

Europe Tissue And Hygiene Paper - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Europe Tissue And Hygiene Paper Market size is estimated at USD 53.23 billion in 2024, and is expected to reach USD 61.09 billion by 2029, growing at a CAGR of 2.79% during the forecast period (2024-2029).

Tissue and hygiene papers are lightweight creped for cosmetic and personal care, cleaning, and hygiene purposes. Products include facial papers, towels, facial masks, toilet paper, napkins, diapers, and sanitary pads.

According to the European Tissue Symposium (European Tissue Paper Association), the European market contributes more than 25% of the global tissue market. The advancements in tissue manufacturing technology, efficient raw material usage, and the recyclability of used tissues are expected to improve further the design of tissue products and the way they get dispensed.

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

According to the Office for National Statistics (UK) report published in July 2023, the manufacturers' toilet paper sales in the country increased from 742 thousand tons to 849 thousand tons. Therefore, the rise of manufacturers' toilet paper sales in three years expanded to over 100 thousand tons, depicting a surge in demand for toilet paper across the country. Further, as per the same report, the demand for toilet paper held the

highest position in terms of sales of household paper and toilet requisites in the United Kingdom. This growth trend is expected to be witnessed during the forecast period, depicting the bolstered top-line growth across the sector.

The demand for paper tissues and hygiene products is steadily increasing in Europe owing to various factors that directly or indirectly impact the market ecosystem. The rise of e-commerce, hospitality, and the food service sector further boosts the need for paper tissues. However, deforestation concerns reduce access to domestic resources for the market vendors, making them rely on recovered paper and wastepaper imports. Environmental impact is one of the most critical challenges that the paper is facing at this moment. Making paper requires significant natural resources like wood, water, and energy.

Additionally, it involves using chemicals and other materials that can negatively impact the environment. The pulp and paper sector has been associated with deforestation risks in Europe. Increasing pulp and paper production increases deforestation, fires, social conflict, and conflict with wildlife.

A significant share of commercial establishments has installed electric tissue dispensers to release hand towels for consumers. In addition, consumers are changing their eating habits by not eating at the store but taking their pre-packaged meals with them because of time and hygiene restrictions due to the pandemic.

Europe Tissue And Hygiene Paper Market Trends

The Toilet Paper Segment is Expected to Hold a Major Market Share

Toilet paper constitutes a significant portion of the tissue hygiene paper market. Consumers are looking for items that contribute to a cleaner and better lifestyle, and the growing focus on health and well-being also influenced the market. Also, toilet paper and bathroom tissues are used interchangeably, serving the same function.

Growing environmental concerns and increasing consumer awareness of sustainability issues are driving the adoption of eco-friendly practices in the toilet paper industry. Due to population growth, urbanization, and improved hygiene standards, the demand for toilet paper will continue to rise steadily. According to data from the Population Reference Bureau for 2023, Europe's urban population exceeds 75%, with a continuing upward trend.

Manufacturers of tissue products know consumers' aesthetic associations with embossed tissue. Brands commonly utilize embossing to reinforce unique patterns, logos, or other features to drive consistent customer loyalty and purchases. By designing an appropriate embossing pattern and process, the correct combination can facilitate lamination, resulting in multi-ply finished products that customers perceive as high quality.

In February 2024, Aldi, a supermarket chain, unveiled its trials to double the sheets per toilet roll in select own-brand lines to remove 60 tonnes of plastic packaging annually and reduce emissions during delivery. When selling double toilet rolls, the retailer expects to lower the packaging size and fit more packs into delivery trucks, reducing the number of vehicles on the road and the number of trips required to transport the products to stores. The double toilet rolls will be trialed in the West Midlands, East Midlands, Yorkshire, and other countries in the Kingdom.

Companies operating in the market are expanding their business through acquisitions or partnerships to reach more customers and gain more profits. For instance, in December 2023, Partners Group, a global private markets firm, acquired Velvet CARE, one of Central Europe's fastest-growing consumer tissue producers, from Abris Capital Partners and intends to build value through initiatives including expansion in Central Europe and beyond. Velvet CARE is one of Central Europe's largest producers of hygiene tissue products, including toilet paper and other tissue hygiene products.

Sweden is Expected to Witness Significant Growth

Numerous tissue paper manufacturing companies thrive in Sweden, ranging from large-scale producers to smaller enterprises. These entities boast state-of-the-art manufacturing facilities with advanced machinery and technology, enabling them to produce high-quality tissue paper products efficiently.

Sweden has several prominent paper manufacturing companies, such as SCA, Holmen, Stora Enso, and BillerudKorsnäs. These companies have established themselves as leaders in the industry, producing a diverse array of paper products, including tissue and packaging materials and papers.

Rapid urbanization and a growing female population are reshaping feminine hygiene products nationwide. According to Statistics Sweden, the female population across the

country grew steadily in the past few years, from 5.14 million in 2018 to 5.31 million in 2023. This constant growth of the female population in the country is expected to bolster the demand for female hygiene products in the same proportion.

Many companies in Sweden's paper industry prioritize sustainability, emphasizing renewable resources and eco-friendly production practices. This commitment, bolstered by a rich history in paper manufacturing, not only drives innovation but also underpins the sector's pivotal role in Sweden's economy and global market presence.

The Swedish market also has multiple investments in Tissue paper production and manufacturing. In February 2024, Mets? Group invested significantly in its Mariestad site in Sweden, partnering with Valmet Tissue Converting and C.G Bretting Manufacturing Co. to install three cutting-edge converting lines.

Europe Tissue And Hygiene Paper Market Industry Overview

The European tissue and hygiene paper market is highly fragmented, with major players like Sofidel Group, Kimberly Clark Corporation, WEPA Hygieneprodukte GmbH, Mets? Group, and Industrie Cartarie Tronchetti SpA. Players are adopting partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In March 2024, Metsa Tissue increased its capacity in Finland for locally produced Lambi Home Towel household towels and sheets. The new investment in a packaging line will improve the efficiency of the M?ntt? hand towel production, providing additional capacity for paper towel sheets and hand towels and enabling broader availability of the products.

In January 2024, WEPA acquired Star Tissue UK, a hygiene paper company based in Blackburn, Lancashire. The new business would be known as WEPA Professional UK, a sign of WEPA's strategic ambition to grow in the UK professional hygiene market.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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Contents

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 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 Consumers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitutes
 - 4.3.5 Intensity of Competitive Rivalry

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increase in Trend of Take-away Food
 - 5.1.2 Growing Awareness Regarding Hygiene
- 5.2 Market Restraints
 - 5.2.1 Growing Concerns over Deforestation, Operational Concerns for Manufacturers, and Increasing Raw Material Prices

6 MARKET SEGMENTATION

- 6.1 By Product Type
 - 6.1.1 Baby Diapers
 - 6.1.2 Feminine Hygiene
 - 6.1.3 Household Paper
 - 6.1.4 Incontinence
 - 6.1.5 Paper Tissues

- 6.1.5.1 Paper Napkins
- 6.1.5.2 Paper Towels
- 6.1.5.3 Facial Tissues
- 6.1.5.4 Specialty and Wrapping Tissues
- 6.1.6 Toilet Paper
- 6.2 By Raw Material (Qualitative Analysis)
 - 6.2.1 Kraft
 - 6.2.2 Sulfite
 - 6.2.3 Recycled
 - 6.2.4 Other Raw Material
- 6.3 By Type
 - 6.3.1 At Home
 - 6.3.2 Away from Home
- 6.4 By Country***
 - 6.4.1 United Kingdom
 - 6.4.2 Germany
 - 6.4.3 France
 - 6.4.4 Italy
 - 6.4.5 Spain
 - 6.4.6 Netherlands
 - 6.4.7 Denmark
 - 6.4.8 Finland
 - 6.4.9 Norway
 - 6.4.10 Sweden
 - 6.4.11 Ireland
 - 6.4.12 Switzerland
 - 6.4.13 Russia
 - 6.4.14 Poland

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles*
 - 7.1.1 Sofidel Group
 - 7.1.2 Kimberly Clark Corporation
 - 7.1.3 WEPA Hygieneprodukte GmbH
 - 7.1.4 Metsa Group
 - 7.1.5 Industrie Cartarie Tronchetti SpA
 - 7.1.6 Lucart SpA
 - 7.1.7 Essity AB

7.1.8 Renova

7.1.9 Procter & Gamble

7.1.10 Cartiere Carrara SpA

7.1.11 Industrie Celtex SpA

7.1.12 Johnson & Johnson Services Inc. (kenvue Inc.)

7.1.13 Ontex Group

7.1.14 Tosama DOO

7.1.15 Drylock Technologies NV

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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