

# Tissue Paper Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### Tissue Paper Market Summary

#### Introduction

Tissue paper, a soft and absorbent paper product, serves essential hygiene and convenience needs across applications like toilet and facial tissue, napkins, kitchen use, and others. Made from virgin or recycled pulp, it is a staple in households, commercial spaces, and industrial settings. The tissue paper market operates within the consumer goods and hygiene sector, driven by population growth, hygiene awareness, and premium product demand, though it faces challenges from cost pressures, competition from alternatives, and sustainability concerns.

#### Market Size and Growth Forecast

The global tissue paper market is valued at approximately USD 45–75 billion in 2025, with a projected CAGR of 1.8–2.7% through 2030. This modest growth reflects stable demand and evolving consumer preferences.

#### Regional Analysis

**North America:** Expected to grow at 1.5–2.5%, the United States leads with premium tissue demand. Trends focus on softness and sustainability.

**Europe:** Projected to grow at 1.5–2.5%, Germany and the UK dominate with hygiene needs. Trends emphasize eco-friendly products.

**Asia Pacific:** Anticipated to grow at 2–3%, China and India drive growth with population and urbanization. Trends prioritize affordability and scale.

**Rest of the World:** Expected to grow at 1.8–2.7%, Brazil and South Africa contribute through household use, with trends favoring cost-effective options.

### Application Analysis

Toilet & Facial: Expected to grow at 1.8–2.7%, it dominates due to hygiene needs.

Trends focus on comfort and eco-friendliness.

Napkins: Projected at 1.5–2.5%, it serves dining and commercial uses. Trends highlight premium designs.

Kitchen: Anticipated at 1.5–2.5%, it supports household tasks. Trends explore durability and absorbency.

Others: Expected at 1–2%, including industrial wipes, with trends in niche uses.

### Key Market Players

Georgia Pacific: Supplies high-quality tissue products.

P&G: Offers premium tissue brands.

Kimberly Clark: Specializes in soft and sustainable tissue.

Cascades: Focuses on eco-friendly tissue solutions.

Essity: Provides innovative hygiene products.

First Quality: Supplies reliable tissue options.

Kruger Inc.: Offers scalable tissue products.

Clearwater Paper Corporation: Focuses on quality tissue.

Irving Consumer Products: Supplies regional needs.

Sofidel: Offers sustainable tissue solutions.

Metsa Group: Specializes in eco-friendly tissue.

Industrie Cartarie Tronchetti SpA: Provides premium tissue.

Lucart: Focuses on sustainable products.

Hengan: A Chinese leader in tissue production.

Vinda International: Supplies regional tissue needs.

Gold Hongye Paper Group: Offers cost-effective solutions.

C&S Paper Co. Ltd.: Targets hygiene markets.

Daio Paper Corporation: A Japanese player in tissue.

Oji Holdings Corporation: Provides efficient tissue products.

### Porter's Five Forces Analysis

Threat of New Entrants: Moderate; capital and brand loyalty limit entry, but demand attracts players.

Threat of Substitutes: Medium; cloth alternatives compete, though tissue convenience sustains demand.

Bargaining Power of Buyers: High; large retailers negotiate due to bulk purchases.

Bargaining Power of Suppliers: Medium; pulp supply gives suppliers leverage.

Competitive Rivalry: High; players compete on quality, price, and sustainability.

## Market Opportunities and Challenges

### Opportunities:

- Rising hygiene awareness in Asia Pacific offers a vibrant opportunity, as tissue use grows with urbanization. Producers can leverage affordable options to capture this market.
- Premium trends in North America create a promising landscape, with soft and sustainable tissues gaining favor. Innovating with high-quality designs can tap into this shift.
- Commercial demand presents a pathway, as napkins and kitchen tissues meet hospitality needs. Enhancing durability can position manufacturers favorably.

### Challenges:

- Cost pressures from pulp prices risk profitability, requiring efficient production.
- Competition from cloth alternatives pressures market share, demanding differentiation through convenience.
- Sustainability concerns demand eco-friendly practices, increasing operational complexity.

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