



Passport

Wipes in Ukraine

Euromonitor International

March 2021

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purposes only.

Some content and data have been changed.

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WIPES IN UKRAINE - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Increased hygiene concerns lead to sharp rise in demand for general purpose wipes

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Facial cleansing wipes retain attraction as A convenient way to retain clear skin

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Biosphere builds on strong lead thanks to large and affordable range of products

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RECOVERY AND OPPORTUNITIES

Mixed fortunes predicted within personal wipes

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Demand for moist toilet wipes expected to expand thanks to increased hygiene awareness

Content removed from sample

Baby wipes set for bright future despite demographic challenges

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CATEGORY DATA

Table 1 Retail Sales of Wipes by Category: Value 2015-2020

UAH million	2015	2016	2017	2018	2019	2020
Home Care Wipes and Floor Cleaning Systems						
- Dry Electro-Static Wipes						
-- Starter Kits/Sweepers/Sticks (Dry Electro-Static)						
-- Wipes and Refills (Dry Electro-Static)						
- Floor Cleaning Systems						
-- Refills						
--- Cleaning Solution						
--- Refill Wipes/Pads						
-- Starter Kits/Trigger Device						
- Impregnated Wet Wipes						
-- All Purpose Cleaning Wipes						
-- Furniture Polish Wipes						
-- Toilet Care Wipes						
-- Window/Glass Wipes						
-- Other Impregnated Wipes						
- Starter Kits/Sweepers/Sticks (Excluding Wipes)						
- Wipes (Excluding Starter Kits/Sweepers/Sticks)						
Personal Wipes						
- General Purpose Wipes						
- Intimate Wipes						
- Baby Wipes						
- Cosmetic Wipes						
-- Facial Cleansing Wipes						
-- Deodorant Wipes						
- Moist Toilet Wipes						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Retail Sales of Wipes by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Home Care Wipes and Floor Cleaning Systems			
- Dry Electro-Static Wipes			
-- Starter Kits/Sweepers/Sticks (Dry			

- Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes
- Toilet Care Wipes
- Window/Glass Wipes
- Other Impregnated Wipes
- Starter Kits/Sweepers/Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/Sticks)
- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes
- Wipes

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 NBO Company Shares of Retail Wipes: % Value 2016-2020

% retail value rsp					
Company	2016	2017	2018	2019	2020

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Retail Wipes: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Retail Sales of Wipes by Category: Value 2020-2025

UAH million	2020	2021	2022	2023	2024	2025
Home Care Wipes and Floor Cleaning Systems	Data removed from sample					
- Dry Electro-Static Wipes						
-- Starter Kits/ Sweepers/Sticks (Dry Electro-Static)						
-- Wipes and Refills (Dry Electro-Static)						
- Floor Cleaning Systems						
-- Refills						
--- Cleaning Solution						
--- Refill Wipes/Pads						
-- Starter Kits/Trigger Device						
- Impregnated Wet Wipes						
-- All Purpose Cleaning Wipes						
-- Furniture Polish Wipes						
-- Toilet Care Wipes						
-- Window/Glass Wipes						
-- Other Impregnated						

- Wipes
- Starter Kits/Sweepers/ Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/ Sticks)

- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes

Wipes

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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Table 6 Forecast Retail Sales of Wipes by Category: % Value Growth 2020-2025

% constant value growth

2020/2021

2020-25 CAGR

2020/25 Total

Home Care Wipes and Floor Cleaning Systems

- Dry Electro-Static Wipes
- Starter Kits/Sweepers/Sticks (Dry Electro-Static)
- Wipes and Refills (Dry Electro-Static)
- Floor Cleaning Systems
- Refills
- Cleaning Solution
- Refill Wipes/Pads
- Starter Kits/Trigger Device
- Impregnated Wet Wipes
- All Purpose Cleaning Wipes
- Furniture Polish Wipes
- Toilet Care Wipes
- Window/Glass Wipes
- Other Impregnated Wipes
- Starter Kits/Sweepers/Sticks (Excluding Wipes)
- Wipes (Excluding Starter Kits/Sweepers/Sticks)

- Personal Wipes
- General Purpose Wipes
- Intimate Wipes
- Baby Wipes
- Cosmetic Wipes
- Facial Cleansing Wipes
- Deodorant Wipes
- Moist Toilet Wipes

Wipes

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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TISSUE AND HYGIENE IN UKRAINE - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on tissue and hygiene

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COVID-19 country impact

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Company response

Content removed from sample

Retailing shift

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What next for tissue and hygiene?

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Chart 1 Tissue and Hygiene Value Sales Growth Scenarios: 2018-2025



Source: Euromonitor International Industry Forecast Model

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Tissue and Hygiene Impact of Drivers on Value Sales: 2018-2025



Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate; 2018 figures show growth over 2017-2018

MARKET INDICATORS

Table 7 Birth Rates 2015-2020

per '000 population

	2015	2016	2017	2018	2019	2020
Birth rates	Data removed from sample					

Source: Euromonitor International from official statistics

Table 8 Infant Population 2015-2020

'000

	2015	2016	2017	2018	2019	2020
0-4 yrs female	Data removed from sample					
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

Table 9 Female Population by Age 2015-2020

'000

	2015	2016	2017	2018	2019	2020
Female population: January 1st	Data removed from sample					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 10 Total Population by Age 2015-2020

'000	2015	2016	2017	2018	2019	2020
Population at January 1st						
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 11 Households 2015-2020

	2015	2016	2017	2018	2019	2020
Households ('000)						
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

Table 12 Forecast Infant Population 2020-2025

'000	2020	2021	2022	2023	2024	2025
0-4 yrs female						
0-4 yrs male						
0-4 yrs total						

Source: Euromonitor International from official statistics

Table 13 Forecast Female Population by Age 2020-2025

'000	2020	2021	2022	2023	2024	2025
------	------	------	------	------	------	------

Female population:	22,389.3	22,233.8	22,075.7	21,915.5	21,753.9	21,591.5
January 1st						
0-4 yrs	Data removed from sample					
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 14 Forecast Total Population by Age 2020-2025

'000	2020	2021	2022	2023	2024	2025
Population at January 1st	Data removed from sample					
0-4 yrs						
5-9 yrs						
10-14 yrs						
15-19 yrs						
20-24 yrs						
25-29 yrs						
30-34 yrs						
35-39 yrs						
40-44 yrs						
45-49 yrs						
50-54 yrs						
55-59 yrs						
60-64 yrs						
65-69 yrs						
70-74 yrs						
75-79 yrs						
80+ yrs						

Source: Euromonitor International from official statistics

Table 15 Forecast Households 2020-2025

	2020	2021	2022	2023	2024	2025
Households ('000)	Data removed from sample					
Average number of occupants per household (Number)						

Source: Euromonitor International from official statistics

MARKET DATA

Table 16 Retail Sales of Tissue and Hygiene by Category: Value 2015-2020

UAH million	2015	2016	2017	2018	2019	2020
Retail Adult Incontinence Nappies/Diapers/Pants Sanitary Protection Wipes Retail Hygiene Paper Towels Paper Tableware Facial Tissues Toilet Paper Retail Tissue Retail Tissue and Hygiene	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Retail Sales of Tissue and Hygiene by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Retail Adult Incontinence Nappies/Diapers/Pants Sanitary Protection Wipes Retail Hygiene Paper Towels Paper Tableware Facial Tissues Toilet Paper Retail Tissue Retail Tissue and Hygiene	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 NBO Company Shares of Retail Tissue and Hygiene: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 LBN Brand Shares of Retail Tissue and Hygiene: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------



Others
Total

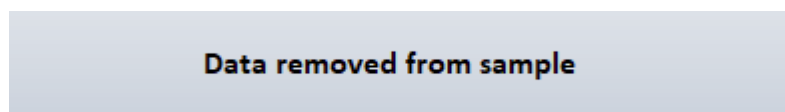
Others
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
--------------------	------	------	------	------	------	------

Facial Tissues
Nappies/Diapers/Pants
Paper Tableware



Paper Towels
Retail Adult Incontinence
Retail Hygiene
Retail Tissue
Retail Tissue and Hygiene
Sanitary Protection
Toilet Paper
Wipes

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Distribution of Retail Tissue and Hygiene by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other HTH non-grocery retailer						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
- Vending						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2020

% retail value rsp	RH	RAC	NDP	SP	W	RT
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						

--- Discounters
 --- Forecourt Retailers
 --- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Non-Grocery Specialists
 -- Health and Beauty Specialist Retailers
 -- Other HTH non-grocery retailer
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 - Vending
 Total

Data removed from sample

PTO PTW FT TP

Store-Based Retailing
 - Grocery Retailers
 -- Modern Grocery Retailers
 --- Convenience Stores
 --- Discounters
 --- Forecourt Retailers
 --- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Non-Grocery Specialists
 -- Health and Beauty Specialist Retailers
 -- Other HTH non-grocery retailer
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 - Vending
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: RH = retail hygiene; RAC = retail adult incontinence; NDP = nappies/diapers/pants; SP = sanitary protection; W = wipes; RT = retail tissue; PTO = paper towels; PTW = paper tableware; FT = facial tissues; TP = toilet paper

Table 23 Forecast Retail Sales of Tissue and Hygiene by Category: Value 2020-2025

UAH million

	2020	2021	2022	2023	2024	2025
Retail Adult Incontinence Nappies/Diapers/Pants Sanitary Protection Wipes Retail Hygiene Paper Towels Paper Tableware Facial Tissues Toilet Paper Retail Tissue Retail Tissue and Hygiene	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Retail Adult Incontinence Nappies/Diapers/Pants Sanitary Protection Wipes Retail Hygiene Paper Towels Paper Tableware Facial Tissues Toilet Paper Retail Tissue Retail Tissue and Hygiene	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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DISCLAIMER

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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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Source: Euromonitor International