

# World Market for Retail Tissue

June 2023

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## INTRODUCTION

### Scope

Examining five trends shaping the retail tissue industry (1)

## STATE OF THE INDUSTRY

Inflation pressure sets back volume gain while buoying value growth in 2022

Current and constant growth gap widens further in 2022

Developing regions, led by Asia Pacific, offset developed loss in 2022

Unfulfilled per capita potential and population base underpin developing potential

Brazil is on track to replace Germany as the fourth largest market in retail tissue

Facial tissues leads 2021-2022 and prospective growth

Asia Pacific's strength in facial tissues further solidifies the region's global leadership

Paper towels further penetrates developing markets, building on sticky new hygiene habits

Toilet paper builds on fundamentals in developing markets, targets value-add in developed

Shifting life routines such as flexible working schedules support per capita toilet paper use

Price fluctuation will vary across categories and markets

Retail tissue professionals take a multifaceted approach to combat inflation

Inflation posts cautionary note for consumer spending and category outlook

E-commerce growth slows but increases penetration in Asia Pacific

Tissue gifting culture drives e-commerce growth in South Korea

## LEADING COMPANIES AND BRANDS

Top players cede shares as market fragmentation grows in most regions

Name recognition, portfolio diversity and retail prevalence sustain top players' ranks

Essity taps premiumisation alongside heightened value and quality expectations

Sofidel accelerates market penetration and adjacency expansion through acquisitions

Local brands build growth advantage on supply chain efficiency and local penetration

Narrowing quality gap plus value sustain private label's foothold in well-situated markets

Private label brands undergo a "more than basic" transformation

Overall, the price gap between private label and branded toilet paper remains

## TOP FIVE TRENDS SHAPING THE INDUSTRY

Examining five trends shaping the retail tissue industry (2)

New value expectation refocuses tissue value creation, with local characteristics

Sharpened focus on "ethical" tissue

New campaigns reinforce performance metrics and emotional resonance

Fragrances to reinforce wellness and emotional wellbeing

Skinification inspires ingredient-led facial tissue innovations

Multi-pathed green journey adds another layer of value on top of performance attributes

## MARKET SNAPSHOTS

Global snapshot of retail tissue

Regional snapshot: Asia Pacific

Regional snapshot: Australasia

Regional snapshot: Eastern Europe

Regional snapshot: Latin America

Regional snapshot: Middle East and Africa

Regional snapshot: North America

Regional snapshot: Western Europe

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