

United Kingdom Toilet Paper Market By Product Type (1 Ply, 2 Ply, Others), By End Use (Residential, Commercial), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

United Kingdom Toilet Paper Market was valued at USD 1.54 Billion in 2024 and is anticipated to grow USD 2.10 Billion by 2030 with a CAGR of 5.31%. The United Kingdom toilet paper market is experiencing steady growth driven by rising hygiene awareness, population growth, and the increasing demand for sustainable and premium products. Consumers are shifting toward eco-friendly and recycled toilet paper due to growing environmental concerns, prompting manufacturers to innovate with biodegradable and plastic-free packaging. The COVID-19 pandemic highlighted the essential nature of toilet paper, influencing stockpiling behavior and reinforcing its necessity in households. Additionally, private label brands from supermarkets continue to gain popularity due to affordability and comparable quality to branded alternatives. Urbanization and improved living standards also contribute to higher per capita usage.

Key Market Drivers

Growing Awareness of Hygiene and Sanitation

One of the primary drivers of the United Kingdom toilet paper market is the increasing awareness of hygiene and sanitation among consumers. As public health campaigns continue to stress the importance of cleanliness to prevent disease, households are more inclined to stock essential hygiene products like toilet paper. The COVID-19 pandemic significantly intensified this trend, with a surge in demand for hygiene-related

items, including toilet rolls. This shift was not temporary; it instilled lasting habits of frequent usage and preparedness. Toilet paper, once considered a basic commodity, is now associated with personal care and wellness. Moreover, with rising concerns about infections and viruses, many consumers are opting for higher-quality or anti-bacterial variants of toilet paper. Government-led health initiatives and education programs in schools and communities have also played a role in reinforcing the importance of sanitation, thereby encouraging higher consumption. In 2024, a consumer campaign backed by government policy debates revealed that 82% of Brits consider toilet paper an essential household item, and 87% support removing the 20% VAT “luxury tax”, signaling a strong public shift in viewing tissue products as crucial for hygiene, not just commodities. The integration of hygiene into daily routines and the emotional association with cleanliness and comfort have elevated the perceived value of toilet paper. As consumers become more health-conscious, the demand for toilet paper, especially soft and dermatologically tested variants, is expected to continue growing, making hygiene awareness a central and persistent driver of market expansion.

Key Market Challenges

Supply Chain Vulnerabilities and Raw Material Dependence

One of the major challenges in the United Kingdom toilet paper market is the vulnerability of its supply chain, particularly concerning raw material sourcing and logistics. Toilet paper manufacturing is heavily reliant on raw pulp, much of which is imported, making the industry sensitive to fluctuations in global supply and transport disruptions. Events like the COVID-19 pandemic, the Russia-Ukraine conflict, and Brexit-related changes in trade regulations have all exposed weaknesses in the supply chain. These disruptions often lead to increased shipping costs, delays in deliveries, and raw material shortages, impacting production timelines and inflating prices for manufacturers and consumers alike. Moreover, the UK’s dependency on imports for energy and chemicals used in production adds another layer of complexity, especially in times of geopolitical tension or global inflation. The panic-buying episodes during COVID-19 further highlighted the market's limited warehousing and distribution flexibility, causing temporary shortages and eroding consumer confidence. While some companies have attempted to mitigate this by localizing production and diversifying suppliers, consistent cost-effective procurement of materials and logistical reliability remain pressing concerns. The challenge lies not only in securing a stable supply but also in maintaining sustainability and cost-efficiency in a globally volatile environment.

Key Market Trends

Rising Popularity of Eco-Friendly and Plastic-Free Products

One of the most prominent trends in the UK toilet paper market is the growing preference for eco-friendly and plastic-free products. As consumers become more environmentally conscious, there has been a noticeable shift away from conventional toilet paper made from virgin pulp and packaged in plastic. Instead, people are increasingly choosing toilet paper made from recycled paper or alternative raw materials like bamboo, which have a lower environmental footprint. Brands such as Who Gives A Crap, Bumboo, and Ecoleaf have capitalized on this movement by offering biodegradable, FSC-certified products with compostable or paper-based packaging. Many UK households, especially in urban areas, are prioritizing sustainability as a key purchasing factor and are willing to pay a slight premium for products that align with their eco-values. This trend is also being supported by broader government initiatives, such as plastic reduction policies and consumer awareness campaigns. Major retailers and supermarkets are responding to this demand by stocking private-label eco-friendly toilet paper options and reducing shelf space for non-sustainable alternatives. The momentum behind sustainability is expected to accelerate further, driven by climate-conscious younger consumers and increasing scrutiny of corporate environmental claims, making eco-friendly innovation essential for long-term competitiveness in the market.

Key Market Players

Essity AB

Kimberly-Clark Corp.

Procter & Gamble Co.

Nova Tissue Co. Ltd.

Accrol Group Holdings Plc

WEPA Hygieneprodukte GmbH

International Tissue Company Ltd.

Fourstones Paper Mill Co. Ltd.

Splash,

Bazoo

Report Scope:

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

United Kingdom Toilet Paper Market, By Product Type:

1 Ply

2 Ply

Others

United Kingdom Toilet Paper Market, By End Use:

Residential

Commercial

United Kingdom Toilet Paper Market, By Region:

England

Scotland

Wales

Northern Ireland

Competitive Landscape

United Kingdom Toilet Paper Market By Product Type (1 Ply, 2 Ply, Others), By End Use (Residential, Commercial...

Company Profiles: Detailed analysis of the major companies presents in the United Kingdom Toilet Paper Market.

Available Customizations:

United Kingdom Toilet 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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