

Toilet Paper Market– Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Type (One-ply, Two-ply, and Others), By End User (Household, Commercial), By Distribution Channel (Hypermarkets/Supermarkets, Departmental Stores, Online, and Others (Direct Sales, Convenience Stores, etc.)), By Region, By Competition

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Abstracts

The global toilet paper market was valued at USD 30.12 billion in 2022 and is anticipated to experience robust growth in the forecast period, with a CAGR of 4.7% through 2028. Home care products, including toilet care, are extensively used for household maintenance and meeting individuals' health requirements. The proliferation of germs, dirt, microorganisms, and other contaminants on surfaces has led to various diseases and conditions. Consequently, the innovation and development of new products have introduced novel approaches to maintaining home hygiene. The introduction of advanced technology devices that incorporate toilet care disinfectants and cleaners has simplified the cleaning process and utilization of home care products. These factors contribute to the growth of the toilet paper market during the forecast period.

The increasing population, urbanization, and improvements in living standards in emerging economies are among the key drivers fueling the demand for toilet paper products. Additionally, growing awareness of hygiene and sanitation, especially in light of the COVID-19 pandemic, has contributed to the increased consumption of toilet paper globally. Toilet paper products can be categorized into various types, including

one-ply, two-ply, scented, recycled, and premium toilet paper. While one-ply toilet paper holds a significant market share due to its affordability, other segments such as premium and recycled toilet paper are gaining traction due to their eco-friendly features.

Key Market Drivers:

Rising Population and Urbanization

The increasing global population, coupled with rapid urbanization, has led to a surge in demand for toilet paper. As more people move to cities and urban areas, the need for hygienic and convenient bathroom products like toilet paper grows. Additionally, improving living standards and changing consumer preferences have further fueled the demand for toilet paper.

Growing Awareness of Hygiene and Sanitation

With a greater emphasis on personal hygiene and cleanliness, awareness about the importance of using toilet paper has increased. Toilet paper provides a convenient and hygienic solution for maintaining cleanliness in the bathroom. Moreover, rising concerns about infectious diseases and the need to maintain proper sanitation practices have also boosted the demand for toilet paper.

Changing Lifestyles and Consumer Preferences

Changing lifestyles, including an increased focus on convenience and comfort, has significantly impacted the global toilet paper market. Consumers are looking for soft, absorbent, and eco-friendly toilet paper options. Manufacturers are innovating and introducing new products that cater to these preferences, such as recycled and sustainable toilet paper.

Improving Disposable Income

The growing disposable income levels across various regions have contributed to the expansion of the toilet paper market. As consumers have more purchasing power, they are willing to spend on premium and high-quality toilet paper products.

Shift Towards Online Retail Channels

The rise of e-commerce platforms and online retail channels has played a crucial role in expanding the reach of toilet paper products. Consumers can conveniently purchase toilet paper online, which has increased accessibility and availability. Online platforms also provide a wider variety of brands and product options, allowing consumers to choose according to their preferences.

Key Market Challenges

Supply Chain Disruptions

The toilet paper market has been significantly affected by disruptions in the supply chain. The COVID-19 pandemic highlighted the vulnerabilities in the supply chain, leading to panic buying and stockpiling of toilet paper. Manufacturers faced challenges in meeting the sudden surge in demand, resulting in shortages and distribution bottlenecks.

Raw Material Availability

The toilet paper industry heavily relies on a steady supply of raw materials, particularly wood pulp. However, the market is facing challenges due to the increasing environmental concerns surrounding deforestation and sustainability. These concerns have led to stricter regulations on logging practices, impacting the availability and cost of raw materials for toilet paper production.

Price Volatility

The toilet paper market has experienced price volatility due to fluctuations in raw material costs, transportation expenses, and market demand. Rapid changes in these factors can significantly impact the profitability of manufacturers and suppliers, making it challenging to maintain stable pricing in the market.

Intense Competition

The global toilet paper market is highly competitive, with numerous manufacturers vying for market share. This intense competition puts pressure on companies to differentiate their products and offer competitive pricing. Smaller players may find it difficult to compete with larger, well-established brands, leading to market consolidation.

Shift in Consumer Preferences

The evolving consumer preferences and changing lifestyle trends pose challenges to the toilet paper market. Consumers are increasingly opting for eco-friendly and sustainable alternatives, such as recycled toilet paper or bidets. This shift in preference requires manufacturers to adapt their product offerings and invest in sustainable practices to meet changing consumer demands.

Rising Operational Costs

Toilet paper manufacturers face rising operational costs, including labor, energy, and packaging materials. Fluctuating costs in these areas can impact profit margins and hinder market growth. Additionally, manufacturers need to invest in advanced technologies and machinery to improve efficiency and reduce costs, further adding to operational expenses.

Environmental Concerns

The toilet paper industry faces scrutiny due to its impact on the environment. The production and disposal of toilet paper contribute to deforestation and waste generation. Increasing awareness and regulations regarding sustainable practices are pressuring manufacturers to adopt environmentally friendly production processes, use recycled materials, and explore alternatives to traditional toilet paper.

Market Saturation in Developed Regions

Developed markets, such as North America and Europe, are experiencing market saturation in terms of toilet paper consumption. High market penetration, slow population growth, and pricing pressures pose challenges for manufacturers to achieve substantial growth in these regions. To combat this, companies are focusing on product innovation, marketing strategies, and expanding into emerging markets.

Hygiene and Health Concerns

The COVID-19 pandemic has highlighted the importance of hygiene and health practices, including handwashing and sanitization. While toilet paper is an essential hygiene product, the market may face challenges if consumers prioritize other hygiene practices or switch to alternative solutions like bidets or wet wipes.

Key Market Trends

Increased Demand

The COVID-19 pandemic led to a surge in demand for toilet paper as consumers stockpiled essential items during lockdowns and restrictions. This unprecedented demand highlighted the importance of toilet paper as a staple product, driving market growth.

Sustainability and Eco-Friendly Products

With growing environmental awareness, there is a rising demand for eco-friendly and sustainable toilet paper products. Consumers are opting for products made from recycled materials or bamboo fibers, which have a lower environmental impact compared to traditional toilet paper.

Premium and Value-added Products

Manufacturers are introducing premium and value-added toilet paper products to cater to diverse consumer preferences. These include products with added benefits such as enhanced softness, fragrance, lotion-infused, and antibacterial properties.

Online Retail and E-commerce

The toilet paper market has witnessed a significant shift towards online retail platforms and e-commerce sales. Convenience, a wider product range, and doorstep delivery options have contributed to the increasing popularity of online purchasing.

Innovation in Packaging

Companies are focusing on innovative packaging solutions to enhance product convenience and sustainability. Single-use and travel-sized packaging options are gaining traction, making it easier for consumers to carry toilet paper while on the go.

Rising Disposable Income and Urbanization

Increasing disposable income and urbanization in developing regions have contributed to the growth of the toilet paper market. As more people transition to urban areas and experience lifestyle changes, the demand for convenient hygiene products like toilet paper continues to rise.

Market Expansion in Emerging Economies

The toilet paper market is expanding in emerging economies due to factors such as population growth, urbanization, and changing consumer preferences. Manufacturers are targeting these markets to tap into the growing demand and gain a competitive edge.

Segmental Insights:

Type Insights:

The global toilet paper market is indeed driven by the one-ply segment, which holds a significant market share. Several factors contribute to the demand for one-ply toilet paper. Affordability and cost-effectiveness are key drivers for both consumers and businesses. One-ply toilet paper is generally more economical compared to two-ply or thicker varieties, making it an attractive option for price-conscious consumers. Additionally, businesses such as hotels, restaurants, and office buildings often opt for one-ply toilet paper due to its lower cost and the need to supply large quantities.

End Use Insights:

The residential sector plays a significant role in fueling the toilet paper market. With a growing global population and increasing urbanization, the demand for toilet paper continues to rise. The residential sector, which includes households and residential buildings, constitutes a major consumer base for toilet paper products. Factors such as improving standards of living, increasing disposable income, and changing consumer preferences have contributed to the consistent demand for toilet paper in residential settings. Additionally, the COVID-19 pandemic further escalated the demand for toilet paper as people stocked up on essential items, including hygiene products. Toilet paper manufacturers and retailers have responded to this demand by offering a wide range of options, including different ply counts, softness levels, and eco-friendly alternatives. They have also introduced innovative packaging solutions and convenient formats to cater to the needs of residential consumers.

Distribution Channel Insights:

The global toilet paper market is experiencing significant growth, propelled by the increasing popularity of online distribution channels. With more consumers embracing

the convenience and accessibility of online shopping, the demand for purchasing toilet paper online has surged. This trend has become a major driving force behind the expansion of the industry, complementing traditional offline distribution channels such as supermarkets, hypermarkets, convenience stores, and more. The online distribution channel offers a wide range of options and competitive prices, attracting a larger customer base and further fueling the market's growth. As technology continues to advance and e-commerce becomes more prevalent, the online distribution channel is expected to play an even more pivotal role in shaping the future of the global toilet paper market.

Regional Insights:

North America currently dominates the global toilet paper market, followed by Europe and the Asia-Pacific region. However, emerging economies in the Asia-Pacific region, particularly China and India, are experiencing significant market growth. The North American market for toilet paper is well-established and mature, with a higher level of product penetration and consumption compared to other regions. Europe also has a strong presence in the market, driven by factors such as a high standard of living and hygiene-conscious consumers.

In recent years, the Asia-Pacific region has witnessed substantial growth in the toilet paper market. Rapid urbanization, increasing disposable incomes, and evolving consumer preferences have contributed to this growth. Countries like China and India, with their large populations and rising middle class, present significant market opportunities for toilet paper manufacturers. Additionally, hygiene awareness campaigns and improved sanitation infrastructure in these regions have further fueled the demand for toilet paper products.

Key Market Players

ABC Tissue

Wepa Hygieneprodukte GmbH

Georgia-Pacific

Procter & Gamble

Suzano

Absormex CMPC Tissue

Kruger Products L.P.

SOFIDEL

Kimberly Clark

Essity Actiebolag (Publ)

Report Scope:

In this report, the global toilet paper market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Toilet Paper Market, By Type:

One-ply

Two-ply

Others

Global Toilet Paper Market, By End User:

Household

Commercial

Global Toilet Paper Market, By Distribution Channel:

Hypermarkets/Supermarkets

Departmental Stores

Online

Others

Global Toilet Paper Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global toilet paper market.

Available Customizations:

Global Toilet Paper 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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