

# **Tissue Paper Market Report by Product (Paper Napkin, Paper Towel, Facial Tissue, Toilet Paper, Wrapping Tissue, and Others), Raw Material (Wood Free, Wood Containing, Recovered Fiber), Application (Household, Commercial), Distribution Channel (Supermarkets & Hypermarkets, Convenience Stores, Online Stores, and Others), and Region 2024-2032**

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## **Abstracts**

The global tissue paper market size reached US\$ 73.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 118.1 Billion by 2032, exhibiting a growth rate (CAGR) of 5.2% during 2024-2032. The rapid growth of the hospitality and tourism industries, the development of organic tissue paper, rising consumer disposable incomes, and favorable government policies to promote public health are some of the major factors propelling the market.

Tissue paper is a lightweight, soft, and thin product used for various purposes. It is typically made from recycled paper pulp or virgin wood fibers that are processed to create a delicate and absorbent material. Tissue paper is known for its gentle texture and high absorbency, making it suitable for personal hygiene and cleaning applications. It is commonly used in households as toilet paper, facial tissues, and paper towels. Tissue paper is also widely utilized in the commercial sector, including restaurants, hotels, and healthcare facilities. It can be found in various forms, such as rolls, folded sheets, or individual tissues. Tissue paper is valued for its convenience, disposability, and softness, providing a hygienic and gentle solution for everyday tasks and personal care needs.

The escalating product demand for cleaning purposes due to rapid population growth,

elevating urbanization levels, and rising consumer disposable incomes will stimulate the growth of the market during the forecast period. Moreover, the growing awareness about hygiene and personal care practices has accelerated the product adoption rate. Apart from this, the rapid development of the commercial and institutional sectors, including hospitality, healthcare, and food service industries, has augmented the demand for tissue paper products. These sectors require a constant supply of tissue paper for applications such as hand drying, surface cleaning, and sanitary purposes. Additionally, the increasing emphasis on cleanliness and hygiene in these sectors is another major growth-inducing factor. Besides this, the surging adoption of tissue paper among consumers looking for convenient and hygienic solutions for their everyday needs owing to changing lifestyles and consumer preferences has catalyzed market growth. Furthermore, the augmenting demand for tissue paper products made from recycled materials or sourced from sustainably managed forests due to the rising focus on sustainable and eco-friendly items is propelling market growth.

#### Tissue Paper Market Trends/Drivers:

##### Rise in awareness and emphasis on hygiene

The increasing awareness and emphasis on hygiene practices have had a significant impact on the market for tissue paper. Consumers are becoming more conscious about the importance of maintaining cleanliness and hygiene, especially in the wake of global health concerns. Tissue paper products, such as facial tissues, toilet paper, and paper towels, provide a convenient and hygienic solution for personal care routines and everyday tasks. The ease of use, disposability, and softness of tissue paper make it a preferred choice among the masses for maintaining cleanliness and promoting good hygiene practices. The growing awareness and importance of hygiene in personal care and cleanliness routines are driving the demand for tissue paper products, propelling the market growth.

##### Surge in demand from commercial and institutional sectors

The commercial and institutional sectors, including hospitality, healthcare, and food service industries, play a vital role in fueling the market growth. In these sectors, tissue paper products are essential for maintaining high standards of hygiene and cleanliness. Hotels, restaurants, hospitals, and public facilities require a constant supply of tissue paper for hand drying, surface cleaning, and other sanitary purposes. The growth in these sectors, driven by factors such as increasing population, urbanization, and rising standards of living, directly contributes to the high demand for tissue paper products. The expanding hospitality industry worldwide has a substantial impact on the tissue

paper market as hotels and resorts require large quantities of tissue paper for guest rooms, public washrooms, and dining areas.

#### Increase in preference for sustainable and eco-friendly products

The growing preference for sustainable and eco-friendly products is a significant driver of the market for tissue paper. Consumers are increasingly becoming aware of the environmental impact of their purchasing choices and are actively seeking products that align with their sustainability values. Tissue paper manufacturers have responded to this substantial shift in preferences by offering environmentally friendly options. These products are often made from recycled materials or sourced from sustainably managed forests, reducing the ecological footprint associated with tissue paper production. The availability of eco-friendly tissue paper products has resonated with the eco-conscious consumer base, contributing to the market growth. Manufacturers have also focused on sustainable packaging and minimizing the overall environmental impact of their production processes, further catering to the growing demand for eco-friendly tissue paper.

#### Tissue Paper Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global tissue paper market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on product, raw material, application and distribution channel.

#### Breakup by Product:

- Paper Napkin
- Paper Towel
- Facial Tissue
- Toilet Paper
- Wrapping Tissue
- Others

Paper napkin represents the most popular product

The report has provided a detailed breakup and analysis of the market based on the product. This includes paper napkin, paper towel, facial tissue, toilet paper, wrapping tissue and others. According to the report, paper napkin represented the largest segment.

Paper napkins have emerged as the dominating product in the tissue paper market due to several key drivers. The increasing demand for convenience and hygiene in various settings, such as restaurants, cafes, and households, has propelled the adoption of paper napkins. They provide a convenient and disposable solution for maintaining cleanliness while having meals or performing other activities. Moreover, the rising trend of eating out and the growing food service industry have contributed to the dominance of paper napkins in the market.

Additionally, restaurants and food establishments rely on paper napkins to provide customers with hygienic and practical options. In line with this, the surging number of people dining in restaurants or taking away orders has augmented the demand for paper napkins. Apart from this, paper napkins come in various sizes, designs, and colors, allowing for personalization and branding opportunities. Moreover, the rising incorporation of business logos or artwork on paper napkins for enhancing brand presence and creating a visually appealing dining experience is contributing to the market growth.

#### Breakup by Raw Material:

Wood Free

Wood Containing

Recovered Fiber

Recovered fiber holds the largest share in the market

A detailed breakup and analysis of the market based on the raw material has also been provided in the report. This includes wood free, wood containing and recovered fiber. According to the report, recovered fiber accounted for the largest market share.

Recovered fiber has become the dominating raw material in the market for tissue paper due to several key drivers. The growing emphasis on sustainability and environmental responsibility across industries has accelerated the product adoption rate. Tissue paper manufacturers are responding to this demand by opting for recovered fiber as a renewable and eco-friendly alternative to virgin wood pulp. Moreover, numerous advancements in recycling technologies and infrastructure have facilitated the availability and quality of recovered fiber. In addition, the development of efficient recycling systems that enable the collection, sorting, and processing of wastepaper into high-quality fibers suitable for tissue paper production is propelling market growth.

Furthermore, cost considerations play a significant role in the dominance of recovered fiber. It offers cost advantages compared to virgin wood pulp, making it an economically attractive option for tissue paper manufacturers. Along with this, the surging adoption of recovered fiber as it reduces raw material costs and can help companies achieve greater cost efficiencies in their production processes is another major growth-inducing factor.

#### Breakup by Application:

Household  
Commercial

Tissue papers are mostly used in the commercial sector

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes the household and commercial. According to the report, commercial sector accounted for the largest market share.

The dominance of the commercial sector as the leading application segment in the market can be attributed to several key drivers. The rapid growth of the hospitality industry, including hotels, restaurants, and cafes, has augmented the demand for tissue paper products. These establishments require a constant supply of tissue paper for various purposes, such as napkins, towels, and toilet paper, to maintain cleanliness and hygiene standards for their customers. Moreover, the healthcare sector plays a crucial role in driving the dominance of the commercial application in the market for tissue paper. Hospitals, clinics, and other healthcare facilities have a high demand for tissue paper products owing to their crucial role in maintaining sanitation and preventing the spread of infections. Furthermore, the rising reliance of numerous restaurants, fast-food chains, and catering services on tissue paper products, such as napkins and disposable table covers, to provide a hygienic dining experience to customers and facilitate easy clean-up is contributing to the market growth.

#### Breakup by Distribution Channel:

Supermarkets & Hypermarkets  
Convenience Stores  
Online Stores  
Others

Supermarkets & hypermarkets account for the majority of the share in the market

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes supermarkets & hypermarkets, convenience stores, online stores, and others. According to the report, supermarkets & hypermarkets accounted for the largest market share.

Supermarkets are large retail stores that offer a wide variety of food and non-food consumer products. On the other hand, hypermarkets are large-scale retail stores that combine the features of supermarkets and department stores. The convenience and one-stop shopping experience offered by supermarkets and hypermarkets attracts a broader customer base. These retail outlets provide a wide range of products, including tissue paper, making it convenient for consumers to fulfill all their household needs in a single location. Moreover, the easy availability of tissue paper in these stores ensures easy access for consumers, which in turn is contributing to the dominance of this distribution channel. Apart from this, supermarkets and hypermarkets have strong purchasing power and established relationships with tissue paper manufacturers and suppliers. They can negotiate competitive pricing and secure a steady supply of tissue paper products, ensuring a consistent stock for customers. Furthermore, supermarkets and hypermarkets invest in effective marketing strategies and promotions to attract customers. This marketing approach further helps drive sales and increases the visibility and demand for tissue paper products in these stores.

Breakup by Region:

North America

Asia Pacific

Europe

Middle East and Africa

Latin America

North America exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America, Asia Pacific, Europe, Middle East and Africa, and Latin America. According to the report, North America was the largest regional market for tissue paper.

North America held the biggest share in the market since the region has a high standard of living and strong consumer purchasing power, which in turn has augmented the

demand for tissue paper products. The region's vast population, coupled with a growing focus on maintaining hygiene and cleanliness, has accelerated the adoption of tissue paper for various applications. Moreover, the well-established hygiene practices and awareness of personal care in North America contribute to the dominance of the region in the market. Consumers prioritize convenience, hygiene, and quality in their everyday routines, leading to a high demand for tissue paper products such as facial tissues, toilet paper, and paper towels.

Furthermore, the presence of prominent tissue paper manufacturers and technological advancements in the region bolster its dominance. North America is home to several major tissue paper manufacturers with advanced production capabilities, enabling them to meet the market demand efficiently and offer innovative products. Apart from this, the well-developed network of supermarkets, hypermarkets, convenience stores, and e-commerce platforms in the region that ensure wide accessibility and availability of tissue paper products to consumers is further propelling the market growth.

#### Competitive Landscape:

The market is experiencing a lower-than-anticipated demand compared to pre-pandemic levels however, this is likely to witness a paradigm shift over the next decade with the introduction of eco-friendly tissue paper products made from recycled fibers or sourced from sustainably managed forests that addresses the growing demand for sustainable and environmentally responsible options. Additionally, the leading manufacturers are developing premium tissue paper products, featuring enhanced designs, embossing, and scents to provide a more luxurious and sensory experience. Furthermore, the integration of technology has resulted in the development of "smart" tissue paper products that incorporate features such as moisture indicators or antibacterial properties, which has accelerated the product adoption rate. We also expect the market to witness new entrants, consolidation of product portfolios and increased strategic collaborations amongst key players to drive healthy competition within the domain during the forecast period.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Asia Pulp and Paper Group (APP)  
Georgia-Pacific LLC  
Kimberly-Clark Corporation  
Procter & Gamble Company

Hengan International Group Company Limited  
CMPC S.A.  
Cascades, Inc.  
Jukebox Print Inc.  
Paper Mart Inc.  
Svenska Cellulosa AB  
Unicharm Corporation

#### Recent Developments:

In June 2022, Procter & Gamble Company is focusing on minimizing potential harm to forests from their purchases of wood pulp for toilet paper and other products. The company has taken steps to address sustainability concerns by implementing measures to ensure responsible sourcing of wood pulp. Additionally, P&G is exploring alternative materials for tissue paper production, such as bamboo-based toilet paper, in order to reduce their reliance on wood pulp.

In 2022, Kimberly-Clark Professional has recently launched its ICON dispenser collection, marking a significant development in the tissue paper industry. This collection includes a first-of-its-kind dispenser design that adds style to hygiene, featuring six interchangeable faceplate design options. It aims to provide a more aesthetically pleasing and customizable experience for users. Additionally, the dispenser is designed for use with coreless toilet paper rolls, reducing waste.

In May 2023, CMPC S.A. integrated the Brazilian company Carta Fabril into one of its operations to strengthen the production capacity of tissue paper.

#### Key Questions Answered in This Report

1. What was the size of the global tissue paper market in 2023?
2. What is the expected growth rate of the global tissue paper market during 2024-2032?
3. What are the key factors driving the global tissue paper market?
4. What has been the impact of COVID-19 on the global tissue paper market?
5. What is the breakup of the global tissue paper market based on the product?
6. What is the breakup of the global tissue paper market based on the raw material?
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10. Who are the key companies/players in the global tissue paper market?



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