

Sustainability in the Global Consumer Tissue Market

March 2022

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Scope

Key findings

SETTING THE SCENE

Normalization of retail tissue trends and slow recovery for AFH products

Asia Pacific and MEA to see the stronger growth ahead in volumes

Inflation impacts discretionary income and consumer spending...

Industry professionals expect green trend to pick up post-pandemic, along with affordability

Climate changers: consumers are increasingly willing to act

Business with purpose trend to intensify post-pandemic

Leading sustainable claims in tissue: rise of more specific claims...

...and growing push against greenwashing: EU reviews sustainability claims

Uneven path of sustainability-related claims across tissue product categories

UNDERSTANDING PRICING CHALLENGES

Costs remain the main barrier to sustainability despite higher awareness...

... but more consumers are willing to pay more...for tangible features

But how much is too much? The mark-up dilemma

The circular economy is key to make sustainability affordable

Tissue companies are investing in sustainable strategies

Circularity is strongly present in packaging preferences - opportunity for further innovation

FOCUS ON SUSTAINABLE PACKAGING

Consumers have a very clear idea on what they see as sustainable packaging

Sustainable packaging from established powerhouses becomes more visible...

...but insurgents still drive multi-facet purposeful innovation and engagement

Private label is picking up pace: Tesco and affordable sustainable innovation

Cascades Tissue Group: continuing focus on circular business model

Grazie Natural: a case study in circular economy

INNOVATION IN ALTERNATIVE FIBRES

Eyes on sustainable virgin wood pulp: eucalyptus claims growing space in tissue production

Bamboo remains an alternative fibre of choice for many eco-friendly brands

Kruger Products: expanding bamboo-based options in Canadian retail

Start-ups venture into bamboo tissue products in Latin America

Recycled fibre has a smaller environmental footprint, but is challenged on supply side

Essity explores wheat straw in Europe

Mapping the wheat production areas as a first step for a fiber-based plan

STRATEGIC RECOMMENDATIONS

Strategic recommendations

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