

Tissue Paper Market – Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Type (Facial Tissue Paper, Toilet Tissue Paper, Napkins, Paper Towel, Others), By Nature (Organic, Regular), By End User (Residential, Commercial), By Distribution Channel (Supermarket/Hypermarket, Convenience Stores, Specialty Stores, Online, Others), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/T0CB455E9D33EN.html>

Date: May 2026

Pages: 192

Price: US\$ 4,500.00 (Single User License)

ID: T0CB455E9D33EN

Abstracts

The Global Tissue Paper Market is projected to expand significantly from USD 96.03 Billion in 2025 to USD 145.66 Billion by 2031, demonstrating a 7.19% Compound Annual Growth Rate. This market encompasses single-use, absorbent paper products such as toilet rolls, facial tissues, and paper towels, which serve critical hygiene and sanitation needs. Growth is primarily propelled by rapid global urbanization, increasing disposable incomes enabling greater expenditure on personal care, and a consistent worldwide emphasis on enhanced health and hygiene standards, which boosts consumption in both residential and commercial sectors. For instance, European tissue paper demand saw a 5.8 percent rebound in 2024.

Despite this robust growth trajectory, the market faces a notable challenge in the form of fluctuating raw material costs. The inherent volatility in prices for essential inputs like wood pulp and recycled fiber often creates instability in manufacturing expenses and impacts profit margins. This unpredictability complicates long-term financial planning for producers, necessitating continuous adjustments to pricing strategies to ensure operational viability within the dynamic sector.

Market Driver

The Global Tissue Paper Market is being significantly driven by a rising demand for eco-friendly and sustainable alternatives, prompting manufacturers to prioritize environmental stewardship. Key industry players are increasingly investing in fossil-free production methods and energy-efficient infrastructure to diminish their carbon footprints, thereby moving beyond conventional fiber sourcing. This strategic shift requires companies to modernize facilities to secure long-term operational sustainability, exemplified by Mets? Group's planned EUR 100 million investment in 2024 to enhance the sustainability of its M?ntt? mill's tissue operations, indicating that environmental performance is now a core industrial strategy rather than a secondary concern.

Concurrently, increasing disposable incomes in emerging markets are substantially boosting market value through the premiumization of hygiene products. As purchasing power grows in developing economies, consumers are rapidly transitioning from basic tissue options to higher-quality, value-added goods, which in turn improves profit margins for producers. This trend is evident in Hengan International's 2023 annual results, where profit attributable to shareholders surged by 45.5 percent, largely driven by robust growth in their upgraded and premium product lines. Such developments highlight the strong link between economic advancement and more sophisticated consumption patterns, reinforcing the sector's financial resilience, with Essity reporting a 12.1 percent increase in net sales for the preceding fiscal year in 2024 due to sustained demand.

Market Challenge

The Global Tissue Paper Market faces a significant obstacle to sustained expansion due to the inherent volatility of raw material costs, particularly concerning wood pulp and recycled fiber. Manufacturers within this sector are heavily reliant on these primary inputs, and their fluctuating prices create an unstable financial environment that disrupts production consistency. Unanticipated increases in raw material costs compel producers to either absorb these additional expenses, which subsequently erodes profit margins, or transfer the elevated costs to consumers, potentially suppressing demand in price-sensitive regions. This unpredictability complicates the development of long-term pricing strategies and discourages investment in expanding production capacity, forcing companies to adopt reactive measures rather than proactive strategic market development.

The severity of this cost instability is further highlighted by recent trade data that indicates surging valuations for crucial fiber inputs. For instance, the Brazilian Tree Industry (Ib?) reported that in 2024, the export value of pulp increased by 33.2 percent, reaching USD 10.6 billion, a surge attributed to strong global demand and elevated market prices. This substantial appreciation in the value of key raw materials directly inflates procurement costs for tissue manufacturers worldwide, requiring them to continuously adjust their operational budgets to maintain financial viability.

Market Trends

A prominent trend in the Global Tissue Paper Market is the widespread transition to plastic-free and compostable packaging, as manufacturers move away from traditional polyethylene films towards biodegradable alternatives to mitigate growing plastic waste concerns. This shift is particularly noticeable in retail, where brands are redesigning product wrappers to align with circular economy principles and stricter environmental regulations. By employing paper-based or bio-polymer materials, companies are not only differentiating their products on shelves but also reducing the overall environmental footprint of their supply chains. An exemplary case is Sofidel's successful conversion of all Sainsbury's private label packaging from polyethylene to paper in 2024, as reported in May 2025, which saved approximately 485 tons of plastic.

Another significant trend is the integration of IoT-enabled smart dispensing systems, which are transforming the commercial tissue market by using real-time data to optimize facility management and hygiene standards. These advanced solutions incorporate sensors in dispensers to monitor consumption levels and visitor traffic, enabling cleaning staff to move from fixed schedules to demand-driven servicing. This technological adoption substantially boosts operational efficiency by preventing product shortages and reducing unnecessary maintenance checks, which is especially crucial in high-traffic environments like airports and office complexes. The broad impact of this digital transformation is reflected by Tork Global's June 2025 report, which stated that an estimated 1.2 billion people in 2024 traveled through buildings utilizing the Tork Vision Cleaning system, demonstrating the widespread acceptance of data-driven hygiene operations.

Key Market Players

Kimberly-Clark Corporation

Essity AB

Vinda International Holdings Limited

The Procter & Gamble Company

Hengan International Group Company Ltd

Sofidel S.p.A.

Kruger Inc.

MPI Papermills Inc.

Lotus Tissue Papers Products

Beeta Machines Private Limited Pvt. Ltd.

Report Scope

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

Tissue Paper Market, By Type

Facial Tissue Paper

Toilet Tissue Paper

Napkins

Paper Towel

Others

Tissue Paper Market, By Nature

Organic

Regular

Tissue Paper Market, By End User

Residential

Commercial

Tissue Paper Market, By Distribution Channel

Supermarket/Hypermarket

Convenience Stores

Specialty Stores

Online

Others

Tissue Paper 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Tissue Paper Market.

Available Customizations:

Global 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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