



Euromonitor
International

Tissue and Hygiene in Myanmar

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?

Chart 1 - Tissue and Hygiene: Convenience Store

Chart 2 - Tissue and Hygiene: Supermarket

Chart 3 - Tissue and Hygiene: Small local grocer

Chart 4 - Tissue and Hygiene: Small local grocer

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, distribution expansion, and affordability drive growth

Unicharm dominates the competitive landscape, while Pyo May gains traction through digital engagement

Traditional retail remains the primary distribution channel, while convenience stores and e-commerce expand

Prospects and Opportunities

Marketing and distribution expansion to support sustained market growth

E-commerce growth remains sluggish due to social stigma

Innovations in absorbency technology to enhance product performance

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

Growth driven by rising hygiene awareness and distribution expansion

Unicharm maintains leadership, while Lebay gains momentum in the premium segment

Baby and child specialist retailers lead distribution, while pharmacies expand into regional markets

Prospects and Opportunities

Slower growth anticipated as rising prices impact affordability

Social media and e-commerce to drive purchasing decisions

Product innovation focused on comfort and flexibility

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

Growth driven by an ageing population and increasing consumer awareness

Unicharm retains leadership, while Certainty gains market share through innovation

Pharmacies dominate distribution, while supermarkets experience slow expansion

Prospects and Opportunities

Expanding consumer base to drive long-term market growth

E-commerce remains a minor channel, with limited potential for rapid expansion

Innovation focused on ease of use and convenience

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

Key Data Findings

2024 Developments

Rising demand for functional wipes and antibacterial variants among urban consumers

Market fragmentation and the emergence of mid-range and budget brands

Traditional trade dominates sales, while convenience stores and e-commerce expand

Prospects and Opportunities

Price sensitivity in rural areas expected to impact sales growth

E-commerce expansion to introduce greater product variety

Innovation in formulation and ingredient preferences to shape future trends

Category Data

Table 28 - Retail Sales of Wipes by Category: Value 2019-2024

Table 29 - Retail Sales of Wipes by Category: % Value Growth 2019-2024

Table 30 - NBO Company Shares of Retail Wipes: % Value 2020-2024

Table 31 - LBN Brand Shares of Retail Wipes: % Value 2021-2024

Table 32 - Forecast Retail Sales of Wipes by Category: Value 2024-2029

Table 33 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

RETAIL TISSUE

Key Data Findings

2024 Developments

Rising production costs drive price increases while facial tissues dominate demand

Special Manufacturing Co leads, while Smile brand gains market share through affordability

Traditional trade leads sales, while convenience stores and e-commerce expand their reach

Prospects and Opportunities

Steady demand for tissue products in urban households despite economic pressures

Convenience stores and mini-marts to play a larger role in distribution

Innovation in sustainable tissue production to gain momentum

Category Data

Table 34 - Retail Sales of Tissue by Category: Value 2019-2024

Table 35 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 36 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 37 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 38 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 39 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

AWAY-FROM-HOME TISSUE AND HYGIENE

Key Data Findings

2024 Developments

Growth in away-from-home tissue driven by tourism recovery and expanding foodservice sector

Price-sensitive consumers prioritise affordability over product innovation

Product innovation focuses on quality improvement in away-from-home tissue

Prospects and Opportunities

Expansion of away-from-home tissue usage in foodservice and commercial establishments

Expansion of distribution channels, including B2B and e-commerce

Sustainability trends drive demand for eco-friendly away-from-home tissue products

Category Data

Table 40 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024

Table 41 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 42 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 43 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 44 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 45 - 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 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-myanmar/report.