



Passport

Tissue and Hygiene in Brazil

Euromonitor International

April 2024

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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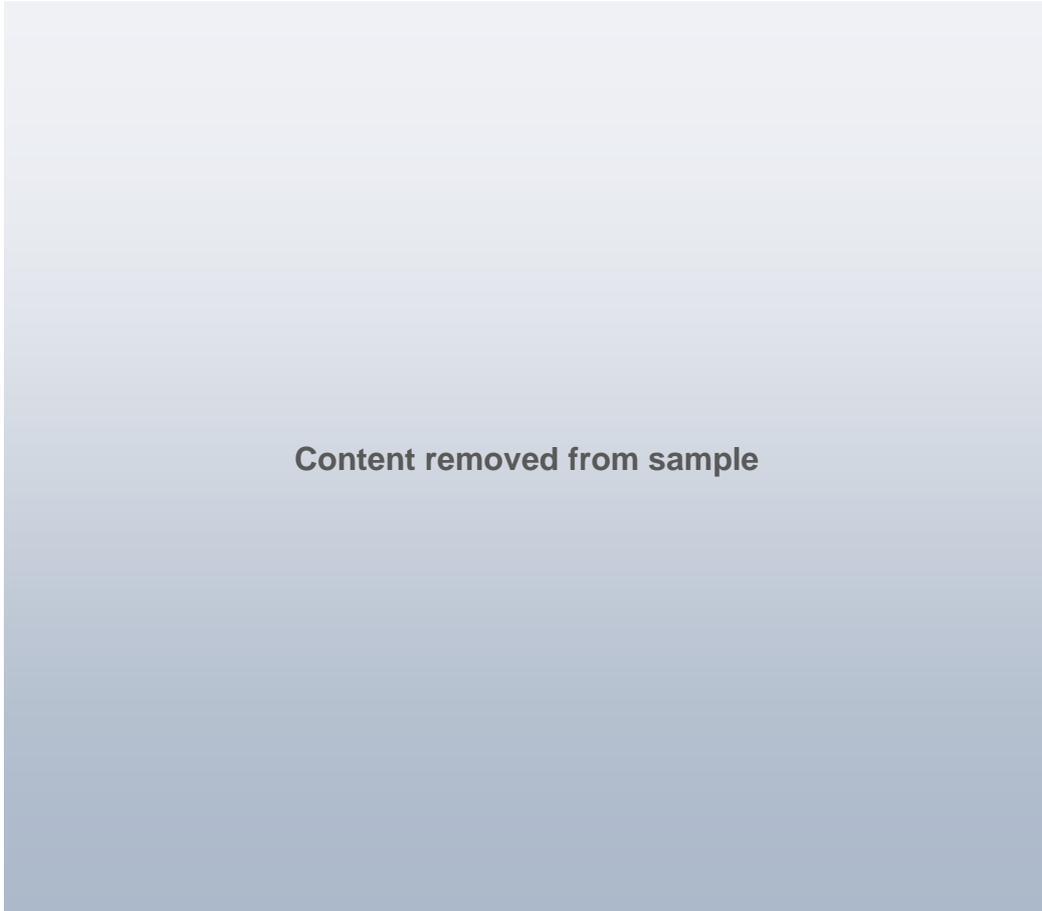
TISSUE AND HYGIENE IN BRAZIL - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

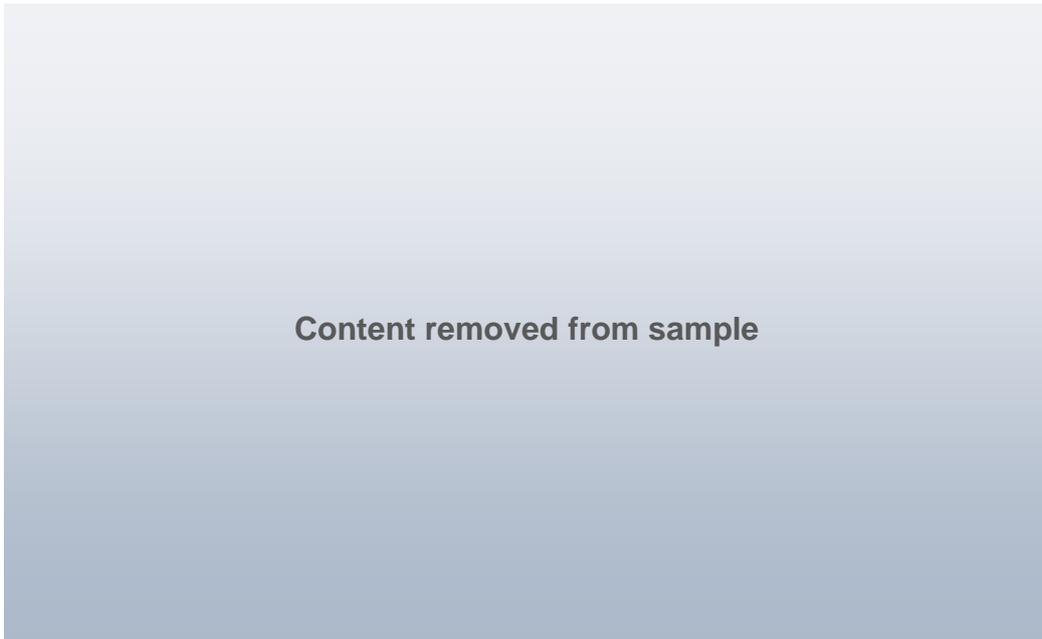
Tissue and hygiene in 2023: The big picture

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2023 key trends



Competitive landscape



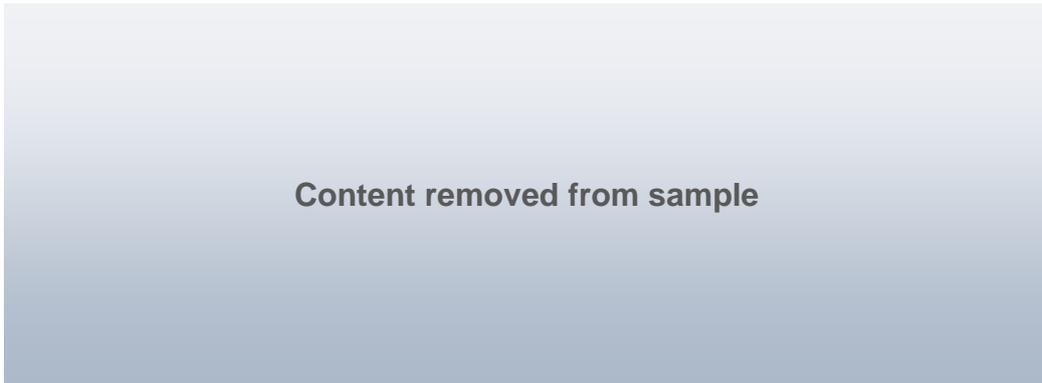
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Retailing developments

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What next for tissue and hygiene?

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MARKET INDICATORS

Table 1 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 2 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 3 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
70-74 yrs
75-79 yrs
80+ yrs

Data removed from sample

Source: Euromonitor International from official statistics

Table 4 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 5 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 6 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 7 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						

Source: Euromonitor International from official statistics

Table 8 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 9 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 10 Retail Sales of Tissue and Hygiene by Category: Value 2018-2023

BRL 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

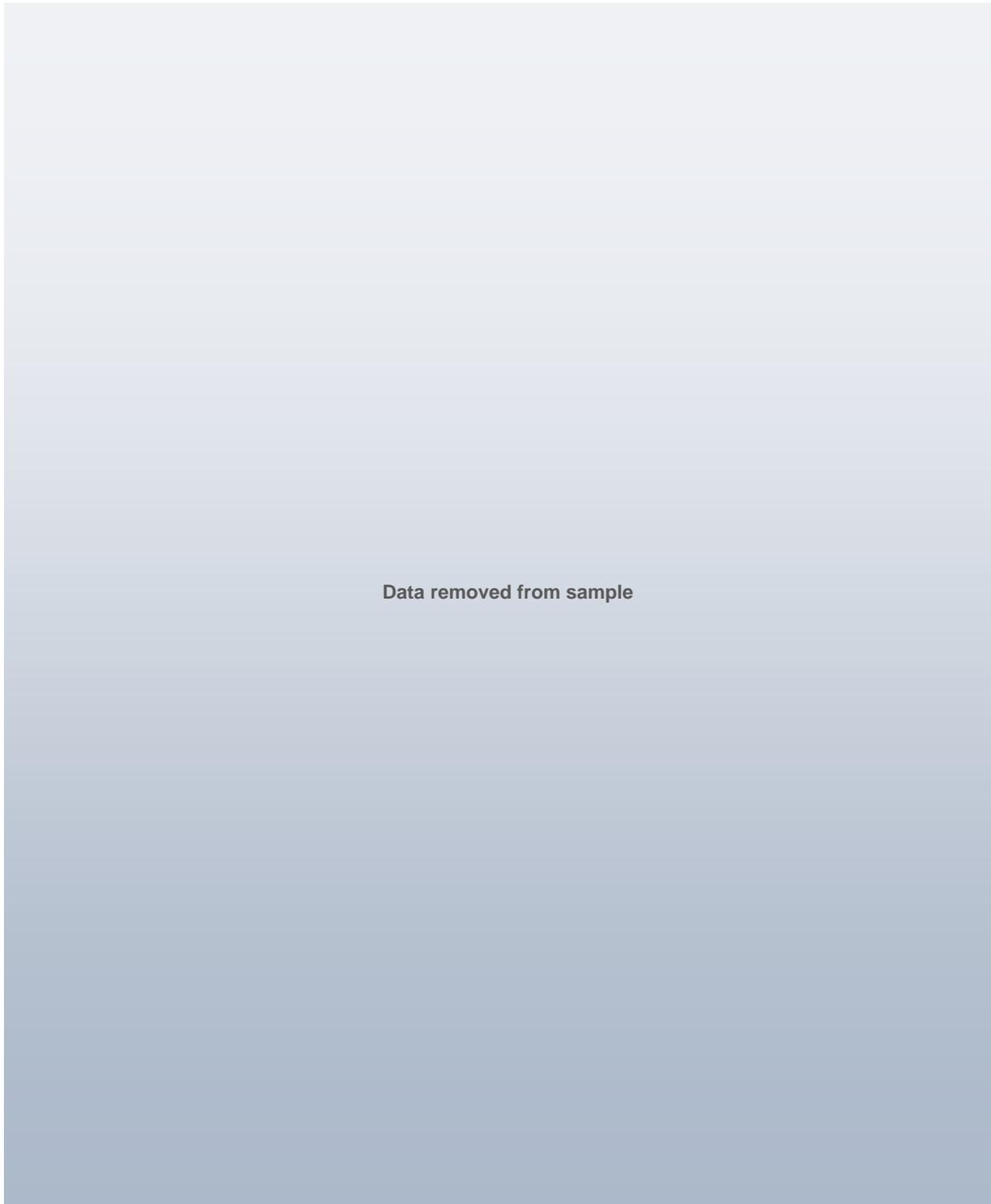
Table 11 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2018-2023

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

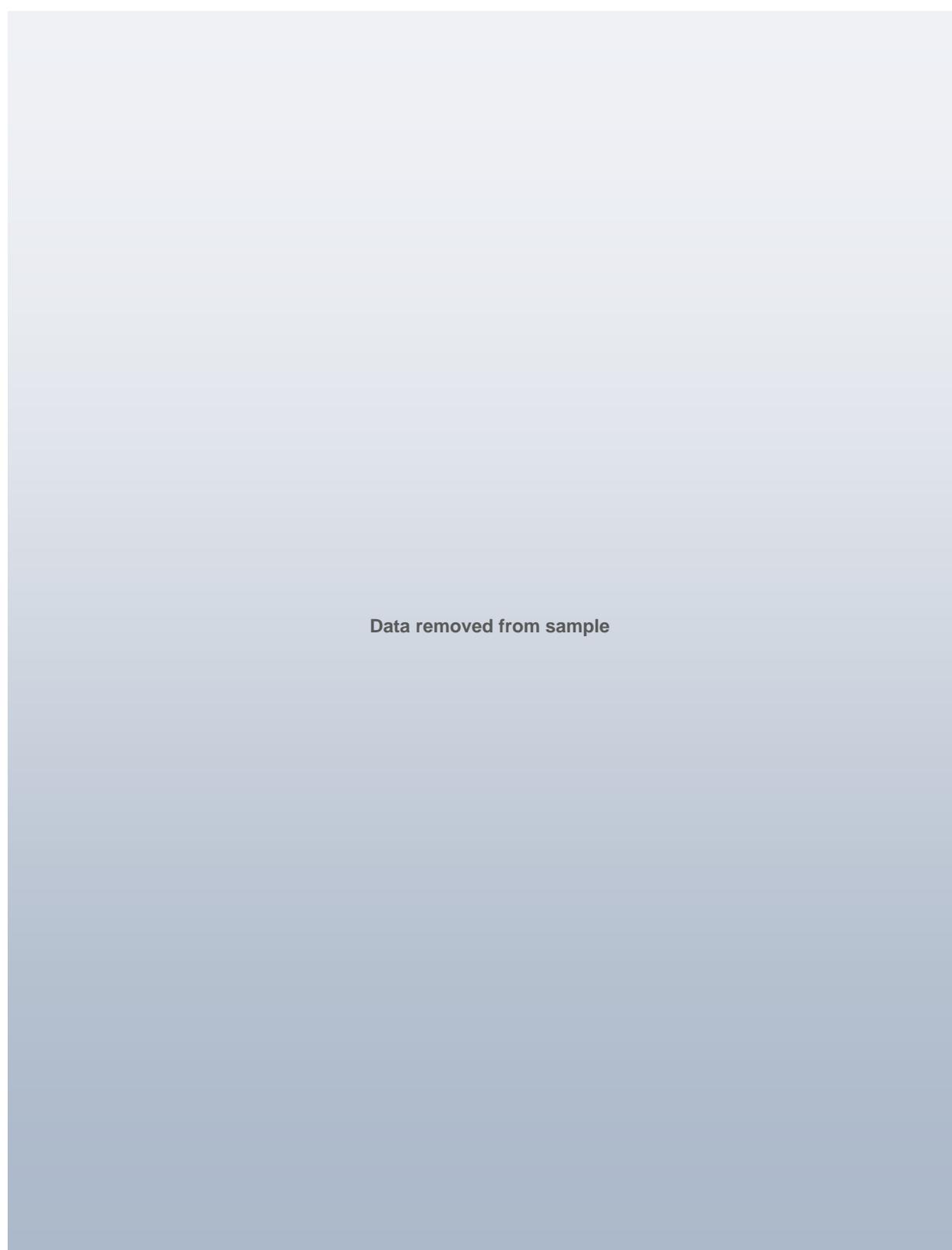
% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					

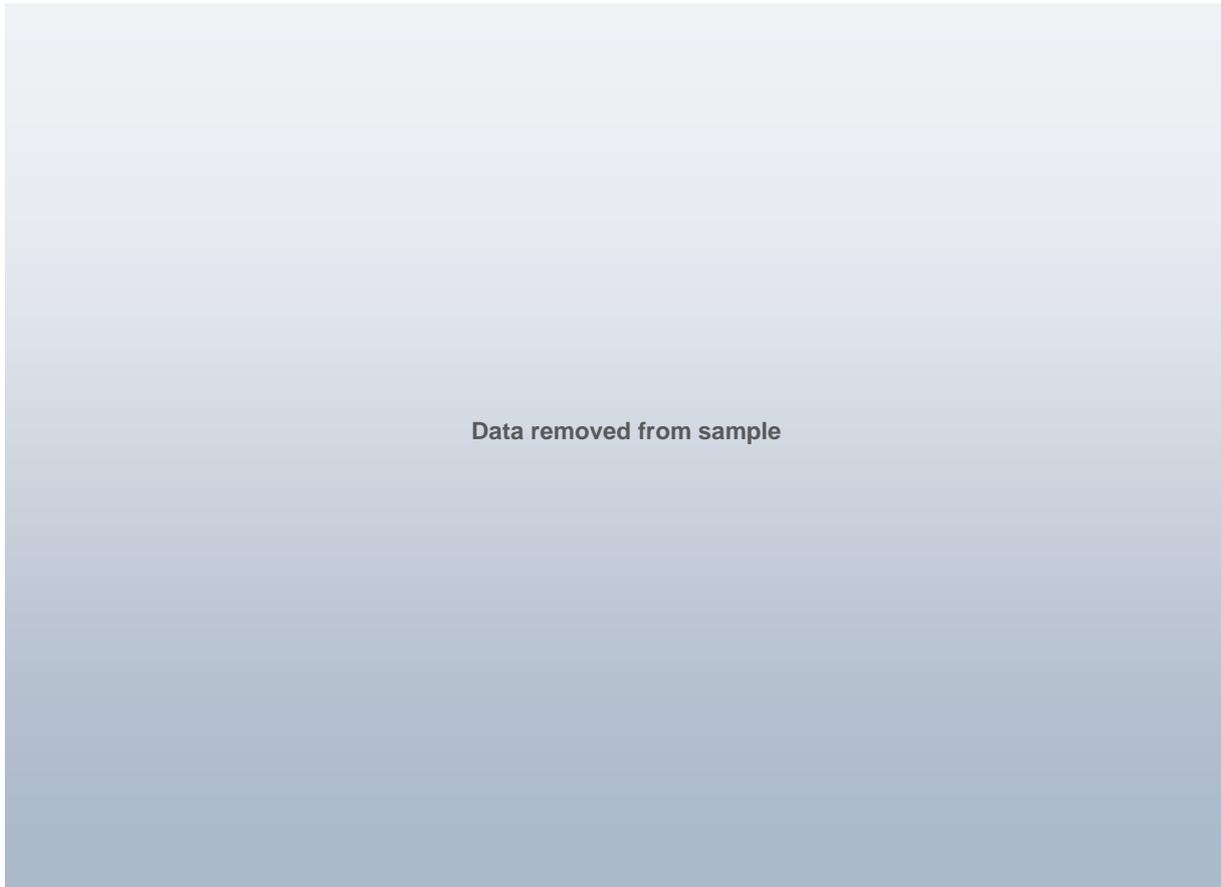


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 LBN Brand Shares of Retail Tissue and Hygiene: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
-----------------------------------	---------------	------	------	------	------





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

Table 14 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						
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 15 Distribution of Retail Tissue and Hygiene by Format: % Value 2018-2023

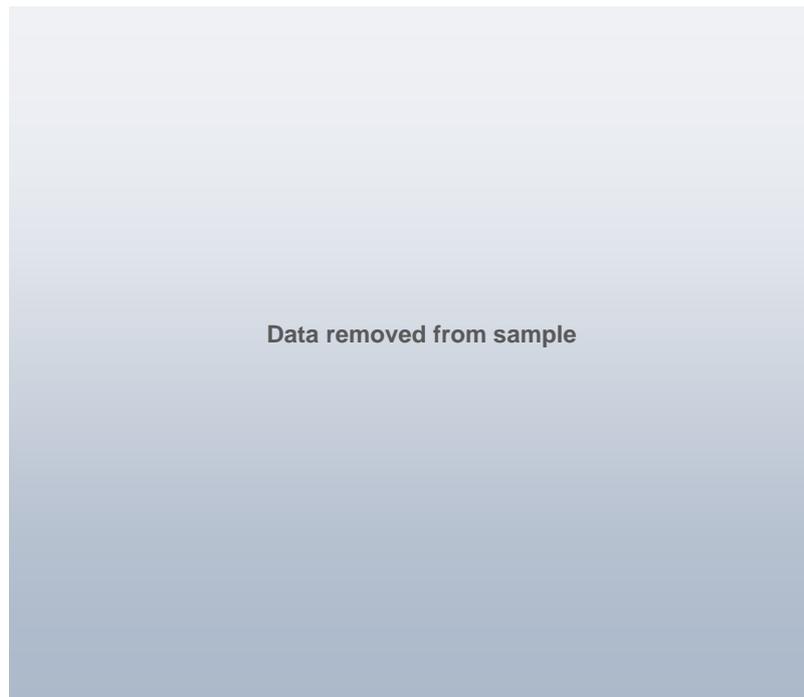
% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- 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 16 Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2023

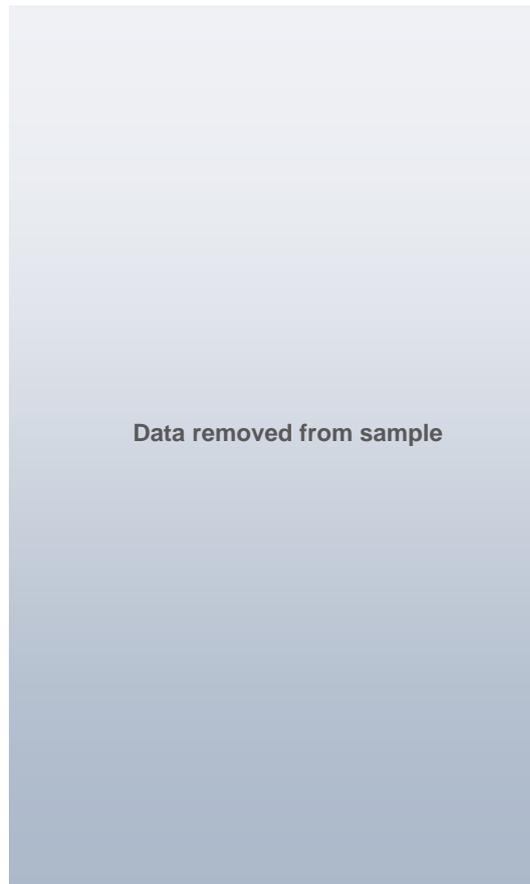
% retail value rsp	Retail Hygiene	Retail Adult Incontinence	Nappies/ Diapers/ Pants	Menstrual Care	Wipes	Retail Tissue
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- 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 17 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2023-2028

BRL 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 18 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: 24 April 2024

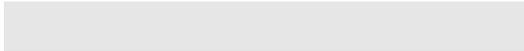
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on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

SOURCES

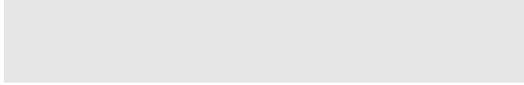
Sources used during the research included the following:

Summary 1 Research Sources

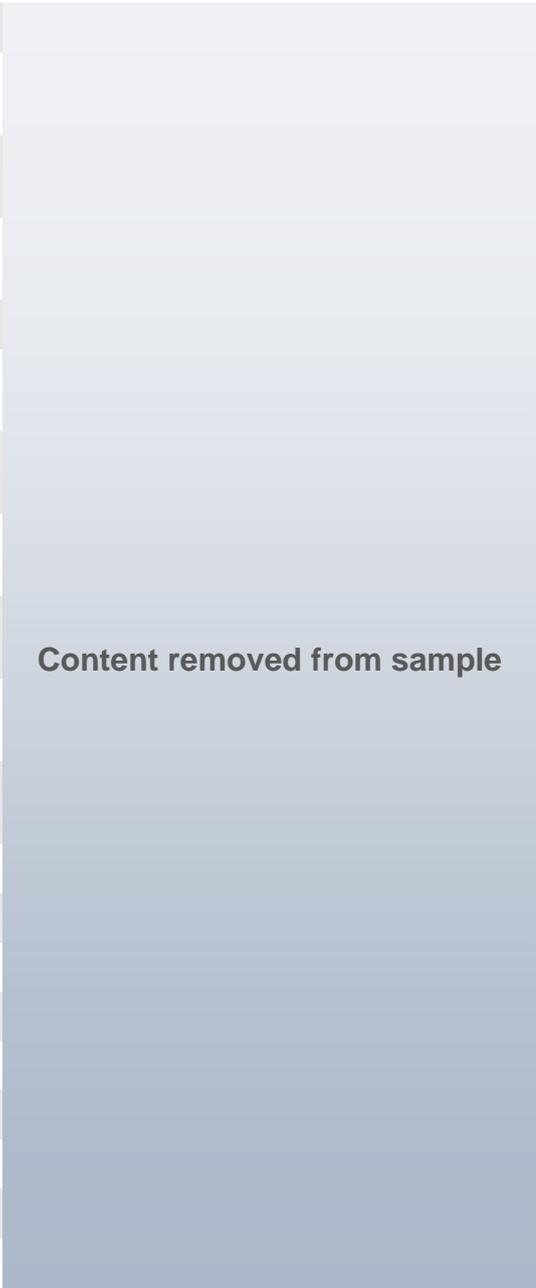
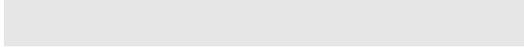
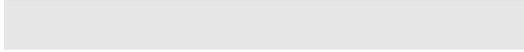
Official Sources



Trade Associations



Trade Press



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Source: Euromonitor International

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

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Afh tissue and hygiene thrives in the post-pandemic era, at least in the short term

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Resilience amidst adversity in afh tissue and hygiene

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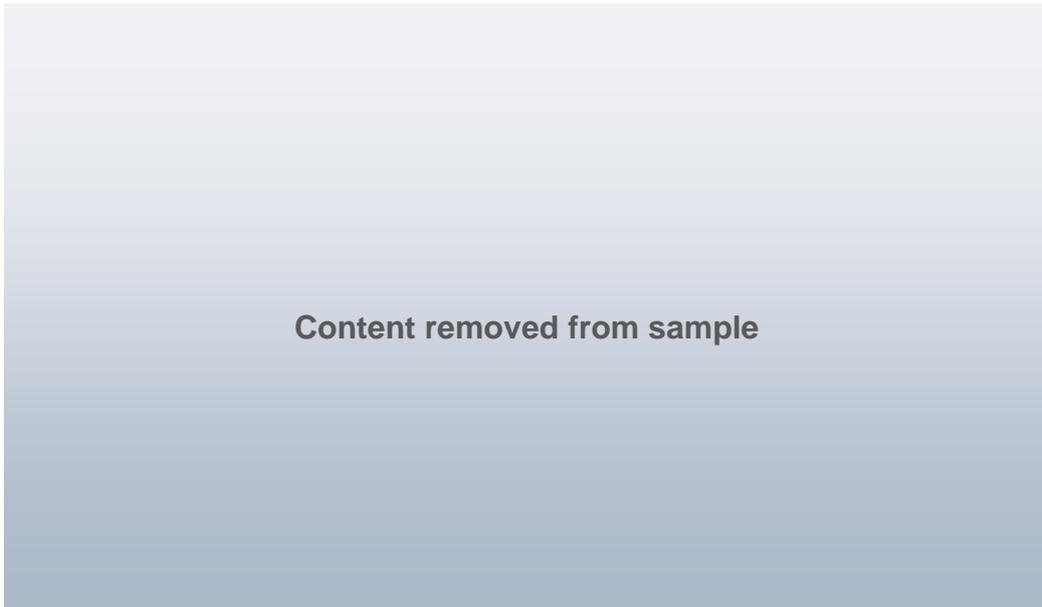
Strategic pricing and supply chain dynamics consolidate the competitive scenario

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PROSPECTS AND OPPORTUNITIES

Afh tissue and hygiene to sustain growth in the forecast period

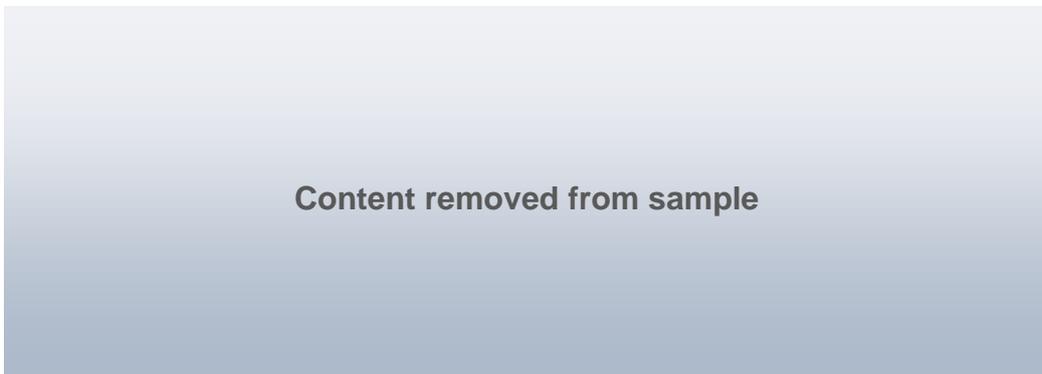
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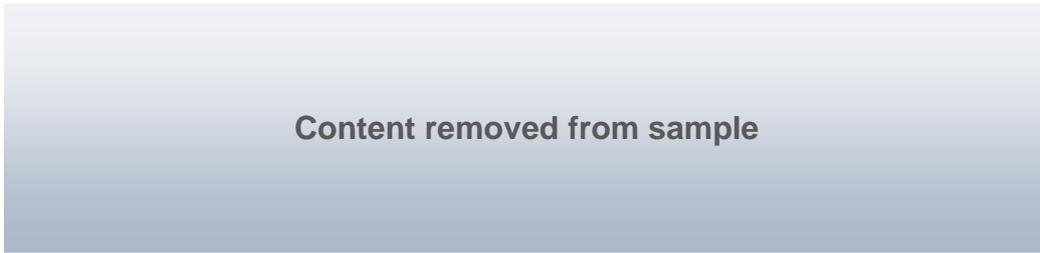


Opportunities to move towards a greener future



Health awareness set to drive sales of hygiene products





CATEGORY DATA

Table 19 Sales of Away-From-Home Tissue and Hygiene by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
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 official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 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	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 official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Sales of Away-From-Home Paper Towels by Type: % Value 2018-2023

% away-from-home value msp

	2018	2019	2020	2021	2022	2023
Interleaf	Data removed from sample					
Roll						
Other						
Total						

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

Table 22 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	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

Table 23 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 24 Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2023-2028

BRL 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

Data removed from sample

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

Table 25 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

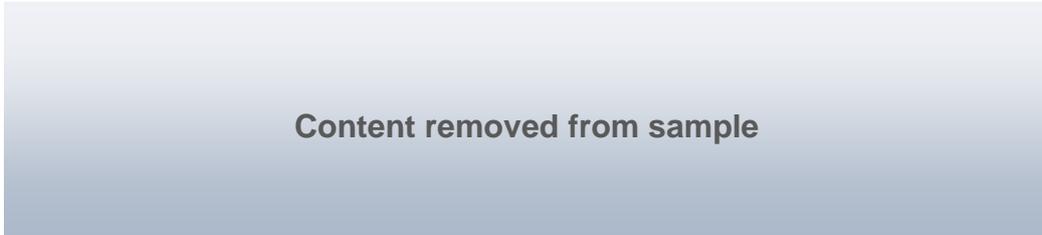
- Away-from-Home Tissue and Hygiene
- Away-from-Home Hygiene
- AFH Adult Incontinence
- Away-from-Home Tissue
- AFH Boxed Facial Tissues
- AFH Paper Tableware
- AFH Napkins
- AFH Tablecloths
- AFH Paper Towels
- AFH Toilet Paper
- AFH Wipers

Data removed from sample

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

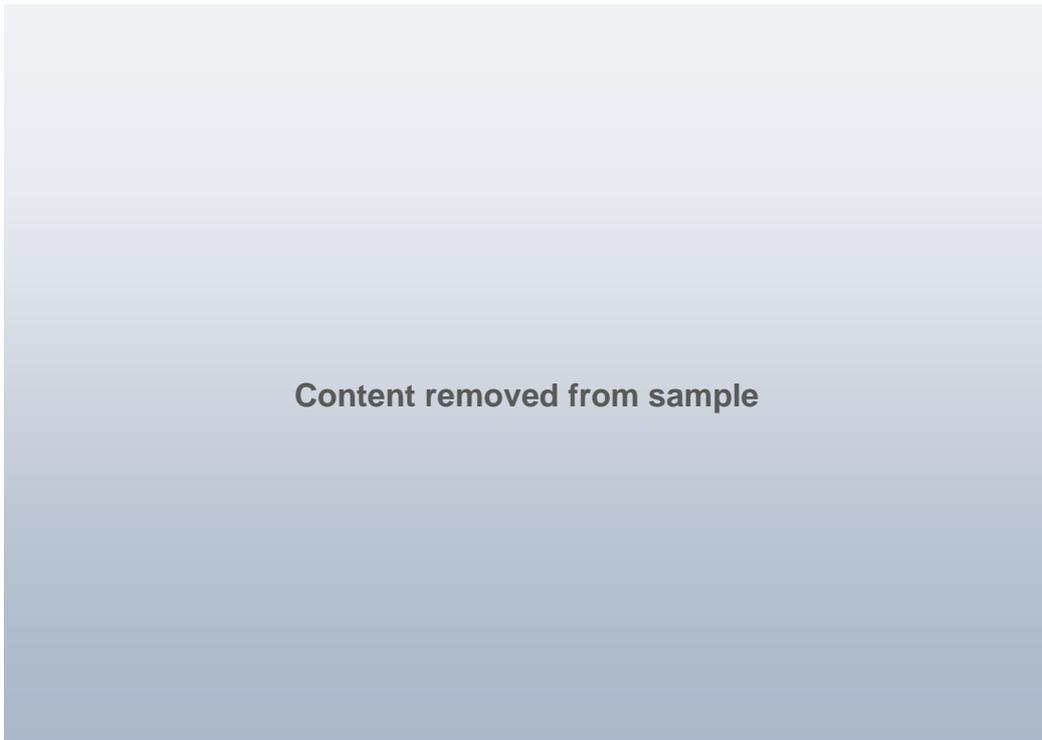
RETAIL ADULT INCONTINENCE IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

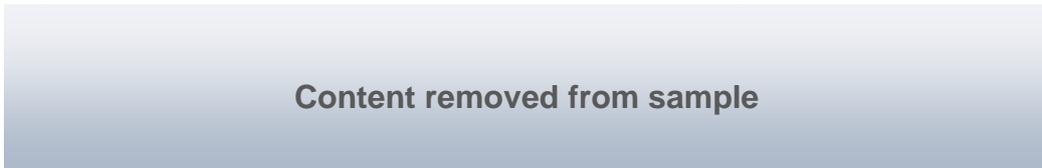


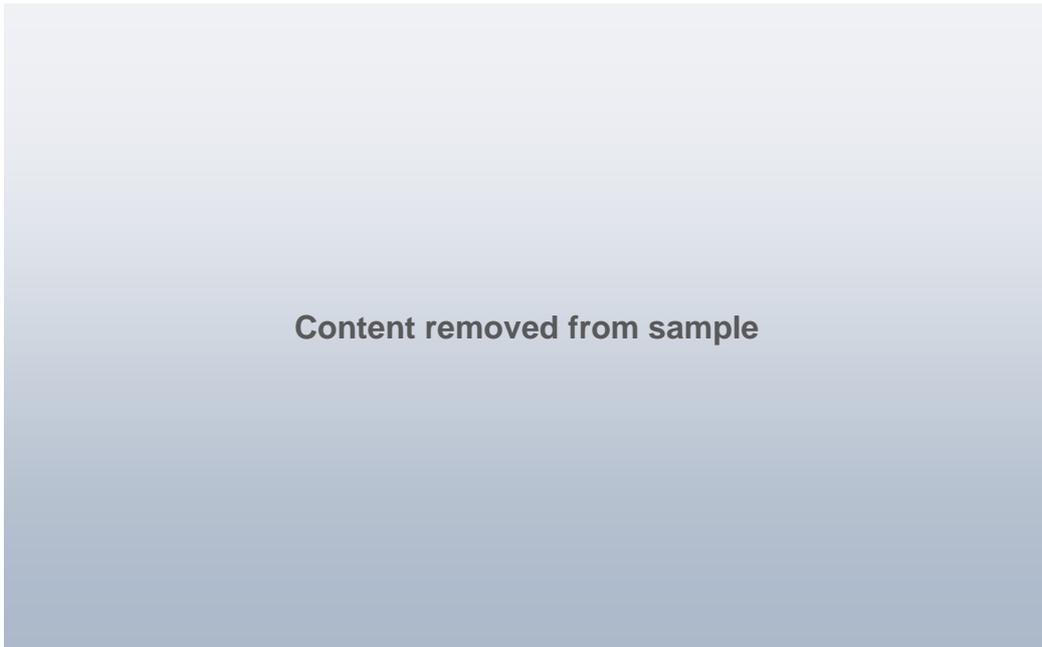
2023 DEVELOPMENTS

Rising knowledge around adult incontinence products highlights the category

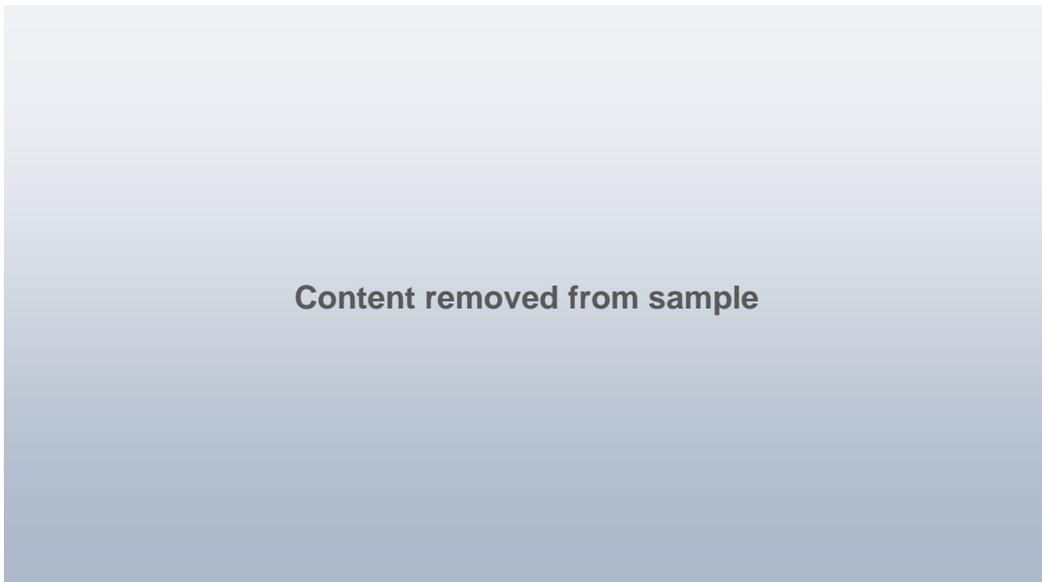


Digital innovation raises awareness and helps caregivers



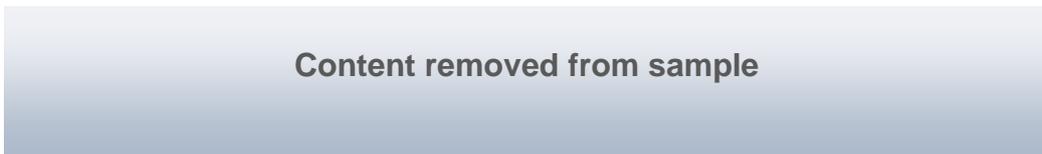


Online pharmaceutical channels empower shopping for incontinence products



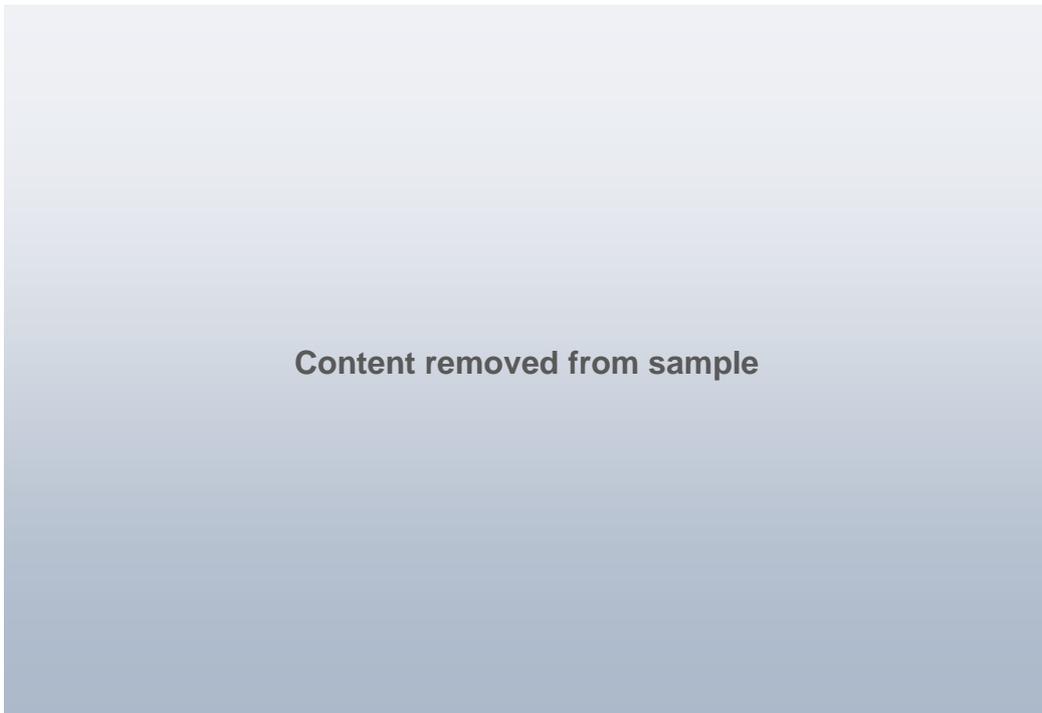
PROSPECTS AND OPPORTUNITIES

Incontinence pants to gain share, but nappy/diaper format to remain dominant

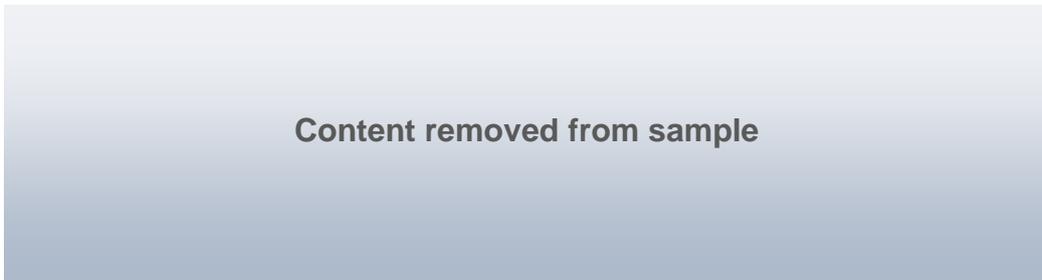


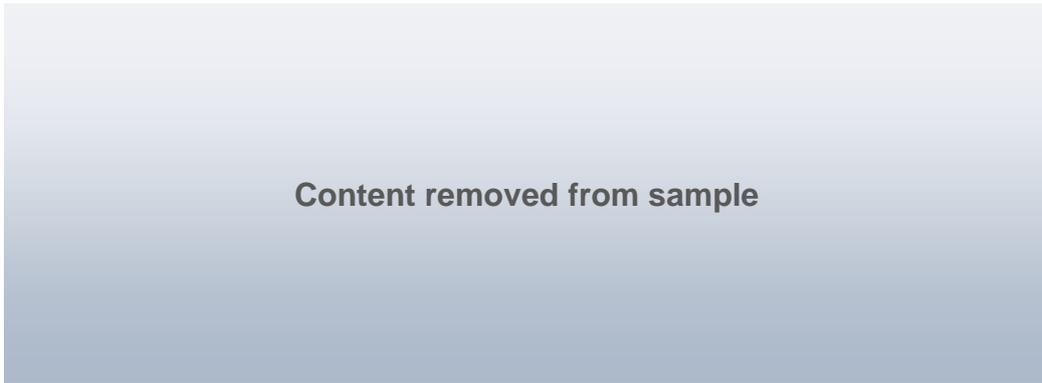


Sustainable solutions on the rise in the brazilian market



Innovations to ensure comfort will be a growth driver





CATEGORY DATA

Table 26 Sales of Retail Adult Incontinence by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
- Retail Adult Incontinence	Data removed from sample					
-- Light Adult Incontinence						
-- Moderate/Heavy Adult Incontinence						

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

Table 27 Sales of Retail Adult Incontinence by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
- Retail Adult Incontinence	Data removed from sample		
-- Light Adult Incontinence			
-- Moderate/Heavy Adult Incontinence			

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

Table 28 NBO Company Shares of Retail Adult Incontinence: % Value 2019-2023

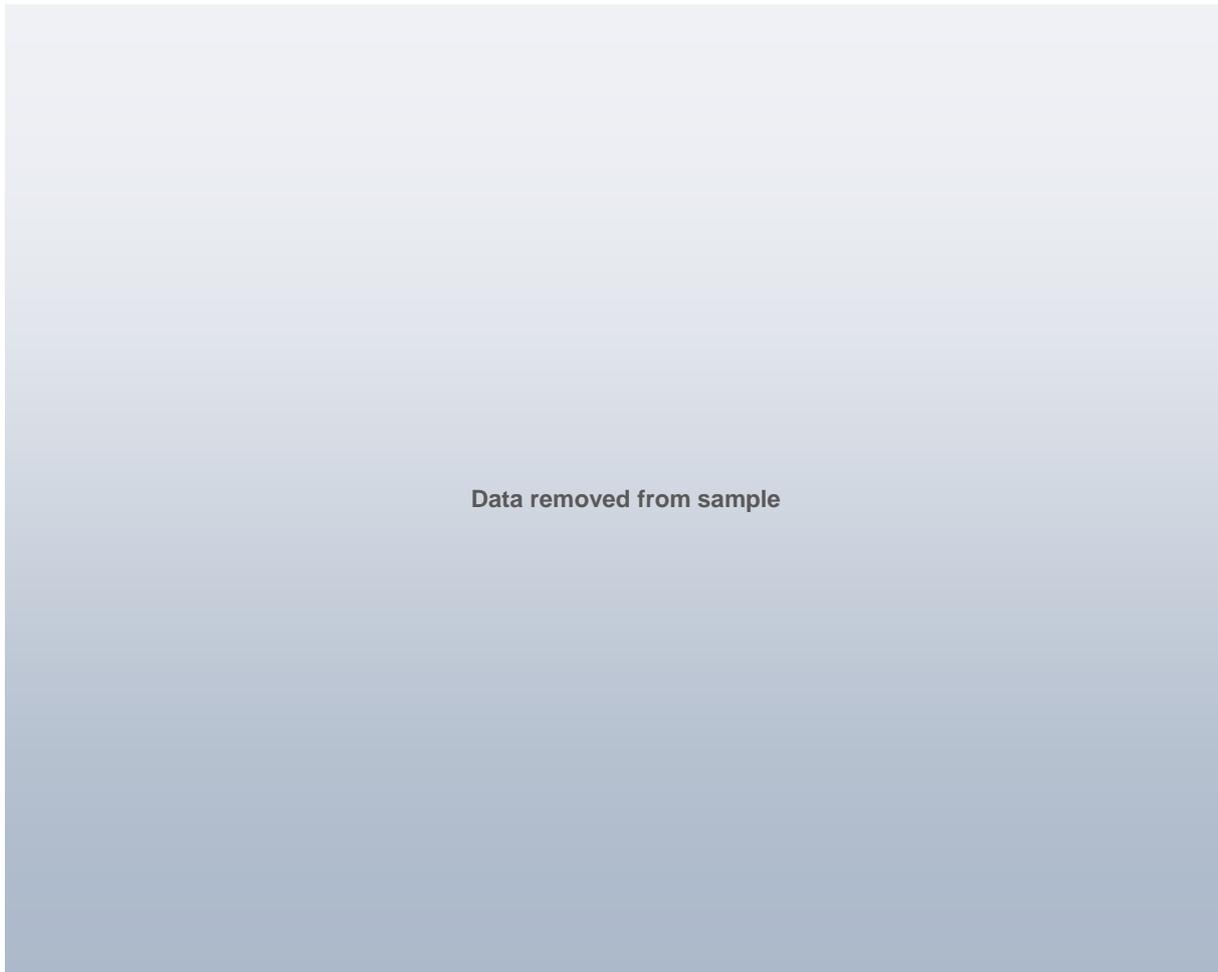
% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					



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

Table 29 LBN Brand Shares of Retail Adult Incontinence: % 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 30 Forecast Sales of Retail Adult Incontinence by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
- Retail Adult Incontinence	Data removed from sample					
-- Light Adult Incontinence						
-- Moderate/Heavy Adult Incontinence						

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

Table 31 Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
- Retail Adult Incontinence	Data removed from sample		
-- Light Adult Incontinence			
-- Moderate/Heavy Adult Incontinence			

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

NAPPIES/DIAPERS/PANTS IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

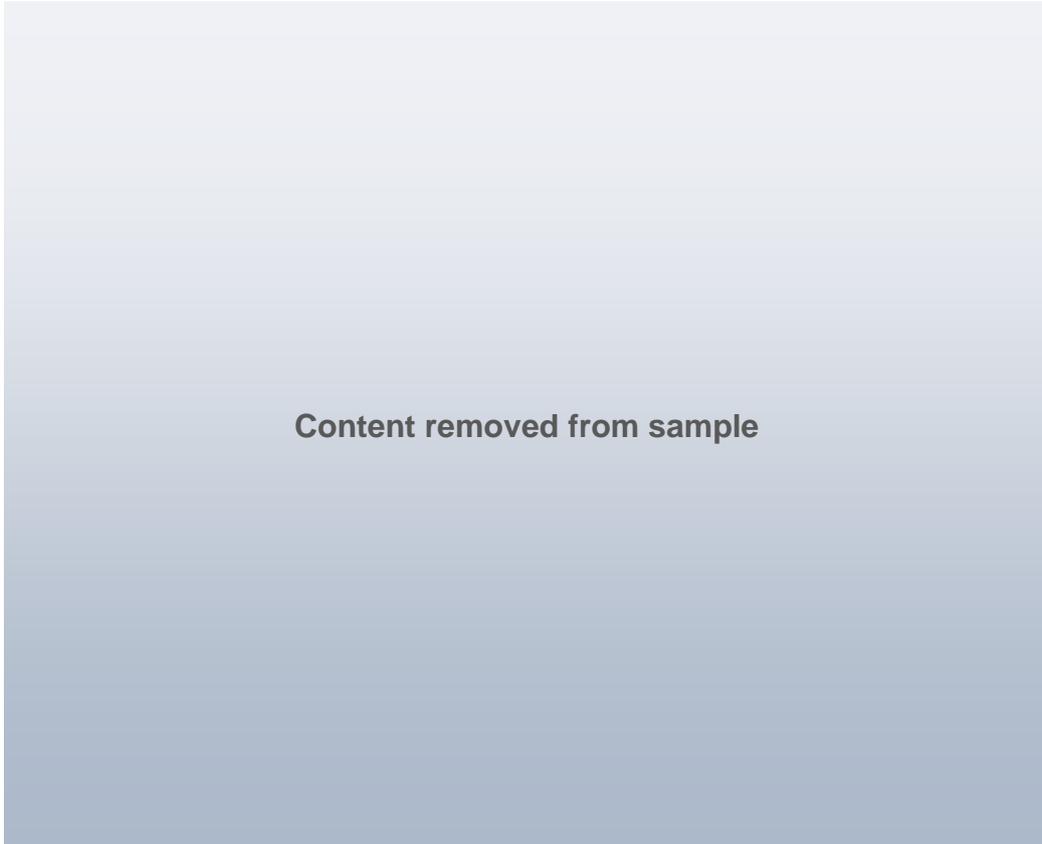
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2023 DEVELOPMENTS

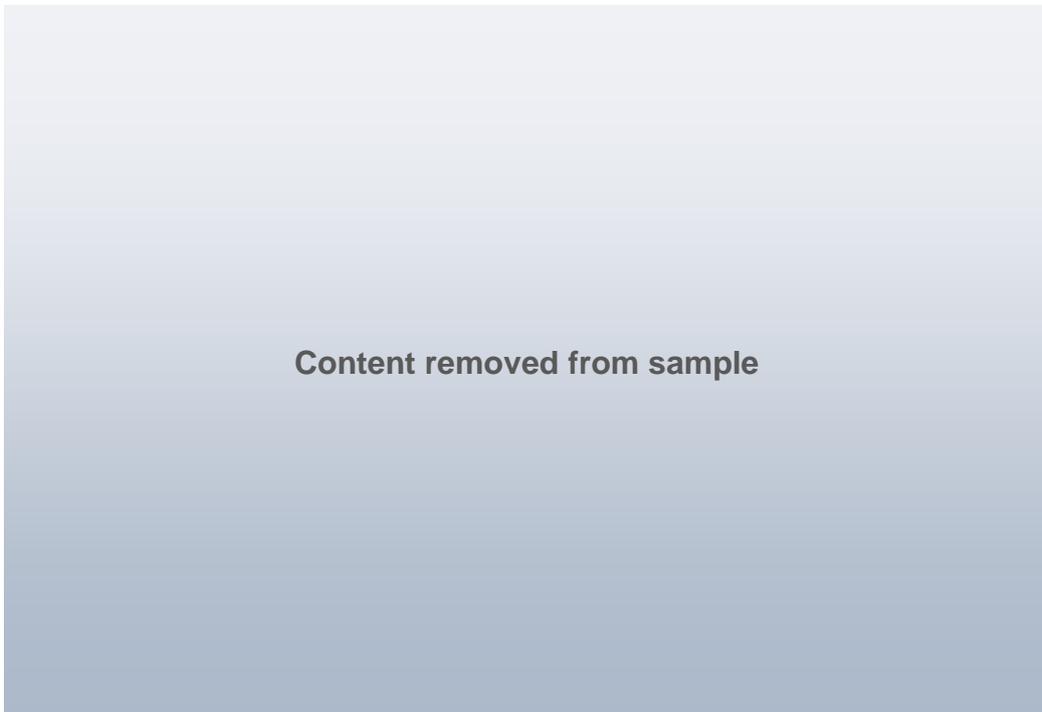
Disposable pants takes the spotlight amidst a declining volume performance for nappies/diapers

Content removed from sample

Nappies/diapers/pants consolidates and expands after economic crisis



Competitive landscape is not advantageous for all players



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PROSPECTS AND OPPORTUNITIES

Premiumisation set to be a significant driver of value growth in the forecast period

Content removed from sample

Shifting preferences and opportunities for private label in nappies/diapers/pants

Content removed from sample

Content removed from sample

Embracing sustainability in baby care in brazil

Content removed from sample

CATEGORY DATA

Table 32 Retail Sales of Nappies/Diapers/Pants by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
- Nappies/Diapers/Pants	Data removed from sample					
-- Disposable Pants						
-- Nappies/Diapers						
--- Junior Nappies/ Diapers						
--- New Born Nappies/ Diapers						
--- Standard Nappies/ Diapers	Data removed from sample					

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

Table 33 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
- Nappies/Diapers/Pants	Data removed from sample		
-- Disposable Pants			
-- Nappies/Diapers			
--- Junior Nappies/Diapers			
--- New Born Nappies/Diapers			
--- Standard Nappies/Diapers			

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

Table 34 NBO Company Shares of Retail Nappies/Diapers/Pants: % 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 35 LBN Brand Shares of Retail Nappies/Diapers/Pants: % 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 36 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
- Nappies/Diapers/Pants	Data removed from sample					
-- Disposable Pants						
-- Nappies/Diapers						
--- Junior Nappies/ Diapers						
--- New Born Nappies/ Diapers						
--- Standard Nappies/ Diapers	Data removed from sample					

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

Table 37 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
- Nappies/Diapers/Pants	Data removed from sample		
-- Disposable Pants			
-- Nappies/Diapers			
--- Junior Nappies/Diapers			
--- New Born Nappies/Diapers			
--- Standard Nappies/Diapers	Data removed from sample		

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

MENSTRUAL CARE IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Menstrual care grows despite maturity and social difficulties

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Addressing menstrual poverty and health concerns takes centre stage

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Media partnerships on menstrual care positively impact companies

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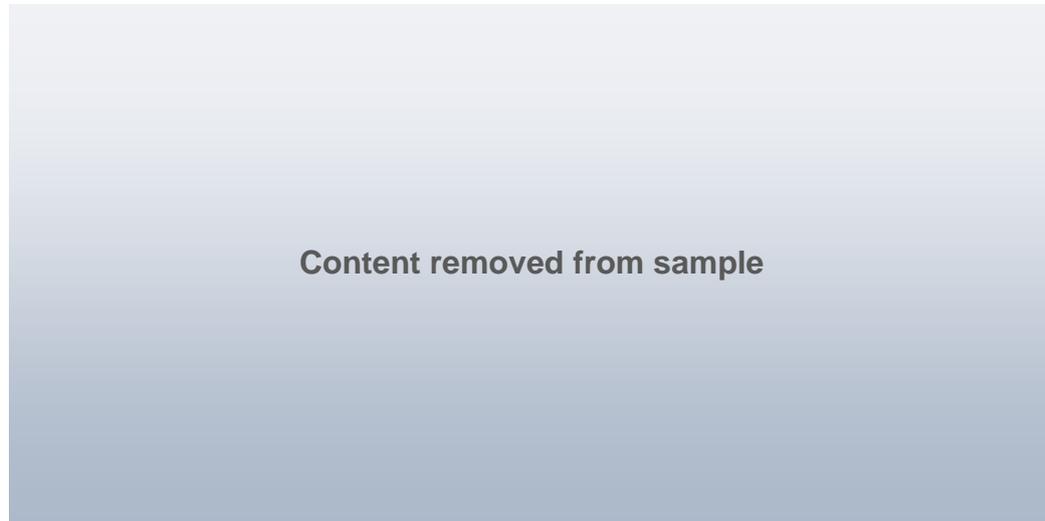
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PROSPECTS AND OPPORTUNITIES

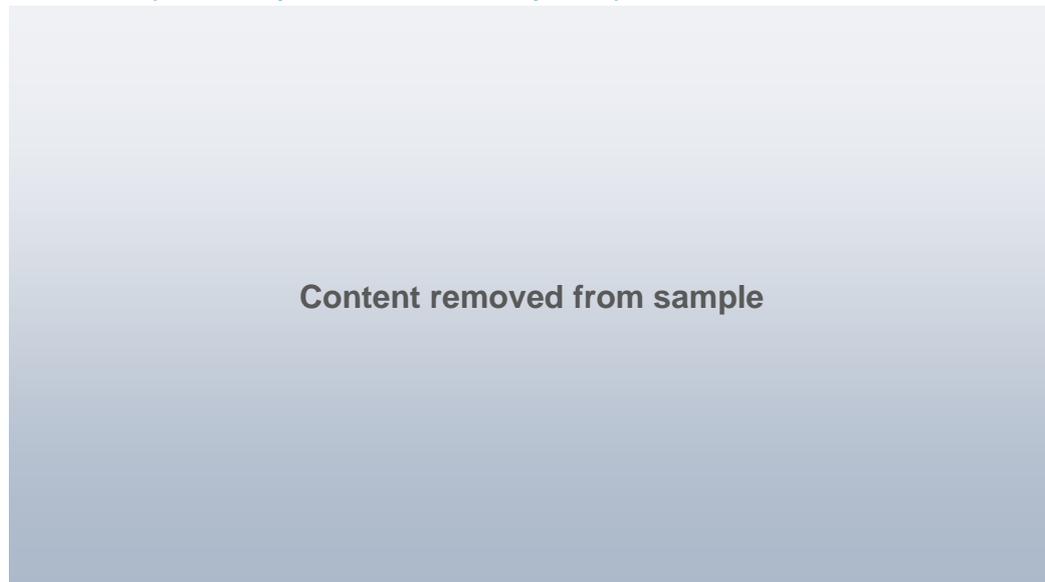
Holistic care to drive innovation

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Private label emerging as an affordable and high-quality alternative



Social responsibility and sustainability are priorities for consumers



CATEGORY DATA

Table 38 Retail Sales of Menstrual Care by Category: Value 2018-2023

BRL 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

Data removed from sample

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

Table 39 Retail Sales of Menstrual Care by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

- Menstrual Care
- 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

Data removed from sample

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

Table 40 Retail Sales of Tampons by Application Format: % Value 2018-2023

% retail value rsp

2018 2019 2020 2021 2022 2023

- Applicator Tampons
- Digital Tampons
- Total

Data removed from sample

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

Table 41 NBO Company Shares of Retail Menstrual Care: % Value 2019-2023

% retail value rsp

Company 2019 2020 2021 2022 2023

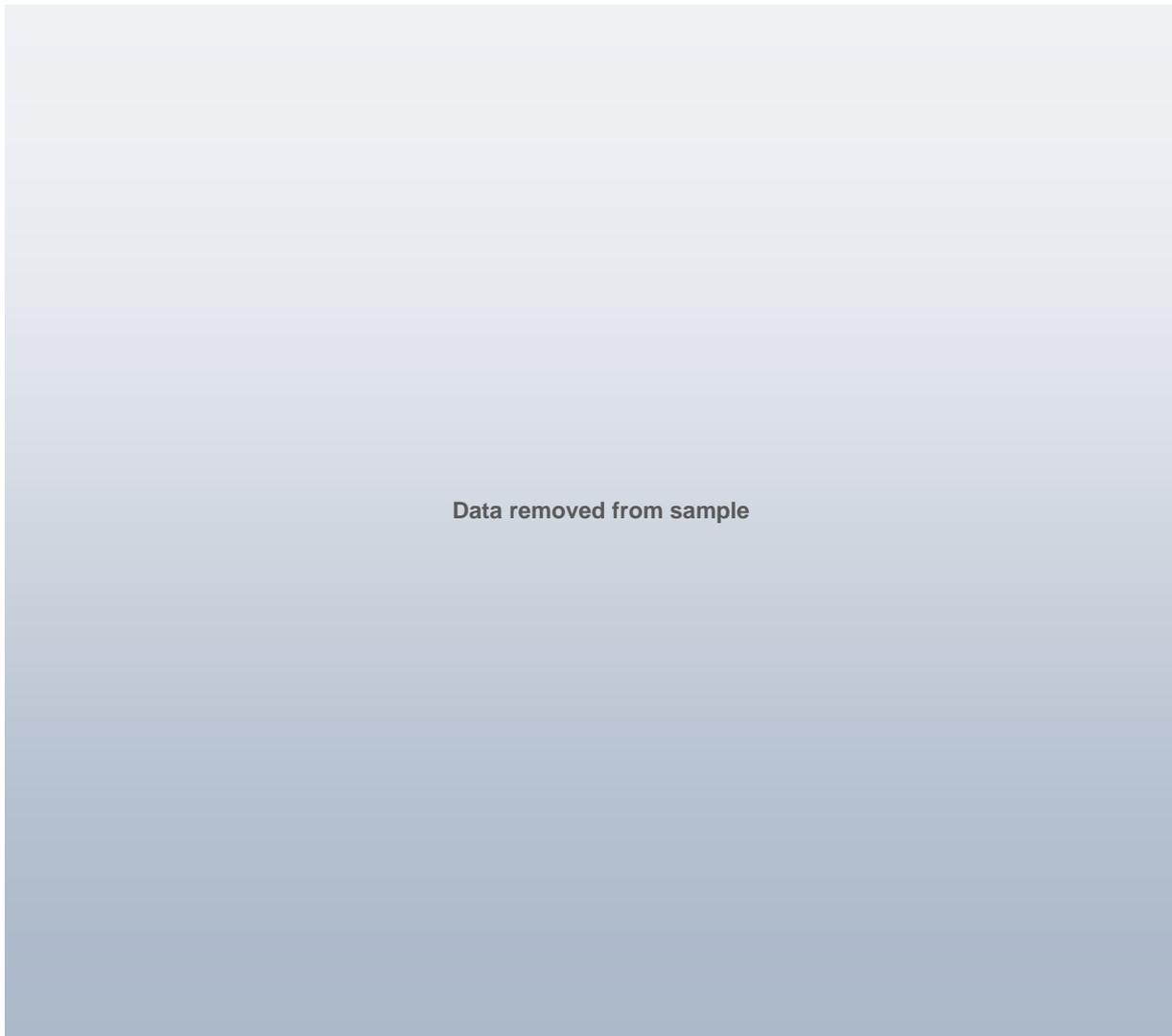
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 42 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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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 Forecast Retail Sales of Menstrual Care by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
- 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

Table 44 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			

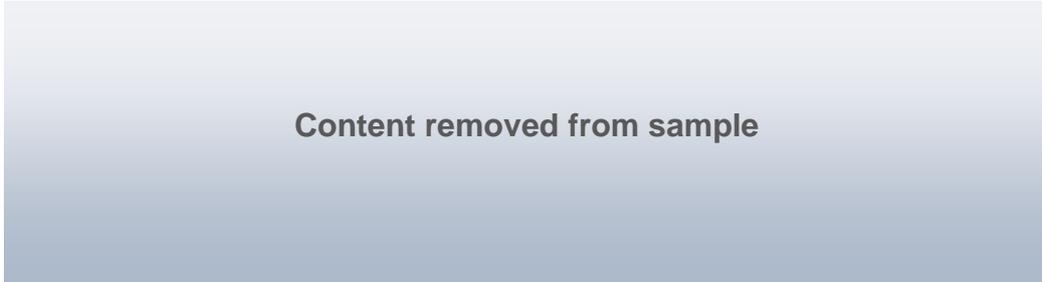
- Slim/Thin/Ultra-Thin Towels
- Slim/Thin/Ultra-Thin Towels With Wings
- Slim/Thin/Ultra-Thin Towels Without Wings
- Menstrual Care Including Intimate Wipes

Data removed from sample

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

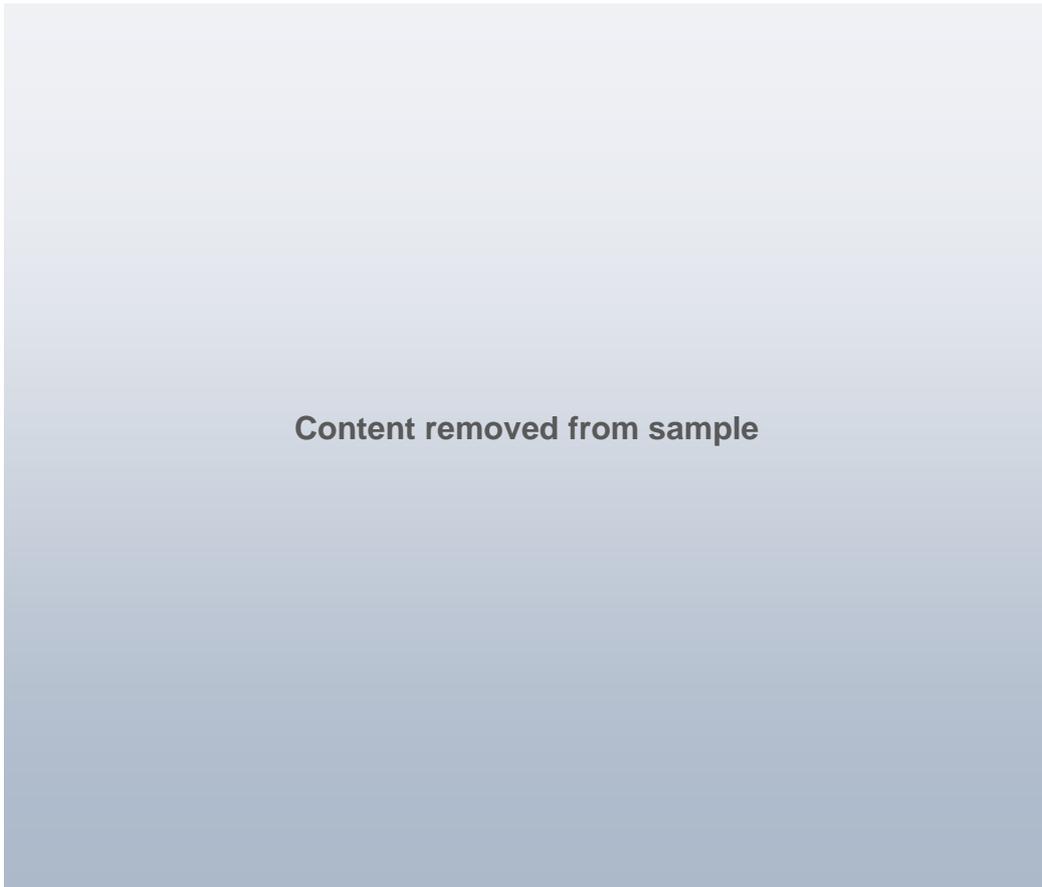
WIPES IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS



2023 DEVELOPMENTS

Wipes remain must-have products in Brazil in the post-pandemic landscape



Baby wipes nurture innovation and address the concerns of new parents



Private label gains relevance and grows in wipes



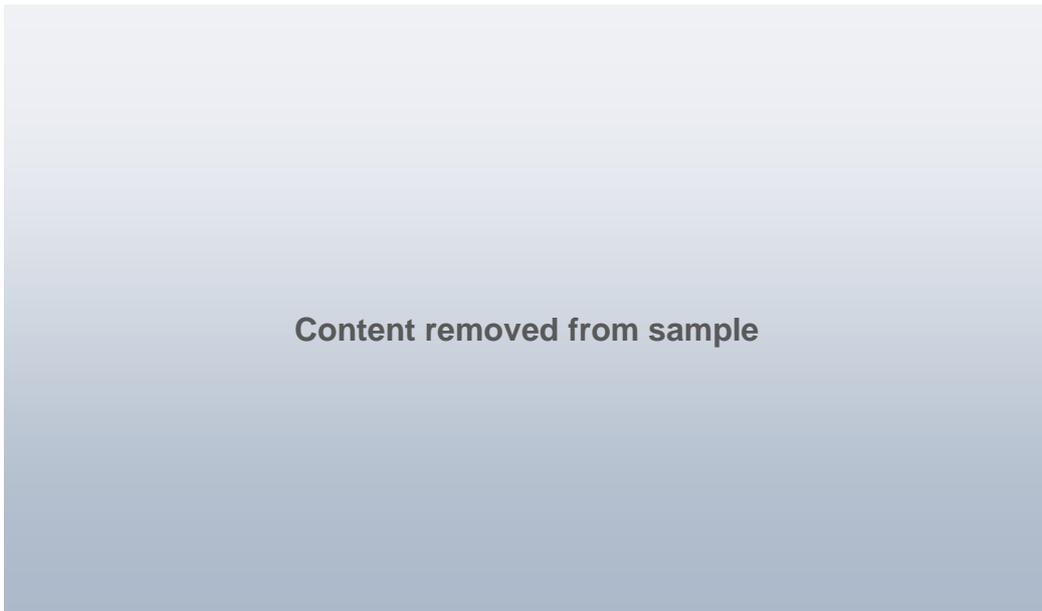
PROSPECTS AND OPPORTUNITIES

Wipes to maintain robust growth and innovation in the forecast period

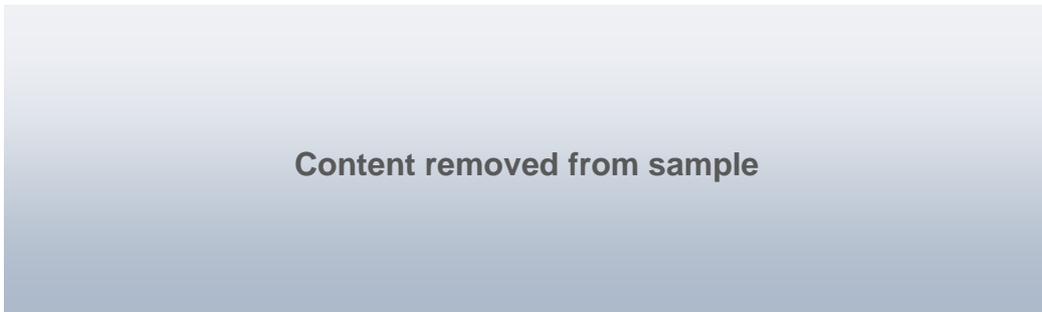


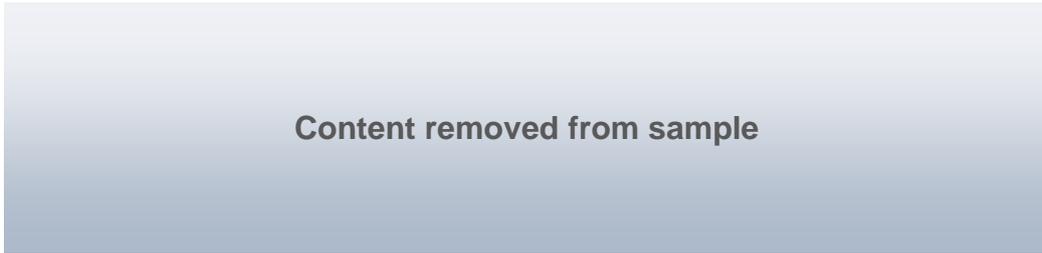


Usage for cleaning is amongst the main trends, both for households and on-the-go



Navigating eco-friendly initiatives within wipes





CATEGORY DATA

Table 45 Retail Sales of Wipes by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
- Wipes	Data removed from sample					
-- Home Care Wipes and Floor Cleaning Systems						
--- Dry Electro-Static Wipes						
---- Starter Kits/Sweepers/Sticks (Dry Electro-Static)						
---- Wipes and Refills (Dry Electro-Static)						
--- Floor Cleaning Systems						
---- Refills						
---- Cleaning Solution						
---- Refill Wipes/Pads						
---- Starter Kits/Trigger Device						
-- Impregnated Wet Wipes						
---- All Purpose Cleaning Wipes						
---- Furniture Polish Wipes						
---- Toilet Care Wipes						
---- Window/Glass Wipes						
---- Other Impregnated Wipes						
--- Starter Kits/Sweepers/Sticks (Excluding Wipes)						
--- Wipes (Excluding Starter Kits/Sweepers/Sticks)						
-- Personal Wipes						
--- General Purpose Wipes						
--- Intimate Wipes						
--- Baby Wipes						
--- Cosmetic Wipes						
---- Facial Cleansing Wipes						
---- Deodorant Wipes						
--- Moist Toilet Wipes						

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

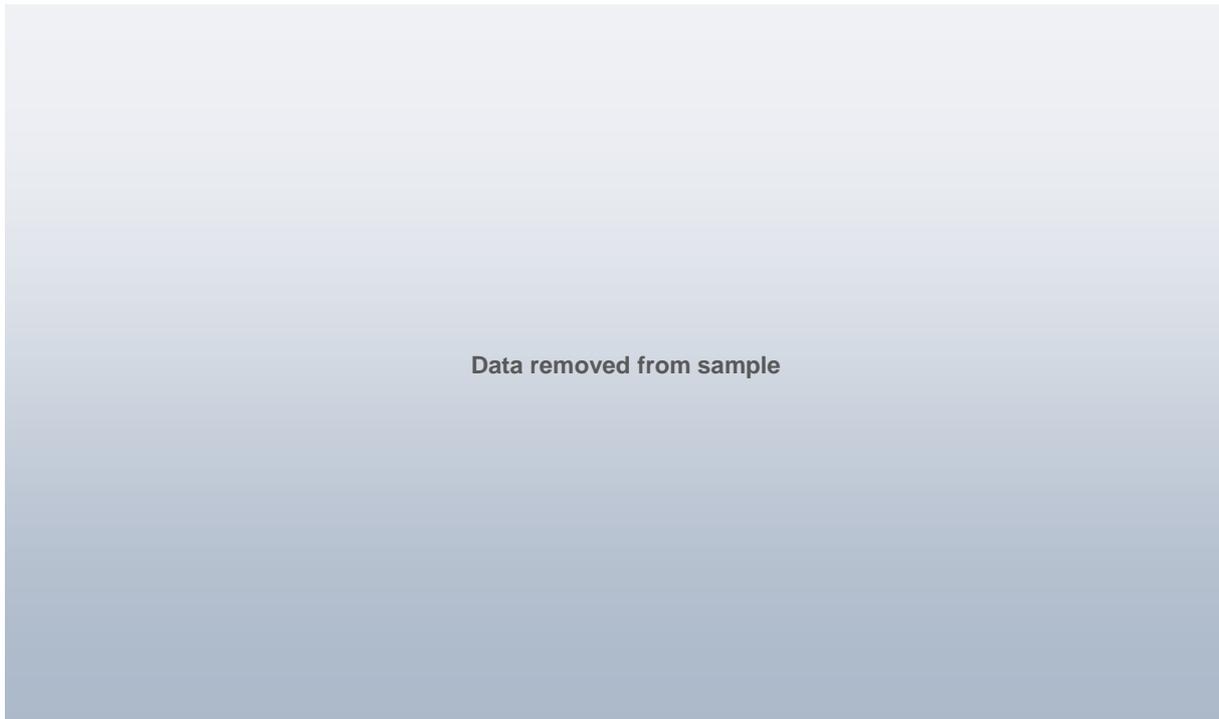
Table 46 Retail Sales of Wipes by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
- Wipes	Data removed from sample		
-- Home Care Wipes and Floor Cleaning Systems			
--- Dry Electro-Static Wipes			
---- Starter Kits/Sweepers/Sticks (Dry Electro-Static)			
---- Wipes and Refills (Dry Electro-Static)			
-- Floor Cleaning Systems			
---- Refills			
---- Cleaning Solution			
---- Refill Wipes/Pads			
---- Starter Kits/Trigger Device			
-- Impregnated Wet Wipes			
---- All Purpose Cleaning Wipes			
---- Furniture Polish Wipes			
---- Toilet Care Wipes			
---- Window/Glass Wipes			
---- Other Impregnated Wipes			
-- Starter Kits/Sweepers/Sticks (Excluding Wipes)			
--- Wipes (Excluding Starter Kits/Sweepers/Sticks)			
-- Personal Wipes			
--- General Purpose Wipes			
--- Intimate Wipes			
--- Baby Wipes			
--- Cosmetic Wipes			
---- Facial Cleansing Wipes			
---- Deodorant Wipes			
--- Moist Toilet Wipes			

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

Table 47 NBO Company Shares of Retail Wipes: % Value 2019-2023

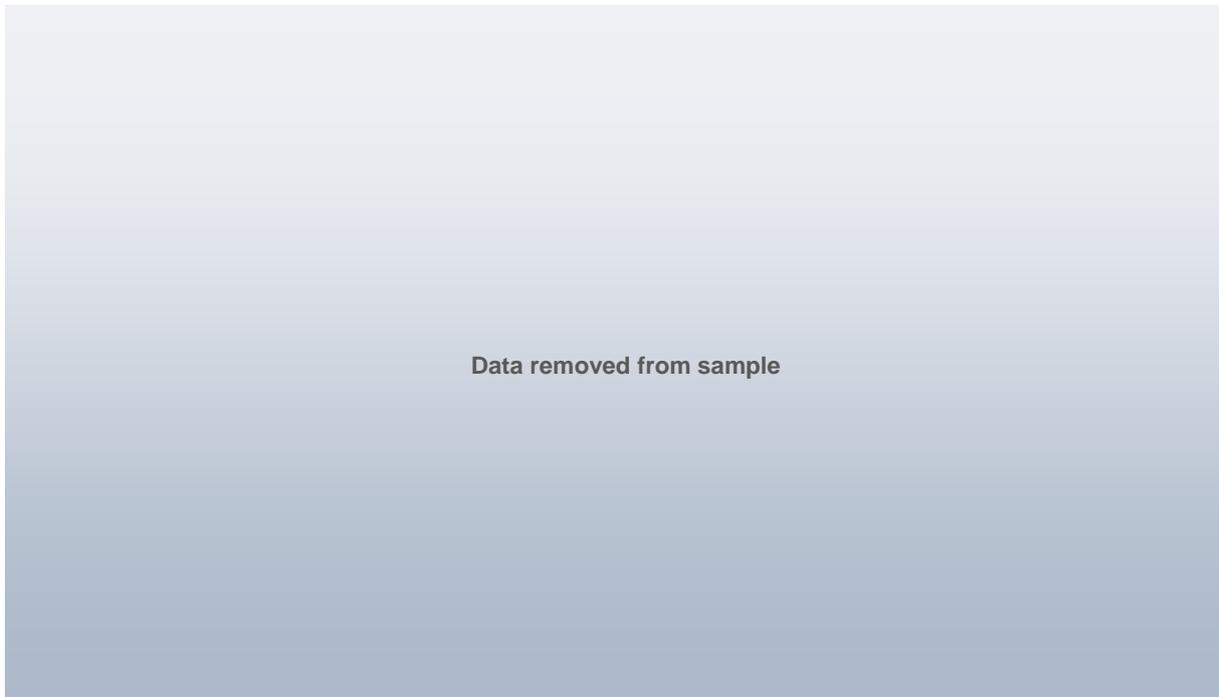
% retail value rsp	2019	2020	2021	2022	2023
Company	Data removed from sample				

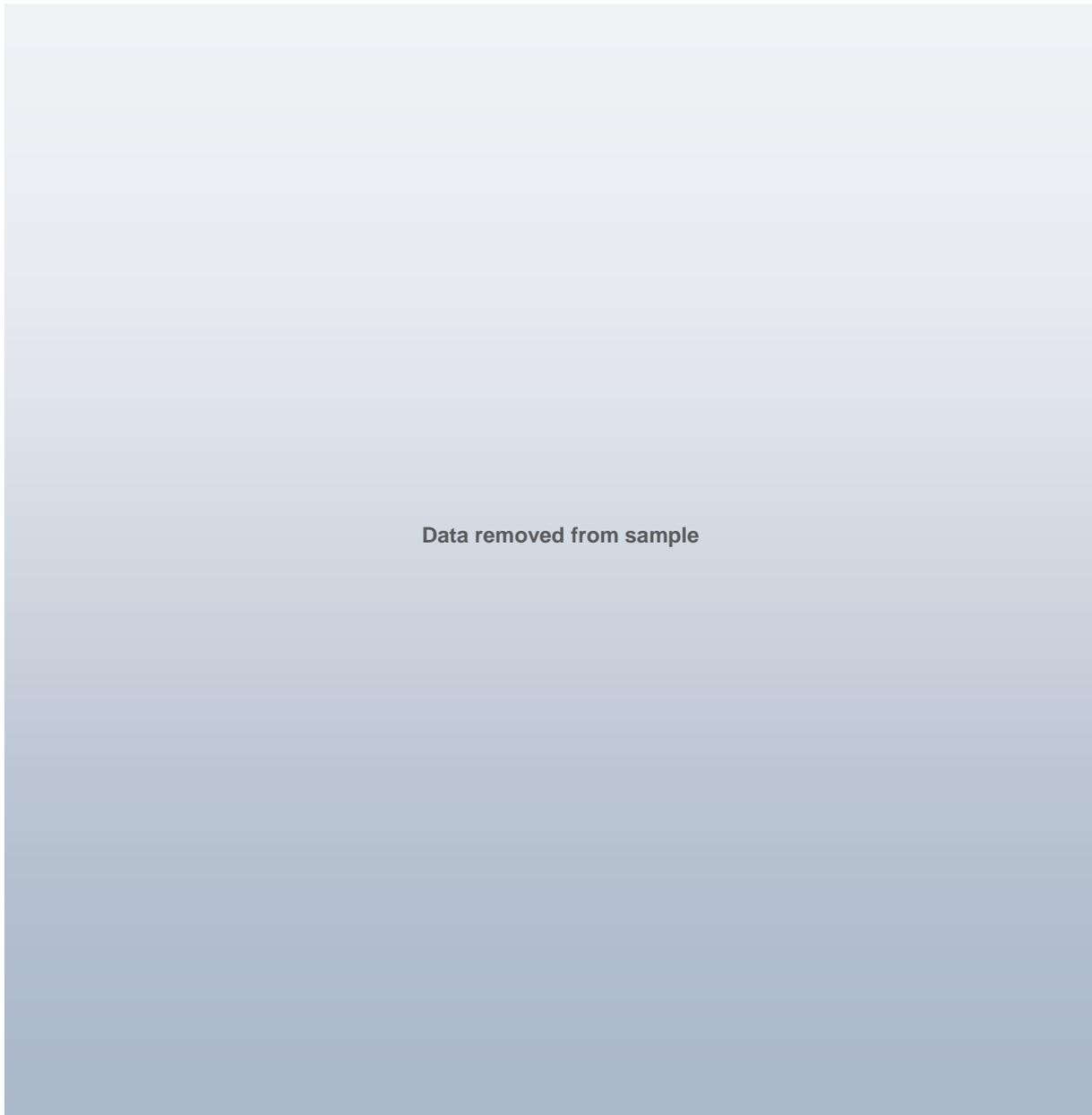


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 48 LBN Brand Shares of Retail Wipes: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
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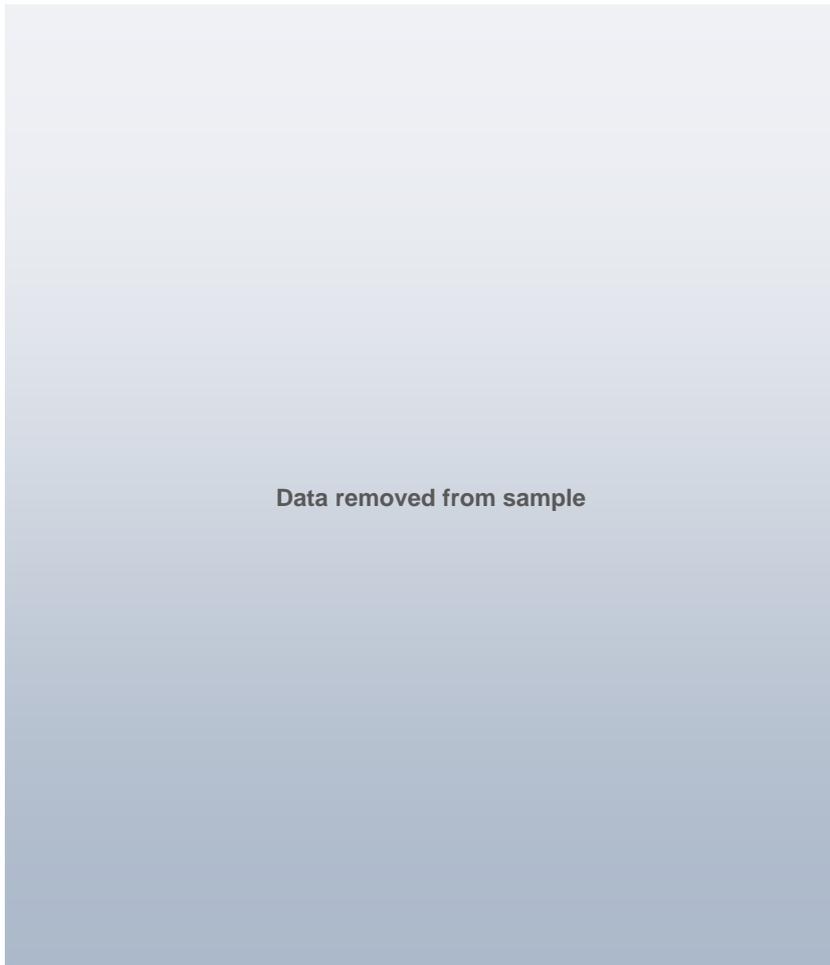


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 49 Forecast Retail Sales of Wipes by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
- Wipes	Data removed from sample					
-- Home Care Wipes and Floor Cleaning Systems						
--- Dry Electro-Static Wipes						
---- Starter Kits/						

- Sweepers/Sticks (Dry Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes
- Toilet Care Wipes
- Window/Glass Wipes
- Other Impregnated Wipes
- Starter Kits/Sweepers/Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/Sticks)
- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes



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

Table 50 Forecast Retail Sales of Wipes by Category: % Value Growth 2023-2028

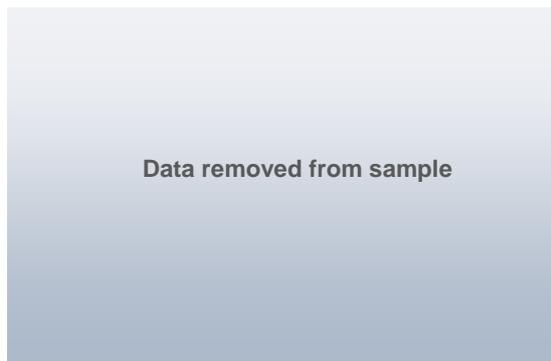
% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Wipes
- Home Care Wipes and Floor Cleaning Systems
- Dry Electro-Static Wipes
- Starter Kits/Sweepers/Sticks (Dry Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes
- Toilet Care Wipes
- Window/Glass Wipes



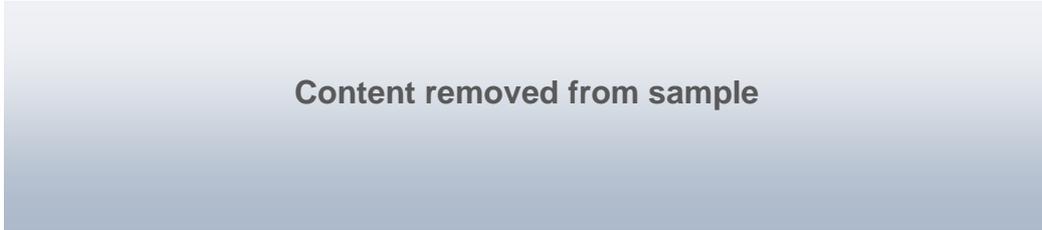
- Other Impregnated Wipes
- Starter Kits/Sweepers/Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/Sticks)
- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes



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

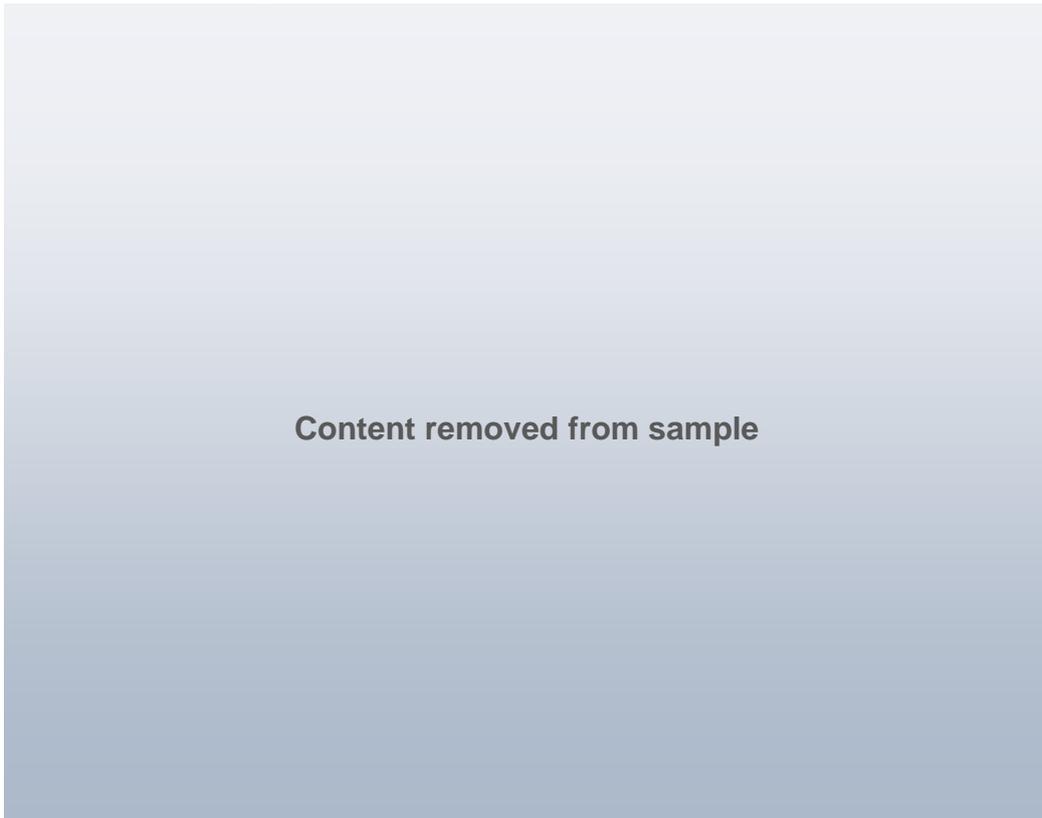
RETAIL TISSUE IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

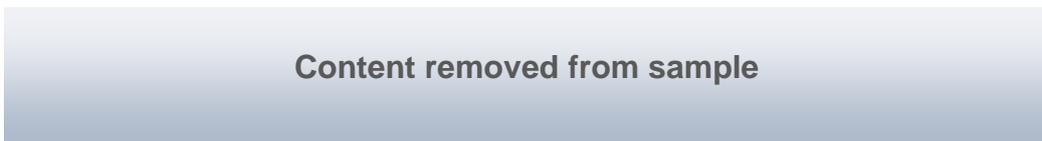


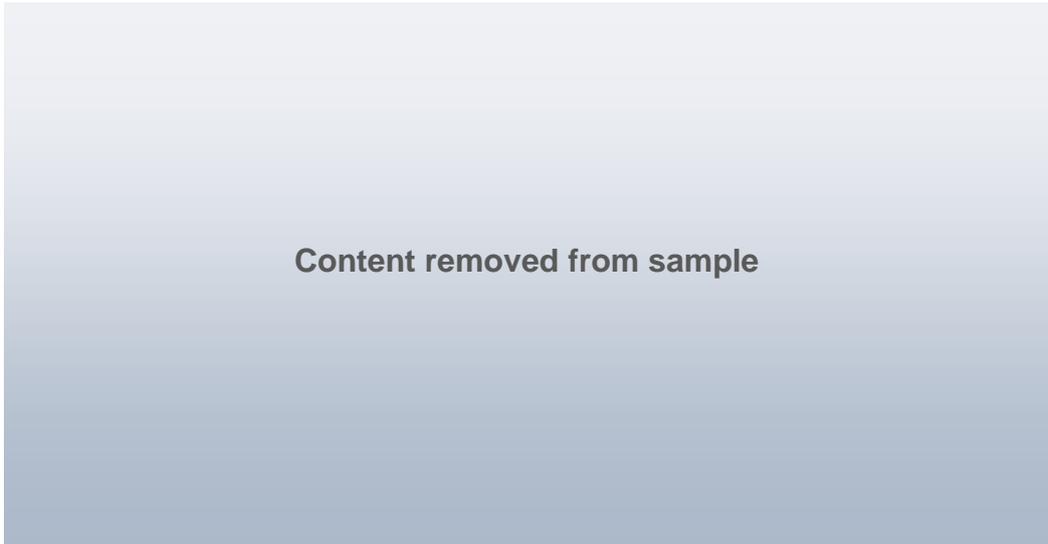
2023 DEVELOPMENTS

Consolidation shapes retail tissue in brazil

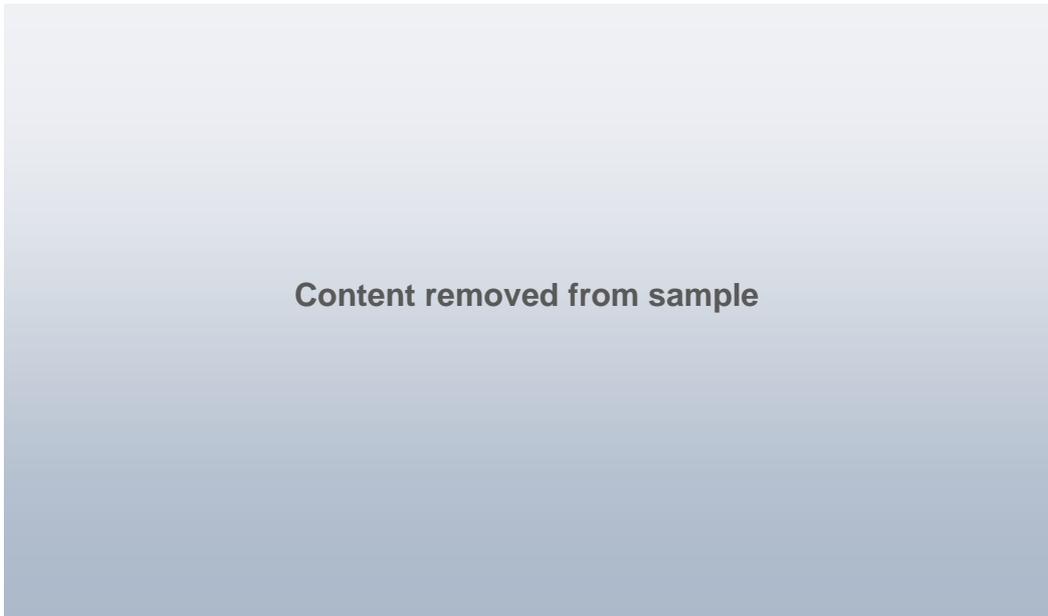


Wider scenario of uncertainty shows shifts in consumer preferences



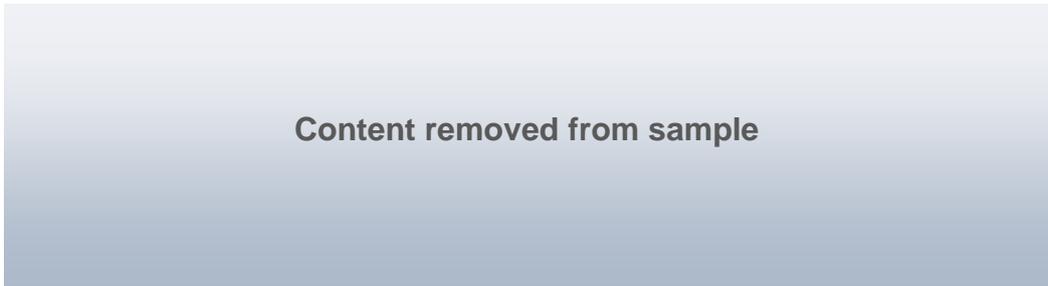


Supply chains and channels broaden the competitive scenario



PROSPECTS AND OPPORTUNITIES

Increasing awareness will drive demand for premium offers



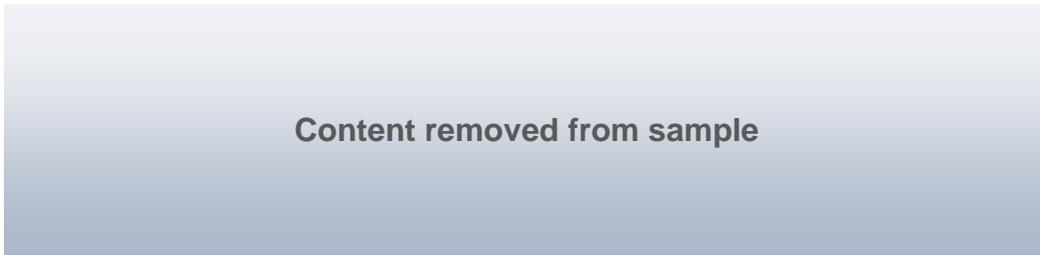
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Mergers and acquisitions should weaken, but not disappear

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Retail tissue paves the way for greener initiatives

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CATEGORY DATA

Table 51 Retail Sales of Tissue by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
Retail Tissue	Data removed from sample					
- Paper Towels						
- Paper Tableware						
-- Napkins						
-- Tablecloths						
- Facial Tissues						
-- Boxed Facial Tissues						
-- Pocket Handkerchiefs						
- Toilet Paper						

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

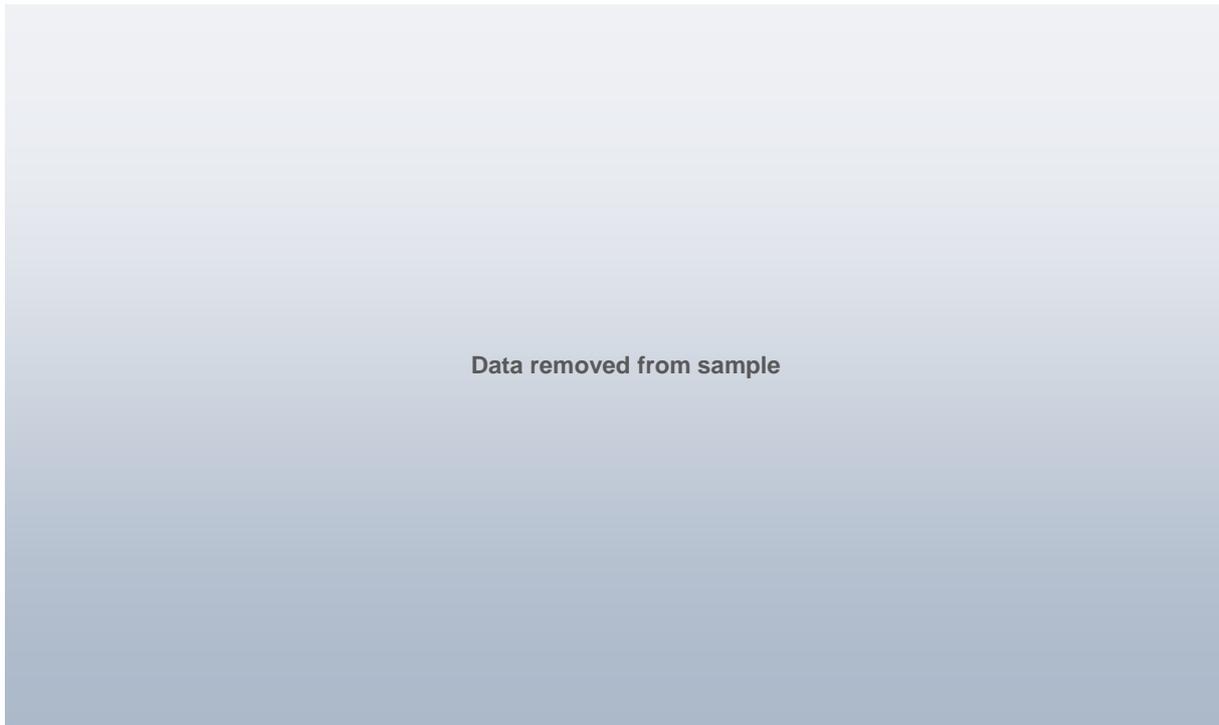
Table 52 Retail Sales of Tissue by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Retail Tissue	Data removed from sample		
- Paper Towels			
- Paper Tableware			
-- Napkins			
-- Tablecloths			
- Facial Tissues			
-- Boxed Facial Tissues			
-- Pocket Handkerchiefs			
- Toilet Paper			

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

Table 53 NBO Company Shares of Retail Tissue: % Value 2019-2023

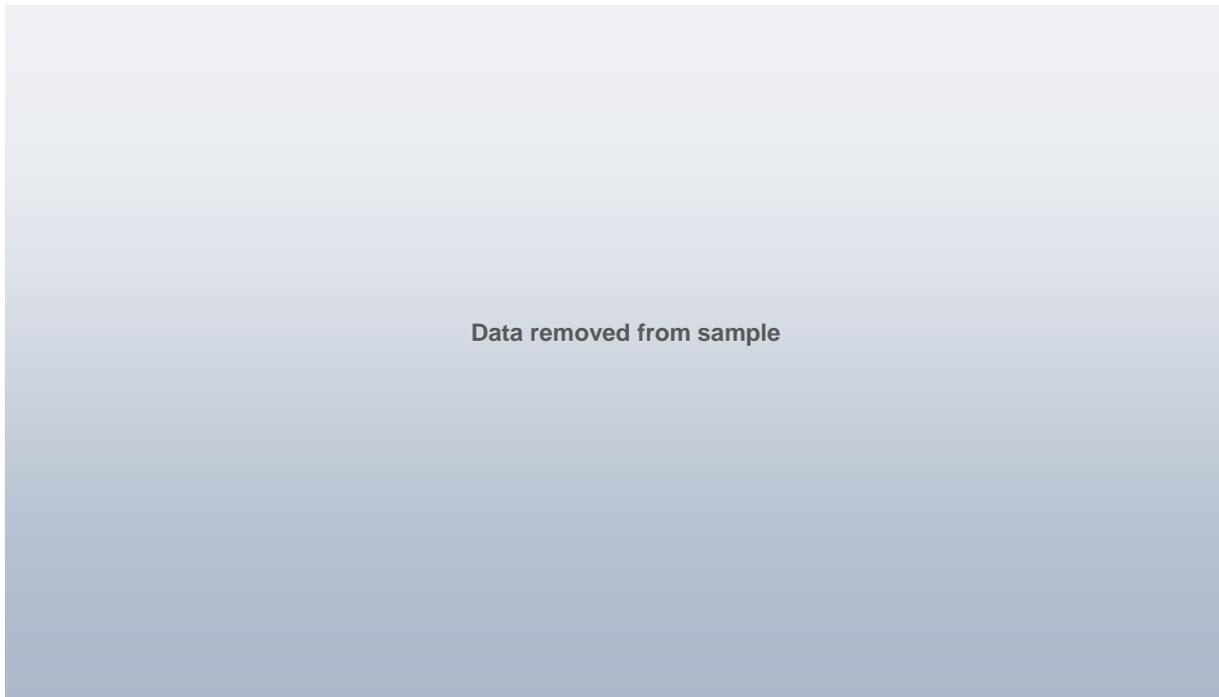
% retail value rsp Company	2019	2020	2021	2022	2023
	Data removed from sample				

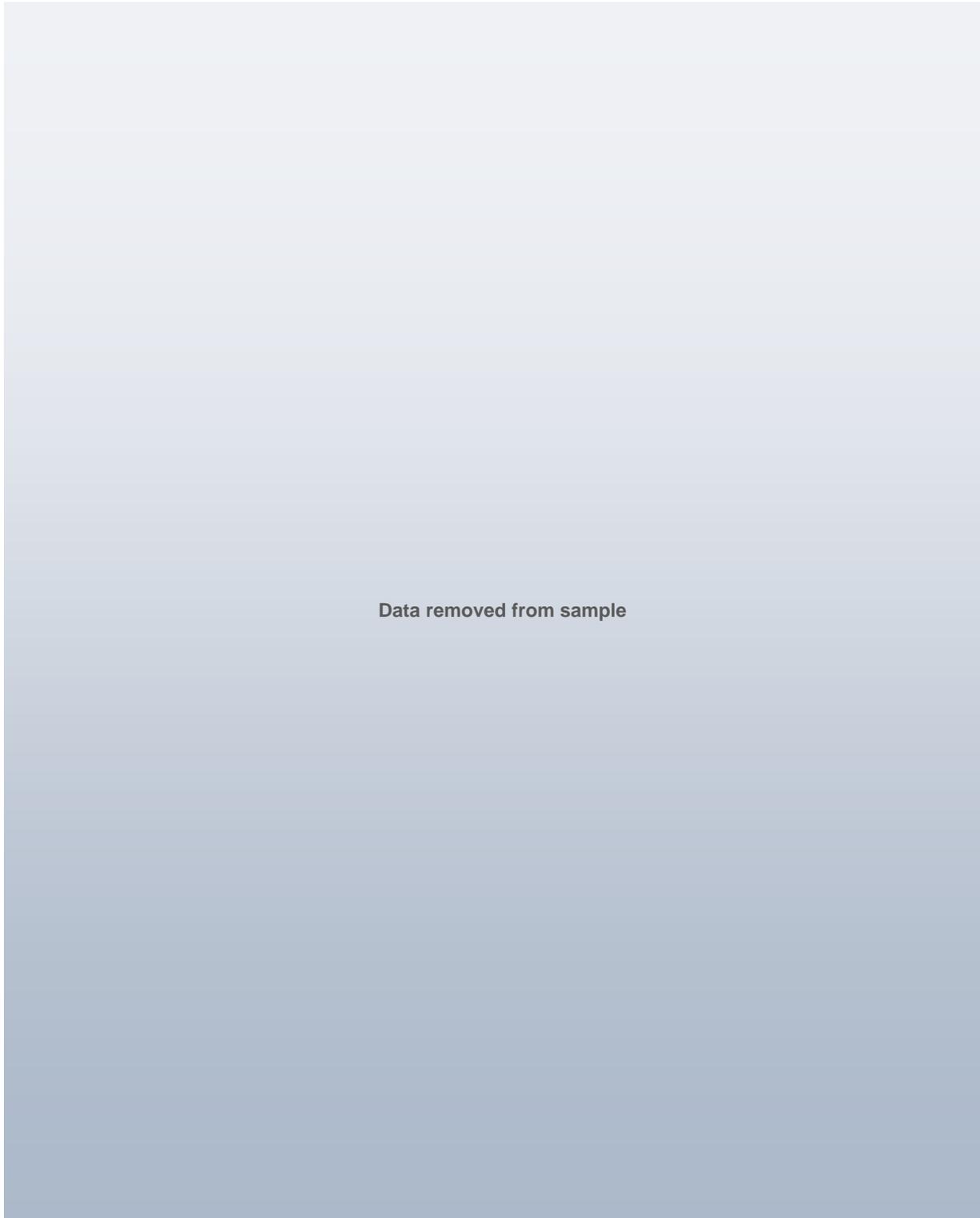


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 LBN Brand Shares of Retail Tissue: % 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 55 Forecast Retail Sales of Tissue by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
Retail Tissue	Data removed from sample					
- Paper Towels						
- Paper Tableware						
-- Napkins						
-- Tablecloths						
- Facial Tissues						
-- Boxed Facial Tissues						
- Pocket Handkerchiefs						
- Toilet Paper						

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

Table 56 Forecast Retail Sales of Tissue by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Retail Tissue	Data removed from sample		
- Paper Towels			
- Paper Tableware			
-- Napkins			
-- Tablecloths			
- Facial Tissues			
-- Boxed Facial Tissues			
- Pocket Handkerchiefs			
- Toilet Paper			

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

RX/REIMBURSEMENT ADULT INCONTINENCE IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Resilience despite a shortage of products

Content removed from sample

The impact of government programmes increases in brazil

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Content removed from sample

Geopolitical turmoil presents challenges to the supply chain

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Brazil's demographic situation set to drive growth

Content removed from sample

Farmácia popular to continue driving growth in rx/reimbursement adult incontinence

Content removed from sample

Electronic prescriptions will ensure timely access for consumers

Content removed from sample

Content removed from sample

CATEGORY DATA

Table 57 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
Rx/Reimbursement adult incontinence	Data removed from sample					

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

Table 58 Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Rx/Reimbursement adult incontinence	Data removed from sample		

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

Table 59 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
Rx/Reimbursement adult incontinence	Data removed from sample					

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

Table 60 Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2023-2028

% current value growth	2023/24	2023-28 CAGR	2023/28 Total
Rx/Reimbursement adult incontinence	Data removed from sample		

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