



Passport

Away-from-Home Tissue and Hygiene in Australia

Euromonitor International

May 2024

This sample report is for illustration purposes only.

Some content and data have been changed.

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AWAY-FROM-HOME TISSUE AND HYGIENE IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Growth for afh tissue in australia

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Players take action to deal with rising costs

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Driving sustainability: Manufacturers' actions in afh tissue and hygiene in australia

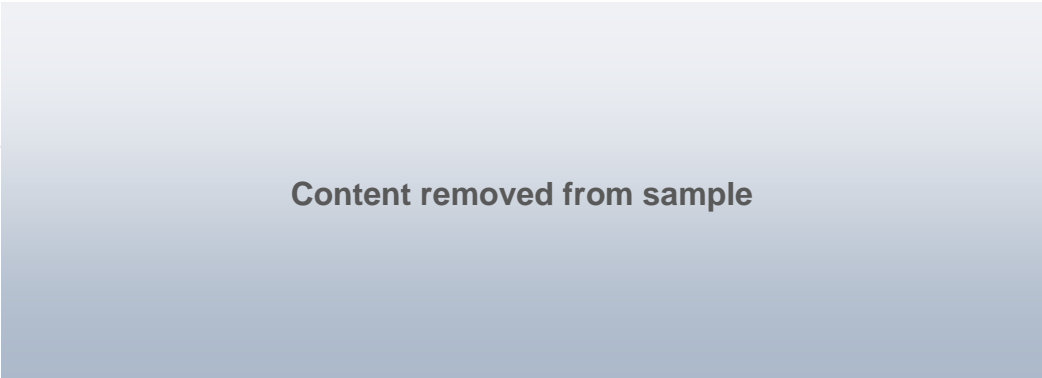
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PROSPECTS AND OPPORTUNITIES

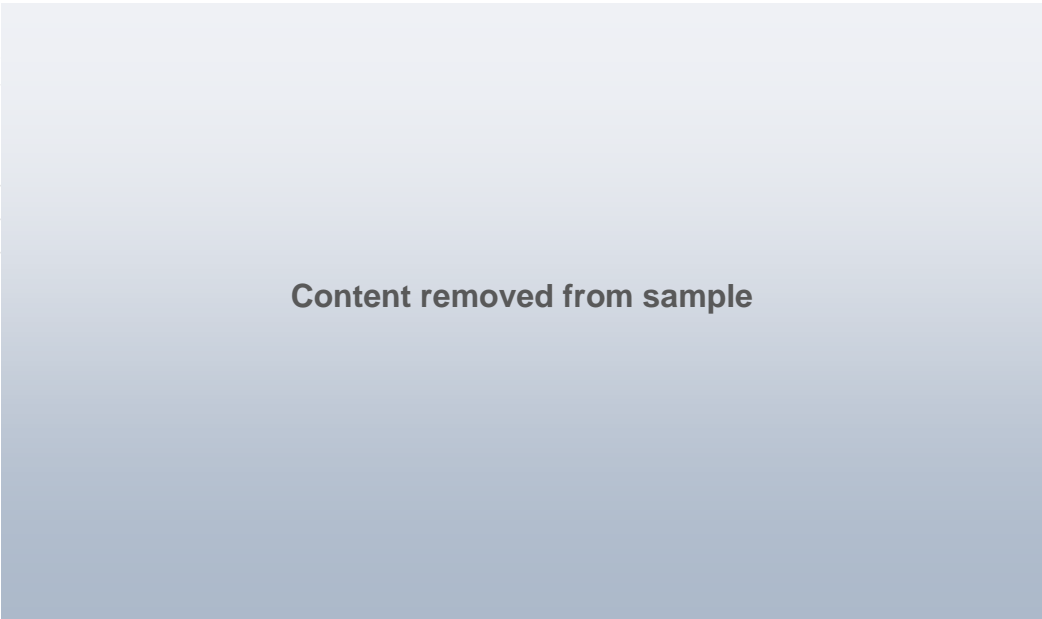
Outlook for afh tissue and hygiene in australia

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Navigating challenges and opportunities

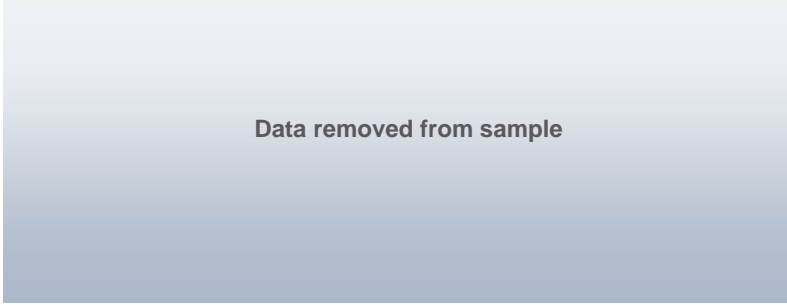


The rise of eco-friendly alternatives



CATEGORY DATA

Table 1 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

AUD million	2018	2019	2020	2021	2022	2023
Away-from-Home Tissue and Hygiene						
Away-from-Home Hygiene						
- AFH Adult Incontinence						
Away-from-Home Tissue						
- AFH Boxed Facial Tissues						
- AFH Paper Tableware						
-- AFH Napkins						
-- AFH Tablecloths						
- AFH Paper Towels						

- AFH Toilet Paper
- AFH Wipers

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

- Away-from-Home Tissue and Hygiene
- Away-from-Home Hygiene
- AFH Adult Incontinence
- Away-from-Home Tissue
- AFH Boxed Facial Tissues
- AFH Paper Tableware
- AFH Napkins
- AFH Tablecloths
- AFH Paper Towels
- AFH Toilet Paper
- AFH Wipers

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

% away-from-home value msp

2018 2019 2020 2021 2022 2023

- Interleaf
- Roll
- Other
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2018-2023

% away-from-home value

2018 2019 2020 2021 2022 2023

- Business/industry
- Horeca
- Hospitals/healthcare
- Public
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2023

% away-from-home value

	Away-from-Home Hygiene	Away-from-Home Tissue
Business/industry	Data removed from sample	
Horeca		
Hospitals/healthcare		
Public		
Total		
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources	
Key:	AH = away-from-home hygiene; AT = away-from-home tissue	

Table 6 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value
2023-2028

AUD million	2023	2024	2025	2026	2027	2028
Away-from-Home Tissue and Hygiene	Data removed from sample					
Away-from-Home Hygiene						
- AFH Adult Incontinence						
Away-from-Home Tissue						
- AFH Boxed Facial Tissues						
- AFH Paper Tableware						
-- AFH Napkins						
-- AFH Tablecloths						
- AFH Paper Towels						
- AFH Toilet Paper						
- AFH Wipers						
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					

Table 7 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value
Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Away-from-Home Tissue and Hygiene	Data removed from sample		
Away-from-Home Hygiene			
- AFH Adult Incontinence			
Away-from-Home Tissue			
- AFH Boxed Facial Tissues			
- AFH Paper Tableware			
-- AFH Napkins			
-- AFH Tablecloths			
- AFH Paper Towels			
- AFH Toilet Paper			
- AFH Wipers			
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		

TISSUE AND HYGIENE IN AUSTRALIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Tissue and hygiene in 2023: The big picture

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2023 key trends

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Competitive landscape

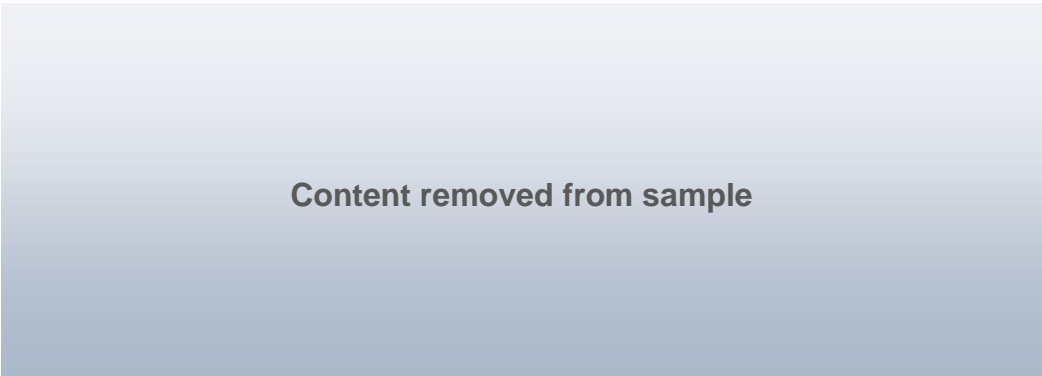
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Retailing developments

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What next for tissue and hygiene?

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MARKET INDICATORS

Table 8 Birth Rates 2018-2023

per '000 population	2018	2019	2020	2021	2022	2023
Birth rates	Data removed from sample					

Source: Euromonitor International from official statistics

Table 9 Infant Population 2018-2023

'000	2018	2019	2020	2021	2022	2023
0-4 yrs female	Data removed from sample					
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

Table 10 Female Population by Age 2018-2023

'000	2018	2019	2020	2021	2022	2023
Female population:	Data removed from sample					
January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						

65-69 yrs
70-74 yrs
75-79 yrs
80+ yrs

Data removed from sample

Source: Euromonitor International from official statistics

Table 11 Total Population by Age 2018-2023

'000	2018	2019	2020	2021	2022	2023
Population at January 1st	Data removed from sample					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 12 Households 2018-2023

	2018	2019	2020	2021	2022	2023
Households ('000)	Data removed from sample					
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

Table 13 Forecast Infant Population 2023-2028

'000	2023	2024	2025	2026	2027	2028
0-4 yrs female	Data removed from sample					
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

Table 14 Forecast Female Population by Age 2023-2028

'000	2023	2024	2025	2026	2027	2028
Female population:	Data removed from sample					
January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 15 Forecast Total Population by Age 2023-2028

'000	2023	2024	2025	2026	2027	2028
Population at January 1st	Data removed from sample					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 16 Forecast Households 2023-2028

	2023	2024	2025	2026	2027	2028
Households ('000)	Data removed from sample					
Average number of occupants per household						
(Number)						

Source: Euromonitor International from official statistics

MARKET DATA

Table 17 Retail Sales of Tissue and Hygiene by Category: Value 2018-2023

AUD million	2018	2019	2020	2021	2022	2023
Retail Tissue and Hygiene	Data removed from sample					
Retail Hygiene						
- Retail Adult Incontinence						
- Nappies/Diapers/Pants						
- Menstrual Care						
- Wipes						
Retail Tissue						
- Paper Towels						
- Paper Tableware						
- Facial Tissues						
- Toilet Paper						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

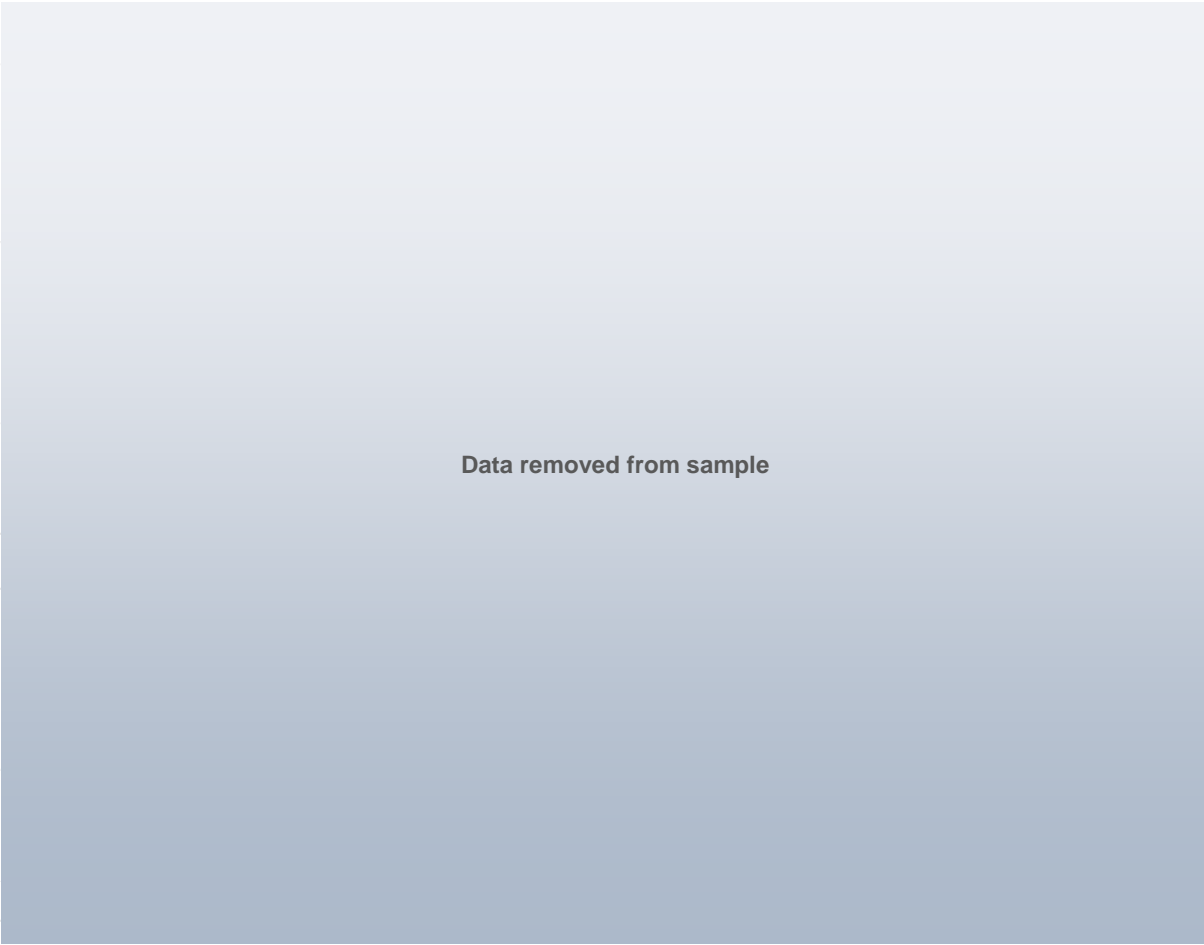
Table 18 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Retail Tissue and Hygiene	Data removed from sample		
Retail Hygiene			
- Retail Adult Incontinence			
- Nappies/Diapers/Pants			
- Menstrual Care			
- Wipes			
Retail Tissue			
- Paper Towels			
- Paper Tableware			
- Facial Tissues			
- Toilet Paper			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 NBO Company Shares of Retail Tissue and Hygiene: % Value 2019-2023

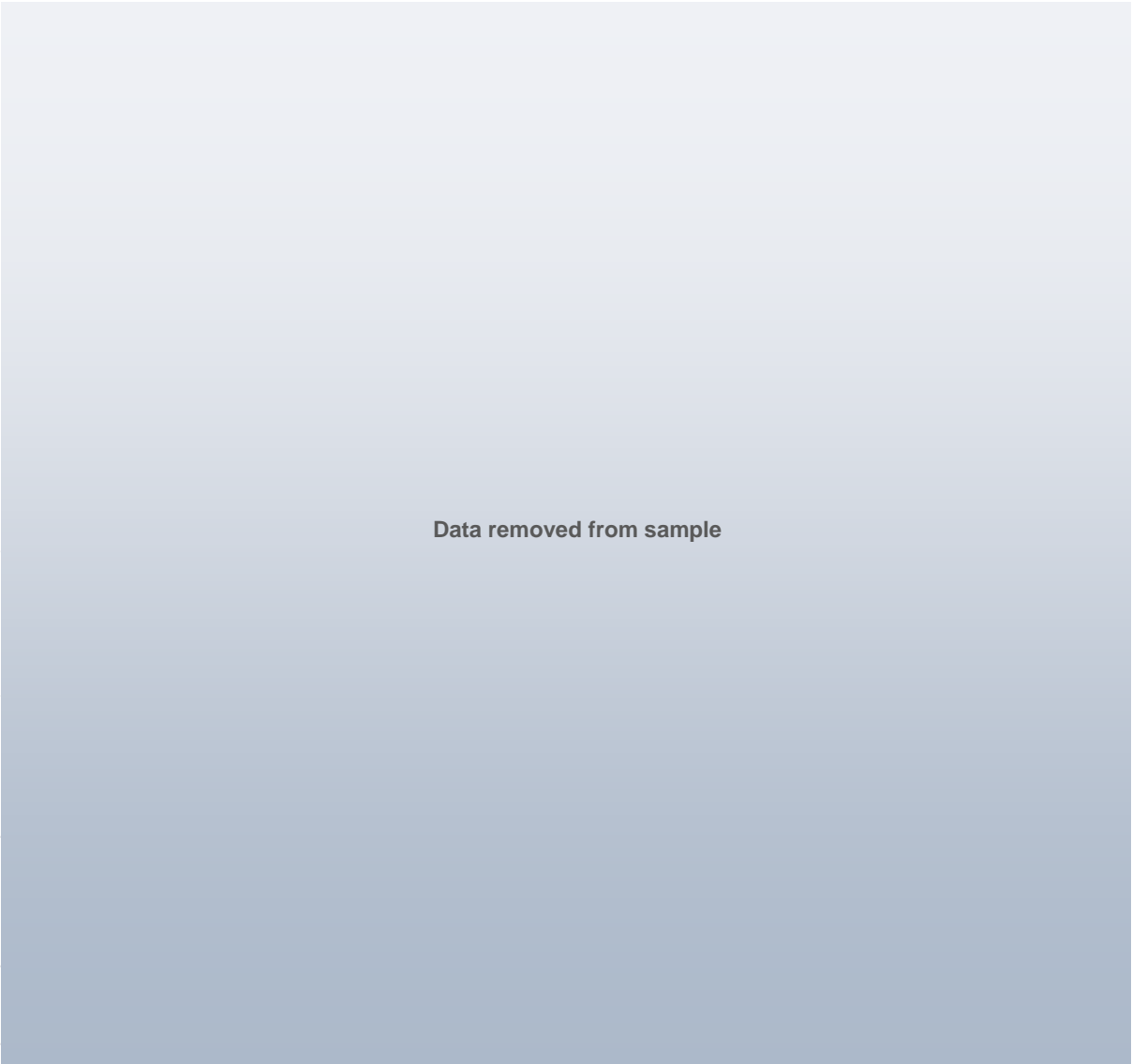
% retail value rsp Company	2019	2020	2021	2022	2023
	Data removed from sample				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 LBN Brand Shares of Retail Tissue and Hygiene: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value
2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Tissue and Hygiene	<div><div></div><div>Data removed from sample</div></div>					
Retail Hygiene						
Retail Adult Incontinence						
Nappies/Diapers/Pants						
Menstrual Care						
Wipes						
Retail Tissue						
Paper Towels						
Paper Tableware						

Facial Tissues
Toilet Paper

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023

% retail value rsp	Retail Hygiene	Retail Adult Incontinence	Nappies/ Diapers/ Pants	Menstrual Care	Wipes	Retail Tissue
Retail Channels	Data removed from sample					

- Retail Offline
 - Grocery Retailers
 - Convenience Retail
 - Convenience Stores
 - Forecourt Retailers
 - Supermarkets
 - Hypermarkets
 - Discounters
 - Warehouse Clubs
 - Food/drink/tobacco specialists
 - Small Local Grocers
 - Non-Grocery Retailers
 - General Merchandise Stores
 - Department Stores
 - Variety Stores
 - Apparel and Footwear Specialists
 - Appliances and Electronics Specialists
 - Home Products Specialists
 - Health and Beauty Specialists
 - Leisure and Personal Goods Specialists
 - Other Non-Grocery Retailers
 - Vending
 - Direct Selling
 - Retail E-Commerce
 - Total

Data removed from sample

Paper
Towels

Paper
Tableware

Facial
Tissues

Toilet
Paper

- Retail Channels
- Retail Offline
 - Grocery Retailers
 - Convenience Retail
 - Convenience Stores
 - Forecourt Retailers
 - Supermarkets
 - Hypermarkets
 - Discounters
 - Warehouse Clubs
 - Food/drink/tobacco specialists
 - Small Local Grocers
 - Non-Grocery Retailers
 - General Merchandise Stores
 - Department Stores
 - Variety Stores
 - Apparel and Footwear Specialists
 - Appliances and Electronics Specialists
 - Home Products

Data removed from sample

Specialists
 --- Health and Beauty Specialists
 --- Leisure and Personal Goods Specialists
 --- Other Non-Grocery Retailers
 -- Vending
 -- Direct Selling
 - Retail E-Commerce
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: RH = retail hygiene; RAC = retail adult incontinence; NDP = nappies/diapers/pants; MC = Menstrual Care; W = wipes; RT = retail tissue; PTO = paper towels; PTW = paper tableware; FT = facial tissues; TP = toilet paper

Table 24 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

AUD million	2023	2024	2025	2026	2027	2028
Retail Tissue and Hygiene	Data removed from sample					
Retail Hygiene						
- Retail Adult Incontinence						
- Nappies/Diapers/Pants						
- Menstrual Care						
- Wipes						
Retail Tissue						
- Paper Towels						
- Paper Tableware						
- Facial Tissues						
- Toilet Paper						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 25 Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Retail Tissue and Hygiene	Data removed from sample		
Retail Hygiene			
- Retail Adult Incontinence			
- Nappies/Diapers/Pants			
- Menstrual Care			
- Wipes			
Retail Tissue			
- Paper Towels			
- Paper Tableware			
- Facial Tissues			
- Toilet Paper			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 12 February 2024

Report closing date: 14 May 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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Source: Euromonitor International

