SCOTTS INTERNATIONAL

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

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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Report description:

The Tissue Paper Market size is estimated at USD 20.85 billion in 2024, and is expected to reach USD 27.49 billion by 2029, growing at a CAGR of 5.68% during the forecast period (2024-2029).

Key Highlights
-With the global average consumption per person per year reaching 55 kg, the global tissue paper market is expected to grow at a CAGR of 6.45%. According to the RISI, it is anticipated that tissue production may globally exceed 44 million tons in 2021, increasing more than 14 million tons from 2010. Advancements in tissue manufacturing technology and the efficient use of raw materials would improve the design of tissue products and the way they are dispensed.
-The tissue paper industry growth is variable from region to region due to various factors such as the availability of raw materials, environmental impacts, income levels, and consumer behavior.
-Asia-Pacific is expected to witness the highest growth rate during the forecast period due to rising disposable incomes, improving living standards, rapid industrialization, and globalization in emerging economies like China, India, and Indonesia.
-The flourishing tourism and hospitality industry and the increasing population of working-class globally, coupled with the growing awareness among consumers related to health and hygiene, are expected to drive the global tissue paper market.
-The tissue paper market's dependency on the pulp industry can hinder the market's growth with rising environmental concerns, such as deforestation and global warming, with the trees being cut at a rapid rate.
-COVID-19 raised the demand for tissue papers, with people focusing on self-hygiene owing to the spread of the virus and preferring to carry products for themselves and also with people who started to stock up on supplies with almost the whole world getting into the lockdown drove the sales in the market.

Tissue Paper Market Trends

Bathroom Tissue Expected to Witness a High Growth Rate

- Bathroom tissue continues to be the most crucial category of tissue paper among all tissue products, driving the tissue market forward via a combination of necessity and the general westernization of bathroom culture. The market is growing due to increased production of organic tissue papers, rising disposable incomes, and government initiatives to support public health.
- The rising awareness of hygiene in developing economies has contributed to the market's growth. Also, the surge in disposable incomes and rising standard of living in these countries have increased demand for more premium sanitaryware products for added convenience.
- There has been a sudden spike in demand for tissue papers with the spread of the COVID-19 pandemic. The manufacturers of these tissues produced nearly 20% more than the normal levels during the COVID-19 pandemic. The prices of tissues are significantly decreasing in the United States, which is also a driving factor for the market's growth.
- Moreover, increasing raw material prices is a crucial factor that negatively impacts the growth of the market for bathroom tissue worldwide. Moreover, innovative products, such as electronic dryers, are impacting the market's growth.

North America to Hold the Largest Market Share

- The average American consumer uses most tissue papers in volume terms compared to the global average. Also, the most significant subsector is toilet paper, which has a household penetration rate of close to 100%. Pushing consumers toward the premium end of the market has become the primary driver of growth.
- The US consumer tissue market is highly concentrated, with roughly 80% of sales in the hands of the top three manufacturers, Kimberly-Clark, Procter & Gamble, and Georgia-Pacific.
- The away-from-home segment of the tissue market dominates the sales in this region. However, dwindling availability and deteriorating quality of recovered fiber oblige tissue makers to use more virgin fiber.
- The regional manufacturers are integrating with pulp companies to lower costs and increase long-term growth potential. However, such integrations can impact pulp capacity negatively, impacting the tissue market. Fierce competition, volume maturity, and price pressure are also putting constraints on the growth of the tissue market.
- With the developments in technologies of manufacturing and design of toilet paper, improving economic conditions is a critical factor that drives the market's growth. The increasing per capita disposable income and consumers' spending capacity increase, leading to a rise in expenditure on toilet paper.

Tissue Paper Industry Overview

The tissue paper market is highly fragmented due to high demand, a large number of market players, and numerous new players entering the market to have a stronghold in it by developing high-quality products for various end-user applications. Some of the key players include Kimberly-Clark Corporation, Georgia Pacific LLC (Koch industries), SCA (Svenska Cellulosa Aktiebolaget), Procter & Gamble, Clearwater Paper Corporation, Wausau Paper Corp., and Kruger Products, among others.

- October 2022 - Suzano announced to buy Kimberly-Clark's tissue paper operation in Brazil. With this acquisition, Suzano will be expected to have a 22% market share and gain a large market share in the Southeast region, Brazil's largest consumer of toilet paper.

- June 2022 - Saudi Paper Manufacturing Co. signed an agreement with Italy's Toscotec to supply a raw tissue paper rolls production line for its Dammam 2nd Industrial City factory. The company said the project would increase the production capacity of tissue paper rolls by 60,000 tonnes per annum (TPA) to 190,000 TPA to meet local and export market requirements.

Additional Benefits:

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

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