

Tissue and Hygiene in Cambodia

March 2025

Table of Contents

Tissue and Hygiene in Cambodia

EXECUTIVE SUMMARY

Tissue and hygiene in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

What next for tissue and hygiene?

Chart 1 - Tissue and Hygiene: Supermarket Chart 2 - Tissue and Hygiene: Supermarket Chart 3 - Tissue and Hygiene: Supermarket

MARKET DATA

Table 1 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024

Table 2 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 3 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024

Table 4 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024

Table 5 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024

Table 6 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024

Table 7 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024

Table 8 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029

Table 9 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

MENSTRUAL CARE

Key Data Findings

2024 Developments

Rising awareness and accessibility drive growth in menstrual care

Unicharm leads, but competition intensifies

Supermarkets and pharmacies dominate

Prospects and Opportunities

Growing awareness and expansion of product accessibility

E-commerce adoption to rise gradually

Innovation and marketing to drive consumer engagement

Category Data

Table 10 - Retail Sales of Menstrual Care by Category: Value 2019-2024

Table 11 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024

Table 12 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024

Table 13 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024

Table 14 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029

Table 15 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

NAPPIES/DIAPERS/PANTS

Key Data Findings

2024 Developments

Growing demand for disposable nappies driven by rising awareness and accessibility

Unicharm leads the market, but competition is increasing

Supermarkets and baby care stores emerge as key distribution channels

Prospects and Opportunities

Strong growth outlook as disposable nappy adoption increases

E-commerce adoption to rise gradually but remain secondary to physical retail

Innovation to focus on skin-friendly materials and comfort

Category Data

- Table 16 Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024
- Table 17 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024
- Table 18 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024
- Table 19 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024
- Table 20 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029
- Table 21 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

RETAIL ADULT INCONTINENCE

Key Data Findings

2024 Developments

Growing awareness and demand in urban areas

Taisun Vietnam Ltd leads retail adult incontinence

Pharmacies dominate distribution channels

Prospects and Opportunities

Sustained market growth anticipated

Slow but steady evolution of e-commerce

Product innovation focused on comfort and functionality

Category Data

- Table 22 Sales of Retail Adult Incontinence by Category: Value 2019-2024
- Table 23 Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024
- Table 24 NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024
- Table 25 LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024
- Table 26 Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029
- Table 27 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

WIPES

2024 Developments

Gradual adoption of wipes driven by urbanisation and convenience

Competitive landscape sees strong positioning of leading brands

Retail expansion supports greater accessibility to wipes

Prospects and Opportunities

Strong sales growth expected, driven by convenience and hygiene awareness

E-commerce growth to remain slow but steady

Innovation in skin-friendly formulations to drive demand

RETAIL TISSUE

Key Data Findings

2024 Developments

Retail tissue demand continues to grow alongside rising hygiene awareness

Competitive landscape remains strong, with leading brands maintaining dominance

Independent grocery stores remain dominant, while modern retail gains traction

Prospects and Opportunities

Retail tissue sales expected to rise alongside modern retail expansion

Independent grocery stores and convenience stores to dominate distribution

Innovation in softness and strength to enhance consumer appeal

Category Data

- Table 28 Retail Sales of Tissue by Category: Value 2019-2024
- Table 29 Retail Sales of Tissue by Category: % Value Growth 2019-2024
- Table 30 NBO Company Shares of Retail Tissue: % Value 2020-2024
- Table 31 LBN Brand Shares of Retail Tissue: % Value 2021-2024
- Table 32 Forecast Retail Sales of Tissue by Category: Value 2024-2029
- Table 33 Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

AWAY-FROM-HOME TISSUE AND HYGIENE

Key Data Findings

2024 Developments

Growing hygiene awareness drives demand for away-from-home tissue

Away-from-home adult incontinence products face slow adoption despite an ageing population

Sustainability and efficiency drive innovation in away-from-home tissue packaging

Prospects and Opportunities

Expanding hospitality and foodservice industries to boost away-from-home tissue demand

Modern retail expansion and direct supplier relationships to enhance accessibility

Sustainability and customisation to shape future innovation

Category Data

Table 34 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024

Table 35 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 36 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 37 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 38 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 39 - Forecast Sales of Away-From-Home Tissue and Hygiene 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-cambodia/report.