



Passport

Menstrual Care in Singapore

Euromonitor International

February 2024

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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MENSTRUAL CARE IN SINGAPORE - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Slim/thin/ultra-thin towels achieve highest value growth in 2023 due to prioritisation of convenience and mobility

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Clean features continue to perform well, while herbal offerings remain unpopular

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Cooling scents are popular to reduce odours, while herbal offerings remain unpopular

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PROSPECTS AND OPPORTUNITIES

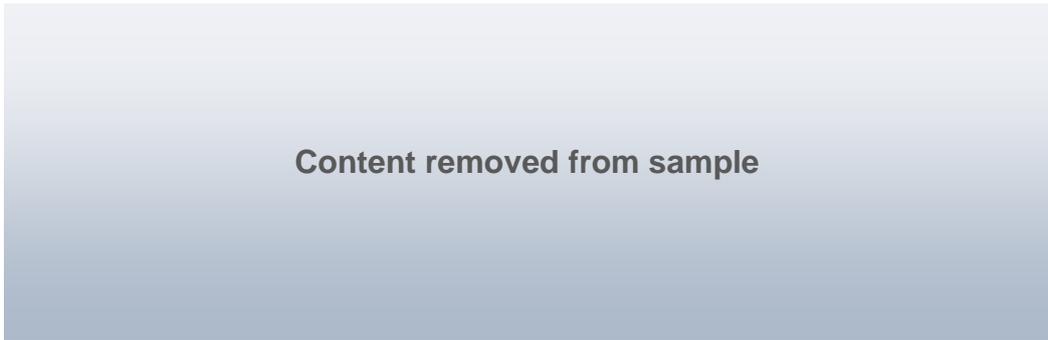
Security assurance remains key driver of innovation

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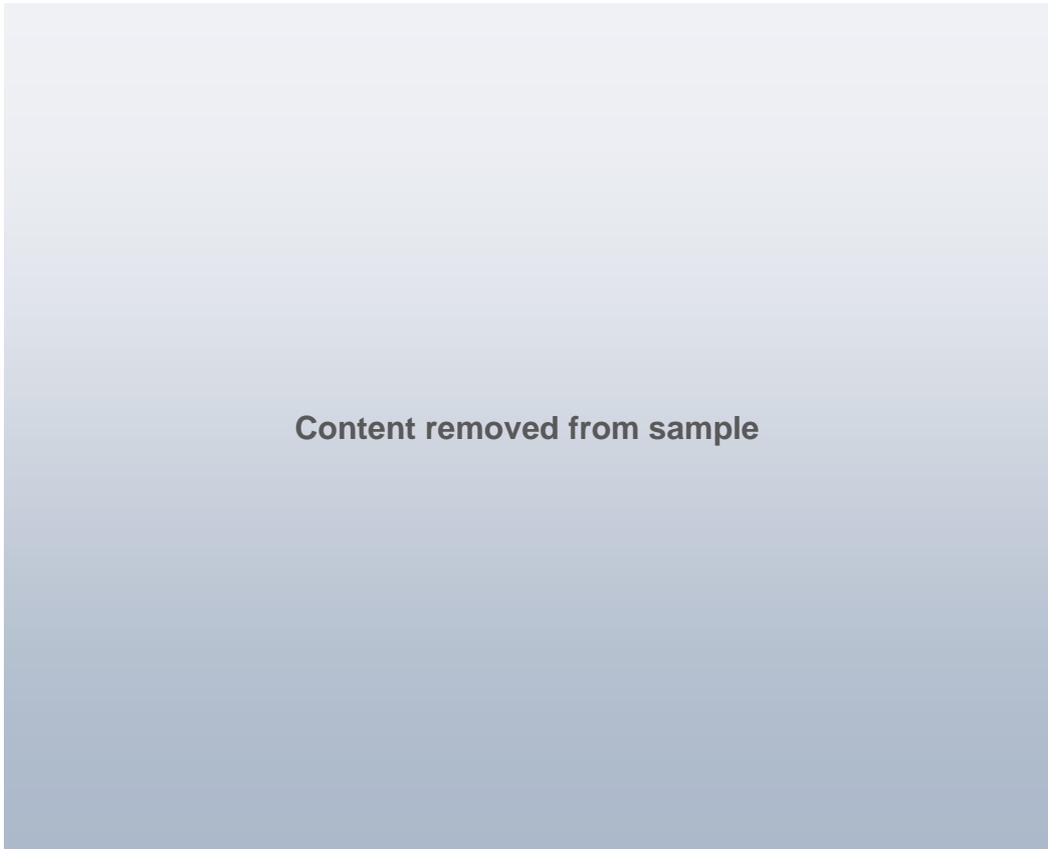
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Brands to expand portfolio with unique offerings to support feminine care and women's health

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Local scene seeks to improve affordability and accessibility of menstrual care



CATEGORY DATA

Table 1 Retail Sales of Menstrual Care by Category: Value 2018-2023

SGD million	2018	2019	2020	2021	2022	2023
- Menstrual Care	Data removed from sample					
-- Pantyliners						
-- Tampons						
-- Towels						

- Standard Towels
- Standard Towels with Wings
- Standard Towels without Wings
- Slim/Thin/Ultra-Thin Towels
- Slim/Thin/Ultra-Thin Towels with Wings
- Slim/Thin/Ultra-Thin Towels without Wings
- Menstrual Care Including Intimate Wipes



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

Table 2 Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
- Menstrual Care	Data removed from sample		
-- Pantyliners			
-- Tampons			
-- Towels			
--- Standard Towels			
---- Standard Towels with Wings			
---- Standard Towels without Wings			
--- Slim/Thin/Ultra-Thin Towels			
---- Slim/Thin/Ultra-Thin Towels with Wings			
---- Slim/Thin/Ultra-Thin Towels without Wings			
-- Menstrual Care Including Intimate Wipes			

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

Table 3 Retail Sales of Tampons by Application Format: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Applicator Tampons	Data removed from sample					
Digital Tampons						
Total						

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

Table 4 NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

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

Data removed from sample

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

Table 5 LBN Brand Shares of Retail Menstrual Care: % Value 2020-2023

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

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

Table 6 Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

SGD million	2023	2024	2025	2026	2027	2028
-------------	------	------	------	------	------	------

- Menstrual Care
- Pantyliners
- Tampons
- Towels
- Standard Towels
- Standard Towels with Wings
- Standard Towels without Wings
- Slim/Thin/Ultra-Thin Towels
- Slim/Thin/Ultra-

Data removed from sample

- Thin Towels with Wings
- Slim/Thin/Ultra-
Thin Towels without Wings
- Menstrual Care
Including Intimate Wipes

Data removed from sample

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

Table 7 Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
- Menstrual Care	Data removed from sample		
-- Pantyliners			
-- Tampons			
-- Towels			
--- Standard Towels			
---- Standard Towels with Wings			
---- Standard Towels without Wings			
--- Slim/Thin/Ultra-Thin Towels			
---- Slim/Thin/Ultra-Thin Towels with Wings			
---- Slim/Thin/Ultra-Thin Towels without Wings			
-- Menstrual Care Including Intimate Wipes			

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

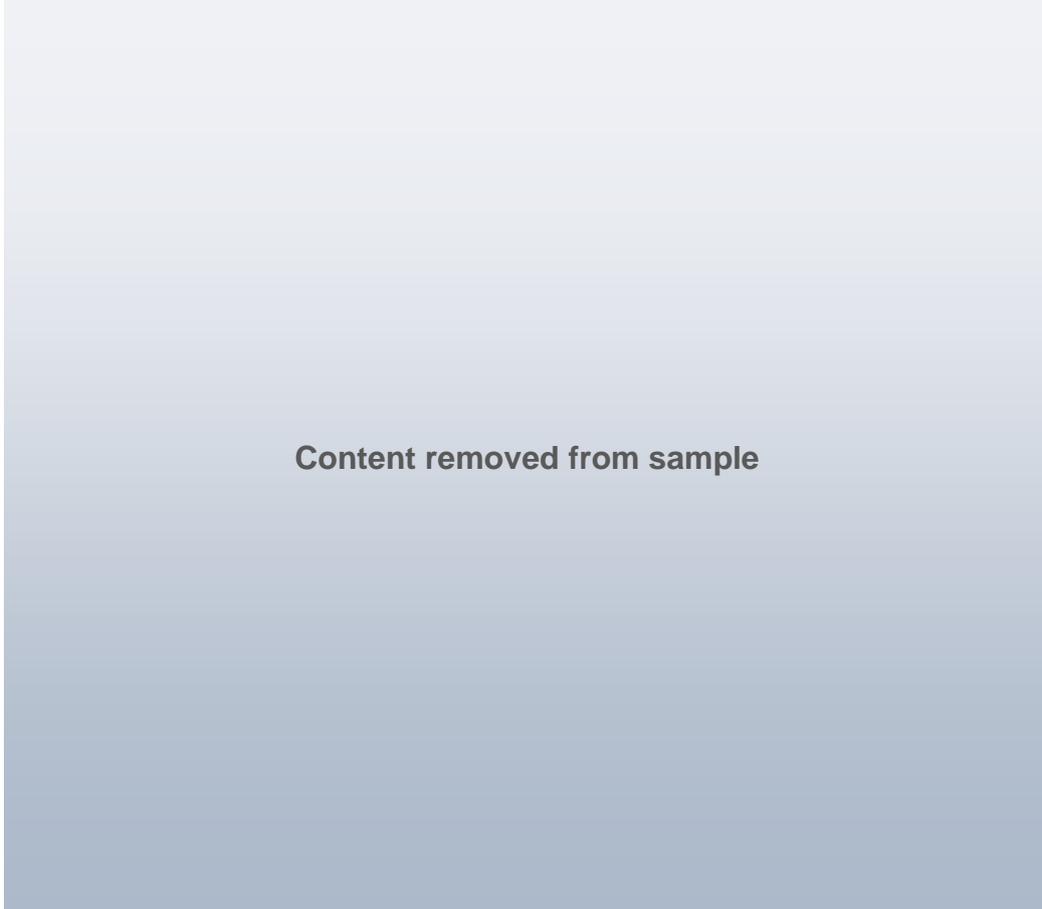
TISSUE AND HYGIENE IN SINGAPORE - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

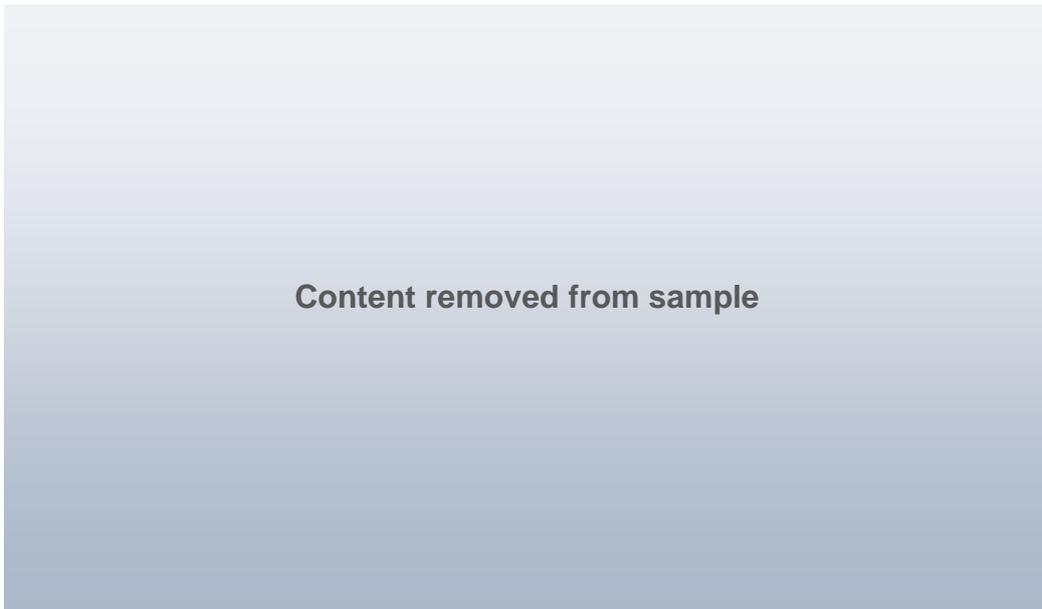
Tissue and hygiene in 2023: The big picture

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2023 key trends



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	Data removed from sample					
0-4 yrs total	Data removed from sample					

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	Data removed from sample					
0-4 yrs	Data removed from sample					
5-9 yrs	Data removed from sample					
10-14 yrs	Data removed from sample					
15-19 yrs	Data removed from sample					
20-24 yrs	Data removed from sample					
25-29 yrs	Data removed from sample					
30-34 yrs	Data removed from sample					
35-39 yrs	Data removed from sample					
40-44 yrs	Data removed from sample					
45-49 yrs	Data removed from sample					
50-54 yrs	Data removed from sample					
55-59 yrs	Data removed from sample					
60-64 yrs	Data removed from sample					
65-69 yrs	Data removed from sample					
70-74 yrs	Data removed from sample					
75-79 yrs	Data removed from sample					
80+ yrs	Data removed from sample					

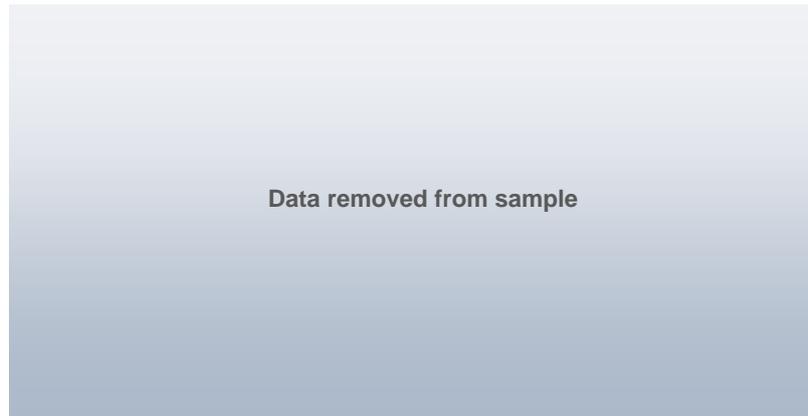
Source: Euromonitor International from official statistics

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	Data removed from sample					
5-9 yrs	Data removed from sample					

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: 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

Data removed from sample

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)						

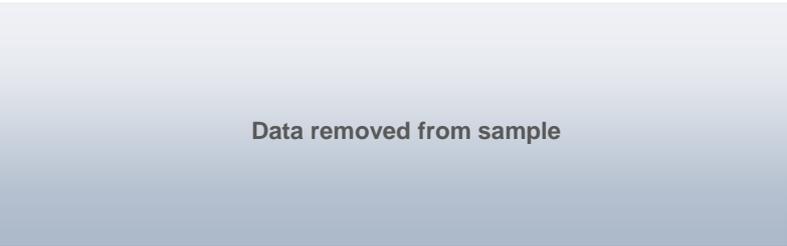
Source: Euromonitor International from official statistics

MARKET DATA

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

SGD 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
- Retail Hygiene
- Retail Adult Incontinence
- Nappies/Diapers/Pants
- Menstrual Care
- Wipes
- Retail Tissue
- Paper Towels
- Paper Tableware
- Facial Tissues
- Toilet Paper

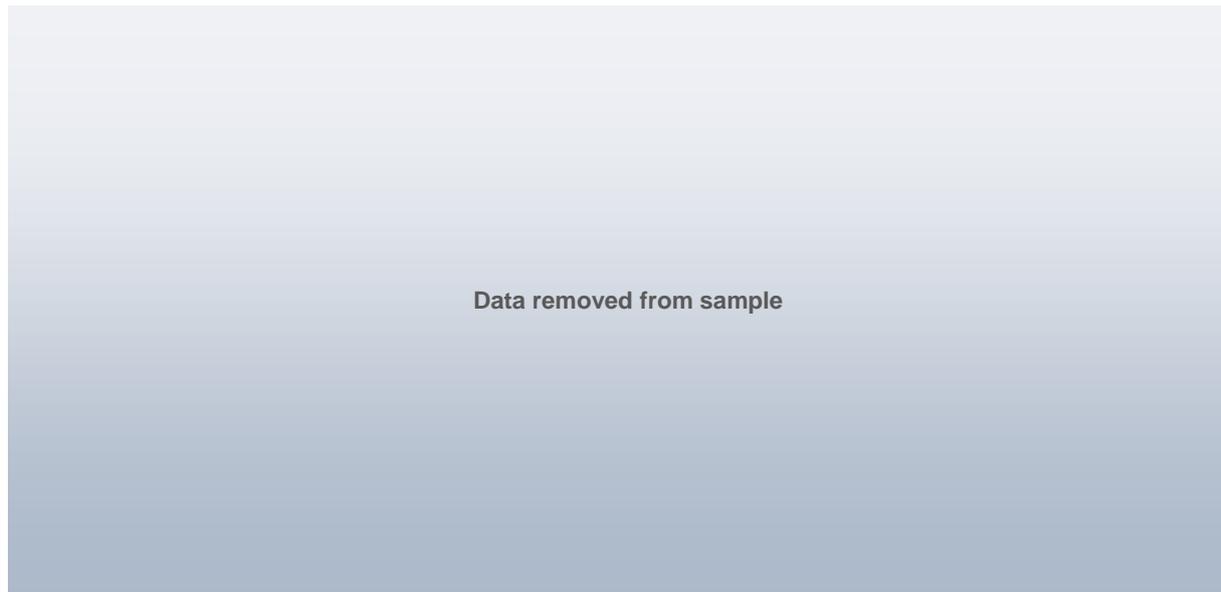


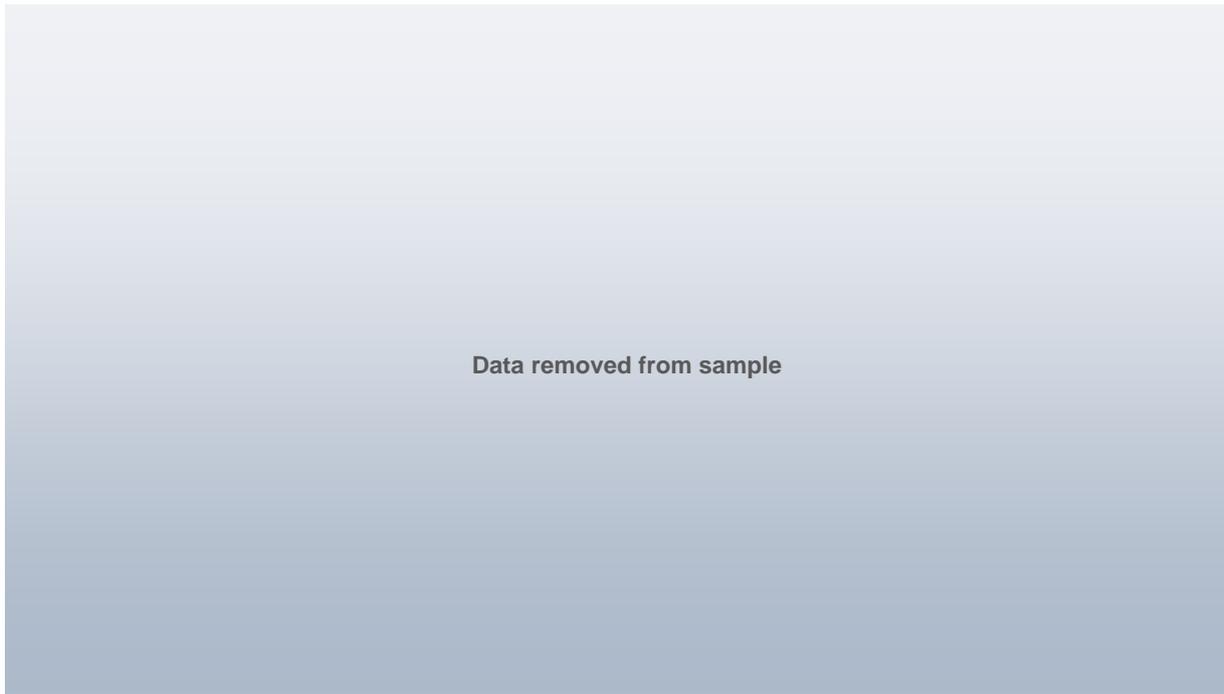
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp
Company

2019 2020 2021 2022 2023

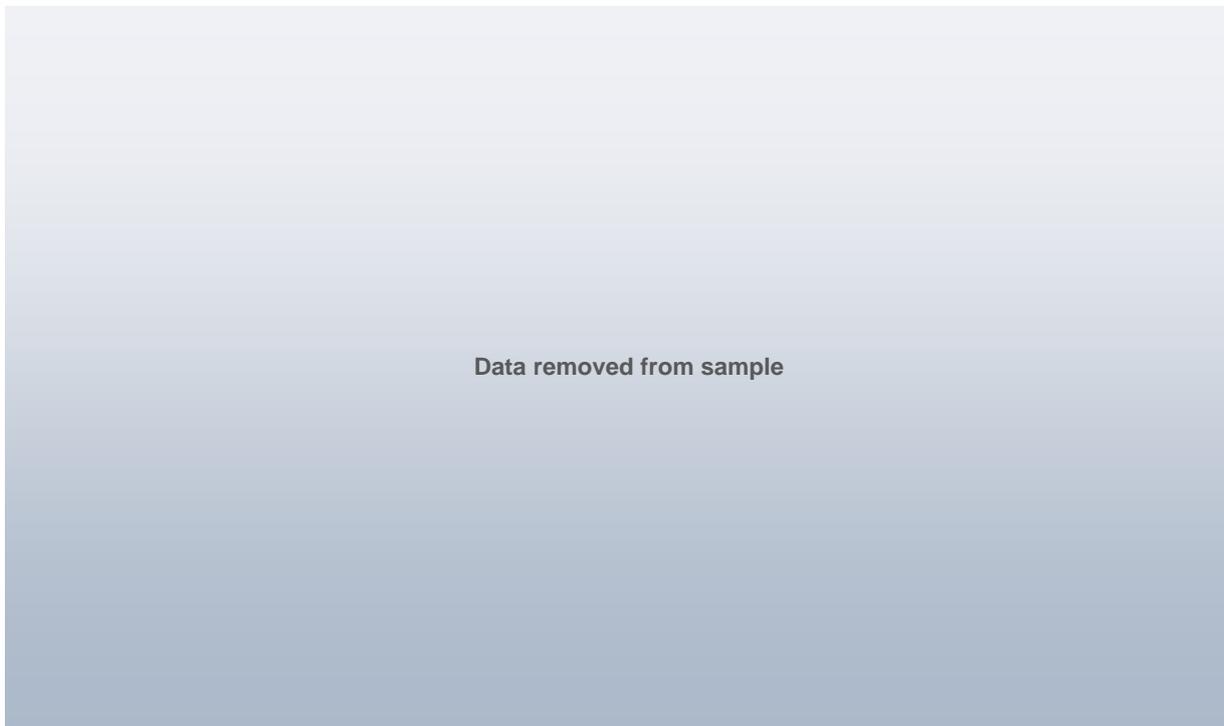


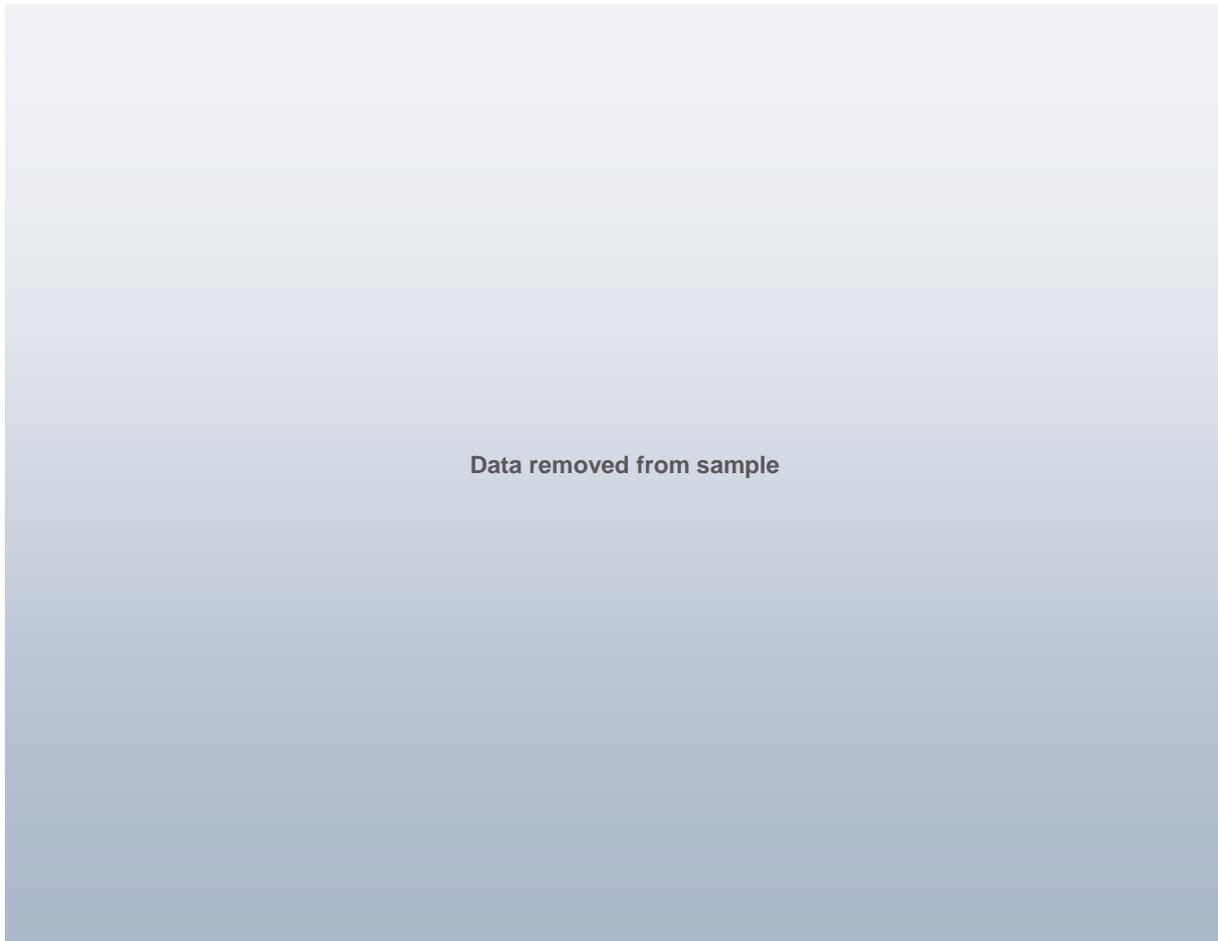


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
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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	Data removed from sample					
Retail Hygiene						
Retail Adult Incontinence						
Nappies/Diapers/Pants						
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 22 Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

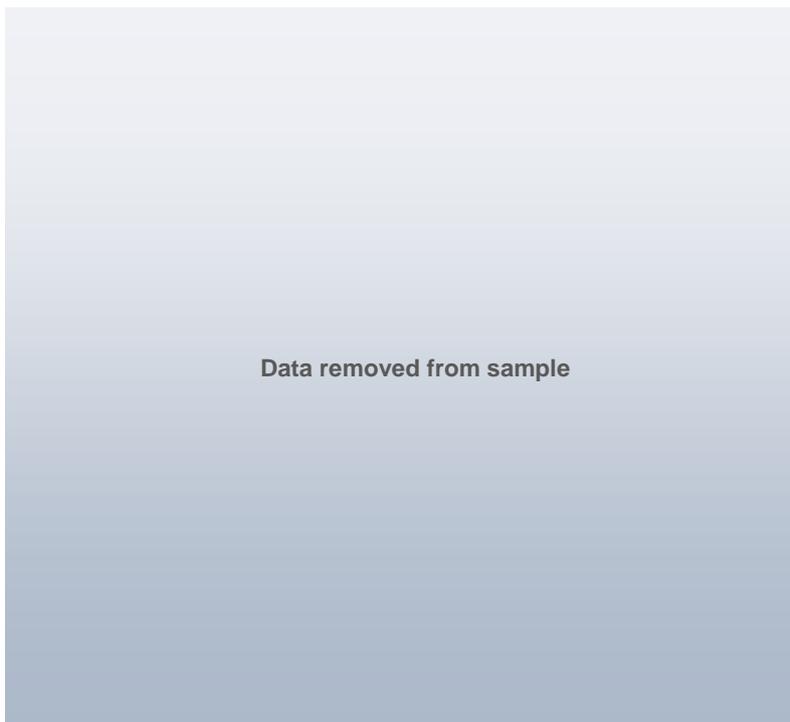
% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- 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

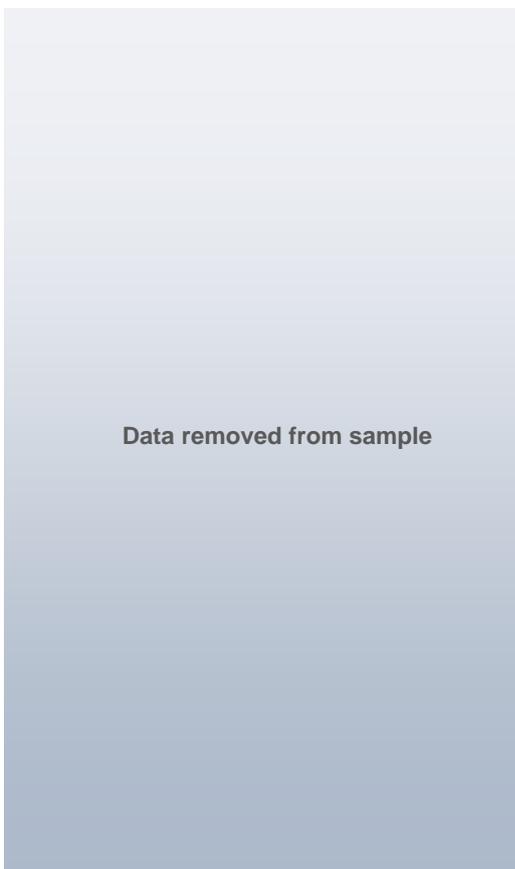
% retail value rsp	Retail Hygiene	Retail Adult Incontinence	Nappies/ Diapers/ Pants	Menstrual Care	Wipes	Retail Tissue
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- 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



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 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

SGD 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: 22 February 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

Trade Press

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Source: Euromonitor International