as consumers feel the pinch

PROSPECTS AND OPPORTUNITIES

Pantyliners likely to remain the key growth driver

E-commerce expected to play a more prominent role in menstrual care

Innovation set to focus on efficacy and sustainability

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Economic pressures impact sales of wipes in 2024

Essity leads thanks to well-established trust in its brands

Distribution landscape sees a slight shift towards budget-friendly options

PROSPECTS AND OPPORTUNITIES

Mixed outlook for wipes as consumers focus on hygiene and the environment

E-commerce set to play a bigger role in wipes

Innovation likely to focus on health and the environment

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Toilet paper remains a basic essential with premiumisation driving value growth Private label the big winner in 2024 as consumers adopt cost-cutting measures

Distribution shifts towards more affordable channels but supermarkets remain on top

PROSPECTS AND OPPORTUNITIES

Positive outlook for retail tissue

Distribution set to focus more e-commerce

Innovation likely to target both ends of the price spectrum as well as sustainability

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sweden's ageing population remains the key growth driver
Tena continues to lead thanks to its well-established position in the market
Increased focus on health and self-care benefits sales

PROSPECTS AND OPPORTUNITIES

Sales should continue to benefit from Sweden's ageing population Innovation expected to focus on comfort, efficacy and discreetness Awareness campaigns will remain important to growth

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 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-sweden/report.