

Europe Tissue And Hygiene Paper - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 164 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Europe Tissue And Hygiene Paper Market size is estimated at USD 54.36 billion in 2024, and is expected to reach USD 62.14 billion by 2029, growing at a CAGR of 2.71% during the forecast period (2024-2029).

Key Highlights

- 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 Suddeutsche 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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

overall market.

-The large presence of locally organized and unorganized manufacturers of tissue products affects the businesses of the prominent 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 Paper Towel Market Trends

Bathroom Tissue to Drive the Market Growth

- Bathroom tissue 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.

- The value of the bathroom tissue category is rising noticeably across Europe. Innovations that offer value and effective category segmentation that encourage a variety of distinctive products are beneficial to many markets. There is no denying that there is room for development in the per capita consumption of the entire tissue market in Europe. Even though there is 100% penetration, toilet paper usage as assessed by sales through retail outlets is approximately 25% lower than in the United States.

- 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 *Suddeutsche Zeitung*, the average annual toilet paper consumption in Germany was estimated at 93 rolls per household.

- The Eastern European markets have massive growth potential. Consumers are becoming more quality-oriented due to the rising disposable income of the middle class. The introduction of a 2-ply and 3-ply toilet tissue as an alternative to the traditional 1-ply product shifted the focus from quantity (54m as the standard length of a roll) to quality (user comfort), which made Zewa (SCA) a strong market leader and the brand continued to set the standards in this market.

- Consumers' perception of private labels has been more robust in tissue than in many other fast-moving consumer goods categories. The private label market share for bathroom tissues is dramatically more prominent in the European Union, particularly in Western Europe, the Netherlands, and Russia. According to Initiative and Referendum Institute Europe, supermarkets and hypermarkets sold almost 3.1 billion units of hygiene items between April 2022 and April 2023 in France.

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 Worldometers, a current statistic, the country's population is above 68 million, and as per Macrotrends, the people's life expectancy increased by 15% to 81.77 years. 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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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 tissues.

- The United Kingdom is among Western European countries with high penetration rates for disposable hygiene products, especially wipes, baby diapers, and female 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, major grocery, and retail chains in the country, hold a lower single-digit market share 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. According to the United Kingdom's ethnicity fact report published in March 2023, men and boys comprised 29.2 million (49.0%) of England and Wales' population, while women and girls comprised 30.4 million (51.0%). With the escalated woman population across the country the demand for female hygiene product is expected to rise more in the going forward period.

- The paper industry in the United Kingdom has increased its efforts to improve the recyclability of the more difficult materials while expanding the quality, variety, and quantity of paper available for recycling. The paper would have the highest recycling rates in the United Kingdom in 2022, at over 70%, making fiber-based products the most environmentally friendly option. The business is awaiting further information on the Resources and Waste Strategy's overhaul, but the government has already set a goal rate for paper and card recycling of 89% by 2030.

Europe Paper Towel Industry Overview

The tissue and hygiene paper market is competitive, with a number of 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.

- April 2023 - Sofidel, a tissue manufacturer based in Italy, disclosed a bamboo-based tissue paper range in response to consumer demand for goods made from environmentally derived materials. This is the first line produced by the company to contain natural bamboo fibers with an FSC certification. With the triple-ply toilet paper and quadruple-ply tissue alternatives, which provide 12% and 17% more softness, respectively, than the category average, this launch also satisfies the demand for luxury products.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Industry Value Chain Analysis

4.3 Industry Attractiveness - Porter's Five Forces Analysis

4.3.1 Bargaining Power of Suppliers

4.3.2 Bargaining Power of Buyers

4.3.3 Threat of New Entrants

4.3.4 Threat of Substitutes

4.3.5 Intensity of Competitive Rivalry

4.4 Assessment of the Impact of COVID-19 on the Market

4.5 Market Drivers

4.5.1 Increase in Trend of Take-away Food

4.5.2 Growing Awareness Regarding Hygiene

4.6 Market Restraints

4.6.1 Growing Concerns over Deforestation, Operational Concerns for Manufacturers, and Increasing Raw Material Prices

5 MARKET SEGMENTATION

5.1 Product Type

5.1.1 Baby Diapers

5.1.2 Feminine Hygiene

5.1.3 Household Paper

5.1.4 Incontinence

5.1.5 Paper Tissues

5.1.5.1 Bathroom Tissues

5.1.5.2 Paper Napkins

5.1.5.3 Paper Towels

5.1.5.4 Facial Tissues

5.1.5.5 Specialty and Wrapping Tissues

5.1.6 Toilet Paper

5.2 Raw Material (Qualitative Analysis)

5.2.1 Kraft

5.2.2 Sulfite

5.2.3 Recycled

5.2.4 Other Raw Materials

5.3 Type

5.3.1 At Home

5.3.2 Away from Home

5.4 Country

5.4.1 United Kingdom

5.4.2 Germany

5.4.3 France

5.4.4 Italy

5.4.5 Spain

5.4.6 Netherlands

5.4.7 Denmark

5.4.8 Finland

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.9 Norway
- 5.4.10 Sweden
- 5.4.11 Ireland
- 5.4.12 Switzerland
- 5.4.13 Rest of Europe

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 WEPA Industrieholding SE
 - 6.1.2 Kimberly-Clark Corporation
 - 6.1.3 Metsa Group
 - 6.1.4 Sofidel Group
 - 6.1.5 Lucart SpA
 - 6.1.6 Industrie Cartarie Tronchetti SpA
 - 6.1.7 Essity AB
 - 6.1.8 Renova
 - 6.1.9 Cartiere Carrara SpA
 - 6.1.10 Ontex Group

7 INVESTMENT ANALYSIS

8 FUTURE OF THE MARKET

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Europe Tissue And Hygiene Paper - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 164 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-28
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com