

Tissue and Hygiene in Sri Lanka

April 2025

Table of Contents

Tissue and Hygiene in Sri Lanka

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

Chart 4 - 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

Economic stabilisation supports renewed demand for branded products

EVA maintains leadership as premium and niche players expand presence

Retail and digital channels evolve to support wider access

Prospects and Opportunities

Steady growth forecast as awareness and affordability improve

E-commerce set to play a growing role in urban markets

Innovation will support category diversification and value growth

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

Urbanisation and evolving lifestyles support steady category growth

Brand innovation and positioning remain key to leadership

Modern trade and digital platforms support expanded reach

Prospects and Opportunities

Sustained growth driven by modern lifestyles and rising incomes

E-commerce expansion to enhance access and brand engagement

Product innovation to support differentiation and long-term growth

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

Economic challenges drive value-seeking behaviour

Inclusive targeting helps Marvel sustain market leadership

Omnichannel retail strengthens access and reach

Prospects and Opportunities

Rising demand driven by shifting demographics and inclusivity

E-commerce to enhance convenience and privacy for urban consumers

Product innovation to support dignity, sustainability and growth

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

Core categories remain resilient despite economic pressures

Established leaders retain share while niche players expand

Expanded pharmacy presence and digital retail drive accessibility

Prospects and Opportunities

Stable demand outlook supported by hygiene consciousness and core usage

Digital channels to broaden reach and improve category visibility

Innovation in sustainability and functionality to support differentiation

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

Tourism rebound and economic stability boost tissue consumption

Market leader sustains dominance as challengers focus on value and format

Modern trade leads while pharmacies and e-commerce gain momentum

Prospects and Opportunities

Steady growth expected as hygiene and tourism trends persist

Channel diversification and institutional partnerships to shape distribution

Innovation in format, sustainability and branding to drive growth

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

Away-from-home tissue sees strong rebound as B2B demand returns

Away-from-home adult incontinence expands through healthcare and inclusive workplace use

Innovation drives premiumisation and environmental positioning

Prospects and Opportunities

Urbanisation and infrastructure development to support expansion

Institutional partnerships and digital procurement to reshape distribution

Smart solutions and sustainability to define future innovation

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 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-sri-lanka/report.