

United States Tissue Paper Market Segmented By Product (Toilet Paper, Kitchen Towel, Facial Tissues, Napkins, and Others (Wipes, Decorative Tissue, etc.)), By End User (Residential, Hospital, Food and Beverage Industry, and Others (Malls and Multiplex, Schools, Colleges, etc.)), By Sales Channel (Supermarkets/Hypermarkets, Departmental Stores, Pharmacy/Drug Stores, Online, and Others (Direct Sellers, General Merchandised Retailers, etc.)), By Region, Competition, Forecast and Opportunities, 2018-2028F

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Abstracts

United States Tissue Paper Market has valued at USD 13.65 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.3% through 2028. The United States tissue paper market is a vital and dynamic segment of the country's paper industry. Tissue paper, a lightweight and absorbent paper product, serves a wide range of purposes in our daily lives, from personal hygiene to industrial applications. This market has experienced steady growth and transformation over the years.

One of the primary drivers of the tissue paper market in the United States is the increasing awareness of hygiene and sanitation. The COVID-19 pandemic further emphasized the importance of tissue paper products in maintaining personal cleanliness and preventing the spread of diseases. This heightened awareness has led to a surge in demand for tissue paper, especially for products like toilet paper, facial

tissues, and paper towels.

Innovation in tissue paper production has been a key factor contributing to the growth of this market. Manufacturers have been developing advanced technologies to enhance the quality, softness, and strength of tissue products. This has led to the introduction of premium and ultra-soft tissue paper varieties, which have gained popularity among consumers.

Sustainability is another crucial aspect of the tissue paper market. With increasing environmental consciousness, there is a growing demand for eco-friendly tissue paper products made from recycled materials or sustainable sources. Many manufacturers are responding to this trend by adopting responsible production practices and using more sustainable materials.

The United States tissue paper market is highly competitive, with several prominent companies vying for market share. Some of the major players include Kimberly-Clark Corporation, Procter & Gamble, Georgia-Pacific, and Cascades Inc. These companies invest heavily in research and development, marketing, and distribution to maintain their market positions and meet the evolving consumer demands.

The e-commerce sector has also played a significant role in the tissue paper market. Online shopping has become increasingly popular, and consumers often purchase tissue paper products online for convenience and competitive pricing.

In conclusion, the United States tissue paper market is a robust and evolving industry with a growing emphasis on hygiene, sustainability, and innovation. As consumers continue to prioritize health and environmental concerns, the market is likely to adapt and thrive, offering a wide range of tissue paper products tailored to meet diverse needs.

Key Market Drivers

Changing Consumer Lifestyles and Hygiene Awareness

One of the primary drivers behind the growth of the tissue paper market in the United States is the evolving consumer lifestyle and increased awareness of hygiene. With an ever-increasing focus on health and cleanliness, consumers are demanding higher-quality tissue paper products that offer enhanced hygiene and convenience. The ongoing global pandemic has further emphasized the importance of maintaining good

personal hygiene, which has driven demand for tissue paper products like never before.

In response to this changing landscape, manufacturers have introduced innovative products such as antimicrobial tissues, wet wipes, and sustainable alternatives. These products not only cater to the health-conscious consumer but also appeal to environmentally conscious individuals. As a result, the tissue paper market is witnessing a surge in sales and revenue.

Sustainability and Eco-Friendly Initiatives

Sustainability has become a driving force in various industries, including the tissue paper market. Increasing awareness about environmental issues has led to a significant shift in consumer preferences. Customers are now more inclined to purchase tissue paper products made from recycled materials and those that are produced through environmentally friendly processes.

Many tissue paper manufacturers are responding to this trend by adopting sustainable practices. They are investing in energy-efficient production methods, using recycled materials, and reducing their carbon footprint. Additionally, companies are working on creating biodegradable tissue products to address concerns about the environmental impact of disposable paper products. The emphasis on sustainability is not only meeting consumer demands but also helping companies improve their brand image and market share.

E-Commerce and Convenience

The rise of e-commerce has also been a pivotal driver for the United States tissue paper market. Online shopping has become increasingly popular due to its convenience, extensive product selection, and home delivery options. Tissue paper products are no exception, with consumers now opting to purchase them online.

E-commerce platforms offer a wider range of choices, competitive prices, and the convenience of doorstep delivery. Manufacturers and retailers have adapted to this shift by enhancing their online presence and offering subscription services for tissue paper products. This subscription model ensures a steady revenue stream and customer loyalty.

In addition to e-commerce, the increasing urbanization of the United States has led to smaller living spaces, where storage is limited. Tissue paper products, being bulky and

consumable, are well-suited for online purchase and delivery. This trend is expected to continue driving the growth of the tissue paper market as long as e-commerce remains a dominant force in retail.

Key Market Challenges

Sustainability and Environmental Concerns

One of the most pressing challenges in the tissue paper industry is the growing concern over sustainability and environmental impact. Tissue paper products are predominantly made from wood pulp, which raises issues related to deforestation and habitat destruction. Consumers are increasingly conscious of their ecological footprint and are seeking environmentally friendly alternatives. In response to these concerns, tissue paper manufacturers are under pressure to adopt more sustainable practices.

To address this challenge, tissue paper manufacturers are investing in sustainable sourcing, such as using certified sustainable wood pulp and recycled materials. Furthermore, they are working to reduce their carbon emissions by implementing energy-efficient production processes and transitioning to renewable energy sources. The market is also witnessing the rise of eco-friendly products, such as tree-free tissue paper made from bamboo or sugarcane. Companies that fail to adapt to these changing consumer preferences risk losing market share and facing regulatory hurdles.

Intense Competition and Price Sensitivity

The United States tissue paper market is highly competitive, with numerous brands and private labels vying for market share. As a result, price sensitivity is a significant challenge. Consumers are often driven by cost when choosing tissue paper products, leading to intense price wars and razor-thin profit margins for manufacturers.

To address this challenge, companies must focus on innovation and product differentiation. Offering unique features, such as enhanced softness or advanced absorbency, can justify premium pricing. Branding and marketing also play a critical role in influencing consumer perception and willingness to pay more for a trusted product. In this fiercely competitive landscape, companies must continuously adapt and refine their pricing and marketing strategies to maintain profitability.

Supply Chain Disruptions and Raw Material Costs

The United States tissue paper market is not immune to the supply chain disruptions that have affected industries worldwide, especially in the wake of the COVID-19 pandemic. The tissue paper production process relies on a steady supply of raw materials, including wood pulp, chemicals, and other components. Any disruptions in these supply chains can lead to production delays and increased costs.

To mitigate these challenges, tissue paper manufacturers are working to diversify their sources of raw materials and establish resilient supply chains. Some are exploring partnerships with suppliers that offer guaranteed supply in times of crisis. Moreover, advances in technology, such as automation and data analytics, are helping companies optimize their supply chain operations and predict potential disruptions. While these measures can help address supply chain challenges, rising raw material costs are an ongoing concern that can affect profit margins and pricing strategies.

Key Market Trends

Sustainable and Eco-Friendly Products

One of the most prominent trends in the tissue paper market is the growing demand for sustainable and eco-friendly products. Consumers are increasingly concerned about the environmental impact of their choices, and this awareness has extended to the tissue paper they use daily. Manufacturers have responded by developing and promoting tissue paper products that are more environmentally responsible.

Recycled Content: Tissue paper manufacturers are incorporating higher percentages of recycled content into their products. This not only reduces the demand for virgin wood pulp but also conserves natural resources and energy. It aligns with the circular economy concept and minimizes the carbon footprint of tissue paper production.

Biodegradable and Flushable: Another emerging trend is the development of biodegradable and flushable tissue products. These products are designed to break down more easily in sewer systems, reducing the risk of clogs and environmental pollution.

Sustainable Packaging: Companies are also focusing on sustainable packaging for tissue products. Using recyclable and eco-friendly materials for packaging not only appeals to environmentally conscious consumers but also reduces waste in landfills.

Premium and Innovative Products

The tissue paper market in the United States is not limited to basic toilet paper and paper towels. Manufacturers are increasingly offering premium and innovative tissue paper products to cater to a wider range of consumer needs and preferences.

Luxurious and Soft Tissue: Ultra-soft and luxurious tissue products have gained popularity. These products often come with added features such as lotion, aloe, or other soothing elements to enhance the user experience.

Customization and Design: Tissue paper manufacturers are focusing on design and aesthetics, offering a variety of patterns, colors, and prints. This trend targets consumers looking to personalize their living spaces with unique tissue paper designs.

Specialty Tissues: Specialty tissues, such as those designed for makeup removal, glass cleaning, or hand drying, are becoming more prevalent. These specialized products offer enhanced functionality and convenience.

Digital Transformation and E-commerce

The tissue paper market has seen a significant shift towards digital transformation and e-commerce, especially in the wake of the COVID-19 pandemic.

Online Retail: E-commerce platforms have become increasingly popular for purchasing tissue paper products. Consumers appreciate the convenience of ordering online and having tissue products delivered to their doorstep, especially during the pandemic when in-person shopping became less desirable.

Subscription Models: Many tissue paper manufacturers now offer subscription-based services, allowing customers to receive regular deliveries of their preferred tissue products. This model ensures a steady revenue stream for manufacturers and convenience for consumers.

Digital Marketing: Tissue paper companies have also embraced digital marketing to reach a wider audience. Online advertising, social media, and influencer marketing have become essential tools for brand promotion and engagement.

Segmental Insights

Product Insights

Toilet paper, a seemingly unassuming product, holds a significant share in the United States tissue paper market. This everyday essential has become a ubiquitous item in American households, commercial spaces, and public facilities. Its prevalence, consumption, and market share underscore its importance in the tissue paper industry.

Toilet paper's prominence can be attributed to several key factors. Firstly, it caters to a fundamental human need for sanitation and hygiene. Its role in maintaining personal cleanliness and preventing the spread of diseases cannot be overstated. With health and hygiene concerns paramount, the demand for toilet paper remains consistently high.

Furthermore, the American lifestyle, with its emphasis on convenience, has contributed to the prominence of toilet paper. The ease of use, disposability, and relatively low cost make it an attractive choice for consumers. The United States has witnessed a surge in single-person households, which also drives the demand for toilet paper, as these households are more likely to prioritize convenience.

In addition to its utilitarian aspects, toilet paper has made significant strides in terms of product innovation and sustainability. Companies have introduced softer, more absorbent, and environmentally friendly options, catering to a diverse consumer base. The industry has evolved to offer various sizes, textures, and even scents to cater to individual preferences.

The COVID-19 pandemic further highlighted the importance of toilet paper. The panic-buying phenomenon during the early days of the pandemic exemplified the product's indispensability. Consumers rushed to stock up on toilet paper, causing temporary shortages and prompting discussions about supply chain resilience.

From a market perspective, toilet paper's contribution to the United States tissue paper market is substantial. It accounts for a significant share of the industry's revenue, driving the growth of manufacturers and retailers. This steady demand has created a competitive market, prompting companies to invest in research and development, marketing, and production efficiency.

Moreover, toilet paper's impact on the tissue paper market extends to environmental concerns. The industry has made strides in adopting sustainable practices, including the use of recycled materials and eco-friendly production processes. As consumers become more conscious of their environmental footprint, these initiatives have become key

selling points for toilet paper manufacturers.

Sales Channel Insights

Online sales have become a dominant force in the United States Tissue Paper Market, capturing a significant share of the industry. This trend is not only a reflection of the broader e-commerce boom but also a response to changing consumer habits and market dynamics. Here, we'll explore the key factors that have led to the substantial growth of online sales in the tissue paper market.

First and foremost, the convenience of online shopping has played a pivotal role. Consumers can browse through a wide range of tissue paper products from the comfort of their homes, offices, or even on the go via mobile devices. The ease of comparing prices, reading reviews, and accessing a plethora of options has made online platforms the preferred choice for many shoppers.

Furthermore, e-commerce platforms have leveraged advanced technologies and algorithms to personalize the shopping experience. They recommend products based on a customer's browsing history and purchase behavior, which enhances the overall shopping experience. These personalized recommendations help customers discover new brands and products, ultimately leading to increased sales.

Another significant factor is the emergence of eco-friendly and sustainable tissue paper products. Consumers are increasingly conscious of their environmental impact and are actively seeking products that align with their values. Online platforms provide a platform for environmentally conscious brands to showcase their products and educate consumers about their sustainability efforts. This has driven a surge in sales of eco-friendly tissue paper products, which are often prominently featured online.

The COVID-19 pandemic accelerated the shift towards online shopping as people turned to e-commerce to meet their essential needs while minimizing physical contact. This shift in consumer behaviour had a profound impact on the tissue paper market, as it reinforced the convenience and safety of online shopping.

The competitive pricing offered by online retailers is another key driver. They can often provide discounts and promotions that are difficult for traditional brick-and-mortar stores to match. Customers are quick to take advantage of these cost-saving opportunities, boosting the appeal of online shopping.

Regional Insights

The American tissue paper market is a thriving industry, with the southern region of the United States playing a crucial role in its success. From Texas to Florida and all the way up to Virginia, the South has a significant share in this lucrative market. There are several key factors that contribute to the South's dominance in the tissue paper market.

First and foremost, the South is home to many large pulp and paper mills, which are the foundation of the tissue paper industry. These mills produce the raw materials necessary for tissue paper production, such as wood pulp. Southern states have abundant timber resources, making them ideal locations for these mills. The favorable climate in the region also supports the growth of fast-growing trees used in paper production, further strengthening the South's position in the market.

In addition to raw material production, the South benefits from a well-developed transportation infrastructure. Its extensive network of highways, railroads, and ports facilitates the efficient distribution of tissue paper products throughout the country. This logistical advantage not only allows for cost-effective transportation but also ensures that products reach their destinations in a timely manner.

Furthermore, the South's business-friendly environment has attracted major tissue paper manufacturers and converters. These companies have established numerous facilities in the region to take advantage of the available resources and skilled workforce. This, in turn, has created jobs and stimulated economic growth in many southern communities.

The South's significant agricultural and forestry activities also contribute to its dominance in the tissue paper market. The abundance of agricultural byproducts, such as sugarcane bagasse and cotton linters, can be utilized in tissue paper production. This diversification of raw materials further solidifies the region's presence in the industry.

Southern states also benefit from a large consumer base. The population in the South is substantial, and the demand for tissue paper products is consistently high. As a result, manufacturers often tailor their products to meet the preferences and needs of southern consumers, further increasing their market share.

Key Market Players

Kimberly-Clark Corporation

The Procter & Gamble Company

Cascades Inc.

Clearwater Paper Corporation

INTERNATIONAL PAPER COMPANY

Essity Aktiebolag (publ)

Sofidel America Corp.

Von Drehle Corporation

First Quality Tissue LLC

OASIS TISSUE, LLC

Report Scope:

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

United States Tissue Paper Market, By Product:

Toilet Paper

Kitchen Towel

Facial Tissues

Napkins

Others

United States Tissue Paper Market, By End User:

United States Tissue Paper Market Segmented By Product (Toilet Paper, Kitchen Towel, Facial Tissues, Napkins,...

Residential

Hospital

Food and Beverage Industry

Others

United States Tissue Paper Market, By Sales Channel:

Supermarkets/Hypermarkets

Departmental Stores

Pharmacy/Drug Stores

Online

Others

United States Tissue Paper Market, By Region:

South

West

Mid-West

North-East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States tissue paper market.

Available Customizations:

United States Tissue 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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