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Global Through-Air Drying (TAD) Tissue Machines Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Through-Air Drying (TAD) Tissue Machines competitive dynamics, regional economic interdependencies, and supply chain reconfigurations.In 2024, global Through-Air Drying (TAD) Tissue Machines production was 9 units, with an average global market price of around 69.17 K US$ per unit. TAD is the acronym for Through Air Drying. The TAD process used in tissue manufacturing was developed by P&G, Kimberly-Clark, and Scott. TAD was first used commercially in the 1960?s in the manufacturing of tissue and towel products. The TAD process is used to dry tissue and towel products efficiently while also maintaining softer, bulkier, and more absorbent properties. Conversely, the traditional wet-pressing method is used for conventional papermaking in other sectors. In the TAD process, the paper web is transferred from the forming section of the paper machine to a specially designed through-air-drying fabric or belt. That belt is permeable, allowing hot air to pass through it and interact with the paper web. This hot air expands the paper fibers, producing a fluffier, softer product than conventional drying methods.TAD tissue machines are advanced papermaking machines used to produce high-quality tissue products, such as bathroom tissue, paper towels, and napkins, known for their softness, bulk, and absorbency. TAD machines incorporate sophisticated systems for air circulation, drying, and automation, offering increased production efficiency, better quality control, and the ability to create premium tissue products that meet growing consumer demands for comfort and performance.The global TAD (Through-Air Drying) tissue machines market is experiencing steady growth, propelled by the rising demand for premium tissue products with enhanced softness and absorbency. TAD technology offers superior drying capabilities compared to conventional methods, resulting in higher-quality tissue products. This technology is particularly favored in the production of paper

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towels and facial tissues, where performance attributes are critical. The increasing consumer preference for premium hygiene products, coupled with the expansion of the hospitality and healthcare sectors, is driving the adoption of Through-Air Drying (TAD) Tissue Machines. Additionally, manufacturers are investing in energy-efficient TAD systems to reduce operational costs and environmental impact.The major global manufacturers of Through-Air Drying (TAD) Tissue Machines include Valmet, Andritz, Toscotec (Voith), OVERMADE, Guangdong Baotuo, etc. In 2024, the world's top three vendors accounted for approximately 97% of the revenue.A significant trend in the Through-Air Drying (TAD) Tissue Machines market is the integration of automation and digitalization. Manufacturers are incorporating advanced control systems and real-time monitoring technologies to enhance operational efficiency and product consistency. These innovations enable predictive maintenance, minimize downtime, and optimize resource utilization. Furthermore, the adoption of Industry 4.0 principles is facilitating data-driven decision-making and continuous process improvement in tissue manufacturing.Another emerging trend is the development of compact and modular TAD systems. These configurations cater to small and medium-sized enterprises seeking to enter the premium tissue market without significant capital investment. Modular designs offer scalability and flexibility, allowing manufacturers to adapt to changing market demands and production requirements. This trend is particularly relevant in emerging economies, where infrastructure constraints and budget limitations necessitate cost-effective solutions.Sustainability is also shaping the Through-Air Drying (TAD) Tissue Machines market. Manufacturers are focusing on reducing energy consumption and carbon emissions by optimizing airflow systems and incorporating heat recovery technologies. Additionally, the use of renewable energy sources and eco-friendly materials in machine construction is gaining traction. These sustainable practices not only align with environmental regulations but also enhance brand reputation and customer loyalty.In conclusion, Through-Air Drying (TAD) Tissue Machines have played a pivotal role in the evolution of the tissue manufacturing industry, particularly in producing high-quality, premium tissue products characterized by superior softness, bulk, and absorbency. Historically, the development of TAD technology marked a significant leap forward from traditional papermaking processes, offering manufacturers the ability to meet growing consumer demand for luxury tissue products. Over the years, TAD machines have been refined with advancements in air circulation, drying efficiency, and automation, enabling higher speeds, reduced waste, and improved energy efficiency. However, the technology also faces challenges, including high capital and operational costs, energy consumption, and competition from emerging technologies like PrimeLineTEX, which offer similar benefits with lower investment and environmental impact. Looking ahead, the future of Through-Air Drying (TAD) Tissue Machines is likely to be shaped by continued innovations aimed at

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reducing energy consumption, integrating more sustainable practices, and improving production flexibility. As consumer preferences for premium, eco-friendly tissue products continue to rise, TAD machines will evolve to address these demands, while competition from alternative technologies will encourage further advancements in both cost-efficiency and product quality. The ongoing development of smarter, more energy-efficient systems will be crucial in ensuring the continued relevance of TAD technology in a rapidly changing market.

The global Through-Air Drying (TAD) Tissue Machines market size was estimated at USD 623.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.30% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Through-Air Drying (TAD) Tissue Machines market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Through-Air Drying (TAD) Tissue Machines market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Through-Air Drying (TAD) Tissue Machines market.

Global Through-Air Drying (TAD) Tissue Machines Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the

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overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Valmet
Andritz
Toscotec (Voith)
OVERMADE
Guangdong Baotuo
Shaanxi Bingzhi Machinery

Market Segmentation (by Type)

Max Width 2800mm
Max Width 5600mm
Others

Market Segmentation (by Application)

200 tpd Below
200 tpd and Above

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

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South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Through-Air Drying (TAD) Tissue Machines Market
Overview of the regional outlook of the Through-Air Drying (TAD) Tissue Machines Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Through-Air Drying (TAD) Tissue Machines Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream

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and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Through-Air Drying (TAD) Tissue Machines, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

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This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter?s five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

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