

Australia Tissue Paper Market, By Product Type (Toilet Paper, Facial Tissues, Napkins, Wrapping Tissue, Others), By End User (Residential, Commercial), By Sales Channel (Hypermarket/Supermarket, Departmental Stores, Online, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The Australia Tissue Paper Market was valued at USD 2.13 billion in 2024 and is projected to reach USD 2.90 billion by 2030, registering a CAGR of 5.33% over the forecast period. The market is evolving rapidly due to increasing hygiene consciousness, growing environmental awareness, and changing consumer preferences. The COVID-19 pandemic accelerated the use of disposable hygiene items across households and commercial sectors, leading to sustained demand. A rising shift toward eco-friendly products—such as bamboo-based and recycled tissues—is influencing purchasing behavior. In response, manufacturers are adopting green production methods, including alternative fibers and reduced resource consumption. The government's Recycling Modernisation Fund (RMF), with a USD 0.64 billion commitment, aims to strengthen domestic recycling infrastructure, reduce waste exports, and support the use of recycled inputs in tissue production, further bolstering the sustainable growth of this sector.

Key Market Drivers

Rising Hygiene Awareness

The Australian tissue paper market has witnessed strong momentum from increasing hygiene consciousness, a trend sharply intensified by the COVID-19 pandemic. With enhanced awareness around cleanliness and infection control, consumers and institutions alike have incorporated tissue products as essentials in everyday routines. Demand has surged for toilet paper, facial tissues, wet wipes, and paper towels across homes, offices, restaurants, and healthcare facilities.

The cultural integration of disposable hygiene products is particularly noticeable in urban regions, where convenience and sanitation are prioritized. In parallel, public facilities and private enterprises have expanded hygiene protocols, driving higher usage across commercial sectors. In 2023–24, Australia utilized approximately 335.1 kilotonnes of tissue stock for producing various tissue items, highlighting its widespread integration in both residential and institutional settings.

Key Market Challenges

Rising Competition from Low-Cost Imports

Domestic tissue manufacturers in Australia are increasingly challenged by the influx of competitively priced imports, primarily from countries with lower production costs such as China, Indonesia, and Malaysia. These imported products benefit from cost efficiencies and often bypass stringent environmental standards, allowing them to underprice local offerings.

Australian producers, on the other hand, face high operating expenses tied to labor, energy, raw materials, and environmental compliance. The competitive disadvantage threatens the profitability and sustainability of domestic production. Without intervention in the form of trade support, tariffs, or subsidies, the local industry may continue to lose ground to imported goods, limiting its long-term growth potential.

Key Market Trends

Premiumization and Product Innovation

The tissue paper market in Australia is seeing strong consumer interest in premium products that offer improved comfort, strength, and skin compatibility. As a result, innovations such as quilted textures, hypoallergenic tissues, and multi-ply toilet paper have become increasingly common.

In addition, consumers are seeking advanced product features, leading to the popularity of flushable wipes, antibacterial tissues, and scented variants. These enhancements not only address specific consumer needs but also support value-based differentiation in a highly commoditized category. Manufacturers are capitalizing on these trends to command premium prices and strengthen brand positioning.

Key Market Players

Kimberly-Clark Corporation

Essity Aktiebolag

Vinda International Holdings Limited

The Procter & Gamble Company

Hengan International Group Company Ltd.

Clearwater Paper Corporation

Unicharm Corporation

Sofidel Group

Kruger Inc.

MPI Papermills Inc.

Report Scope:

In this report, the Australia Tissue Paper Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Australia Tissue Paper Market, By Product Type:

Toilet Paper

Facial Tissues

Napkins

Wrapping Tissue

Others

Australia Tissue Paper Market, By End User:

Residential

Commercial

Australia Tissue Paper Market, By Sales Channel:

Hypermarket/Supermarket

Departmental Stores

Online

Others

Australia Tissue Paper Market, By Region:

Australia Capital Territory & New South Wales

Northern Territory & Southern Australia

Western Australia

Queensland

Victoria & Tasmania

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Australia Tissue Paper Market.

Available Customizations:

Australia Tissue Paper Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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