

Away from Home Tissue and Hygiene Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Toilet Papers, Wipes, Paper Napkins, Paper Towels, and Others), By End-User (Hospitals & Healthcare, Food & Beverage, Commercial, Others), By Distribution Channel (Offline and Online), By Region, By Competition, 2018-2028

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Abstracts

Global Away from Home Tissue and Hygiene Market was valued at USD 34.21 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.1% through 2028. The Global Away from Home (AFH) Tissue and Hygiene Market encompasses a wide spectrum of products designed for use outside domestic settings, including commercial, public, and industrial spaces. This market segment is vital, catering to hygiene, sanitation, and comfort needs in various non-residential environments like offices, healthcare facilities, hospitality venues, educational institutions, and other public spaces.

The AFH Tissue and Hygiene Market offer a diverse array of products, including paper towels, tissues, napkins, wipes, hand hygiene solutions, and other sanitation essentials. These products are available in different forms, sizes, and specifications to meet the varying needs of different industries and establishments.

The market experiences steady growth driven by factors such as increased focus on hygiene and cleanliness standards, rising awareness of health concerns, and the expansion of commercial spaces globally. Furthermore, the growing emphasis on sustainability and eco-friendly solutions has led to the development of biodegradable and environmentally conscious AFH products.

Innovations in manufacturing processes, material sciences, and product design play a pivotal role in the AFH Tissue and Hygiene Market. Manufacturers continually seek to enhance product efficiency, absorbency, durability, and sustainability. Technological advancements, such as touchless dispensers, antimicrobial coatings, and improved materials, aim to provide enhanced hygiene solutions for diverse commercial settings.

The market operates within a framework of stringent regulatory standards and guidelines to ensure product quality, safety, and compliance with industry-specific requirements. Adherence to hygiene regulations and certifications is crucial for manufacturers to meet the expectations of businesses and consumers while ensuring safety and efficacy.

Key players in the industry engage in competitive strategies, including mergers, acquisitions, product launches, and geographical expansions, aiming to strengthen their foothold in the global market. The AFH Tissue and Hygiene Market is highly competitive, with companies focusing on market penetration and expanding their product portfolios to meet diverse consumer demands across various regions.

In essence, the Global AFH Tissue and Hygiene Market represent a vital sector essential for maintaining hygiene standards and comfort in commercial, public, and industrial spaces. The market's growth trajectory continues to evolve, propelled by technological advancements, changing consumer preferences, regulatory compliance, and an increasing emphasis on hygiene and sanitation across diverse sectors.

Key Market Drivers

Increasing Focus on Hygiene Standards

The escalating emphasis on hygiene and sanitation, particularly in public spaces, healthcare facilities, restaurants, hotels, and workplaces, acts as a primary driver for the AFH tissue and hygiene market. The global awareness, driven by health concerns, outbreaks of diseases, and the ongoing COVID-19 pandemic, has propelled a surge in demand for high-quality tissue and hygiene products. Businesses and institutions are increasingly prioritizing cleanliness and ensuring adequate availability of tissues, towels, and sanitizing solutions to maintain a hygienic environment, thereby driving market growth.

Growth in the Hospitality and Tourism Sector

The expansion of the hospitality and tourism industry, including hotels, restaurants, entertainment venues, and travel hubs, significantly fuels the demand for AFH tissue and hygiene products. The rise in travel and leisure activities worldwide, coupled with the increasing number of restaurants and dining establishments, has led to a growing need for disposable tissue papers, hand towels, and other hygiene essentials. Additionally, the stringent hygiene standards and regulations within the hospitality sector further drive the adoption of quality AFH tissue and hygiene products, boosting market growth.

Sustainability and Eco-friendly Solutions

The growing environmental consciousness and preference for sustainable products are influencing the AFH tissue and hygiene market. Businesses and consumers are increasingly seeking eco-friendly, biodegradable, and recyclable AFH tissue and hygiene solutions to reduce environmental impact. Manufacturers are responding by introducing environmentally sustainable products, such as recycled paper towels, biodegradable tissues, and compostable hygiene solutions, catering to the demand for green alternatives. This shift towards sustainability not only aligns with corporate social responsibility initiatives but also resonates with environmentally conscious consumers, driving market expansion for eco-friendly AFH products.

Key Market Challenges

Sustainability and Environmental Concerns

One of the primary challenges faced by the AFH Tissue and Hygiene Market revolves around sustainability and environmental impact. There's increasing pressure from consumers, regulatory bodies, and advocacy groups to adopt eco-friendly practices, reduce waste, and minimize the environmental footprint of disposable hygiene products. The market is urged to transition towards sustainable sourcing, production, and disposal practices to address concerns regarding deforestation, plastic usage, and waste generation. The shift towards eco-friendly alternatives while maintaining product performance remains a significant challenge for manufacturers and distributors.

Supply Chain Disruptions and Raw Material Costs

The AFH Tissue and Hygiene Market is susceptible to supply chain disruptions, particularly in sourcing raw materials and manufacturing. Fluctuations in raw material

prices, especially pulp and paper-based inputs, impact production costs, affecting product pricing and profitability for industry players. Additionally, disruptions due to global events, natural disasters, trade regulations, and logistical challenges can affect the availability and cost of raw materials, leading to supply shortages or increased expenses. Balancing cost-effective production with supply chain resilience becomes a critical challenge for market participants.

Hygiene and Safety Standards Post-Pandemic

The COVID-19 pandemic significantly altered hygiene and safety standards across industries, amplifying the demand for tissue and hygiene products in various public and commercial spaces. However, post-pandemic, there's a challenge in maintaining heightened hygiene awareness and meeting elevated cleanliness expectations while navigating shifts in consumer behaviors. Businesses need to adapt to evolving hygiene norms, invest in advanced disinfection solutions, and implement stringent sanitation practices to reassure consumers about safety without compromising on sustainability or inflating operational costs.

Key Market Trends

Sustainability Initiatives and Eco-Friendly Products

An emerging trend within the AFH Tissue and Hygiene Market revolves around sustainability and eco-conscious practices. Consumers, businesses, and governments are increasingly prioritizing environmentally friendly products and sustainable practices. This shift has spurred innovations in eco-friendly materials, packaging, and manufacturing processes aimed at reducing carbon footprints and minimizing environmental impact. Companies are investing in recyclable, biodegradable, and compostable AFH tissue and hygiene products to meet the demand for sustainable solutions across the hospitality, healthcare, and commercial sectors.

Hygiene and Sanitization Emphasis Post-Pandemic

The COVID-19 pandemic has significantly influenced hygiene practices, creating a heightened focus on cleanliness and sanitation, particularly in public spaces. The AFH Tissue and Hygiene Market has witnessed an increased demand for products such as paper towels, tissues, disinfectant wipes, and hand sanitizers in workplaces, healthcare facilities, and hospitality settings. This trend emphasizes the importance of maintaining hygiene standards and has led to the adoption of touchless dispensers, antimicrobial

products, and enhanced cleaning protocols to ensure safer and more sanitary environments.

Technology Integration and Smart Solutions

Innovations in technology and the integration of smart solutions are transforming the AFH Tissue and Hygiene Market. Manufacturers are incorporating IoT (Internet of Things) and sensor-based technologies into dispensers and hygiene equipment for efficient inventory management, predictive maintenance, and improved user experiences. Smart dispensers equipped with sensors for tracking usage patterns and automated refill systems are gaining traction, optimizing product distribution and reducing wastage. Furthermore, advancements in touchless or hands-free systems cater to the demand for hygienic solutions, enhancing user safety and convenience.

These trends collectively highlight the market's evolution towards sustainable practices, heightened hygiene standards, and technological advancements, reshaping the AFH Tissue and Hygiene Market's landscape globally. As businesses and consumers alike prioritize sustainability, hygiene, and innovation, the industry continues to adapt and innovate to meet evolving demands and expectations.

Segmental Insights

Type Insights

Paper napkins hold a substantial position within the Global Away from Home (AFH) Tissue and Hygiene Market, playing a pivotal role in various commercial and public settings. The AFH sector covers a broad spectrum of establishments, including restaurants, hotels, healthcare facilities, offices, educational institutions, and public venues, where disposable hygiene products like paper napkins are indispensable.

The hospitality and food service sectors drive a significant portion of the demand for paper napkins in the AFH market. Restaurants, cafes, and eateries utilize paper napkins extensively, considering them essential for providing hygiene and convenience to customers. These establishments prefer disposable napkins due to their convenience, ease of use, and cost-effectiveness in maintaining cleanliness and customer satisfaction.

Healthcare facilities, office buildings, educational institutions, and public venues also rely on paper napkins within their hygiene protocols. In healthcare settings, paper

napkins are essential for patient care, hygiene maintenance, and sanitation purposes. Similarly, public facilities such as restrooms and communal areas often provide paper napkins as a convenient and hygienic solution for users.

Paper napkins offer numerous advantages, including disposability, ease of use, and sanitation. They are convenient for users in public settings where washing facilities might not be readily available. Additionally, their disposable nature eliminates the need for laundering and reduces water consumption and maintenance costs, making them a preferred choice for businesses seeking cost-effective hygiene solutions.

The AFH tissue and hygiene market, including paper napkins, continue to expand globally due to increased urbanization, a growing food service industry, and the rising importance of hygiene standards. Manufacturers constantly innovate to introduce eco-friendly materials, improved absorbency, and attractive designs to meet the evolving demands of businesses and consumers, further propelling market growth.

The industry places a significant focus on adhering to environmental regulations and sustainability practices. Many businesses and institutions opt for eco-friendly paper napkins made from recycled materials or those sourced sustainably, aligning with growing environmental consciousness and regulatory standards.

In conclusion, paper napkins serve as fundamental elements within the Global AFH Tissue and Hygiene Market, meeting diverse commercial, hygiene, and convenience needs across various sectors. Their convenience, disposability, and compliance with hygiene standards make them a staple product in commercial and public settings globally.

Distribution Channel Insights

The Global Away from Home (AFH) Tissue and Hygiene Market has witnessed a notable surge in online sales, marking a significant shift in consumer behavior and industry dynamics. Online platforms have become instrumental in shaping the AFH tissue and hygiene product market, revolutionizing how businesses, institutions, and consumers procure these essential products for commercial and public use.

The rise of e-commerce platforms has transformed the procurement process for AFH tissue and hygiene products. Businesses, hospitality sectors, educational institutions, healthcare facilities, and public venues increasingly rely on online platforms to streamline their bulk purchases of tissue paper, paper towels, wipes, and other hygiene

essentials. Online accessibility offers convenience, enabling these entities to efficiently source products, compare prices, and manage their inventories with ease.

Online platforms cater to the diverse needs of commercial buyers by offering customized solutions and bulk ordering options. Businesses can access a wide range of AFH tissue and hygiene products, including different sizes, quality grades, and eco-friendly alternatives. The convenience of browsing, comparing, and selecting products online, coupled with doorstep delivery services, enhances operational efficiency for buyers, allowing them to focus on their core operations.

Online sales have expanded the reach of AFH tissue and hygiene products to a wider customer base globally. This accessibility is particularly beneficial for smaller businesses, startups, and facilities in remote areas that may have limited access to local distributors or wholesalers. The online marketplace bridges geographical gaps, ensuring that a diverse range of businesses and institutions can readily procure essential hygiene supplies.

Online platforms leverage digital marketing strategies, including targeted advertising, customer reviews, and informative content, to engage potential buyers effectively. They provide comprehensive product information, compliance details, and usage guidelines, aiding buyers in making informed decisions while adhering to industry regulations and standards.

Advancements in e-commerce technology, secure payment gateways, and user-friendly interfaces contribute to the significant share of online sales in the AFH tissue and hygiene market. Mobile apps, quick reordering features, and account management tools further enhance the user experience, facilitating recurring purchases and fostering customer loyalty.

In summary, online channels play a pivotal role in the Global AFH Tissue and Hygiene Market, providing businesses, institutions, and consumers with convenient, efficient, and accessible avenues for procuring essential hygiene products in bulk for commercial and public use.

Regional Insights

North America plays a prominent role in the Global Away from Home (AFH) Tissue and Hygiene Market, holding a substantial share within this specialized sector. Several factors contribute to North America's notable presence and influence in this market

segment:

The region's robust commercial and institutional sectors, including hospitality, healthcare facilities, educational institutions, corporate offices, and public facilities, drive a significant demand for AFH tissue and hygiene products. These sectors rely extensively on paper towels, toilet papers, wipes, and other hygiene solutions, creating a consistent market demand.

North America places a strong emphasis on maintaining high standards of hygiene and sanitation across industries. Strict regulatory frameworks and compliance standards in healthcare settings and foodservice industries mandate the use of quality AFH tissue and hygiene products, fostering a continual market demand for reliable and effective solutions.

The region witnesses continual advancements in AFH tissue and hygiene products, including innovations in materials, manufacturing techniques, and product design. Enhanced absorbency, sustainability features, antibacterial properties, and environmentally friendly options are among the key advancements driving market growth.

Consumers in North America prioritize quality, reliability, and convenience when it comes to AFH tissue and hygiene products. They seek products that offer durability, efficiency, and ease of use in commercial and public settings, influencing market trends and encouraging manufacturers to cater to these preferences.

The economic stability and competitiveness of North America contribute significantly to the AFH tissue and hygiene market. The presence of established manufacturers, coupled with a competitive landscape and a variety of product offerings, enables consumers and businesses to access a wide range of choices, further fueling market growth.

The COVID-19 pandemic intensified the focus on hygiene and sanitation, leading to increased adoption of AFH tissue and hygiene products. The heightened awareness of cleanliness and hygiene protocols across industries and public spaces further amplified the demand for these products.

In summary, North America's significant share in the Global AFH Tissue and Hygiene Market is propelled by commercial and institutional usage, adherence to stringent hygiene standards, technological advancements, consumer preferences, economic

stability, and the recent emphasis on hygiene practices spurred by the pandemic, solidifying the region's influential role in this market segment.

Key Market Players

Sofidel Group

Kimberly-Clark Corporation

SCA (Svenska Cellulosa Aktiebolaget)

Procter & Gamble (P&G)

Mets? Group

Asaleo Care Limited

Essity AB

Oji Holdings Corporation

Wausau Paper

Cascades Inc.

Report Scope:

In this report, the global Away from Home tissue and hygiene market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Away from Home Tissue and Hygiene Market, By Type:

Toilet Papers

Wipes

Paper Napkins

Paper Towels

Others

Away from Home Tissue and Hygiene Market, By End-User:

Hospitals & Healthcare

Food & Beverage

Commercial

Others

Away from Home Tissue and Hygiene Market, By Distribution Channel:

Online

Offline

Away from Home Tissue and Hygiene Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global Away

Away from Home Tissue and Hygiene Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Seg...

from Home Tissue and Hygiene market.

Available Customizations:

Global Away from Home Tissue and Hygiene Market report with the given market data, Tech Sci 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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- 14.1.7.1. Company Details
- 14.1.7.2. Products & Services
- 14.1.7.3. Financials (As Per Availability)
- 14.1.7.4. Key Market Focus & Geographical Presence
- 14.1.7.5. Recent Developments
- 14.1.7.6. Key Management Personnel
- 14.1.8. Essity AB
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products & Services
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Key Market Focus & Geographical Presence
 - 14.1.8.5. Recent Developments
 - 14.1.8.6. Key Management Personnel
- 14.1.9. Oji Holdings Corporation
 - 14.1.9.1. Company Details
 - 14.1.9.2. Products & Services
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Key Market Focus & Geographical Presence
 - 14.1.9.5. Recent Developments
 - 14.1.9.6. Key Management Personnel
- 14.1.10. Wausau Paper
 - 14.1.10.1. Company Details
 - 14.1.10.2. Products & Services
 - 14.1.10.3. Financials (As Per Availability)
 - 14.1.10.4. Key Market Focus & Geographical Presence
 - 14.1.10.5. Recent Developments
 - 14.1.10.6. Key Management Personnel
- 14.1.11. Cascades Inc.
 - 14.1.11.1. Company Details
 - 14.1.11.2. Products & Services
 - 14.1.11.3. Financials (As Per Availability)
 - 14.1.11.4. Key Market Focus & Geographical Presence
 - 14.1.11.5. Recent Developments
 - 14.1.11.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

- 15.1. Key Focus Areas
- 15.2. Target Type

15.3. Target Distribution Channel

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