

Europe Tissue and Hygiene Paper Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

Key Highlights

The European tissue and hygiene paper market is expected to register a CAGR of 1.62% during 2022-2027. Consolidation is one of the prevalent trends in the European tissue market, as the major players have been growing through sizeable acquisitions and organic growth. The market consolidation also increased due to expansion in the market sizes of the middle-sized and small players.

Tissue paper products, including paper towels and toilet paper, play an essential role in everyday life. They contribute to improved hygiene, comfort, and convenience. According to the European Tissue Symposium (European Tissue Paper Association), the European market represents around 25% of the global tissue market. The advancements in tissue manufacturing technology and the efficient use of raw materials may improve the design of tissue products and the way they are dispensed.

The consumption of tissue-paper-related products in Europe is rising due to increasing awareness regarding hygiene, growth in the share of private or retailer labels, high per capita consumption, growing use of tissues in the away-from-home segment, and moderate population growth. In a report published by the German *Süddeutsche Zeitung*, the average annual toilet paper consumption in Germany was estimated at 93 rolls per household.

In Europe, the Tuscan industry (Italy) is one of the pillars of the tissue paper sector. In this region, 80% of the national tissue paper production occurs, with approximately 1,200,000 metric tons of tissues produced annually. The most important national paper producers for hygienic/sanitary use are located in the Lucca district, which ranks first in Europe, with 21% of production volumes. (Source - A. Celli Group).

According to a report by the European Tissue Symposium, published in Q2 2020, Essity, Sofidel Group, and the WEPA Group accounted for 27.6%, 12.3%, and 9.6% of the capacity shares in the European tissue market, respectively, almost 50% of the overall market.

The large presence of locally organized and unorganized manufacturers of tissue products affects the businesses of the prominent

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associated companies. Moreover, sudden disruption of the supply chain and trade restrictions faced by several countries limit the business expansion for the companies in the international markets and can hinder market growth.

COVID-19 and panic-buying had a little bit of a down-sided impact on the tissue and hygiene industry. Due to increased sales in the retail sector, orders increased significantly in March and April 2021 across Europe, especially in Germany. Temporarily, the demand for toilet paper in 2021 was nearly twice as high as usual, but that has since leveled off in 2021.

Moreover, companies such as Essity announced that its sales suffered an 11% drop in second-quarter sales, hit by coronavirus lockdowns and adverse effects of bulk buying in the early stages of the crisis.

Europe Tissue & Hygiene Paper Market Trends

Toilet Paper to Drive the Market Growth

Toilet paper holds a prominent share in both away-from-home and home utilities, such as tissue and hygiene products. It is used widely in almost all business establishments, commercial places, and households. Kimberly-Clark leads the toilet paper business in the European market, followed by Essity. The United Kingdom remains an important European growth market despite COVID-19 and Brexit.

Toilet paper sales increased dramatically during the pandemic in most European countries. According to an article published in Forbes, in October 2020, 10% of German consumers stocked toilet paper due to the ongoing lockdown in the country. Such instances were witnessed across several other countries as manufacturers faced a huge upsurge in demand for toilet paper. The ongoing demand compelled several companies to increase their production capacities to meet the spiking demand. For instance, in September 2020, Wepa, one of Europe's leading toilet paper manufacturers, expanded its Bridgend Factory. It invested in a new paper machine with an annual production capacity of 65,000 metric tons. Moreover, WEPA UK secured GBP 6 million from the Welsh government to support its expansion plans.

Many companies are working on innovative solutions to improve customer experience. For instance, in March 2021, The Navigator Company launched a new generation of tissue paper integrated with a soap called Amoos Aquactive. Its innovative technology, Aquactive, is activated when the paper comes in contact with water, immediately producing soap foam.

Moreover, in September 2021, Metsa Tissue, the tissue paper business of the forest industry Metsa Group, announced its plans to invest in a new tissue mill in the United Kingdom. The company plans to increase tissue paper production capacity to 240,000 tons in several phases during the coming years. The plans are part of the company's Future Mill program to drive world-class environmental performance in tissue production.

The United Kingdom to Witness Significant Growth

The United Kingdom is one of the major markets in Europe, where the use of hygiene products and toiletries is significantly high. The country is also one of the main markets for diapers. According to various studies, about 7.5-8 million nappies are used in the United Kingdom.

According to the Office for National Statistics (UK), the country's population aged between 0 and 9 years stood at 8.01 million in 2019, according to the Office for National Statistics (UK). There were 640,370 live births in the country during the year, a decrease of 2.5%. The country's birth rate has been declining steadily since the last decade, and the aging population is increasing, which is expected to impact the diaper market in the country.

With a growing and aging population in the United Kingdom, the demand for hygiene products continues to increase.

Manufacturers in the country make products for all market sections, from branded premium products focusing on quality to generic grades of tissues costing less. Many mills in the country have de-inking plants to process recycled paper fiber to produce

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tissues.

According to a report by the UK Office for National Statistics (2021), the manufacturer sales of paper for household and sanitary goods and toilet requisites in the region accounted for GBP 2,266 million in 2020. The sales of toilet paper and hand towels amounted to 855,717 and 281,699 metric tons, respectively.

The average weekly household expenditure on toilet paper in the United Kingdom in 2020 by people aged less than 30 years, 30 to 49 years, 50 to 64 years, 65 to 74 years, and all households accounted for GBP 0.8, 1.1, 1, 0.9, and 1, respectively. (Source: Office for National Statistics, March 2021). All the above factors will likely contribute to the market's growth during the forecast period. Pampers held a major share of the market in the country.

According to a study (sample size of 6218) by Swagbucks in the United Kingdom, about 21% of the respondents mentioned that Pampers was their favorite brand for baby diapers, followed by Huggies (5%) and Asda Diapers (4%).

The United Kingdom is among the countries in Western Europe with high penetration rates for disposable hygiene products, especially wipes, baby diapers, and femcare pads. With Brexit, the country's need to manufacture these products is expected to increase over the next two years.

Also, in recent times, private labels are emerging as major brands in these product categories. For example, diapers from Asda, Tesco, and Sainsbury, which are major grocery and retail chains in the country, hold a lower single-digit share of the market and are rapidly growing.

The demand for women's hygiene products has also reached the maturity stage in the country, as its female population is slightly higher than that of the male population.

Europe Tissue & Hygiene Paper Market Competitor Analysis

The tissue and hygiene paper market is moderately competitive, with new firms entering the market and the existing firms holding a part of the market share. The firms engage in strategic partnerships and innovate new products to retain their market share.

July 2022 - Santander UK provided a multi-million-pound funding package to Malvern-based Lucart Hygiene to support its growth in the 'away from home' tissue paper industry. The company - formerly Essential Supply Products - was acquired by Italian paper manufacturing giant Lucart SpA in March 2021, marking the group's entrance into the UK market.

June 2021 - In pursuit of its 2030 ambition to reduce the use of fossil fuel-based plastics by half before the end of the decade, Kimberly-Clark announced a partnership with the biotech company, RWDC Industries, to advance sustainable technology for consumer products that provide much-needed solutions to the world's single-use plastics problem.

April 2021 - Lucart S.p.A, an Italian producer of machine glazed (MG) paper and products, acquired a British manufacturer of tissue paper products to grow its presence in the UK. The company intends to increase the production of toilet paper, rolls and hand towels, kitchen paper, and napkins for its main clients: hospitals, schools, hotels, and restaurants.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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