



Euromonitor
International

Away-From-Home Tissue and Hygiene in Indonesia

May 2026

Away-From-Home Tissue and Hygiene in Indonesia - Category analysis

2025 DEVELOPMENTS

Away-From-Home Tissue and Hygiene Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Away-From-Home Tissue and Hygiene

INDUSTRY PERFORMANCE

Cost Focus Outweighs Innovation as Growth Slows

Chart 2 - Livi's product offerings remain unchanged, with no new developments observed

Away-From-Home Tissue Rolls Gain Traction in Low-End Foodservice

Government Budget Cuts Reduce Afh Tissue Usage and Slow Value Growth

Chart 3 - Cost Efficiency Drives Tissue Roll Adoption in Indonesia's Low End Food Service Sector

Chart 4 - Value Sales 2020-2030

Chart 5 - Value Sales by Category 2025

WHAT'S NEXT?

Government-Backed Business Revival Unlocks Untapped Tissue Demand

Tissue Rolls Retain Lead as Hygiene Accelerates on Demographic Change

Price-Led B2b Sales and Urban Growth Shape Future Opportunity

Chart 6 - Forecast Value Sales 2020-2030

Chart 7 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Livi Sustains Leadership as Pricing Eclipses Innovation in B2b Supply

CHANNELS

B2b Tenders Sustain Traditional Supply as Innovation Stalls

Chart 8 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 9 - Economic Context for Away-From-Home Tissue and Hygiene

Chart 10 - Real Gdp Growth 2020-2030

Chart 11 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 12 - Consumer Context for Away-From-Home Tissue and Hygiene

Chart 13 - Population 2020-2030

Chart 14 - Consumer Expenditure 2020-2030

Chart 15 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in Indonesia - Industry Overview

EXECUTIVE SUMMARY

Cussons and Mitu Boost Sales as Affordability Trumps Premium Features

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 16 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Cussons and Mitu Boost Sales as Affordability Trumps Premium Features

Chart 17 - Big bundles and micro-packs drive affordability

Confidence Redefines Adult Incontinence as Stigma Fades and Brands Look to Empower Women

Chart 18 - Confidence launches Pants Daily Fresh: breaking stigma and empowering active women 40+

Blood Leverages Clean Wellness Claims to Capture Young Consumers

Chart 19 - Value Sales 2020-2030

Chart 20 - Value Sales by Category 2025

WHAT'S NEXT?

E-Commerce Competition and New Entrants Reshape Pricing Dynamics

Premiumisation in Adult Care Accelerates as Social Media Drives Adoption

Affordable Innovation and Natural Claims Broaden Consumer Appeal

Chart 21 - Forecast Value Sales 2020-2030

Chart 22 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Uni-Charm Indonesia Pt and Softex Indonesia Pt Protect Share as Newcomers Leverage Value

Chart 23 - Analyst Insight for Tissue and Hygiene

Chart 24 - Company Shares 2025

Chart 25 - Brand Shares 2025

CHANNELS

Offline Retailers Hold Ground as Online Rivals Intensify Promotional-Led Growth

Livestream Promotions and Flash Sales Drive Digital Channel Momentum

Blood Leverages Omni-Channel Strategy to Win Young Deal-Seekers

Chart 26 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 27 - Economic Context for Tissue and Hygiene

Chart 28 - Real Gdp Growth 2020-2030

Chart 29 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 30 - Consumer Context for Tissue and Hygiene

Chart 31 - Population 2020-2030

Chart 32 - Consumer Expenditure 2020-2030

Chart 33 - 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/away-from-home-tissue-and-hygiene-in-indonesia/report.