



Euromonitor
International

Tissue and Hygiene in Latin America

May 2024

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Scope

Key findings

REGIONAL OVERVIEW

Toilet paper the biggest category in Latin American tissue and hygiene

Latin America ranks fourth regionally for sales and per capita spend

The healthy growth seen in 2022 and 2023 is expected to continue in the coming years

Low birth rates impacting demand for nappies/diapers/pants in Mexico

Strong growth for wipes in Mexico over 2018-2023

Nappies/diapers/pants record a disappointing performance over 2018-2023

Retail adult incontinence the most dynamic category over the review period

Small local grocers remain the leading distribution channel

Supermarkets/hypermarkets gaining share in recent years

LEADING COMPANIES AND BRANDS

Consolidated competitive landscapes in most countries across Latin America

Kimberly-Clark loses share but continues to lead in Latin America

Only Tecnoquímicas does not have Mexico or Brazil as its biggest market

Tena benefits from the dynamism of the retail adult incontinence category

FORECAST PROJECTIONS

Positive growth expected throughout the forecast period

Brazil will help drive regional growth in the coming years

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Argentina: Market Context

Argentina: Competitive and Retail Landscape

Bolivia: Market Context

Bolivia: Competitive and Retail Landscape

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Brazil: Competitive and Retail Landscape

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Uruguay: Competitive and Retail Landscape

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