Competitor Strategies in Tissue and Hygiene

August 2025

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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

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/competitor-strategies-in-tissue-and-hygiene/report.