



# Away-From-Home Tissue and Hygiene in North Macedonia

April 2026

## KEY DATA INSIGHTS

### 2025 DEVELOPMENTS

Public Institutions and Horeca Drive Post-Pandemic Hygiene Investments

### INDUSTRY PERFORMANCE

Public Institutions and Horeca Drive Post-Pandemic Hygiene Investments

Chart 1 - Price-Sensitive Consumers Are the Focus of Local Afh Tissue and Hygiene Manufacturers

Bulk Purchasing by Institutions and Horeca Supports Volume Gains

Government Health Initiatives Boost Demand for Hygiene Essentials

Chart 2 - Value Sales 2020-2030

Chart 3 - Value Sales by Category 2025

### WHAT'S NEXT?

Horeca and Public Spending Expected to Offset Shrinking Population

Paper Towels Set to Rebound as Businesses Prioritise Hygiene and Convenience

Innovation in Packaging and Dispensers Anticipated to Boost Efficiency for Institutional Buyers

Chart 4 - Forecast Value Sales 2020-2030

Chart 5 - Forecast Value Sales by Category 2025-2030

### CHANNELS

B2b Procurement Shapes Institutional and Horeca Purchasing Patterns

E-Commerce Gains Traction as Buyers Seek Flexibility and Reach

Chart 6 - Retail Channels 2020-2025

### ECONOMIC CONTEXT

Chart 7 - Economic Context for Away-From-Home Tissue and Hygiene

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

### CONSUMER CONTEXT

Chart 10 - Consumer Context for Away-From-Home Tissue and Hygiene

Chart 11 - Population 2020-2030

Chart 12 - Consumer Expenditure 2020-2030

Chart 13 - Population by Generation 2025

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### EXECUTIVE SUMMARY

Ramstore, Reptil and Vero Expand Online Delivery to Meet Rising Demand

## KEY DATA INSIGHTS

### KEY INDUSTRY TRENDS

Chart 14 - Key Industry Trends for Tissue and Hygiene

### INDUSTRY PERFORMANCE

Ramstore, Reptil and Vero Expand Online Delivery to Meet Rising Demand

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Chart 15 - Key Product Launches Target Price-Sensitive Consumers

Chart 16 - Value Sales 2020-2030

Chart 17 - Value Sales by Category 2025

## WHAT'S NEXT?

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Sustainability Anticipated to Accelerate Value Growth

Chart 19 - Forecast Value Sales 2020-2030

Chart 20 - Forecast Value Sales by Category 2025-2030

## COMPETITIVE LANDSCAPE

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Chart 21 - Company Shares 2025

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## CHANNELS

Supermarkets Sustain Lead While Small Local Grocers Remain Significant

Online Retailers Capture Growth as Convenience Drives Digital Adoption

Chart 23 - Retail Channels 2020-2025

## ECONOMIC CONTEXT

Chart 24 - Economic Context for Tissue and Hygiene

Chart 25 - Real Gdp Growth 2020-2030

Chart 26 - Inflation 2020-2030

## CONSUMER CONTEXT

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Chart 28 - Population 2020-2030

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Chart 30 - Population by Generation 2025

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