

Tissue and Hygiene in the US

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Abstracts

After a year of high inflation and volume declines in 2022, 2023 saw an improving macroeconomic environment, with 2023's average inflation rate of around 3% much softened from 2022's 8%. Unit price increases came through in early 2023, with volatility particularly evident in retail tissue, notably paper towels, toilet paper and facial tissues.

Euromonitor International's Tissue and Hygiene in USA report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023, allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market – be they new product developments, distribution or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Away-from-Home Tissue and Hygiene, Retail Tissue and Hygiene, Rx/Reimbursement adult incontinence, Total Tissue and Hygiene.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

Get a detailed picture of the Tissue and Hygiene market;

Pinpoint growth sectors and identify factors driving change;

Understand the competitive environment, the market's major players and leading brands;



Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.



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2023-2028

NAPPIES/DIAPERS/PANTS IN THE US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value-adding innovation targeting performance, skin health and under-served demographics help solidify competitiveness

Sustainability concerns drive new entrants and releases

Leading players and insurgents to consider expanding strategies to offer other services PROSPECTS AND OPPORTUNITIES

Pants and comfort-forward options offer opportunities for growth, despite unfavourable demographic outlook

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2023-2028

RETAIL ADULT INCONTINENCE IN THE US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value-conscious behaviour and innovation propel private label sales

Moderate/heavy format growth slightly outpaces light counterpart in both value and volume terms, while reusable options continue to peak consumer interest

E-commerce continues to lead channel performance, with community-building and personalised customer service contributing to growth

PROSPECTS AND OPPORTUNITIES

Continued interest in at-home care for expanding 65+ population in the US bodes well for retail adult incontinence

Underserved bowel incontinence consumers present additional innovation avenues for moderate/heavy format

Skin health is highly important for younger incontinence consumers, and brands keep pace with skin-friendly offerings

CATEGORY DATA

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RX/REIMBURSEMENT ADULT INCONTINENCE IN THE US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rx/reimbursement continues to see steady growth, even amid the cessation of

COVID-19 emergency relief funding

Funding constraints limit product options

Florida lawsuit settlements prompt expanded coverage of incontinence products PROSPECTS AND OPPORTUNITIES

Future policy will be a key driver of the category's long-term performance

Brands and direct-to-consumer retailers' education and alliances are essential for the reimbursement consumer

CATEGORY DATA

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WIPES IN THE US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cleaning efficacy, health and convenience influence development of personal care wipes

Moist toilet wipes and baby wipes posted healthy growth, while disinfecting and sanitising wipes witnessed moderate growth

Private labels market share increased across personal care wipes

PROSPECTS AND OPPORTUNITIES

Sustainability to wield greater influence on future sales and competition

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CATEGORY DATA

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RETAIL TISSUE IN THE US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail tissue volume performance continues to dip, though recovery seems feasible in 2024

Private label wins confirm consumers' priorities amidst economic uncertainties Shrinkflation still relevant to protect margins for household paper products PROSPECTS AND OPPORTUNITIES

The next in retailing strategy: Subscription model buying could boost retailer loyalty and consumer savings satisfaction

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