



Euromonitor
International

Competitor Strategies in Tissue and Hygiene

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COMPETITIVE OVERVIEW

Companies at a glance: Tissue and hygiene remains a top-heavy industry
Most top players remain sector focused, but adjacency becomes increasingly relevant
Market momentum continues to drive growth, while competition challenges share gain
Emerging countries offer stronger growth prospect...
...yet escalating market fragmentation requires business prioritisation
Softys and Hengan lead market share increase in active categories
Top players remain focused on a narrow portfolio of strength
Product mix further defines top players' strengths and weaknesses
Tariffs loom large and pile uncertainty onto company strategies
Tariffs accelerate supply chain shifts and vertical integration

STRATEGIES AT PLAY

Industry continues to prioritise portfolio sharpening, new segment discovery
Improved value positioning, portfolio tailoring and digital engagement drive growth
Consumer-centric efficacy and user experience trump innovation strategy
Reinforced benefit call-outs and clear user targeting build value perception
Biome-forward positioning merges gut, mental, skin and intimate health
Develop products for a wider user base and occasions to deepen demand penetration
Under-addressed demographics, occasion need gaps bring innovation opportunities
Vietnam: Unicharm drives adoption by incorporating local immunity health risks
Retail is evolving, demanding a balance between long-term vision and real-time agility
Strong local players are reshaping e-commerce while Amazon maintains its lead
Social platforms fast-track growth for new entrants in emerging categories
Babycare's winning formula in China: A multilayered, parents-centric approach

CONCLUSION

Key findings

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