



# World Market For Tissue

May 2021

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## INTRODUCTION

### Scope

Examining five trends shaping consumer tissue

## STATE OF THE INDUSTRY

COVID-19 spurred higher growth for retail tissue in 2020

Asia Pacific leads in value sales and shows healthy at-home demand

Manufacturers shift focus from institutional to retail in Latin America

Sales growth to slow post-pandemic in developed markets

Forecast growth will primarily be driven by developing markets

China dwarfs developing peers with lion's share of toilet paper growth

Evolving infrastructure can further lift consumption in developing world...

...But may obviate toilet paper need in developed economies

Pandemic drives e-commerce growth

E-commerce surge takes on varied shapes across countries

Personalisation and mobile commerce receive a further impetus

Social media fuels the next phase of e-commerce growth

Digital, frictionless store experience upholds bricks-and-mortar primacy

## LEADING COMPANIES AND BRANDS

Key players remain top of chart as competition mounts

Top players ride pandemic tailwind while fending off competition

Value-orientated spending approach supports private label momentum

Local players thrive on value-added innovation and channel investment

## TOP FIVE TRENDS SHAPING THE INDUSTRY

Examining five trends shaping consumer tissue

Young activists bring purpose-led branding into sharper focus

Insurgents drive multi-facet purposeful innovation and engagement

The Cheeky Panda exemplifies the coupling of sustainability and agility

Along with expectations of efficacy, ethical remains influential

Hygiene awareness brings preventative health features to the fore

Manufacturers go certifiably clean and elevate production transparency

Built-in multifunctionality achieves more with less

## MARKET SNAPSHOTS

Regional snapshot of Asia Pacific

Regional snapshot of Australasia

Regional snapshot of Eastern Europe

Regional snapshot of Latin America

Regional snapshot of Middle East and Africa

Regional snapshot of North America

Regional snapshot of Western Europe

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