

# Tissue Paper Converting Machines - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Tissue Paper Converting Machines Market size is estimated at USD 1.43 billion in 2024, and is expected to reach USD 1.70 billion by 2029, growing at a CAGR of 3.54% during the forecast period (2024-2029).

Tissue paper production has a significant impact on the environment. Tissue paper is made from recycled wastepaper and virgin pulp, contributing to greenhouse gas emissions (estimates state that virgin pulp contributes 30% more than wastepaper). With the escalating concerns about environmental sustainability, tissue paper converting equipment manufacturers are extensively implementing green manufacturing models. This includes using recycled materials, reducing water and energy consumption, and adopting processes that minimize environmental impact.

## Key Highlights

In tissue paper manufacturing, research and development efforts remain focused on several key areas, including energy saving, fiber saving, final product quality, and the ability to run the machine. The approach flow and headbox area are some of the most energy-intensive stages in tissue-making. Manufacturers are actively exploring new smart options to optimize this area, aiming to achieve better stock homogenization, facilitate quick grade changes, and work toward higher consistencies in the headbox. These efforts are essential for improving overall process efficiency, reducing energy consumption, and enhancing the quality of tissue paper products.

The integration of smart technology and automation is on the rise, helping to improve overall operational efficiency, reduce waste, and enhance accuracy. Also, the demand

for high-speed, fully automated converting lines is expanding, along with rising labor costs and efficiency demands. The fully automatic converting machines reduce waste and the need for human intervention by connecting different processes, such as winding and packaging. Major companies spend heavily on cutting-edge robots, vision, and artificial intelligence-driven optimization as they expand into new manufacturing areas.

Innovative converting technologies facilitate the efficient utilization of raw materials, particularly paper fibers. Precision cutting and embossing techniques are examples of methods that reduce material waste, while advanced control systems optimize the consumption of water and chemicals during manufacturing.

The initial investment needed to establish a tissue-converting plant can be substantial, covering expenses like land procurement, building construction or renovation, machinery purchase and installation, and infrastructure development. Much of the capital will be required as working capital, while the cost of machinery and equipment can be as high as 25% or more of the total investment. Securing enough capital for these costs can be tough, especially for small or new businesses. Factors like limited financial resources, perceived risk, and regulatory compliance further complicate the funding process. To address these challenges, businesses may seek partnerships, explore government support programs, develop thorough business plans, and optimize costs to enhance financial viability.

According to a report published by AFRY (Paper industry specialist) and Suzano (a key global paper and pulp producer), the global consumption of paper is expected to rise to a massive 55 million tons in 2032 from 41 million tons in 2021. This rising demand for tissue paper across the globe would open opportunities for many small and medium-scale producers to enter the tissue paper manufacturing industry, thereby increasing the demand for converting equipment.

## Tissue Paper Converting Machines Market Trends

### Toilet Roll Converting Lines to be the Largest Machine Type Segment

Regular tissue products, including toilet paper, constitute a significant portion of the market for converting machinery. The demand for toilet paper is expected to rise steadily due to factors such as population growth, urbanization, and improving hygiene standards.

According to the Population Reference Bureau, in 2023, the degree of urbanization worldwide was 57 %. North America, Latin America, and the Caribbean were the regions with the highest level of urbanization, with over four-fifths of the population residing in urban areas.

Moreover, manufacturers of converting machinery targeting wet paper towel applications can capitalize by developing machinery capable of efficiently producing high-quality, moisture-resistant paper towels. Additionally, innovations in packaging and dispensing systems for wet paper towels present opportunities for manufacturers to differentiate their machinery offerings and cater to evolving market needs.

Growing environmental concerns and increasing consumer awareness of sustainability issues are driving the adoption of eco-friendly practices in the toilet paper industry. Manufacturers invest in converting machinery capable of processing recycled fibers, reducing waste, and minimizing energy consumption. Demand for biodegradable and environmentally friendly toilet paper products prompts manufacturers to invest in machinery capable of handling recycled material.

Furthermore, consumer preferences for personalized and innovative toilet paper products are driving manufacturers to invest in flexible converting machinery. Machinery capable of producing a variety of products, including different sheet sizes, ply configurations, embossing patterns, and packaging options, are in high demand. Customization capabilities enable manufacturers to cater to niche markets and segregate their products in a competitive landscape. In addition, consumers with higher disposable incomes often are more inclined to buy and invest more in luxurious embossed toilet tissue.

Manufacturers of tissue products are aware of consumers' aesthetic associations with embossed tissue. Brands commonly utilize embossing to reinforce unique patterns, logos, or other special features to drive consumer loyalty and purchases consistently. Embossed toilet tissue is especially well-suited for aesthetic appeal and other consumer preferences; however, it is important not to overlook product quality.

The embossing process can impact certain tissue attributes, particularly mechanical strength, and stiffness. 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. By partnering with embossing machinery experts, toilet tissue products can be qualitatively and aesthetically distinguished.

## Asia Pacific is Expected to Hold Significant Market Share

Japan enhanced its reputation for cleanliness by introducing a unique addition to the toilets at Narita International Airport: smartphone cleaning paper. In a fresh approach to public convenience, individuals are encouraged to tear off a paper sheet from a dispenser beside the regular toilet paper roll to sanitize their phone screens. This introduction of cleaning paper was a response to research indicating that smartphone screens tend to harbor more germs than toilet seats. Surveys have consistently shown that tourists from other countries are consistently amazed by the cleanliness and adaptability of Japan's public restrooms. This is expected to impact the target market.

The tissue paper sector in India is currently experiencing consolidation through innovation and acquisitions. This has allowed companies to enhance their market position, broaden their product range, and invest in advanced converting technologies to meet the growing demand. The escalating urbanization, increased focus on hygiene resulting from government initiatives like Swachh Bharat, and a significant rise in the demand from the healthcare and hospitality industries are projected to drive the consumption of tissue paper, napkins, and toilet and towel-grade paper.

In January 2024, Andhra Paper Limited (APL), a top player in the paper and pulp industry, received approval from its Board of Directors to install a cutting-edge tissue paper machine at its Kadiyam manufacturing facility. The machine will employ state-of-the-art technology and have a daily production capacity of 100 tons, allowing diversification of the company's product portfolio. The proposed capacity addition is set at 35,000 Tons Per Annum (TPA) for producing various grades of tissue paper, including facial, toilet, napkin, and towel-grade tissue. The company aims to commence production within an estimated 15 months.

To enhance production capacity within China's domestic market, high-end tissue machines, including the latest TAD technology, have been imported. For instance, Hengan incorporated two additional Valmet Hybrid tissue machines primarily used to produce superior facial tissue and kitchen towels.

Before this, Hengan had implemented two Toscotec TAD tissue machines. The initial step involved the development of differentiated products using advanced technology and equipment to enhance the performance of products during usage. For instance, products with improved thickness were introduced by implementing novel tissue

machine technology and converting machines. Cloud series tissue by Mind Act Upon Mind, cashmere sensory series toilet roll by Vinda, and hot air kitchen towels with TAD technology by Virjoy are some examples of such product launches.

The proliferation of the paper industry in Indonesia is poised to drive growth in the tissue paper machine market. This growth will be fueled by surging demand for tissue paper products, investments in manufacturing capacity, technological advancements, and evolving environmental considerations.

Tissue paper machine suppliers can capitalize on these opportunities by offering innovative solutions and addressing the specific needs of paper manufacturers. In November 2023, the Indonesia International Paper Chain Industry Exhibition (Paper Chain Indonesia) was launched at the JIEXPO Exhibition Center in Jakarta, Indonesia.

## Tissue Paper Converting Machines Industry Overview

The tissue paper converting machines market is highly fragmented. There is the presence of major players like C.G. Bretting Manufacturing Company, Inc., Valmet Oyj, 9 September Tissue Converting, Serv-o-Tec GmbH, and SDF Schnitt-Druck-Falz Spezialmaschinen GmbH. Players in the market are adopting tactics such as partnerships and acquisitions in order to enhance their product offerings as well as gain a sustainable competitive advantage.

January 2024 - United Converting Tissue SRL announced its collaboration with Lila Kagit in Turkey to supply a new Nexus Series Automatic Converting Line.

January 2024 - Valmet will provide Suzano Papel e Celulose in Brazil with a comprehensive tissue line comprising a tissue-making line, converting equipment, and a biomass boiler. Although the total order value is undisclosed, such an order typically amounts to around EUR 100 million (USD 108 million).

November 2023 - Valmet's acquisition of K?rber Group's Business area tissue represents a strategic move aimed at expanding its market presence and diversifying its product portfolio in the tissue industry. The acquisition provides Valmet access to innovative converting and packaging technologies and services tailored to the tissue sector.

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