



Euromonitor
International

From Price Hike to Value Engineering: Premiumisation in Tissue and Hygiene

January 2026

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Tissue and hygiene demand is shaped by price sensitivity and wellness aspirations

Persistent inflation drives scrutiny of value

Leading tissue and hygiene players are actively shifting to higher value portfolio mix

Premiumisation isn't just about setting the top price; it's about adding value at every tier

Wellness remains as a spending priority despite consumer cutbacks

Three key pillars of premiumisation in tissue and hygiene

STATE OF PREMIUMISATION

Value-led growth is most meaningful in categories with volume weakness

Companies must tailor strategies to local market dynamics and category realities

On a product level, shoppers in developing markets exhibit stronger aspirations

Despite rising demand, income disparities dictate timing and scale of premiumisation

Amid false advertising exposés, proof, rather than promises, matters more than ever

SKIN HEALTH: NATURALLY DERIVED, CLINICALLY PROVEN

Health claims focused on skin safety and ingredient purity garner price premium

Natural positioning gains attraction, particularly in baby nappies/diapers

Discerning consumers increasingly scrutinise “natural” claims: Seek evidence backing

Freemore pursues premiumisation with microbiome-forward positioning

Coterie strengthens performance trust with science validation and radical transparency

EXPERIENTIAL ELEVATED: FROM FUNCTIONAL TO FEEL-GOOD

The three pillars of feel-good in tissue and hygiene

Fragrances instil comfort into daily self care routines

Honey Pot's new adaptogenic herb blend offers calming sensation for menstrual care

Confidence is evolving from simple reassurance to emotional empowerment

Essity's Tena Men promotes active living and discreetness for underserved men

Convenience is increasingly about effortlessness

P&G's Charmin's “forever roll” tackles bathroom restock hassle

LIFECYCLE INTEGRATION: FROM MOMENTS TO MILESTONES

Building lifelong value through lifecycle-driven premiumisation

P&G and LOLA: High-stakes life stage entry through postpartum care

Unicharm: Holistic life stage ecosystem focused on healthy ageing

Kimberly-Clark x Kenvue: Lifespan companionship

Emerging future horizon: Tech-enabled lifecycle care

CONCLUSION

Near-term activation priorities and innovation opportunities by product segment

Key recommendations and opportunities

Evolution of tissue and hygiene premiumisation

Questions we are asking

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/from-price-hike-to-value-engineering-premiumisation-in-tissue-and-hygiene/report.