



Euromonitor
International

Retail Tissue in Estonia

May 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Retail Tissue Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail Tissue

INDUSTRY PERFORMANCE

Rimi Leverages Bulk Deals and Private Label to Win Price Wars

Toilet Paper Dominates as Households Shift to Larger Packs

Convenience and Sustainability Claims Accelerate Private Label Growth

Chart 2 - Analyst Insight for Retail Tissue

Chart 3 - Rimi 600-Sheet Jumbo Paper Towels

Chart 4 - Value Sales 2020-2030

Chart 5 - Volume Sales 2020-2030

Chart 6 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label to Gain Ground as Pricing Trumps Consumption

Large-Format Packs to Reshape Household Shopping Habits

Sustainability Will Become Standard as Value and Efficiency Dominate

Chart 7 - Forecast Value Sales 2020-2030

Chart 8 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Rimi, Maxima and Lidl Accelerate Private Label Gains as Essity Loses Share

Rimi Leverages Promotions and Pack Design to Win Share From Brands

Chart 9 - Rimi Private-Label Toilet Paper Leads Affordability

Chart 10 - Company Shares 2025

Chart 11 - Brand Shares 2025

CHANNELS

Supermarkets Strengthen Lead as Shoppers Seek Convenience and Value

Online Platforms Capture Share as Bulk Offers Drive Digital Growth

Aggressive Private Label Strategies Reshape Shopper Habits and Loyalty

Chart 12 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 13 - Economic Context for Retail Tissue

Chart 14 - Real GDP Growth 2020-2030

Chart 15 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 16 - Consumer Context for Retail Tissue

Chart 17 - Population 2020-2030

Chart 18 - Consumer Expenditure 2020-2030

Chart 19 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in Estonia - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 20 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Rimi Expands Affordable Tissue Range and Attracts Price-Conscious Shoppers

Recycled Tissue with Ecolabel Certification Reshapes Everyday Choices

Chart 21 - Rimi Private Label Toilet Paper and Paper Towels Drive Value Growth

Pants-Style Hygiene Products Redefine Convenience for Active Lifestyles

Chart 22 - Value Sales 2020-2030

Chart 23 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label Expands Affordable Bulk Packs as Value Drives Purchases

Chart 24 - Analyst Insight for Tissue and Hygiene

Convenience Formats and Home Delivery Reshape Daily Routines

Sustainable and Skin-Friendly Innovations Challenge Ultra-Cheap Basics

Chart 25 - Recycled Cardboard Tissue with EU Ecolabel

Chart 26 - Forecast Value Sales 2020-2030

Chart 27 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Private Label Gains Ground as Established Leaders Defend Share

Chart 28 - Company Shares 2025

Chart 29 - Brand Shares 2025

CHANNELS

Supermarkets Extend Lead with Strong Private Label and Promotions

Retail E-Commerce Gains Traction as Shoppers Prioritise Convenience

Discounters and E-Commerce Reshape Price and Convenience Dynamics

Chart 30 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 31 - Economic Context for Tissue and Hygiene

Chart 32 - Real GDP Growth 2020-2030

Chart 33 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 34 - Consumer Context for Tissue and Hygiene

Chart 35 - Population 2020-2030

Chart 36 - Consumer Expenditure 2020-2030

Chart 37 - 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/retail-tissue-in-estonia/report.