



Euromonitor
International

Retail Tissue in South Africa

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

Savings Mindset Drives Retail Tissue Dynamics

Loyalty Cards Become Essential as Shoppers Chase Discounts and Stretch Budgets

Chart 2 - More South African Consumers Are Relying on Loyalty Cards

Chart 3 - Value Sales 2020-2030

Chart 4 - Volume Sales 2020-2030

Chart 5 - Value Sales by Category 2025

WHAT'S NEXT?

Private Label Set to Expand Share as Consumers Prioritise Affordability and Value

E-Commerce Projected to Accelerate Repeat Purchases and Drive Subscription Adoption

Chart 6 - E-Commerce Grocery Platforms Are Witnessing Huge Growth

Sustainable Local Production Forecast to Gain Traction among Environmentally Conscious Shoppers

Chart 7 - Analyst Insight for Retail Tissue

Chart 8 - Forecast Value Sales 2020-2030

Chart 9 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Legacy Brands Maintain Lead While Private Label Grows Share

Chart 10 - Company Shares 2025

Chart 11 - Brand Shares 2025

CHANNELS

Supermarkets Leverage Delivery Expansion to Reinforce Dominance

Grocery Delivery Drives E-Commerce'S Value Share Growth

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 South Africa - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 20 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Essential Nature of Tissue and Hygiene Products Supports Strong Demand

Convenience and Affordability Remain Key Purchase Drivers for South African Parents

Chart 21 - L'il Masters: Affordable Diapers

Always Wins Trust as Parents and Women Choose Comfort over Cost

Chart 22 - Always Maxi Slim Foregrounds Comfort and Security

Chart 23 - Value Sales 2020-2030

Chart 24 - Value Sales by Category 2025

WHAT'S NEXT?

South African Consumers Expected to Become Increasingly Driven by Price-To-Value Ratio

Nappies/Diapers/Pants and Retail Adult Incontinence Set to Drive Category Growth

Chart 25 - Analyst Insight for Tissue and Hygiene

Chart 26 - Forecast Value Sales 2020-2030

Chart 27 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Legacy Brands Retain Lead in Key Categories, Despite Intensifying Value Focus

Chart 28 - Company Shares 2025

Chart 29 - Brand Shares 2025

CHANNELS

Supermarkets Expand Delivery Capabilities to Reinforce Consumer Loyalty

Grocery Delivery Boosts E-Commerce but Offline Retail Remains Dominant

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-south-africa/report.