



Euromonitor
International

Tissue and Hygiene in the US

April 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Ongoing Price Sensitivity Even as Inflation Eases

Innovation Drives Growth across Retail Tissue, Retail Adult Incontinence, and Menstrual Care

Several Categories See a Move Towards Premiumisation

Chart 2 - Procter & Gamble launches Always Pocket Flexfoam for Portability and Superior Protection

Needs of Eco-Conscious Consumers Addressed with New Nappy/Diaper Launch

Chart 3 - Cottonsie Introduces First-Ever All-Cotton Nappy/Diaper

Holistic Expansion through Fostering Emotional and Mental Connections

Chart 4 - Kimberly-Clark Releases Toilet Paper with Scented Tube

Chart 5 - Value Sales of Tissue and Hygiene 2020-2030

Chart 6 - Value Sales of Tissue and Hygiene by Category 2025

WHAT'S NEXT?

Retail E-Commerce and Natural Brands Set to Reshape Purchasing Habits

Chart 7 - Analyst Insight for Tissue and Hygiene

Retail Adult Incontinence to See Innovation for an Ageing Population

Sustainability, Digitalisation and Regulation Likely to Accelerate Product Transformation

Chart 8 - Forecast Value Sales of Tissue and Hygiene 2020-2030

Chart 9 - Forecast Value Sales of Tissue and Hygiene by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble and Kimberly-Clark Defend Their Lead Even as Challengers Gain

Chart 10 - Company Shares of Tissue and Hygiene 2025

Chart 11 - Brand Shares of Tissue and Hygiene 2025

CHANNELS

Hypermarkets Retains the Top Position While Retail E-Commerce Reshapes Convenience

Chart 12 - Retail Channels for Tissue and Hygiene 2020-2025

ECONOMIC CONTEXT

Chart 13 - Economic Context for Menstrual Care

Chart 14 - Real Gdp Growth 2020-2030

Chart 15 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 16 - Consumer Context for Menstrual Care

Chart 17 - Population 2020-2030

Chart 18 - Consumer Expenditure 2020-2030

Chart 19 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

2025 DEVELOPMENTS

Away-From-Home Tissue and Hygiene Summary

KEY INDUSTRY TRENDS

Chart 20 - Key Industry Trends Away-from-Home

INDUSTRY PERFORMANCE

Continued Value Growth as Return-To-Work Policies Gain Pace and Prices Rise

Kruger Invests in Ultra-Soft Tissue and a Rebrand to Meet Premium Demand

Chart 21 - Kruger Expands US Presence With New TAD Plant and AFH Rebrand

Kimberly-Clark Drives Circular Solutions for Measurable Sustainability Gains

Chart 22 - Kimberly-Clark Professional Expands Circular Solutions

Chart 23 - Value Sales of Away-from-Home 2020-2030

Chart 24 - Value Sales of Away-from-Home by Category 2025

WHAT'S NEXT?

Millennials and Gen Z to Increase Experiential Spending, Driving Demand

Older Adults Prioritise Independence, Shifting Some Incontinence Product Demand to Retail

Technology Adoption and Real-Time Data Will Improve Operational Efficiency and Sustainability

Chart 25 - Forecast Value Sales of Away-from-Home 2020-2030

Chart 26 - Forecast Value Sales of Away-from-Home by Category 2025-2030

CHANNELS

Return-To-Office Policies Accelerate Business Channel Growth

Chart 27 - Retail Channels for Away-from-Home 2020-2025

ECONOMIC CONTEXT

Chart 28 - Economic Context for Away-from-Home

Chart 29 - Real Gdp Growth 2020-2030

Chart 30 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 31 - Consumer Context for Away-from-Home

Chart 32 - Population 2020-2030

Chart 33 - Consumer Expenditure 2020-2030

Chart 34 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Adult Incontinence in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail Adult Incontinence Summary

KEY INDUSTRY TRENDS

Chart 35 - Key Industry Trends for Retail Adult Incontinence

INDUSTRY PERFORMANCE

Private Label Investment and Affordability Initiatives Boost Volume and Value Growth

Essity'S Skin-Sensitive Innovation Addresses Rising Expectations of Comfort and Skin Health

Chart 36 - Tena Offers Skin-Forward Pad Innovation

Nafc and Brand Leaders Normalise Incontinence through Education and Design

Chart 37 - Reducing Stigma Through Awareness and Design-Led Innovation

Chart 38 - Value Sales of Retail Adult Incontinence 2020-2030
Chart 39 - Volume Sales of Retail Adult Incontinence 2020-2030
Chart 40 - Value Sales of Retail Adult Incontinence by Category 2025

WHAT'S NEXT?

Retail E-Commerce and Private Label to Reshape Pricing and Accessibility
Comfort and Breathability Will Drive Innovation for Active Older Adults
Chart 41 - Analyst Insight for Retail Adult Incontinence
Brands Expand Support and Customisation as Awareness Grows
Chart 42 - Forecast Value Sales of Retail Adult Incontinence 2020-2030
Chart 43 - Forecast Value Sales of Retail Adult Incontinence by Category 2025-2030

COMPETITIVE LANDSCAPE

Kimberly-Clark and Procter & Gamble Adapt Pricing as Private Label Gains Momentum
Chart 44 - Affordability-Driven Growth Propels Private Label Gains and Manufacturing Expansion
Chart 45 - Company Shares of Retail Adult Incontinence 2025
Chart 46 - Brand Shares of Retail Adult Incontinence 2025

CHANNELS

Retail E-Commerce Expands Its Share, Gaining Loyalty with Convenience and Discreet Delivery
Bulk Buyers Seeking Savings Drive Gains for Warehouse Clubs
Chart 47 - Retail Channels for Retail Adult Incontinence 2020-2025

ECONOMIC CONTEXT

Chart 48 - Economic Context for Retail Adult Incontinence
Chart 49 - Real Gdp Growth 2020-2030
Chart 50 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 51 - Consumer Context for Retail Adult Incontinence
Chart 52 - Population 2020-2030
Chart 53 - Consumer Expenditure 2020-2030
Chart 54 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Nappies/Diapers/Pants in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Nappies/Diapers/Pants Summary

KEY INDUSTRY TRENDS

Chart 55 - Key Industry Trends for Nappies/Diapers/Pants

INDUSTRY PERFORMANCE

Volume and Value Sales Decline, but Disposable Pants Gains Slight Volume Share
Premiumisation Drives Brand Innovation as Consumer Priorities Evolve
Chart 56 - The Honest Co's New Premium Clean Conscious Nappies/Diapers
Sustainability and Skin Health New Focuses for Product Design
Chart 57 - Texas Startup Introduces Nappies/ Diapers That Break Down Plastic Naturally
New Preemie Nappies/Diapers Demonstrate Move Towards Inclusivity
Chart 58 - Procter & Gamble Redefines Preemie Care

Chart 59 - Value Sales of Nappies/Diapers/Pants 2020-2030

Chart 60 - Volume Sales of Nappies/Diapers/Pants 2020-2030

Chart 61 - Value Sales of Nappies/Diapers/Pants by Category 2025

WHAT'S NEXT?

Growth Expected, but Demographic Challenges Mean Innovation Will Be Important

Brands Will Prioritise Comfort and Skin Health to Retain Consumer Trust

Chart 62 - Analyst Insight for Nappies/Diapers/Pants

Digital-First Engagement and Customisation to Reshape Purchasing Behaviour

Chart 63 - Forecast Value Sales of Nappies/Diapers/Pants 2020-2030

Chart 64 - Forecast Value Sales of Nappies/Diapers/Pants by Category 2025-2030

COMPETITIVE LANDSCAPE

The Top Two Players Maintain Their Dominance, but the Competition Is Increasing

Rising Competition From Insurgent Brands and Chinese Competitors

Coterie Acquisition Accelerates Premium Innovation and Reshapes the Competition

Chart 65 - Company Shares of Nappies/Diapers/Pants 2025

Chart 66 - Brand Shares of Nappies/Diapers/Pants 2025

CHANNELS

Discounters and Warehouse Clubs Capture Value as Shoppers Trade Down

Retail E-Commerce Grows as Digital Habits Reshape Purchasing Patterns

Chart 67 - Retail Channels for Nappies/Diapers/Pants 2020-2025

ECONOMIC CONTEXT

Chart 68 - Economic Context for Nappies/Diapers/Pants

Chart 69 - Real Gdp Growth 2020-2030

Chart 70 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 71 - Consumer Context for Nappies/Diapers/Pants

Chart 72 - Population 2020-2030

Chart 73 - Consumer Expenditure 2020-2030

Chart 74 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Menstrual Care in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Menstrual Care Summary

KEY INDUSTRY TRENDS

Chart 75 - Key Industry Trends for Menstrual Care

INDUSTRY PERFORMANCE

Growth Continues, Although Consumer Preferences Continue to Shift

Procter & Gamble Partners with Coachella to Drive Premium Pad Adoption

Chart 76 - Premiumisation Driven by Active Lifestyles and a Comfort-First Focus

Rael Secures Walmart Listing as Consumers Turn to Clean Wellness

Chart 77 - Organic Cotton Tampons Gain Share in 2025 for Safety Reasons

Players Focus on Specific Life Stages to Best Meet the Needs of Different Consumer Groups

Chart 78 - Life-Stage Innovation Drives Growth

Chart 79 - Value Sales of Menstrual Care 2020-2030

Chart 80 - Volume Sales of Menstrual Care 2020-2030

Chart 81 - Value Sales of Menstrual Care by Category 2025

WHAT'S NEXT?

Potential for Significant Changes If Legislation Is Enacted

Disposable Period Pants Set to Outpace Other Formats as Design Innovation Accelerates

Chart 82 - Analyst Insight for Menstrual Care

Life Stage-Specific and Plant-Based Formats to Gain Traction as Various Trends Reshape Demand

Chart 83 - Forecast Value Sales of Menstrual Care 2020-2030

Chart 84 - Forecast Value Sales of Menstrual Care by Category 2025-2030

COMPETITIVE LANDSCAPE

Edgewell Exits as Procter & Gamble Strengthens Its Dominance with Natural Products

Potential Changes in the Competitive Environment, and Opportunities for Growth

Chart 85 - Company Shares of Menstrual Care 2025

Chart 86 - Brand Shares of Menstrual Care 2025

CHANNELS

Retail E-Commerce Captures Value as Shoppers Seek Convenience and Other Benefits

Consumers' Search for Value Leads Them to Shop in Bulk at Warehouse Clubs

Hypermarkets Maintains Its Lead but Loses Share to More Convenient and Cheaper Channels

Chart 87 - Retail Channels for Menstrual Care 2020-2025

ECONOMIC CONTEXT

Chart 88 - Economic Context for Menstrual Care

Chart 89 - Real Gdp Growth 2020-2030

Chart 90 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 91 - Consumer Context for Menstrual Care

Chart 92 - Population 2020-2030

Chart 93 - Consumer Expenditure 2020-2030

Chart 94 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Wipes in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Wipes Summary

KEY INDUSTRY TRENDS

Chart 95 - Key Industry Trends for Wipes

INDUSTRY PERFORMANCE

Value Growth Continues as Consumers Value Convenience

Chart 96 - Noshinku's Skin Care Travel Sanitising Wipes For On-the-Go Wellness

Moist Toilet Wipes Drives Gains, While Baby Wipes Struggles

Harper Hygienics Sets a New Benchmark with Eco-Friendly Innovation

Chart 97 - Harper Hygienics Unveils 100% Biodegradable Baby Wipes for Eco-Conscious Care

Niches & Nooks Taps Wellness Demand with Targeted Formulations

Chart 98 - Niches & Nooks Launches Intimate Wipes for Modern Wellness

Chart 99 - Value Sales of Wipes 2020-2030

Chart 100 - Value Sales of Wipes by Category 2025

WHAT'S NEXT?

Continued Growth as Consumers Demand Convenience and Efficacy

Chart 101 - Analyst Insight for Wipes

Personal Wipes Set to Outperform as Innovation and Skin Health Set the Pace

State Legislation and Digital Strategies to Reshape Innovation and Compliance

Chart 102 - Forecast Value Sales of Wipes 2020-2030

Chart 103 - Forecast Value Sales of Wipes by Category 2025-2030

COMPETITIVE LANDSCAPE

Established Brands See Share Erosion as Consumers Seek to Balance Quality and Affordability

Dude Wipes Diversifies with Child-Focused Launch and Digital Strategy

Merger Finalised, Which Could Impact the Competitive Landscape Moving Forward

Chart 104 - Company Shares of Wipes 2025

Chart 105 - Brand Shares of Wipes 2025

CHANNELS

Warehouse Clubs Expands through Offering Bulk Value as Supermarkets Loses Ground

Growth in Retail E-Commerce Stalls as Offline Specialists Capture Value-Seeking Shoppers

Health and Beauty Specialists and Variety Stores Gain Traction with Targeted Offerings

Chart 106 - Retail Channels for Wipes 2020-2025

ECONOMIC CONTEXT

Chart 107 - Economic Context for Wipes

Chart 108 - Real Gdp Growth 2020-2030

Chart 109 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 110 - Consumer Context for Wipes

Chart 111 - Population 2020-2030

Chart 112 - Consumer Expenditure 2020-2030

Chart 113 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Retail Tissue in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail Tissue Summary

KEY INDUSTRY TRENDS

Chart 114 - Key Industry Trends for Retail Tissue

INDUSTRY PERFORMANCE

Continued Volume and Value Growth Driven by Economic and Population Trends

Bravo Meets Rising Demand with Eco-Friendly Towel Innovation

Chart 115 - Eco-Friendly Paper Towels Expand Their Retail Reach

First Quality Invests in Ultra-Premium Tissue to Set New Benchmarks

Chart 116 - First Quality Expands TAD Manufacturing of Premium Tissue Products

Chart 117 - Value Sales of Retail Tissue 2020-2030

Chart 118 - Volume Sales of Retail Tissue 2020-2030

Chart 119 - Value Sales of Retail Tissue by Category 2025

WHAT'S NEXT?

Brands Expected to Accelerate Omnichannel Strategies to Capture Evolving Shopper Habits

Chart 120 - Analyst Insight for Retail Tissue

Toilet Paper Will Maintain Its Lead, While Facial Tissues and Paper Towels Set to Perform Well

Sustainability and Premiumisation to Reshape the Competition and Ensure Value Creation

Chart 121 - Forecast Value Sales of Retail Tissue 2020-2030

Chart 122 - Forecast Value Sales of Retail Tissue by Category 2025-2030

COMPETITIVE LANDSCAPE

Procter & Gamble Leverages Brand Strength to Defend Leadership

Private Label Gains Traction as Consumers Seek Value and Quality

Chart 123 - Company Shares of Retail Tissue 2025

Chart 124 - Brand Shares of Retail Tissue 2025

CHANNELS

Hypermarkets Expands Its Channel Share by Blending Convenience and Sustainability

Subscription Models Drive Rapid Growth in Online Sales of Retail Tissue Products

Chart 125 - Retail Channels for Retail Tissue 2020-2025

ECONOMIC CONTEXT

Chart 126 - Economic Context for Retail Tissue

Chart 127 - Real Gdp Growth 2020-2030

Chart 128 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 129 - Consumer Context for Retail Tissue

Chart 130 - Population 2020-2030

Chart 131 - Consumer Expenditure 2020-2030

Chart 132 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Rx/Reimbursement Adult Incontinence in the US](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Rx/Reimbursement Adult Incontinence Summary

KEY INDUSTRY TRENDS

Chart 133 - Key Industry Trends for Rx/Reimbursement Adult Incontinence

INDUSTRY PERFORMANCE

Medicaid Budget Cuts Prompt States to Reconsider Incontinence Support

Chart 134 - Reimbursement Adult Incontinence Under Threat from Medicaid Budget Cuts

Expanded Product Design Empowers Independent Purchasing among Older Adults

Chart 135 - Comfort-Focused Design Expands Choice and Encourages Independent Purchasing

Chart 136 - Volume Sales of Rx/Reimbursement Adult Incontinence 2020-2030

WHAT'S NEXT?

Medicaid Funding Cuts to Restrict Access to Essential Supplies for Recipients

Medicaid Recipients to Shift to Alternative Insurance as Access Tightens

Chart 137 - Forecast Value Sales of Rx/Reimbursement Adult Incontinence 2020-2030

ECONOMIC CONTEXT

Chart 138 - Economic Context for Rx/Reimbursement Adult Incontinence

Chart 139 - Real Gdp Growth 2020-2030

Chart 140 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 141 - Consumer Context for Rx/Reimbursement Adult Incontinence

Chart 142 - Population 2020-2030

Chart 143 - Consumer Expenditure 2020-2030

Chart 144 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/tissue-and-hygiene-in-the-us/report.