# Tissue Paper Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Paper, Corrugated & Board Packaging (Packaging)
> **Source:** [https://www.mordorintelligence.com/industry-reports/global-tissue-paper-market-industry](https://www.mordorintelligence.com/industry-reports/global-tissue-paper-market-industry)
> **Scraped Date:** 2026-09-17

## Executive Market Summary

| Market Metric | Details |
| :--- | :--- |
| **Base Market Size** | USD 23.20 billion |
| **Projected Forecast (2031)** | USD 23.20 billion |
| **Growth Rate (CAGR)** | 5.29 % |
| **Largest Market Region** | N/A |
| **Fastest-Growing Region** | N/A |

## Market Visualizations & Infographics

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![Major players in Tissue Paper industry](images/chart_2.png)

![Tissue Paper Market Size](images/chart_3.png)

![Tissue Paper Market Share by Raw Material, 2025](images/chart_4.png)

![Tissue Paper Market Share by End-User Industry, 2025](images/chart_5.png)

![Tissue Paper Market Growth Rate by Region](images/chart_6.png)

![Tissue Paper Market Concentration](images/chart_7.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

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![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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## Comprehensive Research Analysis

### Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 23.20 Billion |
Market Size (2031) | USD 30.01 Billion |
Growth Rate (2026 - 2031) | 5.29 % |
Fastest Growing Market | Asia Pacific |
Largest Market | North America |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order



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### Market Overview

Tissue Paper Market Analysis by Mordor IntelligenceThe global tissue paper market size was valued at USD 22.03 billion in 2025 and estimated to grow from USD 23.2 billion in 2026 to reach USD 30.01 billion by 2031, at a CAGR of 5.29% during the forecast period (2026-2031). This expansion shows the tissue paper market’s ability to absorb elevated fiber and energy costs while sustaining consumer demand. Large integrated mills have committed more than USD 3 billion to new capacity and acquisitions since 2024, underscoring confidence in steady long-term consumption. North American producers are modernizing lines with through-air-dried (TAD) technology that cuts manual operations by 85%, whereas Asia-Pacific converters scale recycled-fiber grades to meet urban hygiene needs. Regulatory pressure - from the EU Packaging and Packaging Waste Regulation (PPWR) to the EU Deforestation Regulation (EUDR)- is reshaping sourcing and packaging strategies but simultaneously creating niches for certified, traceable products. On the demand side, the commercial reopening of offices, schools, and HoReCa outlets is lifting the away-from-home channel and shifting the mix toward higher-margin towel and napkin formats.

Key Report Takeaways* By raw material, Bleached Softwood Kraft Pulp held 46.98% of the tissue paper market share in 2025, while recycled fiber pulp is projected to expand at a 6.34% CAGR through 2031.
* By product type, bathroom tissue commanded 57.90% of the tissue paper market size in 2025; paper towels are advancing at a 6.73% CAGR to 2031.
* By end-user, the residential segment accounted for 59.62% of the tissue paper market size in 2025, and offices and educational institutions are progressing at a 6.72% CAGR through 2031.
* By distribution channel, offline retail controlled 50.68% of the tissue paper market share in 2025, whereas online sales are widening at a 6.84% CAGR during the forecast period.
* By geography, North America led with 37.95% revenue share in 2025; Asia-Pacific is forecast to grow at an 7.66% CAGR to 2031.

### Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Tissue Paper Market*

| Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
|---|---|---|---|
| Growing hygiene and sanitation expenditure | +1.2% | Global (strongest in Asia-Pacific) | Medium term (2-4 years) |
| Rapid away-from-home reopening post-COVID | +0.9% | North America and Europe; spillover to Asia-Pacific | Short term (≤ 2 years) |
| Capacity additions of large integrated mills | +0.8% | North America and Latin America | Long term (≥ 4 years) |
| E-commerce-led private-label tissue boom | +0.7% | North America and Europe; growing in urban Asia-Pacific | Medium term (2-4 years) |
| Plastic-free packaging mandates | +0.4% | Europe and North America; global regulatory spillover | Long term (≥ 4 years) |

Source: Mordor Intelligence |

### Competitive Landscape

Competitive Landscape

The tissue paper market is moderately fragmented, with merger activity redefining the top tier. The USD 3.4 billion Suzano-Kimberly-Clark joint venture amalgamates upstream pulp self-sufficiency with downstream brand equity, producing 1 million tons annually across 70 countries. Sofidel’s USD 1.06 billion pickup of Clearwater elevates it to fourth place in North America, illustrating how European players seek geographic diversification. Equipment investments tilt toward TAD and NeXFormer shoe-press technologies that boost bulk and absorbency while curbing energy intensity. Producers also court carbon-savvy customers by converting sp ent pulping liquor into biomethanol, usable as mill fuel or chemical feedstock.

Private-label partnerships are accelerating. Retail chains negotiate exclusivity on three-ply recycled variants, capturing higher margins and customer stickiness. Branded incumbents counter with differentiated fragrances, post-consumer recycled fiber thresholds above 80%, and subscription bundles bundled with digital water-tracking apps. Patent filings concentrate on micro-emboss geometries that enhance perceived softness at constant basis weight, reducing pulp consumption without compromising touch. Mills that meet SBTi-validated emissions trajectories tout the certification in RFP submissions, converting decarbonization into a pricing premium.

Tissue Paper Industry Leaders* Kimberly-Clark Corporation

* Georgia Pacific LLC

* Kruger Products L.P.

* Procter & Gamble Company

* Metsä Tissue Corporation

* *Disclaimer: Major Players sorted in no particular order


### Scope Methodology P Space

This market covers the value of tissue paper products sold for hygiene and cleaning uses, across consumer and institutional demand, counted at the point where tissue rolls, sheets, or folded formats are sold through trade channels in each country.

Scope exclusions: This sizing excludes upstream pulpwood and pulp commodities and also excludes non-paper substitutes (such as spunlace or polymer-based wipes) even if they are used for similar tasks.

### Segmentation Container

* By Raw Material* Bleached Softwood Kraft Pulp (BSK)
* Birch Hardwood Kraft Pulp (BHK)
* High-Yield Pulp (HYP)
* Recycled Fibre Pulp
* Other Raw Materials

* By Product Type* Bathroom Tissue
* Paper Towels
* Facial Tissues
* Paper Napkins
* Specialty and Wrapping Tissue

* By End-User Industry* Residential
* HoReCa (Hotels/Restaurants/Cafés)
* Healthcare Facilities
* Offices and Educational Institutions
* Other End-User Industries

* By Distribution Channel* Online Sales
* Offline Sales

* By Geography* North America* United States
* Canada
* Mexico

* South America* Brazil
* Argentina
* Rest of South America

* Europe* Germany
* United Kingdom
* France
* Italy
* Spain
* Rest of Europe

* Asia-Pacific* China
* Japan
* India
* South Korea
* Australia
* Malaysia
* Rest of Asia-Pacific

* Middle East and Africa* Middle East* Saudi Arabia
* United Arab Emirates
* Turkey
* Rest of Middle East

* Africa* South Africa
* Egypt
* Nigeria
* Rest of Africa

## Frequently Asked Questions

#### What is the current value of the tissue paper market in 2026?

The tissue paper market is valued at USD 23.2 billion in 2026, with a projected rise to USD 30.01 billion by 2031.

#### How fast is Asia-Pacific demand for tissue products growing?

Asia-Pacific demand is set to increase at an 7.66% CAGR through 2031, making it the fastest-expanding region.

#### Which raw material dominates tissue manufacturing today?

Bleached Softwood Kraft Pulp leads with a 46.98% share, though recycled fiber is gaining quickly.

#### Why are paper towels outpacing other product categories?

Higher hygiene standards in offices, restaurants, and homes are propelling paper towels at a 6.73% CAGR through 2031.

#### How are new regulations affecting tissue producers?

Rules such as the EU Deforestation Regulation require geolocation tracing of wood inputs and can levy fines of at least 4% of EU revenue for non-compliance, incentivizing supply-chain transparency.

#### What technologies are mills adopting to stay competitive?

Producers are investing in through-air-dried lines and biomass-based energy systems, which improve product softness while cutting labor and carbon intensity.