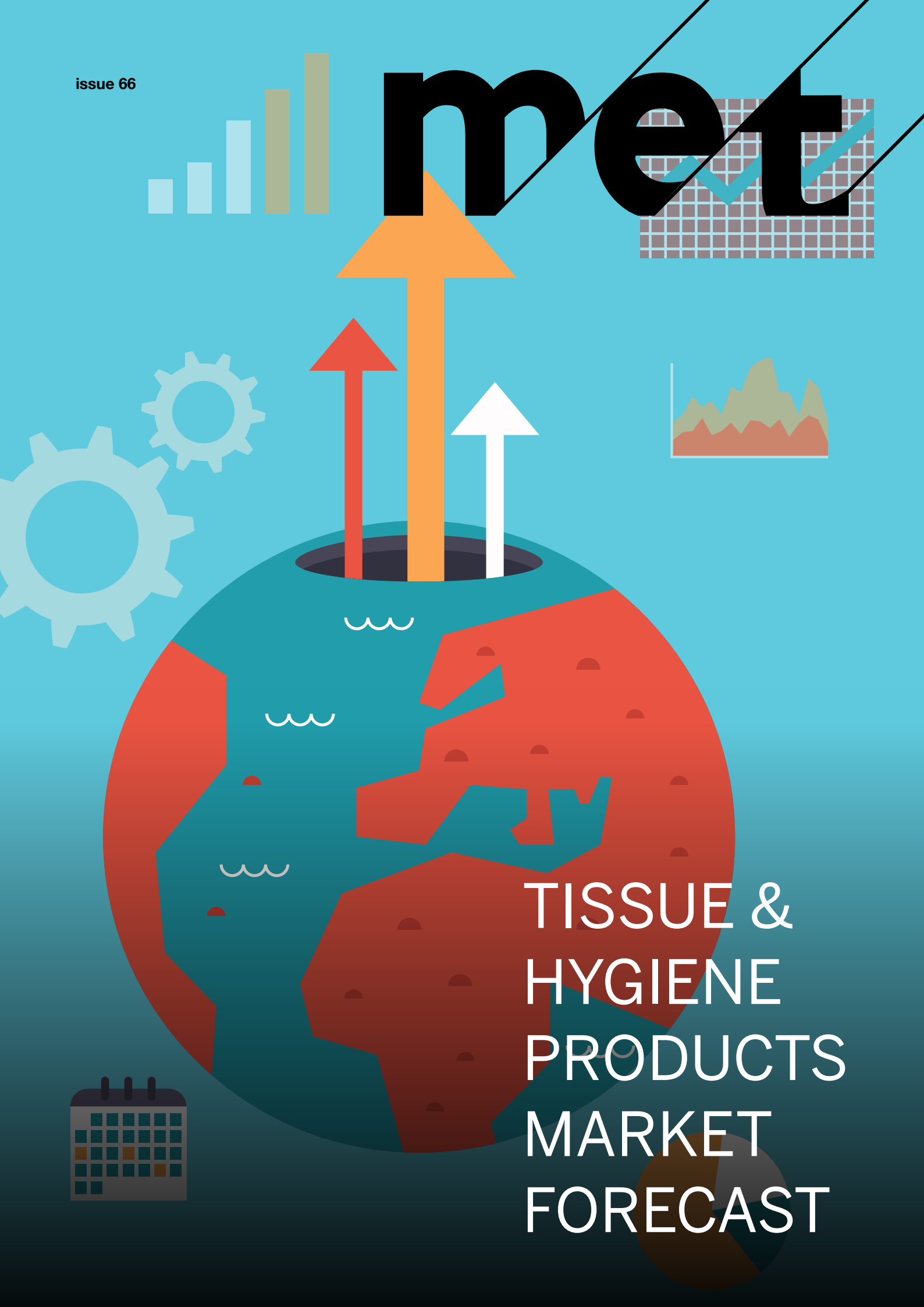


issue 66

met



TISSUE &
HYGIENE
PRODUCTS
MARKET
FORECAST

SENNING Hanky Production Lines S.PM 805 + 662 TG and S.PM 820 + 660 TG

All production steps from a single source - because unity creates perfection

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www.senning.de/en/wrapping-machines/handkerchiefs/productionline



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TÜRKIYE

Gulf Paper Manufacturing starts up tissue line after Toscotec's rebuild

Gulf Paper Manufacturing and Toscotec started up PM2 after a forming section upgrade at their Mina Abdullah facility in Kuwait. The successful completion of this rebuild marks a new important stepping stone in the cooperation between the two companies, after Toscotec performed a major dryer section rebuild of Gulf Paper's packaging paper machine in 2019.

The forming section rebuild included an approach flow system upgrade and the installation of a state-of-the-art TT Headbox designed to match the high quality requirements for facial tissue in the Middle Eastern market. The targets of improvement of tissue formation and basis weight cross direction (CD) control have been fully achieved.

Ghaleb Alhadhrami, Gulf Paper Manufacturing Projects & Development Manager, and Ahmed Kasim Plant Manager say, "With this project, we invested in a technological upgrade of our existing machine in order to achieve a substantial quality improvement. The project hit its mark, and we are already offering an important added value to our customers in the regional market."

Catalin Balint, Project Manager at Toscotec, says, "The positive outcome of this project was of great satisfaction to both parties, who have cooperated extremely well all along. Toscotec's equipment has achieved their targets of speed increase and quality improvement. The fact that we have a long partnership with Gulf Paper Manufacturing was quite clear from the familiarity and trust that have characterized the relationship between the technical teams since the engineering phase."



Toscotec and Gulf Paper Manufacturing (GPM) in front of PM2 at their Mina Abdullah paper mill, Kuwait.

Turkuvaz boosts diaper line efficiency with ANDRITZ retrofit

ANDRITZ has completed a service retrofit for the Turkish company Turkuvaz at its Sakarya plant, modernizing the diaper fastening tape system. This will improve the production process of the converting line and the quality of the diapers.

The modernization of the diaper fastening tape system ensures a strong, reliable bond on the diaper closure and facilitates the converting process. The improvement in raw material tension results in reduced downtime, increased productivity and significant cost savings. Raw material costs are drastically reduced compared to conventional side tape solutions.

Sedat Mala, General Manager of Turkuvaz, said: "ANDRITZ completed this major retrofit in a remarkably short time of just two weeks, demonstrating its ability to deliver fast and impactful solutions."

Turkuvaz already operates nine converting lines and one spunlace line from ANDRITZ, which underlines the company's confidence in ANDRITZ as a reliable and innovative partner. Turkuvaz is a member of the retail company BIM, which owns 11,000 stores across Türkiye.



Modernization of the diaper fastening tape system by the ANDRITZ Service team. Image: ANDRITZ

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ITA Holding (A.Celli Group) acquires Sipack

Italia Technology Alliance (ITA Holding), has acquired Sipack Srl, a Lucca-based company specialized in complete production lines for corrugated cardboard boxes, such as case makers, printer-slotter, rotary die-cutters, flexo printers, and folder gluers. The acquisition will also expand the possibilities for retrofitting existing lines in terms of mechanical components and automation and control systems.

Sipack's products integrate seamlessly with existing offerings within A.Celli Group, particularly SADAS, expanding its automation solutions beyond the paper and tissue sectors, and Smartlogistix, which will fully integrate the intralogistics management of finished corrugated cardboard products through autonomous guided vehicles (AGVs and AMRs), automated warehouses, and related management software.

"Sipack is a company from the Lucca area which, over the years, thanks to the disruptive passion and great expertise of Walter Pacioni, has managed to design, build, and successfully operate machinery for customers demanding top-tier performance," commented Mauro Celli, shareholder of ITA Holding. "I am confident that Sipack's organization, supported by the services and expertise of ITA Holding and the other group companies, will be a strong accelerator to reinforce our market offering in terms of products and services."

Walter Pacioni, Founder & CEO of Sipack Srl, stated: "From the moment I spoke with Alessandro and Mauro Celli of ITA Holding, I realized that my vision for Sipack's future development had found its match in a group with 80 years of experience in building custom machinery and systems. The opportunity to immediately develop synergies in technical, commercial, automation, customer service, and truly integrated solutions for our customers was the boost to define this new set-up. I look forward to continuing to visit our clients and to meet new ones, now able to present a stronger, more innovative structure, increasingly attentive to market needs."

Walter Pacioni will serve as CEO of Sipack Srl, supported by the new board of directors, including Luca Brugioni, CFO of ITA Holding, and Simone Bertuccelli, Technical Director of A.Celli Nonwovens.



Walter Pacioni (left) and Mauro Celli (right) shake hands, marking the acquisition of Sipack by Italia Technology Alliance.

A.Celli and Saueressig unveil new technological collaboration

Saueressig and A.Celli have partnered to develop VoluMAX3, a new 3D embossing and aperturing line featuring in-line slitting and winding, specifically designed to meet the evolving needs of hygiene nonwovens producers.

This standalone solution combines the strengths and expertise of both companies and includes the A.Celli E-WIND® non-stop unwinder, in-line slitting winder, and an optional metal detector, as well as a pre-heat unit with S-Wrap roller configuration and an embossing calender developed by Saueressig.

The collaboration delivers a flexible, easy-to-maintain system that ensures high precision, product quality, and production speeds of up to 600 m/min. VoluMAX3 enables embossing and aperturing in a single step, while meeting the highest safety and environmental standards.

Part of the A.Celli F-LINE® family, this line is designed to support the development of next-generation hygiene products for all life stages, offering enhanced skin comfort and optimized liquid absorption.

César Iglesias expands tissue production with Toscotec's tissue line

Toscotec has secured a repeat order from Dominican-based group César Iglesias to supply a complete AHEAD 1.8 tissue line at its production facility in Santo Domingo. The new line, scheduled for start-up in 2026, follows the successful installation of a Toscotec TT SYD Steel Yankee Dryer on PM1 in 2019.

The new PM2 tissue machine will feature a 2,800 mm sheet width and a production capacity exceeding 30,000 tons per year. Key components include Toscotec's TT NextPress shoe press, TT SYD Steel Yankee Dryer, and high-efficiency TT Hoods, all designed to deliver superior drying performance and energy efficiency.



César Iglesias and Toscotec's team in front of Toscotec's headquarter in Lucca, Italy.

AUSTRIA

ANDRITZ strengthens its position in the tissue and paper industry by acquiring A.Celli Paper

ANDRITZ has signed an agreement to acquire the Italian company A.Celli Paper.

A.Celli Paper has decades of experience in the supply of machinery and key equipment for the production of tissue, paper and board grades. In 2020, the company widened its portfolio of winders, rewinders, systems for roll handling and packaging, as well as tissue machines and services through the acquisition of PMT.

A.Celli Paper is headquartered in Lucca, Italy, and operates additional locations in Pinerolo, Italy, and Shanghai, China. It achieves annual revenues in the range of 70 MEUR with a team of more than 100 experts.

Alexander Wassermann, ANDRITZ Executive Vice President Paper & Textile, says: "This strategic move is driven by our commitment to providing comprehensive, innovative solutions to our customers. It expands our capabilities in key areas such as winding and rewinding technologies, making us a leading full line supplier from fiber to the packaged paper rolls, while also strengthening our service business."

Alessandro Celli, shareholder of A.Celli Group (Italia Technology Alliance), adds: "In its eighty-year history, A.Celli Paper has developed a wide portfolio of products and services through investments and innovation. This has been made possible by the commitment of our family and our employees. Joining a multinational organization such as ANDRITZ represents an opportunity for A.Celli Paper to further develop and grow in the tissue and paper market. Despite the change, the priority remains to ensure business continuity and excellent service to our customers."



From left to right: Andreas Lukas, ANDRITZ Senior Vice President Nonwoven & Textile, Alexander Krause, ANDRITZ Regional General Counsel CEMEA & CHINA/Group Compliance Officer, Alessandro Celli, A.Celli Paper Shareholder, Alexander Wassermann, ANDRITZ Executive Vice President, Paper & Textile, Giuseppe Antonini, A.Celli Paper Shareholder, Mauro Celli, A.Celli Paper Shareholder. Image: ANDRITZ

USA

Ontex completes sale of Brazilian operation to Softys

Ontex Group NV has announced the completion of the sale of its commercial activities in Brazil to Softys, a subsidiary of Empresas CMPC S.A. Headquartered in Chile, Softys operates throughout Latin America in the personal care segment.

The transaction includes Ontex's business in Brazil and its manufacturing facility in Senador Canedo in the State of Goiás, which includes the development, manufacture, marketing and distribution of diapers and pants for the baby care market under the PomPom, Cremer, Sapeka and Turma da Mônica brands, as well as for the adult care market under the Bigfrol brand.

The net cash proceeds received at closing, net of cash/debt disposed, are €81 million, after the impact of tax-related and transaction costs, hedging expenses, as well as provisional balance sheet adjustments. In addition, 18 million euros will be put up as collateral at closing. The proceeds from the sale will be used to reduce Ontex's gross financial debt.

CHINA

Alear Silk Road invests in new spunlace lines

ANDRITZ has received an order from Alear Silk Road New Materials Co., Ltd. to deliver three complete neXline aXcess spunlace crosslapped lines for the production of nonwovens.

The lines will process viscose and cotton fibers to produce nonwovens for the hygiene and medical markets. ANDRITZ's complete spunlace production lines ensure perfect web uniformity and high tensile strength at high output rates enabling Alear Silk Road to meet the growing market demand. The state-of-the-art Profile® crosslappers will help reduce operating costs by improving even distribution of fiber. Start-up is scheduled for the fourth quarter of 2025.



Feng Quanzhi, General Manager of Alear Silk Road New Materials, and Shi Wei, Vice President of ANDRITZ Paper and Textile Asia Pacific. Image: ANDRITZ



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Anticipating Change: Key Circular Economy Trends across Future Landscapes

Dr. Tom Voegelé,
Director of Public Policy, GRS Service

The transition to a circular economy is not a linear journey—it unfolds within a dynamic and uncertain global context. As industries, governments, and communities seek to redesign systems for sustainability, understanding how key trends may evolve under different future scenarios becomes essential. Strategic foresight offers a structured approach to explore these uncertainties, helping decision-makers prepare for multiple potential outcomes rather than relying on a single forecast.

This article presents 5 key future trends shaping the circular economy, identified through a combination of literature review and foresight techniques such as horizon scanning and scenario analysis. These trends span digital innovation, regulatory transformation, biocircular systems, localized resilience, and changing cultural values.

To assess their strategic relevance, a foresight matrix maps each trend across four distinct future scenarios. This visualization serves as a decision-support tool for identifying resilient strategies, stress-testing policies, and prioritizing innovations that align with both emerging risks and opportunities. By anticipating change, organizations can not only adapt but lead in shaping a more circular, regenerative future.

5 KEY FUTURE TRENDS IN THE CIRCULAR ECONOMY

As the world transitions from linear production models to more regenerative systems, the circular economy is emerging as a vital pathway for sustainability, resilience, and long-term value creation. Through a combination of literature review and strategic foresight techniques, five key trends have been identified that are likely to shape the future of the circular economy. These trends reflect technological innovation, policy evolution, biophysical systems integration, localized resilience, and shifting societal values.

1. Digital Circularity and Smart Technologies

Trend: Integration of AI, IoT, blockchain, and digital twins will enable real-time tracking, optimization, and transparency across supply chains, facilitating more effective reuse, remanufacturing, and recycling.

Implications:

- Enhanced product life cycle data for design and recovery.
- More robust platforms for circular business models (e.g., product-as-a-service).
- Greater consumer trust and engagement via transparency.

2. Policy-Driven Circular Transitions

Trend: Governments will increasingly use regulatory levers (such as extended producer responsibility, carbon pricing, and material passports) to enforce circular practices.

Implications:

- Businesses will need to innovate preemptively to comply.
- Cross-border collaboration on circular standards will grow.
- Public procurement will drive demand for circular products.

3. Circular Bioeconomy Expansion

Trend: The circular economy will intersect with the bioeconomy, utilizing regenerative natural systems and biodegradable materials to close biological loops.

Implications:

- Surge in biobased alternatives to plastics and synthetics.
- Growth in regenerative agriculture and industrial symbiosis using organic waste.
- Localized, circular food and material systems.

4. Decentralized and Localized Circular Systems

Trend: Urban and regional systems will shift toward localized circularity—urban mining, repair hubs, community sharing platforms, and modular infrastructure.

Implications:

- Cities become hubs for circular innovation.
- Greater resilience through shorter, circular supply chains.
- Empowerment of local actors and SMEs in circular transitions.

5. Cultural and Behavioral Shift Toward Sufficiency

Trend: Societal values are gradually shifting from ownership and consumption toward sufficiency, longevity, and stewardship—driven by environmental concerns and new generational ethics.

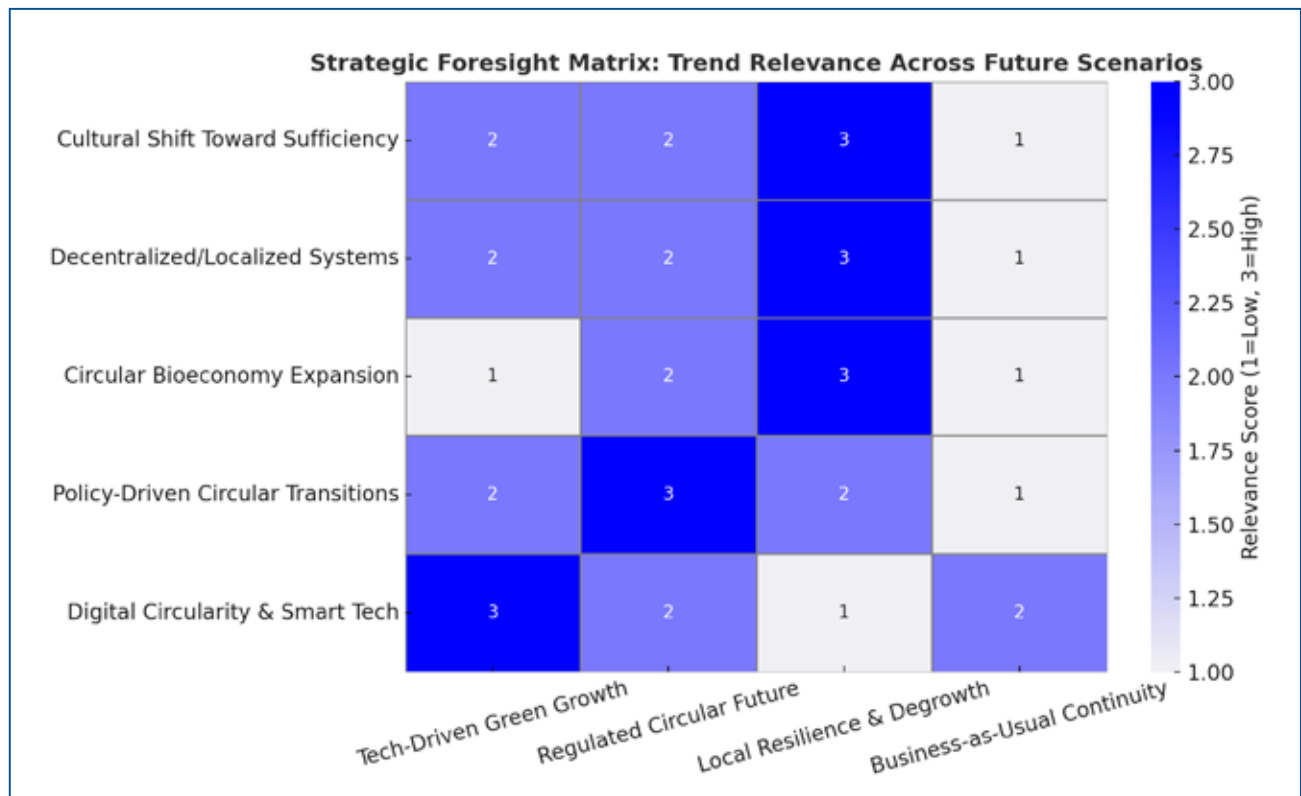
Implications:

- Business models must align with values of minimalism, repairability, and access-over-ownership.
- Education and storytelling become crucial tools for transition.
- New metrics of prosperity beyond GDP (e.g., Doughnut Economics) gain traction.

APPLYING STRATEGIC FORESIGHT TECHNIQUES

To assess how these trends may play out under different future conditions, a strategic foresight matrix has been developed. This matrix maps the relevance of each trend across four distinct scenarios: Tech-Driven Green Growth, Regulated Circular Future, Local Resilience and Degrowth, Business-as-Usual Continuity.

Each cell in the matrix is scored from 1 (low relevance) to 3 (high relevance), offering a visual tool to compare how robust and adaptive each trend is across diverse potential futures. This matrix supports strategic planning, policymaking, and innovation prioritization in both public and private sectors.



	A. Digital Circularity & Smart Technologies	B. Policy-Driven Circular Transitions	C. Circular Bioeconomy Expansion	D. Decentralised and Localised Systems	E. Cultural and Behavioral Shift Toward Sufficiency
Assessment	Most relevant in: Tech-Driven Green Growth (Score: 3) Moderately relevant in: Regulated Circular Future and Business-as-Usual Least relevant in: Local Resilience & Degrowth	Most relevant in: Regulated Circular Future (Score: 3) Moderately relevant in: Tech-Driven Green Growth and Local Resilience Least relevant in: Business-as-Usual	Most relevant in: Local Resilience & Degrowth (Score: 3) Moderately relevant in: Regulated Circular Future Least relevant in: Tech-Driven Green Growth and Business-as-Usual	Most relevant in: Local Resilience & Degrowth (Score: 3) Moderately relevant in: Tech-Driven Green Growth and Regulated Circular Future Least relevant in: Business-as-Usual	Most relevant in: Local Resilience & Degrowth (Score: 3) Moderately relevant in: Tech-Driven Green Growth and Regulated Circular Future Least relevant in: Business-as-Usual
Implication	Digital solutions thrive in high-tech, innovation-driven futures. Strategic planning should focus on investing in enabling infrastructure (5G, AI, blockchain), especially in markets and regions aligned with green growth narratives. However, planners should diversify strategies for low-tech or degrowth-oriented futures where digital systems may be less central.	Robust policy frameworks and regulatory tools are central to any deliberate circular transition. Policymakers should anticipate and design adaptive regulatory systems that can function across different trajectories, particularly in scenarios where market forces alone are insufficient.	Biobased, regenerative systems become most vital in scenarios emphasizing environmental harmony and local resource cycles. Strategic investments should support innovation in biodegradable materials, regenerative agriculture, and organic waste valorization—especially under ecological transition policies.	Local loops (repair, reuse, sharing platforms) are key to resilient and degrowth-oriented futures. Urban planners and regional governments should promote localized infrastructure that supports circular hubs, community manufacturing, and resource sharing networks.	Cultural change underpins long-term success of circular models. Education, storytelling, and ethical consumption campaigns are crucial tools to enable sufficiency. This trend also highlights the need for non-technological levers of transformation.

CROSS-SCENARIO TAKEAWAYS

- Scenarios with the strongest trend support: Regulated Circular Future and Local Resilience and Degrowth.
- Business-as-Usual is least compatible with circular innovation, suggesting the need for proactive disruption to avoid stagnation.
- Strategic foresight should prepare flexible policies, dual-pathway innovations, and invest in both high-tech and low-tech circular infrastructures.

WAY FORWARD

The analysis of future trends and their relevance across diverse scenarios underscores a critical insight: while the path to a circular economy is not fixed, certain directions remain consistently influential. Trends such as digital circularity and policy-driven frameworks gain strength in more centralized, tech-forward futures, while local resilience and cultural sufficiency rise in importance within decentralized, degrowth-oriented contexts.

The strategic foresight reveals that no single trend is universally dominant—but several exhibit high adaptability across multiple scenarios. This highlights the need for portfolio approaches to innovation and policy, investing in both high-tech solutions and low-tech, community-based systems. Organisations and governments should also pay close attention to behavioral and cultural dimensions, which can catalyse or constrain systemic change.

Above all, this foresight exercise reinforces the value of preparing for multiple futures. By stress-testing strategies and embracing systemic flexibility, stakeholders can make the circular economy not just an aspiration but a robust, resilient reality.

ACTIONABLE RECOMMENDATIONS

- ✓ **Adopt a Dual Innovation Strategy:** Invest in both advanced digital solutions (e.g., circular traceability, AI-enabled remanufacturing) and grassroots, low-tech models (e.g., repair networks, sharing platforms) to

build resilience across scenarios.

- ✓ **Design Policy for Adaptability:** Develop regulatory frameworks that can evolve with emerging technologies and social values, such as modular EPR schemes, dynamic incentives, and circular public procurement mandates.
- ✓ **Build Scenario-Resilient Business Models:** Encourage business models (e.g., product-as-a-service, circular marketplaces) that can flex across tech-driven and community-led futures.
- ✓ **Strengthen Local Circular Ecosystems:** Support cities and regions in becoming circular innovation hubs through localized resource loops, repair hubs, and community circularity programs.
- ✓ **Invest in Cultural Change and Education:** Launch public campaigns, curricula, and storytelling initiatives to shift societal norms toward sufficiency, stewardship, and long-term value. Adopt a Dual Innovation Strategy

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TISSUE & HYGIENE PRODUCTS MARKET FORECAST (2025-2029)

The global tissue and hygiene products market is poised for sustained expansion, with revenue projected to reach **US\$370.79 billion in 2025** and grow at a **compound annual rate of 5.1% through 2029**. This growth is driven by increasing demand across both high-income and emerging markets, reflecting a global shift toward improved sanitation, rising disposable incomes, and changing hygiene habits.

Toilet paper continues to lead the sector, expected to generate **US\$120.49 billion** in revenue in 2025. **China** emerges as the largest contributor overall, with **US\$75 billion** in projected sales, supported by its vast population and growing consumer spending. Notably, **online channels** are reshaping distribution dynamics and are expected to account for over **25% of total market revenue** by 2025.

The COVID-19 pandemic significantly accelerated demand in the tissue and hygiene products market, particularly for face masks, which had previously accounted for only a minor share. Panic buying during the early months of the crisis led to an unprecedented surge in toilet paper sales, highlighting the essential role of hygiene products in consumers' minds. More broadly, COVID-19 normalized stockpiling and heightened global attention to items like masks and toilet paper, embedding them more deeply into everyday routines.

The Tissue & Hygiene Products market is divided into seven main sections:

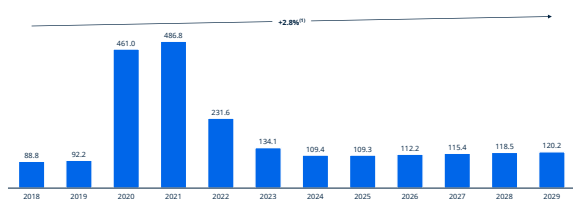
- **Toilet Paper:** Includes dry and wet toilet paper.
- **Paper Tissues:** Comprises facial tissues, wet wipes, and pulp-based paper tissues.
- **Household Paper:** Covers tissue products for household care, like paper towels, napkins, kitchen rolls, and tablecloths.
- **Feminine Hygiene:** Includes sanitary products such as tampons and pads made from pulp.
- **Baby Diapers:** Disposable diapers for infants and toddlers.
- **Face Masks:** Surgical, disposable, and respirator masks (e.g., N95, KN95), excluding shields and specialized masks.
- **Incontinence:** Adult diapers, excluding other medical continence products.

Beyond these short-term effects, the market's long-term growth is underpinned by structural factors. Improved access to sanitation facilities, clean water, and urban infrastructure is closely linked to higher consumption of tissue and hygiene paper. High-income countries, where such infrastructure is well established, consistently report the highest usage rates. Meanwhile, middle-income nations are emerging as key growth markets as their infrastructure continues to develop. By 2025, global per capita consumption is projected to reach **14.0 kg**, with total market volume expected to climb to **120.3 billion kg by 2029**.

As the market evolves, manufacturers are focusing on innovation, sustainability, and product quality, responding to rising consumer expectations for performance, safety, and environmental responsibility. This positions the tissue and hygiene products sector as a key pillar in the broader consumer goods industry.

Global Tissue and Hygiene Products Volume Forecast

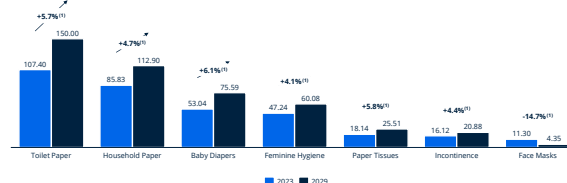
Volume forecast in billion kilograms



Market Insights
by statista

Global Tissue and Hygiene Products Market Revenue Forecast

Revenue forecast in billion US\$



Market Insights
by statista

BABY DIAPERS HYGIENE

The baby diapers market remains a dynamic and competitive segment, shaped by increasing consumer demand for affordability, convenience, and sustainable solutions.

Manufacturers face ongoing pressure to manage production and distribution costs while maintaining competitive pricing. Simultaneously, the market is contending with the growing appeal of environmentally friendly alternatives such as cloth diapers, driven by heightened environmental awareness.

Despite these pressures, the global baby diapers market is projected to continue its upward trajectory. In 2025, global revenue is expected to reach **US\$60.75 billion**, with a compound annual growth rate (CAGR) of **5.61%** forecasted through 2029. China is set to lead the market, generating an estimated **US\$13 billion** in revenue. Per capita revenue is projected at **US\$7.78**, with average individual consumption estimated at **1.1 kg**. Total market volume is expected to reach **9.9 billion kg** by 2029, with a **3%** year-on-year volume growth anticipated in 2026. The continued expansion of e-commerce platforms is playing a key role in market accessibility, while innovation in eco-conscious product development is gaining significant momentum across regions.

REGIONAL MARKET OUTLOOK

Americas

Growing environmental awareness and shifting consumer preferences are reshaping the baby diapers market across the Americas. Demand for eco-friendly and organic options is particularly strong in North and South America, while in the Caribbean, a rising number of working parents are driving the need for convenient and affordable diaper solutions. The market is projected to generate **US\$14.06 billion** in revenue in 2025, with an expected annual growth rate of **4.30%** (CAGR 2025–2029). By 2029, volume is forecasted to reach **1.8 billion kg**. In 2025, the average per capita revenue is expected to reach **US\$13.74**, with diaper usage at **1.7 kg** per person. A moderate volume growth of **+1.1%** is anticipated in 2026.

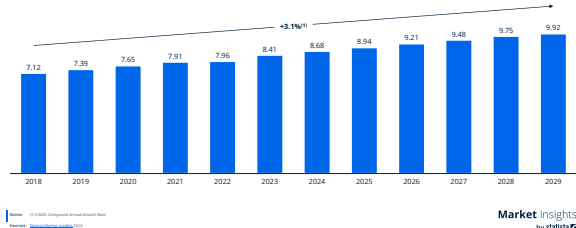
Regional Highlights:

North America:

- Revenue: US\$10.27 billion in 2025
- Per capita revenue: US\$20.02
- Average consumption: 1.9 kg per person
- Growth rate: 3.12% CAGR (2025–2029)
- Volume growth in 2026: -0.5% (slight decline)
- Projected volume by 2029: 965.8 million kg

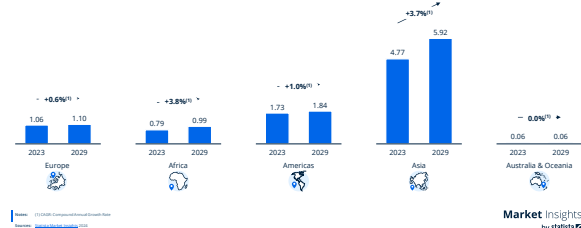
Baby Diapers market volume projected to increase by 2029

Volume forecast in billion kilograms



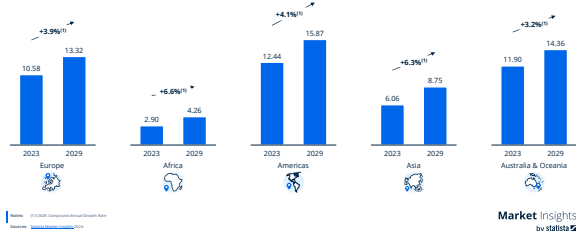
Asia is projected to lead in the Baby Diapers market volume by 2029

Volume forecast in billion kilograms



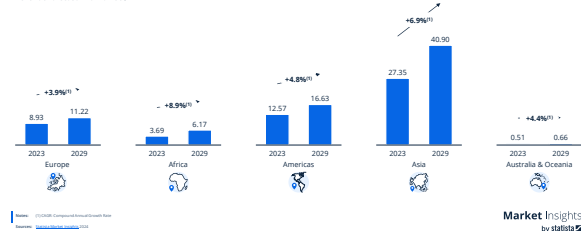
Americas set to lead in average revenue per capita for the Baby Diapers market by 2029

Average revenue per capita forecast in US\$



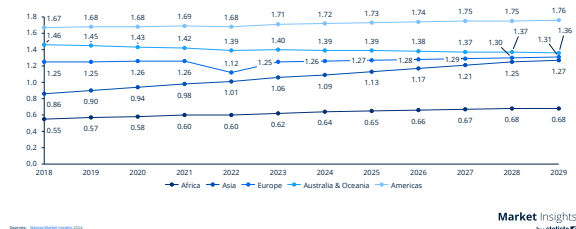
Asia is projected to lead in Baby Diapers market revenue by 2029

Revenue forecast in billion US\$



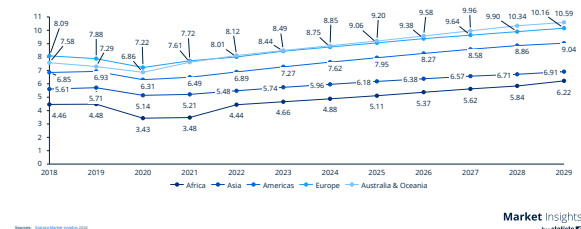
Americas is poised to lead in average volume per capita in kilograms in the Baby Diapers market by 2029

Average volume per capita forecast in kilograms



Australia & Oceania is set to lead in the Baby Diapers market as the region with the highest price per unit by 2029

Price per unit forecast in US\$



South America:

- Revenue: US\$3.21 billion in 2025
- Per capita revenue: US\$7.71
- Average consumption: 1.6 kg per person
- Growth Rate: 7.68% CAGR (2025–2029)
- Volume growth in 2026: +3.2%
- Projected volume by 2029: 752.0 million kg

Central America:

- Revenue: US\$311.70 million in 2025
- Per capita revenue: US\$5.82
- Average consumption: 1.2 kg per person
- Growth Rate: 6.77% CAGR (2025–2029)
- Volume growth in 2026: +3.4%
- Projected volume by 2029: 71.1 million kg

Caribbean:

- Revenue: US\$266.35 million in 2025
- Per capita revenue: US\$6.53
- Average consumption: 1.1 kg per person
- Growth Rate: 3.01% CAGR (2025–2029)
- Volume growth in 2026: +2.5%
- Projected volume by 2029: 50.7 million kg

Australia & Oceania

Valued at **US\$560.24 million** in 2025, the baby diapers market in Australia and Oceania is on a growth trajectory, with an expected annual increase of **4.11%** (CAGR 2025–2029). The region's market volume is projected to reach **62.2 million kg** by 2029, with per capita diaper usage averaging 1.4 kg in 2025. Revenue per person is forecasted at **US\$12.76**. Notably, this growth is accompanied by a rising demand for sustainable and organic diaper options, especially in Australia, where eco-conscious consumer habits are influencing product choices. A modest volume increase of **+0.6%** is anticipated in 2026.

Europe

Sustainability has become a defining theme in Europe's baby diaper market, with increasing demand for eco-friendly and organic products across the continent. Countries like Germany and regions in Northern and Eastern Europe are witnessing a surge in environmentally conscious consumer behavior, with parents prioritizing both sustainability and health-focused features. The market is expected to generate **US\$9.73 billion** in revenue in 2025, with a projected annual growth rate of **3.62%** (CAGR 2025–2029). By 2029, volume is forecasted to reach **1.1 billion kg**. Per capita revenue is anticipated to be **US\$7.78**, with diaper usage averaging **1.3 kg** per person in 2025. A modest volume growth of **+0.6%** is expected in 2026.

Regional Highlights:

Central & Western Europe:

- Revenue: US\$5.02 billion in 2025
- Per capita revenue: US\$14.97
- Average consumption: 1.5 kg per person
- Growth Rate: 3.30% CAGR (2025–2029)
- Volume growth in 2026: +0.3%
- Projected volume by 2029: 516.3 million kg

Eastern Europe:

- Revenue: US\$1.69 billion in 2025
- Per capita revenue: US\$7.08
- Average consumption: 0.6 kg per person
- Growth rate: 2.14% CAGR (2025–2029)
- Volume growth in 2026: -1.6% (slight decline)
- Projected volume by 2029: 139.7 million kg

Northern Europe:

- Revenue: US\$586.72 million in 2025
- Per capita revenue: US\$17.27 (highest among subregions)
- Average consumption: 1.4 kg per person
- Growth rate: 3.45% CAGR (2025–2029)
- Volume growth in 2026: -0.6% (slight decline)
- Projected volume by 2029: 47.5 million kg

Africa

Driven by a growing environmental consciousness and expanding urban populations, Africa's baby diaper market is experiencing robust momentum. Demand for eco-friendly and biodegradable products is on the rise, particularly in Nigeria, Western Africa, and Northern Africa. In Eastern Africa, urbanization and rising disposable incomes are key growth drivers. In 2025, the market is expected to generate **US\$4.41 billion** in revenue, with an impressive annual growth rate of **8.76%** (CAGR 2025–2029). Market volume is projected to reach **992 million kg** by 2029. Per capita revenue is forecasted at **US\$3.32**, with average diaper consumption at 0.6 kg per person. A healthy volume growth of **+4.1%** is anticipated in 2026.

Regional Highlights:

Western Africa:

- Revenue: US\$1.55 billion in 2025
- Per capita revenue: US\$3.67
- Average consumption: 0.6 kg per person
- Growth Rate: 9.76% CAGR (2025–2029)
- Volume growth in 2026: +4.2%
- Projected volume by 2029: 291.9 million kg

Eastern Africa:

- Revenue: US\$1.06 billion in 2025
- Per capita revenue: US\$2.26
- Average consumption: 0.5 kg per person (2025)
- Growth Rate: 7.30% CAGR (2025–2029)
- Volume growth in 2026: +5.1%
- Projected volume by 2029: 260.0 million kg

Northern Africa:

- Revenue: US\$970.39 million in 2025
- Per capita revenue: US\$3.66
- Average consumption: 0.9 kg per person
- Growth Rate: 8.64% CAGR (2025–2029)
- Projected volume by 2029: 264.3 million kg
- Volume growth in 2026: +3.7%

Central Africa:

- Revenue: US\$349.90 million in 2025
- Per capita revenue: US\$3.53
- Average consumption: 0.8 kg per person
- Growth Rate: 7.21% CAGR (2025–2029)
- Volume growth in 2026: +4.8%
- Projected volume by 2029: 91.8 million kg

Southern Africa:

- Revenue: US\$472.73 million in 2025
- Per capita revenue: US\$6.68
- Average consumption: 1.1 kg per person
- Growth Rate: 9.97% CAGR (2025–2029)
- Volume growth in 2026: +1.8%
- Projected volume by 2029: 84.0 million kg

Asia

Driven by rising disposable incomes, population growth, and increasing demand for eco-friendly baby products, Asia's baby diapers market is poised to reach **US\$31.99 billion** in 2025. The region is expected to grow steadily at an annual rate of **6.34%** (CAGR 2025–2029), with market volume projected to hit 5.9 billion kg by 2029. On average, each person is forecasted to contribute **US\$7** in revenue and consume around **1.1 kg** of baby diapers in 2025. Volume growth of **+3.9%** is anticipated in 2026. China remains the global leader in this segment, with projected revenue of **US\$13 billion** in 2025. Throughout the region, Japan focuses on high-quality, innovative, and sustainable diapers; Southeast and Western Asia are seeing strong interest in organic options; and in Southern Asia, particularly India, demand is rising rapidly due to expanding populations and improved living standards.

Regional Highlights:

Eastern Asia:

- Revenue: US\$15.67 billion in 2025
- Per capita revenue: US\$9.60
- Average consumption: 1.5 kg per person
- Growth rate: 6.52% CAGR (2025–2029)
- Volume growth in 2026: +4.2%
- Projected volume by 2029: 2.9 billion kg

Southern Asia:

- Revenue: US\$8.88 billion in 2025
- Per capita revenue: US\$4.59
- Average consumption: 0.8 kg per person
- Growth rate: 6.38% CAGR (2025–2029)
- Volume growth in 2026: +4.2%
- Projected volume by 2029: 1.8 billion kg

Southeast Asia:

- Revenue: US\$5.03 billion in 2025
- Per capita revenue: US\$7.21
- Average consumption: 1.1 kg per person
- Growth Rate: 5.95% CAGR (2025–2029)
- Volume growth in 2026: +3.5%
- Projected volume by 2029: 862.0 million kg

Western Asia:

- Revenue: US\$1.98 billion in 2025
- Per capita revenue: US\$8.80
- Average consumption: 1.4 kg per person
- Growth Rate: 6.20% CAGR (2025–2029)
- Volume growth in 2026: +2.5%
- Projected volume by 2029: 335.1 million kg

Central Asia:

- Revenue: US\$431.25 million in 2025
- Per capita revenue: US\$5.37
- Average consumption: 0.7 kilograms per person
- Growth Rate: 3.70% CAGR (2025–2029)
- Volume growth in 2026: -0.8% (slight decline)
- Projected volume by 2029: 57.1 million kg

INCONTINENCE HYGIENE

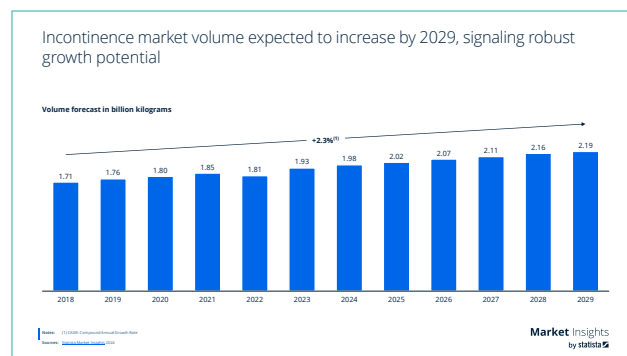
The global incontinence products market is expanding steadily, fueled primarily by an aging population and the rising prevalence of incontinence. As life expectancy increases worldwide, demand for effective, comfortable, and discreet incontinence solutions continues to rise. However, the market also faces notable challenges, including high product costs, persistent social stigma, and unequal access to care.

Affordability remains a significant concern, as many incontinence products are not covered by insurance and can place a financial strain on individuals, particularly the elderly and those in low-income communities. This has led to increasing demand for budget-friendly alternatives and greater advocacy for government-funded programs to provide support to those in need.

Stigma is another major hurdle; many individuals are reluctant to discuss their needs, resulting in delayed treatment and increased difficulty managing incontinence. This social barrier continues to hinder market visibility and product adoption, despite growing awareness efforts.

Limited access to care, particularly in rural or underserved communities, can also be a challenge for the incontinence products market. This can lead to a lack of access to appropriate products and services and can further exacerbate the issue of stigma surrounding incontinence.

Despite these issues, the global market is expected to grow significantly. In 2025, the incontinence hygiene sector is projected to generate **US\$17.92 billion** in revenue, with a compound annual growth rate (CAGR) of **3.90%** from 2025 to 2029. The United States leads the market with an anticipated revenue of **US\$5 billion** in 2025. On average, global per capita revenue is forecasted at **US\$2.29**, with consumption reaching approximately **0.3 kg** per person that year. By 2029, market volume is expected to reach **2.2 billion kg**, with a projected volume increase of **2.2%** in 2026, driven by sustained demand, especially in aging populations.



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OUTLOOK

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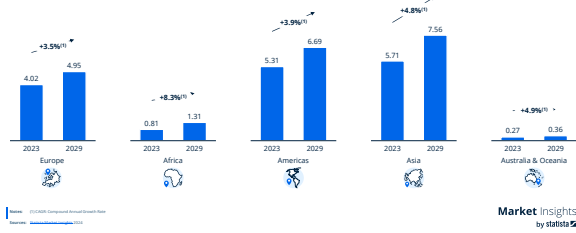
WIPES DAY
Innovations
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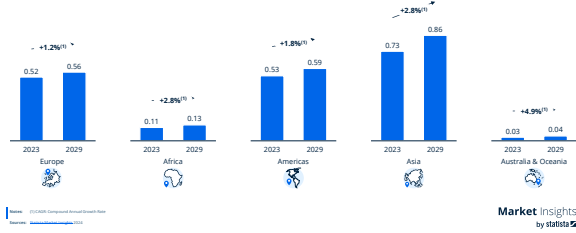
Asia is projected to lead in the Incontinence market revenue by 2029

Revenue forecast in billion US\$



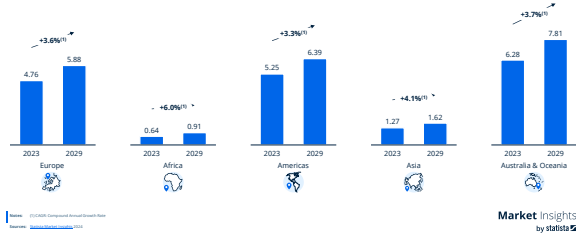
Asia is projected to lead in Incontinence market volume by 2029

Volume forecast in billion kilograms



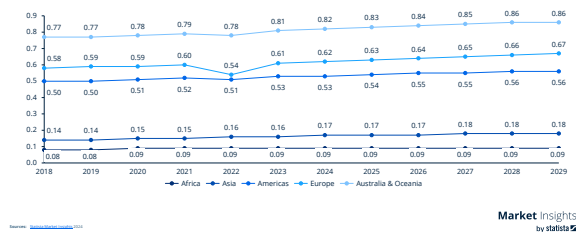
Australia & Oceania leads in average revenue per capita in the Incontinence market by 2029

Average revenue per capita forecast in US\$



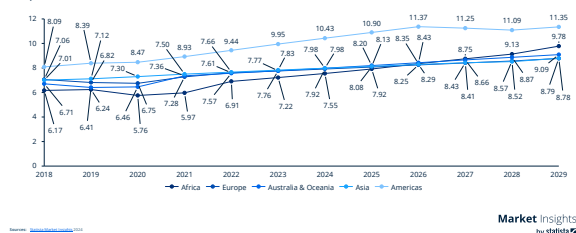
Australia & Oceania leads in per capita volume in the Incontinence market by 2029

Average volume per capita forecast in kilograms



Americas is projected to lead in price per unit in the Incontinence market by 2029

Price per unit forecast in US\$



REGIONAL MARKET OUTLOOK

Americas

The incontinence hygiene market in the Americas is evolving in response to shifting demographics, rising awareness, and regional healthcare priorities. Revenue is projected to reach **US\$6.03 billion** in 2025, with growth forecasted at a CAGR of **2.64%** between 2025 and 2029. Average per capita revenue stands at **US\$5.89**, with consumption reaching **0.5 kg** per person. Market volume is expected to grow moderately, with a **1.8%** increase anticipated in 2026, ultimately reaching **589.6 million kg** by 2029. The United States continues to dominate the region, generating **US\$5 billion** in 2025. In North America, the aging population is driving demand for high-quality, discreet incontinence products designed for comfort and convenience. In South America, there is growing emphasis on maintaining dignity and quality of life for older adults, leading to innovation in product design. Central America's market is expanding rapidly due to improved awareness of hygiene and healthcare needs. Meanwhile, in the Caribbean, interest in innovative and eco-friendly solutions is growing despite an overall market contraction.

Regional Highlights:

North America:

- Revenue: US\$5.37 billion in 2025
- Per capita revenue: US\$10.47
- Average consumption: 0.9 kg per person
- Growth rate: 2.43% CAGR (2025–2029)
- Volume growth in 2026: 1.6%
- Projected volume by 2029: 486.5 million kg

South America:

- Revenue: US\$540.59 million in 2025
- Per capita revenue: US\$1.30
- Average consumption: 0.2 kg per person
- Growth rate: 5.23% CAGR (2025–2029)
- Volume growth in 2026: 2.6%
- Projected volume by 2029: 85.3 million kg

Central America:

- Revenue: US\$57.35 million in 2025
- Per capita revenue: US\$1.07
- Average consumption: 0.2 kg per person
- Growth rate: 5.14% CAGR (2025–2029)
- Volume growth in 2026: 2.7%
- Projected volume by 2029: 9.7 million kg

Caribbean:

- Revenue: US\$59.66 million in 2025
- Per capita revenue: US\$1.46
- Average consumption: 0.2 kg per person
- Growth rate: -6.68% CAGR (2025–2029)
- Volume growth in 2026: 1.7%
- Projected volume by 2029: 8.1 million kg

Australia & Oceania

Despite a relatively small population, the region's market shows steady growth fueled by increasing awareness and an aging population. Revenue is expected to reach **US\$298 million** in 2025, with a CAGR of **4.70%** projected through 2029. Per capita revenue stands at **US\$6.78**, and average

product consumption is **0.8 kg** per person. Market volume is set to reach **39.4 million kg** by 2029, with a **2.3%** volume growth anticipated in 2026.

Asia

Asia's incontinence hygiene market is witnessing dynamic growth, driven by demographic shifts and rising awareness of elderly care needs. Revenue is projected to reach **US\$6.31 billion** in 2025, with an expected CAGR of **4.61%** through 2029. Per capita revenue stands at **US\$1.38**, with average product consumption at **0.2 kg** per person. Market volume is forecasted to reach **860.4 million kg** by 2029, and a **3.0%** volume growth is anticipated in 2026. Japan leads the region with cutting-edge, high-tech wearable solutions that emphasize both comfort and discretion. In Southeast and Southern Asia, demand is accelerating due to aging populations and growing awareness around incontinence management. Meanwhile, Central and Western Asia are seeing increased interest in discreet, elderly-focused hygiene solutions.

Regional Highlights:

Eastern Asia:

- Revenue: US\$2.35 billion in 2025
- Per capita revenue: US\$1.44
- Average consumption: 0.2 kg per person
- Growth rate: 4.31% CAGR (2025–2029)
- Volume growth in 2026: 2.7%
- Projected volume by 2029: 302.4 million kg

Southern Asia:

- Revenue: US\$1.98 billion in 2025
- Per capita revenue: US\$1.02
- Average consumption: 0.1 kg per person
- Growth rate: 4.58% CAGR (2025–2029)
- Volume growth in 2026: 3.1%
- Projected volume by 2029: 289.7 million kg

Southeast Asia:

- Revenue: US\$1.36 billion in 2025
- Per capita revenue: US\$1.95
- Average consumption: 0.2 kg per person
- Growth rate: 5.13% CAGR (2025–2029)
- Volume growth in 2026: 3.5%
- Projected volume by 2029: 184.8 million kg

Western Asia:

- Revenue: US\$562.71 million in 2025
- Per capita revenue: US\$2.5
- Average consumption: 0.3 kg per person
- Growth rate: 4.47% CAGR (2025–2029)
- Volume growth in 2026: 2.1%
- Projected volume by 2029: 72.2 million kg

Central Asia:

- Revenue: US\$56.94 million in 2025
- Per capita revenue: US\$0.71
- Average consumption: 0.1 kg per person
- Growth rate: 6.81% CAGR (2025–2029)
- Volume growth in 2026: 3.5%
- Projected volume by 2029: 11.3 million kg

Europe

Europe's incontinence hygiene market is evolving in response to demographic changes and shifting consumer expectations. Revenue is projected to reach **US\$4.32 billion** in 2025, with a CAGR of **3.46%** through 2029. Average per capita revenue stands at **US\$5.12**, while individual product consumption is expected to reach **0.6 kg**. By 2029, market volume is anticipated to hit **564.4 million kg**, with a modest **1.5%** volume growth forecasted for 2026. Germany leads the region through continuous innovation in elderly-focused incontinence technologies. In Central and Western Europe, high-quality solutions are being developed to meet the complex needs of aging populations. Eastern Europe is showing a strong shift toward discreet, comfort-oriented products, while Northern Europe is experiencing a growing demand for sustainable, eco-conscious alternatives. Meanwhile, Southern Europe—especially Italy—is embracing discreet and environmentally responsible solutions.

Regional Highlights:

Central & Western Europe:

- Revenue: US\$2.53 billion in 2025
- Per capita revenue: US\$7.56
- Average consumption: 1.0 kg per person
- Growth rate: 3.35% CAGR (2025–2029)
- Volume growth in 2026: 1.5%
- Projected volume by 2029: 337.2 million kg

Eastern Europe:

- Revenue: US\$469.73 million in 2025
- Per capita revenue: US\$1.97
- Average consumption: 0.2 kg per person
- Growth rate: 4.07% CAGR (2025–2029)
- Volume growth in 2026: 1.5%
- Projected volume by 2029: 58.4 million kg

Northern Europe:

- Revenue: US\$265.11 million in 2025
- Per capita revenue: US\$7.81
- Average consumption: 0.9 kg per person
- Growth rate: 4.15% CAGR (2025–2029)
- Volume growth in 2026: 1.9%
- Projected volume by 2029: 34.1 million kg

Southern Europe:

- Revenue: US\$1.05 billion in 2025
- Per capita revenue: US\$4.46
- Average consumption: 0.5 kg per person
- Growth rate: 3.28% CAGR (2025–2029)
- Volume growth in 2026: 1.4%
- Projected volume by 2029: 134.7 million kg

Africa

Africa's incontinence hygiene market is experiencing strong growth, driven by a growing elderly population, improved hygiene awareness, and increasing access to incontinence care. Western Africa leads in momentum with rising demand for eco-friendly and innovative solutions. In 2025, revenue is projected to reach **US\$952.99 million**, with growth expected at a CAGR of **8.37%** from 2025 to 2029. Per capita revenue is forecasted at **US\$0.72**, with average product consumption

at **0.1 kg** per person. By 2029, market volume is anticipated to reach **134.4 million kg**, with a projected volume growth of **3.2%** in 2026.

Regional Highlights:

Western Africa:

- Revenue: US\$438.59 million in 2025
- Per capita revenue: US\$1.04
- Average consumption: 0.1 kg per person
- Growth rate: 10.54% CAGR (2025–2029)
- Volume growth in 2026: **3.2%**
- Projected volume by 2029: 42.1 million kg

Central Africa:

- Revenue: US\$59.00 million in 2025
- Per capita revenue: US\$0.59
- Average consumption: 0.1 kg per person
- Growth rate: 6.10% CAGR (2025–2029)
- Volume growth in 2026: 3.8%
- Projected volume by 2029: 11.3 million kg

Eastern Africa:

- Revenue: US\$198.42 million in 2025
- Per capita revenue: US\$0.42
- Average consumption: 0.1 kg per person
- Growth rate: 6.58% CAGR (2025–2029)
- Volume growth in 2026: 4.2%
- Projected volume by 2029: 37.8 million kg

Northern Africa:

- Revenue: US\$183.08 million in 2025
- Per capita revenue: US\$0.69
- Average consumption: 0.1 kg per person
- Growth rate: 5.96% CAGR (2025–2029)
- Volume growth in 2026: 2.7%
- Projected volume by 2029: 34.0 million kg

Southern Africa:

- Revenue: US\$73.91 million in 2025
- Per capita revenue: US\$1.04
- Average consumption: 0.1 kg per person
- Growth rate: 7.33% CAGR (2025–2029)
- Volume growth in 2026: 0.9%
- Projected volume by 2029: 9.2 million kg

China will top the global revenue in incontinence market generating around US\$13 billion.

FEMINE HYGIENE

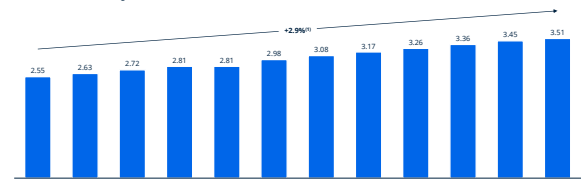
The global feminine hygiene products market is undergoing a significant transformation, driven by rising consumer awareness of environmental concerns and the push for more sustainable solutions. Traditional products like disposable sanitary pads and tampons contribute significantly to global waste, with billions ending up in landfills annually. In response, demand is growing for eco-friendly alternatives such as reusable menstrual cups, cloth pads, and biodegradable options—offering lower environmental impact and aligning with the values of increasingly conscious consumers.

The shift toward digital shopping habits is also shaping the market. The increasing popularity of e-commerce platforms is making it easier for consumers to access a wider range of personal care products, including innovative and sustainable hygiene solutions—supporting continued growth in online sales.

In 2025, the global feminine hygiene market is projected to generate **US\$52.31 billion** in revenue, with a compound annual growth rate (CAGR) of **4.83%** between 2025 and 2029. China leads the market with an estimated **US\$13 billion** in revenue. On average, the global market generates about **US\$6.70** per person. Despite cultural taboos in some regions, demand continues to rise—especially in large emerging markets like India and China—fueled by increased awareness and evolving consumer preferences.

Feminine Hygiene market volume is set to increase by 2029, indicating significant growth trends

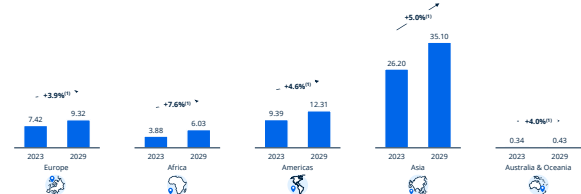
Volume forecast in billion kilograms



Market Insights by Statista

Asia is poised to lead in Feminine Hygiene market revenue by 2029

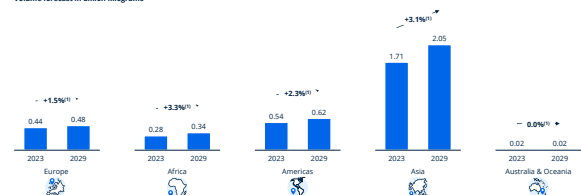
Revenue forecast in billion US\$



Market Insights by Statista

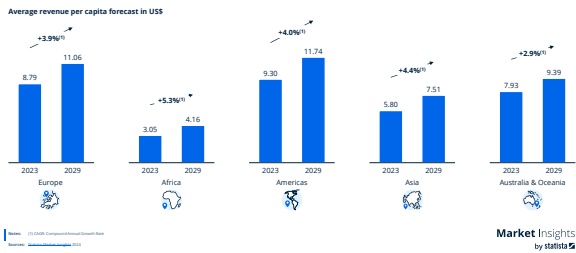
Asia is projected to lead in the Feminine Hygiene market volume by 2029

Volume forecast in billion kilograms

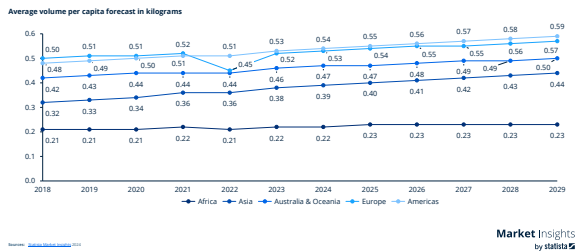


Market Insights by Statista

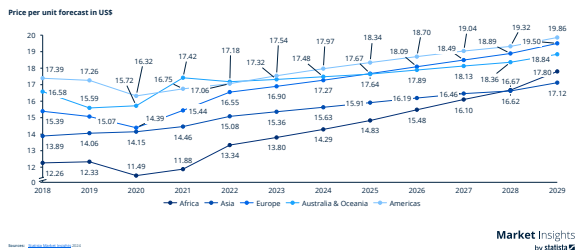
Americas is projected to lead in average revenue per capita in the Feminine Hygiene market by 2029



Americas set to lead in per capita Feminine Hygiene market volume by 2029



Americas poised to lead in price per unit in the Feminine Hygiene market by 2029



REGIONAL MARKET OUTLOOK

Americas

Consumer preferences across the Americas are increasingly shifting toward organic and sustainable feminine hygiene solutions, with heightened awareness around health, environmental impact, and product transparency. This evolving landscape is encouraging major brands, especially in North and Central America, to expand their eco-friendly product lines. In 2025, the feminine hygiene market in the region is expected to generate **US\$10.37 billion** in revenue, with a projected compound annual growth rate (CAGR) of **4.37%** through 2029. On a per capita basis, average revenue is forecasted at **US\$10.13**.

Regional Highlights

North America:

- Revenue: US\$6.66 billion in 2025
- Per capita revenue: US\$12.96
- Growth rate: 4.26% CAGR (2025–2029)

Central America:

- Revenue: US\$287.30 million in 2025
- Per capita revenue: US\$5.37
- Growth Rate: 5.11% CAGR (2025–2029)

South America:

- Revenue: US\$3.18 billion in 2025
- Per capita revenue: US\$7.64
- Growth rate: 4.72% CAGR (2025–2029)

Caribbean:

- Revenue: US\$249.73 million in 2025
- Per capita revenue: US\$6.12
- Growth rate: 1.70% CAGR (2025–2029)

Australia & Oceania

In 2025, the Feminine Hygiene market in Australia & Oceania is projected to generate a revenue of **US\$366.85 million**. The market is expected to grow at an annual rate of **4.07% CAGR** (2025–2029). In terms of per capita revenue, each person in Australia & Oceania is estimated to contribute **US\$8.35** in 2025.

Asia

Asia's feminine hygiene market is undergoing a transformation as sustainability gains ground across the region. In 2025, revenue is projected to reach **US\$29.09 billion**, with growth expected at a CAGR of **4.81%** between 2025 and 2029. Per capita revenue stands at **US\$6.36**. Demand for eco-friendly, sustainable, and reusable products is on the rise, fueled by diverse cultural, economic, and environmental drivers. Countries like Indonesia are leading growth in Southeast Asia through increased adoption of organic and biodegradable options. In Eastern and Western Asia, organic and eco-conscious products are rapidly gaining traction. Meanwhile, Central Asia is witnessing a notable shift toward menstrual cups and cloth pads, and in Southern Asia, discreet, sustainable products are becoming more popular due to prevailing cultural taboos.

Regional Highlights:

Central Asia

- Revenue: US\$312.23 million in 2025
- Per capita revenue: US\$3.89
- Growth rate: 6.74% CAGR (2025–2029)

Eastern Asia

- Revenue: US\$14.63 billion in 2025
- Per capita revenue: US\$8.96
- Growth rate: 4.77% CAGR (2025–2029)

Southeast Asia

- Revenue: US\$4.34 billion in 2025
- Per capita revenue: US\$6.21
- Growth rate: 4.67% CAGR (2025–2029)

Southern Asia

- Revenue: US\$8.08 billion in 2025
- Per capita revenue: US\$4.17
- Growth rate: 4.90% CAGR (2025–2029)

Western Asia

- Revenue: US\$1.73 billion in 2025
- Per capita revenue: US\$7.71
- Growth rate: 4.65% CAGR (2025–2029)

Europe

Sustainability continues to shape consumer behavior in Europe's feminine hygiene market. In 2025, the sector is expected to generate **US\$8.01 billion** in revenue, with a projected CAGR of **3.84%** through 2029. Average per capita revenue is estimated at **US\$9.50**. Eco-conscious choices are driving product innovation and consumption across the continent. In Northern Europe, Sweden stands out for its strong adoption of sustainable hygiene solutions, while Southern Europe—particularly Spain—is seeing a steady rise in demand for organic and environmentally friendly alternatives. This shift reflects a broader continental move toward products that prioritize health, transparency, and environmental impact.

Regional Highlights:

Central & Western Europe

- Revenue: US\$3.69 billion in 2025
- Per capita revenue: US\$11.01
- Growth rate: 3.17% CAGR (2025–2029)

Northern Europe

- Revenue: US\$376.84 million in 2025
- Per capita revenue: US\$11.09
- Growth rate: 3.52% CAGR (2025–2029)

Southern Europe

- Revenue: US\$1.98 billion in 2025
- Per capita revenue: US\$8.36
- Growth rate: 4.97% CAGR (2025–2029)

Eastern Europe

- Revenue: US\$1.97 billion in 2025
- Per capita revenue: US\$8.27
- Growth rate: 3.99% CAGR (2025–2029)

Africa

The feminine hygiene market in Africa is gaining momentum as awareness around personal hygiene grows and access to essential products improves. In 2025, the market is projected to generate **US\$4.47 billion** in revenue, with a robust CAGR of **7.74%** through 2029. Per capita revenue is expected to reach **US\$3.36**. Increasing educational initiatives, urbanization, and a gradual shift in cultural perceptions are contributing to wider acceptance and use of feminine hygiene products across the continent. As affordability and availability improve, so does the demand for both basic and eco-conscious product options.

Regional Highlights:

Central Africa:

- Revenue: US\$309.06 million in 2025
- Per capita revenue: US\$3.11
- Growth rate: 6.45% CAGR (2025–2029)

Eastern Africa:

- Revenue: US\$921.07 million in 2025
- Per capita revenue: US\$1.96
- Growth rate: 6.79% CAGR (2025–2029)

Northern Africa:

- Revenue: US\$948.69 million in 2025
- Per capita revenue: US\$3.58
- Growth Rate: 6.04% CAGR (2025–2029)

Southern Africa:

- Revenue: US\$468.42 million in 2025
- Per capita revenue: US\$6.62
- Growth rate: 7.10% CAGR (2025–2029)

Western Africa:

- Revenue: US\$1.83 billion in 2025
- Per capita revenue: US\$4.31
- Growth Rate: 9.40% CAGR (2025–2029)

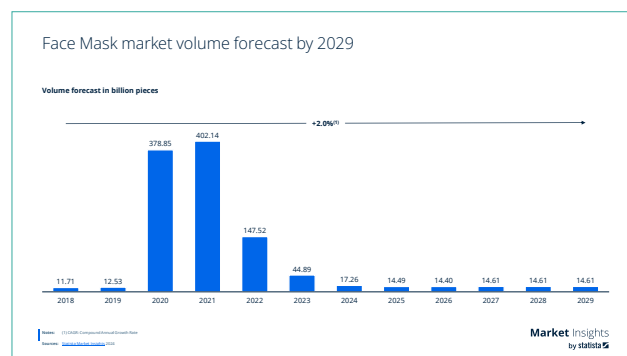
FACE MASKS

Originally used almost exclusively by medical professionals, face masks became an everyday essential for billions of people during the COVID-19 pandemic. The global surge in demand transformed the face mask market virtually overnight, with over 378 billion masks sold in 2020. China and India led in both consumption and export volumes, while industries ranging from automotive to electronics pivoted to produce face masks to meet urgent global needs.

This explosive demand triggered a spike in prices, with average global costs increasing more than 500% compared to 2019. In response, many governments imposed emergency price caps to curb profiteering and ensure supply. By 2021, the recovery of supply chains and manufacturing capacity brought prices down in most regions, though regulations such as Europe's FFP mask mandates sustained above-average costs in some areas.

As mass vaccination reduced COVID-19 cases and mask mandates eased, demand began to taper, still, the market remains substantial: **global revenues are projected to reach US\$4.14 billion in 2025**, with **Japan emerging as the top revenue contributor at US\$750 million**. On average, **per capita revenue is estimated at US\$0.53**, and **market volume is expected to reach 14.6 billion pieces by 2029**. A modest **-0.6% volume decline in 2026** reflects the broader slowdown, though this is considered minor and consistent with the post-pandemic normalization.

While demand has eased from its pandemic-era peak, face masks are likely to remain essential in healthcare settings and for vulnerable individuals, and could see renewed uptake in response to seasonal outbreaks or evolving public health needs.



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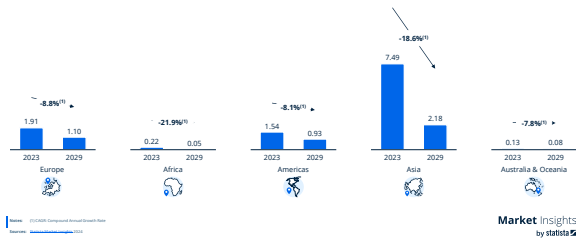
July 1-3, 2025, RMCC Wiesbaden, Germany

ZELL  CHEMING
EXPO



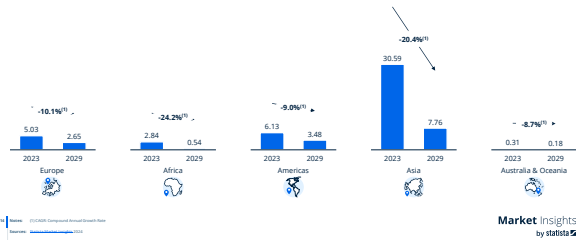
Asia is projected to lead in Face Mask market revenue by 2029

Revenue forecast in billion US\$



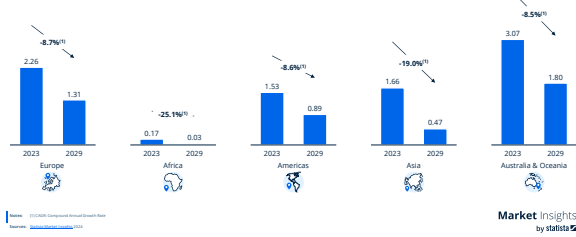
Asia is projected to lead in the Face Mask market volume by 2029

Volume forecast in billion pieces



Australia & Oceania is projected to lead in the Face Mask market by having the highest average revenue per capita by 2029

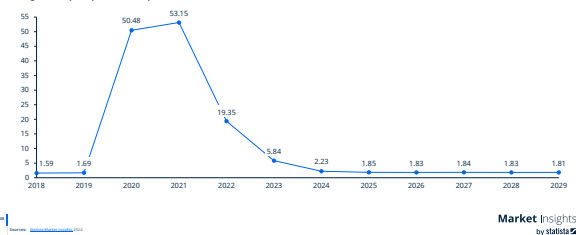
Average revenue per capita forecast in US\$



Face Mask market shows promising growth with an increase in average volume per capita expected by 2029

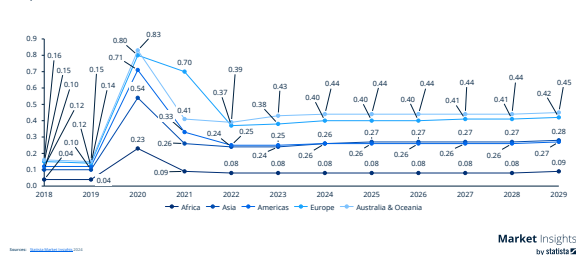
Market size: Worldwide (45)

Average volume per capita forecast in pieces



Australia & Oceania set to lead in price per unit in the Face Mask market by 2029

Price per unit forecast in US\$



REGIONAL MARKET OUTLOOK

Americas

In 2025, the Face Masks market in the Americas is projected to generate a revenue of **US\$900.16 million**. The market is expected to grow annually by **0.94%** (CAGR 2025-2029). In terms of per capita revenue, the Americas is expected to generate **US\$0.88** per person in 2025. By 2029, the volume in the Face Masks market is expected to reach **3.5 billion pieces**, with an anticipated volume decline of **-0.3%** in 2026. On average, each person in the Americas is projected to consume **3.38 pieces** of face masks in 2025.

Regional Highlights:

North America:

- Revenue: US\$608.71 million in 2025
- Per capita revenue: US\$1.19
- Average Consumption: 4.20 pieces per person
- Growth rate: 0.63% CAGR (2025-2029)
- Volume growth in 2026: -0.3%
- Projected volume by 2029: 2.2 billion pieces

South America:

- Revenue: US\$263.54 million in 2025
- Per capita revenue: US\$0.63 (2025)
- Average consumption: 2.89 pieces per person
- Growth rate: 1.69% CAGR (2025-2029)
- Volume growth in 2026: -0.1%
- Projected volume by 2029: 1.2 billion pieces

Central America:

- Revenue: US\$14.08 million in 2025
- Per capita revenue: US\$0.26
- Average consumption: 1.01 pieces per person
- Growth rate: -0.18% CAGR (2025-2029)
- Volume growth in 2026: -3.4%
- Projected volume by 2029: 52.7 million pieces

Caribbean:

- Revenue: US\$13.83 million in 2025
- Per capita revenue: US\$0.34
- Average consumption: 1.05 pieces per person
- Growth rate: 1.17% CAGR (2025-2029)
- Volume growth in 2026: -3.4%
- Projected volume by 2029: 41.6 million pieces

Australia & Oceania

The face masks market in Australia & Oceania is projected to generate **US\$79.12 million** in revenue by 2025, with a modest **compound annual growth rate (CAGR) of 1.06%** expected through 2029. Per capita revenue is estimated at **US\$1.80**, with average individual consumption reaching **4.07 face masks per person**. Market volume is anticipated to grow to **181.8 million pieces by 2029**, although a slight decline of **-0.5%** in volume growth is expected in 2026.

Regional Highlights:

- Revenue: US\$79.12 million in 2025
- Per capita revenue: US\$1.80 (2025)
- Average Consumption: 4.07 pieces per person
- Growth rate: 1.06% CAGR (2025-2029)
- Volume growth in 2026: -0.5%
- Projected volume by 2029: **181.8 million pieces**

Asia

The Face Masks market in Asia is set to generate **US\$2.05 billion** in revenue in 2025, with **Japan leading the region at US\$750 million**. On average, each person is expected to consume **1.66 face masks**, corresponding to a **per capita revenue of US\$0.45**.

Looking ahead, the market is projected to grow at a **1.67% compound annual growth rate (CAGR)** through 2029. A minor setback is expected in 2026, with volume growth dipping slightly by **-0.1%**. Despite this, total market volume is anticipated to reach **7.8 billion pieces** by 2029.

Regional Highlights:

Central Asia:

- Revenue: US\$30.75 million in 2025
- Per capita revenue: US\$0.38
- Average Consumption: 3.28 pieces per person
- Growth Rate: 2.57% CAGR (2025–2029)
- Volume growth in 2026: -0.3%
- Projected volume by 2029: 265.1 million pieces

Eastern Asia:

- Revenue: US\$1.39 billion in 2025
- Per capita revenue: US\$0.85
- Average Consumption: 2.73 pieces per person
- Growth rate: 2.01% CAGR (2025–2029)
- Volume growth in 2026: -1.0%
- Projected volume by 2029: 4.6 billion pieces

Southeast Asia:

- Revenue: US\$112.35 million in 2025
- Per capita revenue: US\$0.16
- Average Consumption: 1.06 pieces per person
- Growth rate: 0.20% CAGR (2025–2029)
- Volume growth in 2026: -2.8%
- Projected volume by 2029: 723.1 million pieces

Southern Asia:

- Revenue: US\$462.14 million in 2025
- Per capita revenue: US\$0.24
- Average Consumption: 0.99 pieces per person
- Growth rate: 1.12% CAGR (2025–2029)
- Volume growth in 2026: -1.3%
- Projected volume by 2029: 1.9 billion pieces

Western Asia

- Revenue: US\$51.65 million in 2025
- Per capita revenue: US\$0.23
- Average Consumption: 0.98 pieces per person
- Growth rate: -0.07% CAGR (2025–2029)
- Volume growth in 2026: -3.1%
- Projected volume by 2029: 214.6 million pieces

Europe

The Face Masks market in Europe is **expected to generate US\$1.07 billion** in revenue in 2025, with a **per capita revenue of US\$1.27**. Average consumption is estimated at **3.16 face masks per person** across the region.

This segment is **forecast to grow at a modest CAGR of 0.85%** through 2029. A **slight volume decline of -0.9%** is anticipated in 2026. By 2029, total volume is **set to reach 2.7 billion pieces**. On the global stage, **Japan remains the**

top revenue-generating country, with **US\$750 million** in expected revenue for 2025.

Regional Highlights:

Northern Europe:

- Revenue: US\$88.45 million in 2025
- Per capita revenue: US\$2.60 per person
- Average Consumption: 4.57 pieces (2025)
- Growth rate: 0.82% CAGR (2025–2029)
- Projected volume by 2029: 154.8 million pieces
- Volume growth in 2026: -0.5%

Southern Europe:

- Revenue: US\$155.57 million in 2025
- Per capita revenue: US\$0.66
- Average Consumption: 1.89 pieces per person
- Growth rate: 0.89% CAGR (2025–2029)
- Volume growth in 2026: -1.6%
- Projected volume by 2029: 442.3 million pieces

Eastern Europe:

- Revenue: US\$145.60 million in 2025
- Per capita revenue: US\$0.61
- Average Consumption: 3.02 pieces per person
- Growth rate: 1.16% CAGR (2025–2029)
- Volume growth in 2026: -1.4%
- Projected volume by 2029: 707.6 million pieces

Central & Western Europe:

- Revenue: US\$678.12 million in 2025
- Per capita revenue: US\$2.02
- Average Consumption: 4.02 pieces per person
- Growth rate: 0.77% CAGR (2025–2029)
- Volume growth in 2026: -0.5%
- Projected volume by 2029: 1.3 billion pieces

Africa

Revenue in Africa's Face Masks market is anticipated to reach **US\$45.99 million** in 2025, translating to a per capita revenue of just **US\$0.03**. Average usage remains low, with **0.44 face masks per person** expected that year.

The market is **forecast to grow at a modest CAGR of 0.34%** through 2029. A notable challenge is expected in 2026, with a **sharp volume decline of -8.2%**. Still, the total volume is expected to reach **541.5 million pieces** by 2029.

Regional Highlights:

Central Africa:

- Revenue: US\$2.11 million in 2025
- Per capita revenue: US\$0.02
- Average Consumption: 0.23 pieces per person
- Growth rate: -3.53% CAGR (2025–2029)
- Volume growth in 2026: -17.7%
- Projected volume by 2029: 18.8 million pieces

Eastern Africa:

- Revenue: US\$11.98 million in 2025
- Per capita revenue: US\$0.03
- Average Consumption: 0.35 pieces per person
- Growth rate: -0.58% CAGR (2025–2029)
- Projected volume by 2029: 150.1 million pieces
- Volume growth in 2026: -10.0%

Northern Africa:

- Revenue: US\$10.44 million in 2025
- Per capita revenue: US\$0.04
- Average Consumption: 0.62 pieces per person
- Growth rate: 0.82% CAGR (2025–2029)
- Volume growth in 2026: -5.8%
- Projected volume by 2029: 154.4 million pieces

Southern Africa:

- Revenue: US\$5.13 million in 2025
- Per capita revenue: US\$0.07
- Average Consumption: 0.73 pieces per person
- Growth rate: 0.42% CAGR (2025–2029)
- Volume growth in 2026: -3.9%
- Projected volume by 2029: 50.6 million pieces

Western Africa:

- Revenue: US\$16.33 million in 2025
- Per capita revenue: US\$0.04
- Average Consumption: 0.43 pieces
- Growth rate: 1.13% CAGR (2025–2029)
- Volume growth in 2026: -8.6%
- Projected volume by 2029: 167.5 million pieces

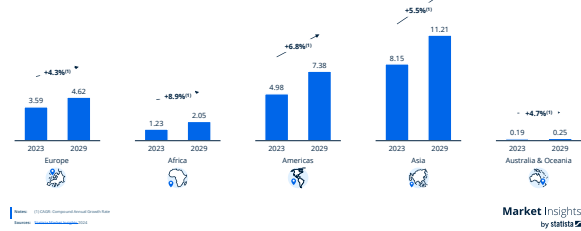
PAPER TISSUES

The global paper tissues market has seen consistent growth, fueled by rising populations, improved living standards, and greater hygiene awareness. However, challenges such as competition from reusable alternatives, rising raw material costs, and environmental pressures are shaping the market landscape. At the same time, increasing demand for premium and eco-friendly tissue products offers strong opportunities for growth and innovation.

In 2025, the paper tissues market worldwide is projected to generate a revenue of **US\$20.64 billion**. The market is expected to grow at an annual rate of **5.45% CAGR (2025–2029)**. In terms of per capita revenue, each person worldwide is estimated to contribute **US\$2.64** in 2025. By 2029, the volume in the paper tissues market is anticipated to reach **5.2 billion kg**, with a volume growth of **3.1%** expected in 2026. On average, each person is projected to consume **0.6 kg** of paper tissues in 2025. When compared globally, the United States generates the highest revenue in this segment with **US\$4 billion** in 2025. Worldwide, the demand for paper tissues has surged due to increased hygiene awareness and the growing preference for convenient, disposable products.

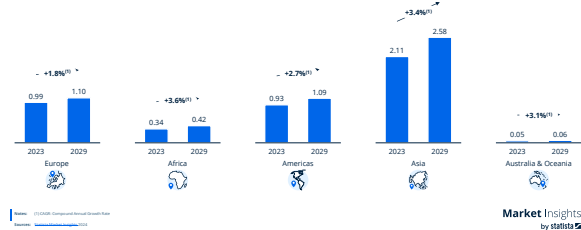
Asia is projected to lead in the Paper Tissues market revenue by 2029

Revenue forecast in billion US\$



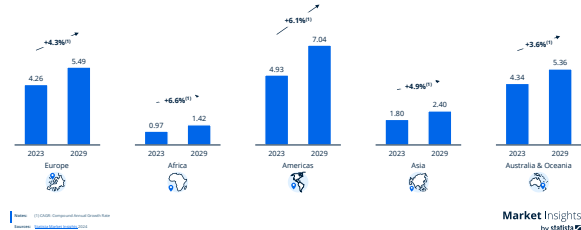
Asia is projected to lead in the Paper Tissues market volume by 2029

Volume forecast in billion kilograms



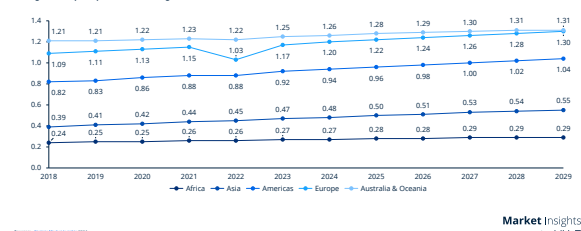
Americas set to lead in average revenue per capita for the Paper Tissues market by 2029

Average revenue per capita forecast in US\$



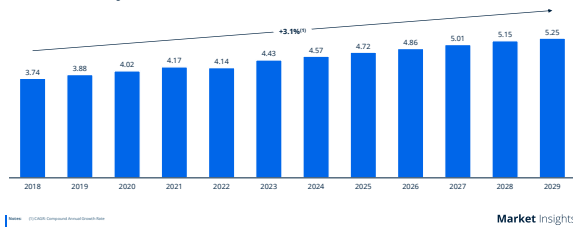
Australia & Oceania is projected to lead in per capita volume consumption of Paper Tissues by 2029

Average volume per capita forecast in kilograms



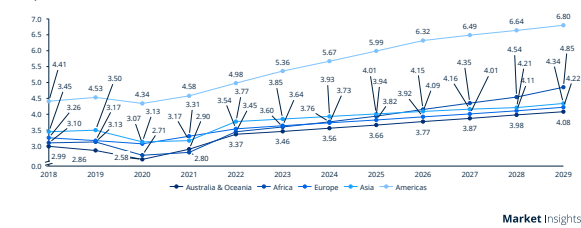
Paper Tissues market projected to experience growth in volume by 2029

Volume forecast in billion kilograms



Americas is set to lead in price per unit in the Paper Tissues market by 2029

Price per unit forecast in US\$



REGIONAL MARKET OUTLOOK

Americas

The paper tissues market in the Americas is projected to generate **US\$5.90 billion** in revenue, with an expected annual growth rate of **2.8% CAGR (2025–2029)**. The United States leads the global segment, contributing **US\$4 billion** to the total. Per capita revenue in the region is estimated at **US\$5.90**, while average consumption per person is projected to be **1.0 kg**. By 2029, market volume is forecasted to reach **1.1 billion kg**, with a volume growth of **2.8%** anticipated in 2026. Growing consumer interest in eco-friendly products continues to drive demand for sustainable paper tissue options across the Americas.

Regional Highlights:

North America:

- Revenue: US\$4.81 billion in 2025
- Per capita revenue: US\$9.37
- Average consumption: 1.3 kg per person
- Growth rate: 5.94% CAGR (2025–2029)
- Volume growth in 2026: 2.8%
- Projected volume by 2029: 740.1 million kg

Central America:

- Revenue: US\$88.65 million in 2025
- Per capita revenue: US\$1.66
- Average consumption: 0.5 kg per person
- Growth Rate: 3.2% CAGR (2025–2029)
- Volume Growth in 2026: 3.2%
- Projected Volume by 2029: 30.2 million kg

South America:

- Revenue: US\$918.95 million in 2025
- Per capita revenue: US\$2.21
- Average consumption: 0.6 kg per person
- Growth rate: 5.32% CAGR (2025–2029)
- Volume Growth in 2026: 2.8%
- Projected volume by 2029: 291.7 million kg

Caribbean:

- Revenue: US\$81.98 million in 2025
- Per capita revenue: US\$2.01 (2025)
- Average consumption: 0.5 kg per person
- Growth Rate: -0.93% CAGR (2025–2029)
- Volume Growth in 2026: 2.1%
- Projected Volume by 2029: 23.1 million kg

Australia & Oceania

The paper tissues market in Australia & Oceania is projected to generate **US\$205.04 million** in revenue, growing at an annual rate of **4.63% CAGR (2025–2029)**. Globally, the United States leads the segment with **US\$4 billion** in revenue. In Australia & Oceania, per capita revenue is estimated at **US\$4.67**, with average consumption per person projected at **1.3 kg**. By 2029, the market volume is expected to reach **60.3 million kg**, with a **2.0%** volume growth anticipated in 2026. Growing environmental awareness is driving demand for eco-friendly and recycled paper tissue products in the region.

Asia

The demand for paper tissues in Asia is driven by the growing focus on hygiene, increasing disposable incomes, and higher consumption in rapidly developing countries. In 2025, the Paper Tissues market in Asia is projected to generate a revenue of **US\$9.15 billion**. The market is expected to grow at an annual rate of **5.23% CAGR (2025–2029)**. In terms of per capita revenue, each person in Asia is estimated to contribute **US\$2** in 2025. The volume of the Paper Tissues market is projected to reach **2.6 billion kg** by 2029, with an anticipated volume growth of **3.6%** in 2026. The average volume per person is expected to be **0.5 kg** in 2025.

Regional Highlights:

Eastern Asia

- Revenue: US\$4.10 billion in 2025
- Per capita revenue: US\$2.51
- Average Consumption: 0.6kg per person
- Growth Rate: 5.11% CAGR (2025–2029)
- Projected volume by 2029: 1.1 billion kg
- Volume growth in 2026: 3.5%

Southeast Asia

- Revenue: US\$1.57 billion in 2025
- Per capita revenue: US\$2.25
- Average consumption: 0.6kg per person
- Growth rate: 5.29% CAGR (2025–2029)
- Volume growth in 2026: 3.7%
- Projected volume by 2029: 450.2 million kg

Southern Asia

- Revenue: US\$2.74bn (2025)
- Per capita revenue: US\$1.41
- Average consumption: 0.4kg per person
- Growth Rate: 5.33% CAGR (2025–2029)
- Volume Growth in 2026: 4.1%
- Projected Volume by 2029: 839.1 million kg

Central Asia

- Revenue: US\$93.19 million in 2025
- Per capita revenue: US\$1.16
- Average consumption: 0.4kg per person
- Growth rate: 7.21% CAGR (2025–2029)
- Projected volume by 2029: 36.7 million kg
- Volume growth in 2026: 4.1%

Western Asia

- Revenue: US\$643.38 million in 2025
- Per capita revenue: US\$2.86
- Average consumption: 0.7kg per person
- Growth rate: 5.07% CAGR (2025–2029)
- Volume Growth in 2026: 2.6%
- Projected volume by 2029: 180.6 million kg

Europe

The European market continues to grow, driven by increasing hygiene awareness and a focus on sustainability. In 2025, the revenue generated in the Paper Tissues market in Europe

amounts to **US\$3.93 billion**. It is projected that the market will experience an annual growth rate of **4.16%** (CAGR 2025–2029). In terms of per capita revenue, each person in Europe contributes **US\$9.50** to the Paper Tissues market in 2025. By 2029, the volume in the Paper Tissues market is expected to reach **1.1billion kg**. Additionally, there will be a volume growth of **1.8%** in 2026. On average, each person in Europe is expected to consume **1.2kg** units of paper tissues in 2025.

Regional Highlights:

Northern Europe

- Revenue: US\$213.42 million (2025)
- Growth rate: 4.20% CAGR (2025–2029)
- Projected volume by 2029: 57.6 million kg
- Per capita revenue: US\$6.28
- Average consumption: 1.6kg per person
- Volume growth in 2026: 1.4%

Southern Europe

- Revenue: US\$976.17 million in 2025
- Per capita revenue: US\$4.12
- Average consumption: 1.1 kg per person
- Growth rate: 4.62% CAGR (2025–2029)
- Volume growth in 2026: 2.3%
- Projected volume by 2029: 286.8 million kg

Central & Western Europe

- Revenue: US\$2.09bn in 2025
- Per capita revenue: US\$6.25
- Average Consumption: 1.7kg
- Growth rate: 3.82% CAGR (2025–2029)
- Volume growth in 2026: 1.5%
- Projected volume by 2029: 585.2 million kg

Africa

The paper tissues market in Africa is projected to generate **US\$1.46 billion** in revenue, with a strong annual growth rate of **8.89%** (CAGR 2025–2029). Per capita revenue is estimated at **US\$1.10**, while average consumption per person stands at **0.3 kg**. By 2029, market volume is expected to reach **423.2 million kg**, with volume growth of **3.9%** projected for 2026. Rising hygiene awareness, urbanization, increasing disposable income, and a growing middle class are fueling demand across the continent. However, despite economic progress, Southern Africa still records lower tissue consumption compared to other regions.

Regional Highlights:

Central Africa:

- Revenue: US\$93.95 million in 2025
- Per capita revenue: US\$1.16
- Average consumption: 0.3 kg per person
- Growth rate: 6.77% CAGR (2025–2029)
- Volume growth in 2026: 4.4%
- Projected volume by 2029: 37.3 million kg

Eastern Africa:

- Revenue: US\$294.44 million in 2025
- Per capita revenue: US\$0.63
- Average consumption: 0.2 kg per person
- Growth rate: 7.18% CAGR (2025–2029)

- Volume growth in 2026: 4.9%
- Projected volume by 2029: 115 million kg

Northern Africa:

- Revenue: US\$289.88 million in 2025
- Per Capita Revenue: US\$1.09
- Average Consumption: 0.4kg
- Growth rate: 6.50% CAGR (2025–2029)
- Volume growth in 2026: 3.4%
- Projected Volume by 2029: 109.9 million kg

Southern Africa:

- Revenue: US\$133.93 million in 2025
- Per capita revenue: US\$1.89
- Average consumption: 0.4 kg per person
- Growth rate: 7.42% CAGR (2025–2029)
- Projected volume by 2029: 32.2 million kg
- Volume growth in 2026: 1.3%

Western Africa:

- Revenue: US\$649.15 million in 2025
- Per capita revenue: US\$1.53
- Average consumption: 0.3 kg per person
- Growth rate: 11.20% CAGR (2025–2029)
- Volume growth in 2026: 4.0%
- Projected volume by 2029: 128.8 million kg

TOILET PAPER

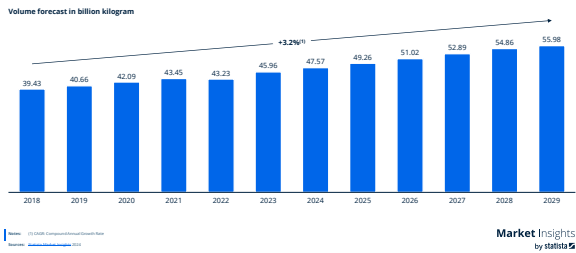
Toilet paper remains a staple in everyday hygiene routines and has proven to be a resilient consumer good, even in times of crisis. While demand surged during the COVID-19 pandemic due to stockpiling and heightened awareness of sanitation, the market is now entering a phase of steady, long-term growth. This expansion is fueled by population growth, urbanization in developing regions, and a shift in consumer preferences toward sustainability and premium quality.

The global toilet paper market is projected to generate **US\$120.49 billion** in revenue by 2025, with a compound annual growth rate (CAGR) of **5.64%** forecast through 2029. China is forecasted to lead globally, generating **US\$26 billion** in revenue. On a per capita basis, global revenue is estimated at **US\$15.42**, with average individual consumption projected at **6.3 kg**.

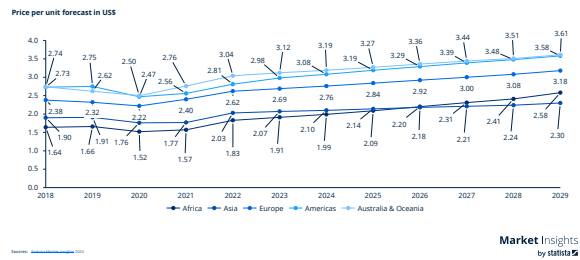
Rising demand for soft, absorbent, and chemical-free toilet paper is creating opportunities for premium brands, while sustainability concerns are accelerating interest in recycled products, a segment still relatively untapped in many regions. E-commerce is also reshaping consumer access and distribution models. By 2029, total market volume is expected to reach **56 billion kg**, with a projected **3.6%** volume growth in 2026. Although demand remains high globally, developing markets such as India and Nigeria continue to face infrastructure and accessibility challenges in meeting the hygiene needs of their expanding populations.

In addition to functional improvements, some brands are exploring design-led differentiation, including the re-emergence of colored toilet paper to cater to niche preferences and special occasions.

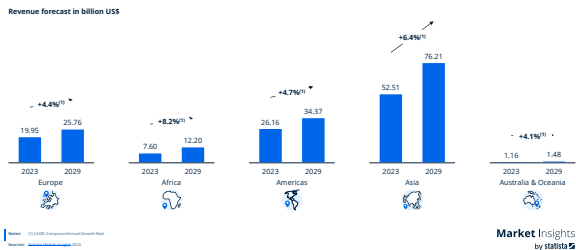
Toilet Paper market volume is projected to increase by 2029, signaling robust growth potential



Australia & Oceania set to lead in Toilet Paper market pricing per unit by 2029



Asia is projected to lead in Toilet Paper market revenue by 2029



Americas

The toilet paper market in the Americas is poised for strong growth, with revenue expected to reach **US\$28.87 billion** in 2025 and continue expanding at a CAGR of **4.46%** through 2029. While China remains the global leader, the Americas are projected to account for a substantial share of global demand. Per capita revenue is forecasted at **US\$28.21**, with average individual consumption reaching **8.9 kg**. Market volume is projected to hit **9.6 billion kg** by 2029, supported by a volume growth of **1.5%** in 2026.

Regional Highlights:

North America:

- Revenue: US\$21.89 billion in 2025
- Per capita revenue: US\$42.65
- Average consumption: 10.1 kg
- Growth rate: 4.49% CAGR (2025–2029)
- Volume growth in 2026: 1.3%
- Projected volume by 2029: 5.4 billion kg

Central America:

- Revenue: US\$538.62 million in 2025
- Per capita revenue: US\$10.07
- Average consumption: 5.8 kg
- Growth rate: 4.88% CAGR (2025–2029)
- Volume growth in 2026: 2.1%
- Projected volume by 2029: 332.8 million kg

South America:

- Revenue: US\$5.94 billion in 2025
- Per capita revenue: US\$14.28
- Average consumption: 8 kg
- Growth rate: 4.72% CAGR (2025–2029)
- Volume growth in 2026: 1.9%
- Projected volume by 2029: 3.6 billion kg

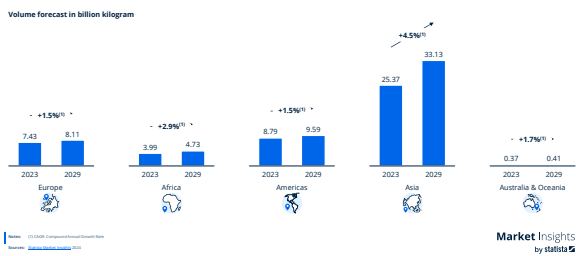
Caribbean:

- Revenue: US\$499.94 million in 2025
- Per Capita revenue: US\$12.26
- Average consumption: 5.8 kg
- Growth rate: -0.82% CAGR (2025–2029)
- Volume growth in 2026: 1.4%
- Projected volume by 2029: 250.2 million kg

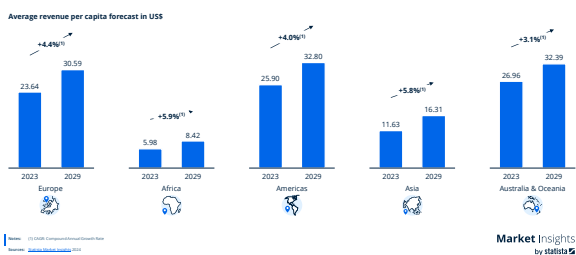
Australia & Oceania

Australia & Oceania's toilet paper market is projected to reach **US\$1.26 billion** in revenue, with a CAGR of **4.22%** through 2029. Per capita revenue is forecasted at **US\$28.65**, with individuals expected to consume an average of **8.8 kg**

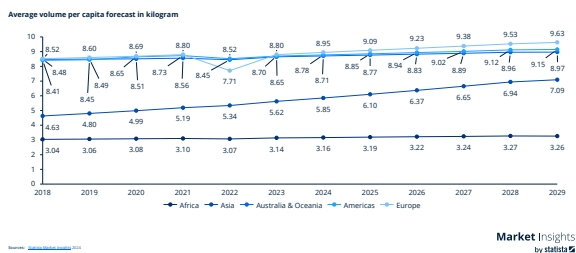
Asia is set to lead in the Toilet Paper market volume by 2029



Americas is projected to lead in average revenue per user in the Toilet Paper market by 2029



Europe is set to lead in average volume per capita in the Toilet Paper market by 2029



Innovations in Wipes

25 September 2025

EDANA invites researchers, innovators, and industry leaders to submit original presentations for inclusion in the upcoming Wipes sessions. These dedicated sessions to the future of the global wipes industry, bring together professionals across the entire value chain—from raw materials to finished products—to explore new technologies, trends, and sustainable practices shaping the wipes market.

We are seeking submissions that address one or more of the following key themes:

1 / Sustainable Materials and Processes

- Biodegradable and compostable fibers
- Alternative feedstocks (e.g., hemp, flax, seaweed, recycled content)
- Innovations in nonwoven manufacturing and energy-efficient processes
- LCA (Life Cycle Assessment) studies and carbon footprint reduction

2 / Product Innovation and Functional Performance

- Advances in flushable, dispersible, and multi-use wipes
- Performance-enhancing additives and technologies
- Smart wipes (embedded tech, sensors, etc.)
- Wipe design for emerging applications (e.g., industrial, pet care, medical)

3 / Circular Economy and End-of-Life Solutions

- Recycling and reuse strategies
- Regulatory challenges and labeling best practices
- Compostability in different environments (home, industrial, marine)
- Waste management innovations and partnerships

4 / Market Trends, Consumer Insights & Regulatory Landscape

- Regional market analyses and future growth areas
- Behavioral research: how consumers choose and use wipes
- Adapting to evolving global and local regulations
- Transparency, labeling, and greenwashing prevention

5 / Packaging

- Sustainable packaging solutions
- Single-use vs. refillable systems
- Enhancing user experience and hygiene

Please send your abstract to giovanna.merola@edana.org by 30 May 2025.

It should include a suggested title, 3-4 bullet points summarizing the presentation, and the contact details of the speaker(s).

Presenters will have the opportunity to showcase their work in front of key stakeholders across R&D, product development, sustainability, and supply chain sectors.

in 2025. Market volume is set to reach **411.2 million kg** by 2029, supported by a **1.8%** volume growth in 2026. Sustainability is shaping consumer preferences, with growing interest in recycled and environmentally responsible toilet paper options.

Asia

Asia's toilet paper market is poised to generate **US\$59.74 billion** in revenue, with a projected annual growth rate of **6.28%** (CAGR 2025–2029). Per capita revenue is estimated at **US\$13.07**, with individuals expected to consume an average of **6.1 kg** of toilet paper. By 2029, total market volume is anticipated to reach **33.1 billion kg**, with a volume growth rate of **4.9%** projected for 2026.

Regional Highlights:

Eastern Asia:

- Revenue: US\$31.85 billion in 2025
- Per capita revenue: US\$19.50
- Average consumption: 9.3 kg
- Growth Rate: 7.04% CAGR (2025–2029)
- Volume growth in 2026: 6.1%
- Projected Volume by 2029: 18.7 billion kg

Central Asia:

- Revenue: US\$575.43 million in 2025
- Per capita revenue: US\$7.16
- Average consumption: 4.7 kg
- Growth rate: 6.59% CAGR (2025–2029)
- Volume growth in 2026: 3.1%
- Projected Volume by 2029: 418.0 million kg

Southeast Asia:

- Revenue: US\$9.32 billion in 2025
- Per capita revenue: US\$13.34
- Average consumption: 5.6 kg
- Growth rate: 4.80% CAGR (2025–2029)
- Volume growth in 2026: 2.9%
- Projected volume by 2029: 4.3 billion kg (2029)

Southern Asia:

- Revenue: US\$14.20 billion in 2025
- Per capita revenue: US\$7.34
- Average consumption: 3.6 kg
- Growth rate: 5.89% CAGR (2025–2029)
- Volume growth in 2026: 4.4%
- Projected volume by 2029: 8 billion kg

Western Asia:

- Revenue: US\$3.80 billion in 2025
- Per capita revenue: US\$16.87
- Average Consumption: 6.9 kg
- Growth rate: 4.70% CAGR (2025–2029)
- Volume growth in 2026: 1.6%
- Projected volume by 2029: 1.6 billion kg

Europe

Europe's toilet paper market is projected to generate **US\$21.77 billion** in revenue, with annual growth forecast at **4.31%** (CAGR 2025–2029). Per capita revenue stands at **US\$25.80**, with average consumption expected to reach **9.1 kg** per

person. Market volume is anticipated to grow to **8.1 billion kg** by 2029, with a modest **1.5%** increase projected for 2026.

Regional Highlights:

Northern Europe:

- Revenue: US\$1.20 billion in 2025
- Per Capita Revenue: US\$35.33
- Average Consumption: 1.6 kg
- Growth Rate: 1.7% CAGR (2025–2029)
- Volume growth in 2026: 1.7%
- Projected volume by 2029: 398.6 million kg

Southern Europe:

- Revenue: US\$5.05 billion in 2025
- Per capita revenue: US\$21.32
- Average consumption: 8.1 kg
- Growth rate: 4.43% CAGR (2025–2029)
- Projected volume by 2029: 2.0 billion kg
- Volume growth in 2026: 1.3%

Central & Western Europe:

- Revenue: US\$11.44 billion in 2025
- Per capita revenue: US\$34.12
- Average consumption: 10.7 kg
- Growth Rate: 4.29% CAGR (2025–2029)
- Volume growth in 2026: 1.6%
- Projected volume by 2029: 3.8 billion kg

Eastern Europe:

- Revenue: US\$4.08 billion in 2025
- Per Capita Revenue: US\$17.16
- Average Consumption: 7.5 kg
- Growth rate: 4.20% CAGR (2025–2029)
- Volume growth in 2026: 1.5%
- Projected volume by 2029: 1.9 billion kg

Africa

Africa's toilet paper market is expected to generate **US\$8.85 billion** in revenue, with strong annual growth projected at **8.35%** (CAGR 2025–2029). Per capita revenue stands at **US\$6.66**, while average individual consumption is estimated at **3.2 kg**. Market volume is set to reach **4.7 billion kg** by 2029, with a volume increase of **3.1%** projected for 2026. Demand across the continent continues to rise, driven by urbanization and improved hygiene practices.

Regional Highlights:

Central Africa

- Revenue: US\$575.23 million in 2025
- Per capita revenue: US\$5.80
- Average consumption: 3.8 kg
- Growth rate: 6.39% CAGR (2025–2029)
- Volume growth in 2026: 3.8%
- Projected volume by 2029: 436.5 million kg

Eastern Africa

- Revenue: US\$1.80 billion in 2025
- Per capita revenue: US\$3.82
- Average consumption: 2.3 kg
- Growth rate: 7.00% CAGR (2025–2029)
- Volume growth in 2026: 4.3%

- Projected volume by 2029: 1.3 billion kg

Northern Africa

- Revenue: US\$1.77 billion in 2025
- Per capita revenue: US\$6.69
- Average consumption: 4.3 kg
- Growth rate: 5.96% CAGR (2025–2029)
- Volume growth in 2026: 2.6%
- Projected volume by 2029: 1.3 billion kg

Southern Africa

- Revenue: US\$845.10 million in 2025
- Per capita revenue: US\$11.93
- Average consumption: 5.4 kg
- Growth rate: 6.90% CAGR (2025–2029)
- Volume growth in 2026: 0.1%
- Projected volume by 2029: 385.3 million kg

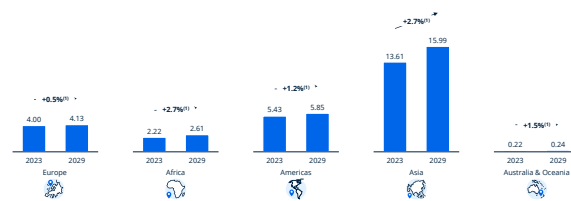
China will lead the global household paper market with US\$18 billion in revenue.

HOUSEHOLD PAPER

The global household paper market is expected to generate **US\$94.54 billion** in revenue by 2025, with a projected compound annual growth rate (CAGR) of **4.53%** through 2029. China is forecasted to lead in revenue, contributing approximately **US\$18 billion**. Based on population figures, per capita revenue is estimated at **US\$12.10**, while average individual consumption is projected at **3.4 kg**. By 2029, global market volume is anticipated to reach **28.8 billion kg**, with a volume growth rate of **2.2%** projected for 2026. Overall, demand for household paper products continues to rise steadily, driven primarily by major markets such as China and the United States.

Asia is projected to lead in the Household Paper market volume by 2029

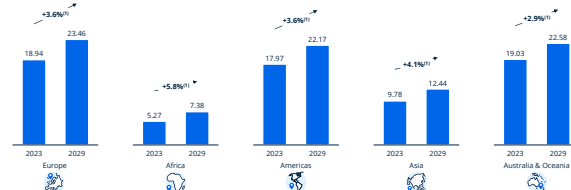
Volume forecast in billion kilograms



Market Insights
by Statista

Europe is projected to lead in average revenue per capita in the Household Paper market by 2029

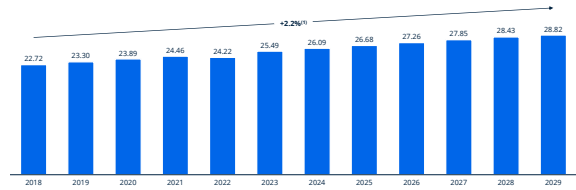
Average revenue per capita forecast in US\$



Market Insights
by Statista

Forecast shows Household Paper market volume set to increase by 2029

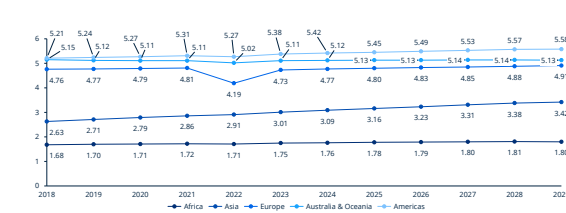
Volume forecast in billion kilograms



Market Insights
by Statista

Americas leads in per capita Household Paper consumption projected by 2029

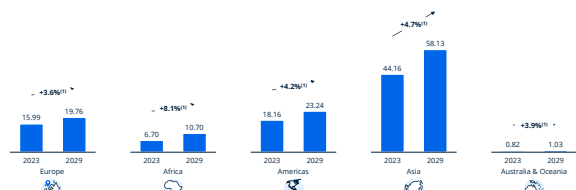
Average volume per capita forecast in kilograms



Market Insights
by Statista

Asia is projected to lead in Household Paper market revenue by 2029

Revenue forecast in billion US\$



Market Insights
by Statista

Europe is projected to lead in price per unit in the Household Paper market by 2029

Price per unit forecast in US\$



Market Insights
by Statista

REGIONAL MARKET OUTLOOK

Americas

The household paper market in the Americas is projected to generate **US\$19.92 billion** in revenue, with a forecasted annual growth rate of **3.93% CAGR** between 2025 and 2029. Per capita revenue is estimated at **US\$19.47**, while average consumption per person is expected to reach **5.5 kg**. By 2029, the market volume is anticipated to hit **5.9 billion kg**, with a **1.3%** volume growth projected for 2026. In the United States, demand for eco-friendly household paper products is rising rapidly as sustainability becomes a key consumer priority.

Regional Highlights:

North America:

- Revenue: US\$13.96 billion in 2025
- Per capita revenue: US\$27.19
- Average consumption: 6.7 kg per person
- Growth rate: 3.83% CAGR (2025–2029)
- Volume growth in 2026: 1.0%
- Projected volume by 2029: 3.6 billion kg

Central America:

- Revenue: US\$476.23 million in 2025
- Projected volume by 2029: US\$8.90
- Average consumption: 3.2 kg per person
- Growth rate: 4.80% CAGR (2025–2029)
- Volume growth in 2026: 2.1%
- Projected volume by 2029: 187 million kg

South America:

- Revenue: US\$5.06 billion in 2025
- Per capita revenue: US\$12.17
- Average consumption: 4.4 kg per person
- Growth rate: 4.42% CAGR (2025–2029)
- Volume growth in 2026: 1.8%
- Projected volume by 2029: 2 billion kg

Caribbean:

- Revenue: US\$424.02 million in 2025
- Growth rate: -0.21% CAGR (2025–2029)
- Projected volume by 2029: 137.0 million kg
- Per capita revenue: US\$10.39
- Average consumption: 3.2 kg
- Volume growth in 2026: 1.2%

Australia & Oceania

The household paper market in Australia & Oceania is projected to generate **US\$885.25 million** in revenue, with an expected annual growth rate of **3.98% CAGR** from 2025 to 2029. Per capita revenue is estimated at **US\$20.16**, while average consumption per person is expected to reach **5.1 kg**. By 2029, total market volume is forecast to reach **235.4 million kg**, with a volume growth of **1.2%** anticipated in 2026. Across the region, rising environmental awareness is fueling demand for eco-friendly household paper products, especially in Australia.

Regional Highlights:

Australia & Oceania:

- Revenue: US\$885.25 million in 2025
- Per capita revenue: US\$20.16
- Average consumption: 5.1 kg
- Growth rate: 3.98% CAGR (2025–2029)
- Volume growth in 2026: 1.2%
- Projected volume by 2029: 235.4 million kg

Asia

The household paper market in Asia is projected to generate **US\$48.70 billion** in revenue, with an expected annual growth rate of **4.52% CAGR** from 2025 to 2029. Per capita revenue is estimated at **US\$10.65**, and average consumption per person is projected to reach **3.2 kg**. By 2029, total market volume is expected to hit **16 billion kg**, with a volume growth of **2.9%** anticipated in 2026. In Japan, the shift toward eco-friendly and sustainable household paper products is gaining momentum as consumer preferences evolve.

Regional Highlights:

Central Asia:

- Revenue: US\$507.50 million in 2025
- Per capita revenue: US\$6.32
- Average consumption: 2.6 kg
- Growth rate: 6.48% CAGR (2025–2029)
- Volume growth in 2026: 3.1%
- Projected volume by 2029: 233.7 million kg

Eastern Asia:

- Revenue: US\$22.87 billion in 2025
- Per capita revenue: US\$14
- Average consumption: 4.2 kg
- Growth rate: 4.46% CAGR (2025–2029)
- Volume growth in 2026: 3.2%
- Projected volume by 2029: 7.7 billion kg

Southeast Asia:

- Revenue: US\$7.90 billion in 2025
- Growth rate: 4.50% CAGR (2025–2029)
- Projected volume by 2029: 2.4 billion kg
- Volume growth in 2026: 2.5%
- Per capita revenue: US\$11.32
- Average consumption: 3.2 kg

Southern Asia:

- Revenue: US\$14.22 billion in 2025
- Growth rate: 4.63% CAGR (2025–2029)
- Volume growth in 2026: 2.9%
- Projected volume by 2029: 4.7 billion kg
- Per capita revenue: US\$7.35
- Average consumption: 2.2 kg

Western Asia:

- Revenue: US\$3.20 billion in 2025
- Per capita revenue: US\$14.24
- Average consumption: 3.9 kg
- Growth rate: 4.27% CAGR (2025–2029)
- Projected volume by 2029: 915.2 million kg

Europe

The Household Paper market in Europe is set to generate **US\$17.22 billion** in revenue, with a projected annual growth rate of **3.50% CAGR** between 2025 and 2029. Per capita revenue is estimated at **US\$20.41**, while average consumption per person is expected to reach **4.8 kg**. By 2029, the market volume is anticipated to reach **4.1 billion kg**, with modest volume growth of **0.5%** forecasted for 2026. Germany remains at the forefront of Europe's household paper market, driven by strong consumer demand for sustainable and eco-friendly products.

Regional Highlights:

Northern Europe:

- Revenue: US\$839.66 million in 2025
- Growth rate: 3.36% CAGR (2025–2029)
- Projected volume by 2029: 195.8 million kg
- Per capita revenue: US\$24.72
- Average consumption: 5.6 kg per person
- Volume growth in 2026: 0.7%

Southern Europe:

- Revenue: US\$4.45 billion in 2025
- Per capita revenue: US\$18.78
- Average consumption: 4.7 kg per person
- Growth rate: 4.02% CAGR (2025–2029)
- Projected volume by 2029: 1.1 billion kg
- Volume growth in 2026: 0.6%

Eastern Europe:

- Revenue: US\$3.35 billion in 2025
- Growth rate: 3.62% CAGR (2025–2029)
- Projected volume by 2029: 989.1 million kg
- Per capita revenue: US\$14.08
- Average consumption: 4 kg per person
- Volume growth in 2026: 0.9%

Central & Western Europe:

- Revenue: US\$8.58 billion in 2025
- Per capita revenue: US\$25.61
- Average Consumption: 5.4 kg per person
- Growth rate: 3.20% CAGR (2025–2029)
- Volume growth in 2026: 0.2%
- Projected volume by 2029: 1.8 billion kg

Africa

Africa's Household Paper market is expected to reach **US\$7.82 billion** in revenue, growing at a robust compound annual growth rate (CAGR) of **8.17%** between 2025 and 2029. On a per capita basis, spending is estimated at US\$5.88, while average individual consumption is likely to reach **1.8 kg**. Market volume is forecasted to grow steadily, potentially reaching **2.6 billion kg** by 2029, with a **2.9%** increase projected for 2026. In South Africa, rising demand is fueled by a growing middle class and shifting consumer preferences toward convenience and hygiene.

Regional Highlights:

Central Africa:

- Revenue: US\$508.29 million in 2025
- Per capita revenue: US\$5.12
- Average consumption: 2.2 kg per person
- Growth rate: 6.12% CAGR (2025–2029)
- Projected volume by 2029: 242.2 million kg
- Volume growth in 2026: 3.6%

Eastern Africa:

- Revenue: US\$1.56 billion in 2025
- Per capita revenue: US\$3.32
- Average consumption: 1.3 kg per person
- Growth rate: 6.53% CAGR (2025–2029)
- Volume growth in 2026: 3.9%
- Projected volume by 2029: 688.2 million kg

Northern Africa:

- Revenue: US\$1.56 billion in 2025
- Per Capita revenue: US\$5.90
- Average consumption: 2.4 kg per person
- Growth rate: 5.74% CAGR (2025–2029)
- Volume growth in 2026: 2.4%
- Projected volume by 2029: 693.8 million kg

Southern Africa:

- Revenue: US\$741.65 million in 2025
- Per capita revenue: US\$10.47
- Average consumption: 3.0 kg per person
- Growth rate: 6.57% CAGR (2025–2029)
- Projected volume by 2029: 217.6 million kg
- Volume growth in 2026: 0.3%

Western Africa:

- Revenue: US\$3.44 billion in 2025
- Per Capita Revenue: US\$8.12
- Average Consumption: 1.6 kg per person
- Growth Rate: 10.52% CAGR (2025–2029)
- Volume growth in 2026: 3.0%
- Projected volume by 2029: 769.8 million kg

This article is based on data and insights from Statista.

All market figures, forecasts, and regional breakdowns are derived from Statista reports.

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We are coming to Africa and the Middle-East!

Investkonsult Sweden are thrilled to expand our presence to You, and to introduce our specialized services to the markets of the African continent and the Middle East, through **MET Magazine**.

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We really look forward to collaborating with forward-thinking businesses within the tissue and paper industry, looking to innovate and grow in the hygiene and nonwoven segments.

Whether you're exploring new technologies, seeking efficient project execution, or aiming to enhance your market presence, Investkonsult Sweden is your trusted partner. Reach out to us to discover how we can help your business achieve its goals in these growing markets.

Below please find a small selection of the used/second-hand machinery and equipment that we currently can offer directly from our warehouses, or from factory floors:

559-0011 1 x Protner/Synchropack wet wipe line, Width: 400mm YOC: 2004 2005

For producing wipes in several sizes. Protner type: Multi-NW HOL with Synchropack type 900 WP

559-0013 1 x Kansan / Dynamic Plus wet wipe line, YOC: 2012

Complete wet wipes production with Kansan converting machine, Dynamic Plus packaging and plastic lid robot.

593-0042 1 x Joa pull-up pants diaper line, Type: J6S-TP YOC: 2005

Complete line for baby training pants/pull-ups, in 3 product sizes M, L and XL, speed up to 400 ppm

594-0018 1 x Fameccanica femcare line, Type: FNL-8 YOC: 2005

Fully automatic production line for sanitary napkins with fluff core. Speed: 700 ppm, 240 mm (regular size).

595-0019 1 x Joa light-inco production line, YOC: 2002/2024

Complete line for light-inco products with fluff core for 3 sizes - Normal, Extra and Super. Speed 400 ppm

595-0017 1 x Joa open type adult diaper line

Full servo line for production of adult diapers at up to 250 ppm. 2 sizes included - L 930 mm and XL 1010 mm

595-0020 1 x SSP combo-line, adult diapers and underpads, yoc: 2004

Fully refurbished in 2019, speed 170 m/min

596-0017 1 x Tekma underpad line, Type: TR-98 YOC: 1990s

Complete line for production of pet-pads/underpads in five sizes. Bargain price.

Please contact us for further info

info@ik.se - +46 11 106075



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TISSUE PRODUCERS IN THE MIDDLE EAST AND NORTH AFRICA

Country	Company	Tissue Machine	Operating Speed (m/min)	Width (m)	Production Capacity (tons/year)	Supplier	Startup Year
Lebanon	Unipak Tissue Mill	PM1	1,500	2.7	22,000	Beloit	1995
	Sanitary Paper Co - Mimosa	PM4	700	2.3	7,000	Toscotec	1992
		PM5	850	2.1	8,000	Toscotec	1995
Jordan	Al Keena Hygienic Paper Mill	PM2	1,650	3.67	30,000	Voith	1995
	Al Snobar Hygienic Paper Mill	PM4	2,000	5.4	54,000	Valmet	2007
Syria	Oriental Paper Manufacturing	PM1	600	2.7	9,000	Recard	1995
	Lanatex	PM2	1,100	2.72	17,000	OverMade	2000
	Dinatex Paper Manufacturing	PM3	1,800	2.72	28,000	OverMade	2007
UAE	Abu Dhabi National Paper Mill	PM1	1,900	2.77	28,000	OverMade	2002
		PM2	2,000	3.62	35,000	OverMade	2007
		PM3	2,000	2.8	27,000	Valmet	2015
	Crown Paper Mill Ltd FZC	PM1	1,100	1.86	11,000	Beloit	2000
		PM2	1,700	2.75	24,000	PMT	2007
		PM3	2,000	5.6	60,000	Valmet	2019
	Emirates Fine Tissue Industry	PM1	700	2.7	8,000	OverMade	2016
	Queenex Hygiene Paper Mfg.	PM1	1,800	2.85	28,000	OverMade	2012
	Star Paper Mill	PM1	1,700	2.85	30,000	Recard	2019
	Al Nakheel Paper Mill	PM5	2,000	5.4	54,000	Valmet	2018
Kuwait	Gulf Paper Manufacturing Co.	PM2	1,200	2.25	12,500	Carcano	1982
Iraq	Alsindyian	PM1	1,200	2.7	20,000	Toscotec	2023
Qatar	Zain Paper Industry	PM1	2,000	2.7	30,000	OverMade	2023
Bahrain	Olayan Kimberly Clark	PM1	1,250	2.6	14,000	Y.K.	1990
		PM2	2,000	2.8	28,000	Voith	2011

Country	Company	Tissue Machine	Operating Speed (m/min)	Width (m)	Production Capacity (tons/year)	Supplier	Startup Year
Iran	Pars Hayat Saglik Urunleri S.H	PM3	2,200	5.6	70,000	Valmet	2013
	Zarrin Barge Persia Paper Industry	PM1	2,000	5.6	60,000	Valmet	2014
		PM2	2,000	5.6	60,000	Valmet	2018
	Harir Khuzestan Co.	PM1	1,000	2.7	15,000	Voith	1995
	Latif Paper Co.	PM2	1,400	2.7	18,000	Andritz	2010
	Aryan Cellulose Sanat Co.	PM1	500	2.8	10,000	-	2014
	Golpoune Pars Industrial Co.	PM1	1,400	2.75	18,000	OverMade	2014
Tunisia	Tunisie Ouate	PM2	1,100	2.7	16,500	PMT	2002
		PM3	1,600	2.76	26,000	GapCon	2014
	Azur Papier	PM1	1,500	2.75	22,000	Recard	2013
		PM2	1,800	2.75	28,000	Recard	2018
Morocco	SIPAT	PM1	600	1.8	5,000	Toscotec	1978
		PM2	1,300	2.75	16,000	Toscotec	1995
	Jeesr Industries	PM1	2,000	2.8	30,000	Valmet	2013
Algeria	Tonic Emballage Industrie	PM1	1,500	2.7	20,000	Valmet	2006
	Faderco SPA	PM1	2,000	2.8	30,000	Valmet	2015
		PM2	2,000	2.8	30,000	Valmet	2020
	Africaine Paper Mills	PM1	2,000	2.85	30,000	Andritz	2019
	WAFA Group	PM1	2,000	2.85	40,000	Toscotec	2026
Egypt	Al-Sindian Paper Mill	PM1	1,600	2.25	17,000	Valmet	1991
		PM3	2,000	5.4	54,000	Valmet	2005
	Al Zeina Tissue Mill	PM1	2,000	2.75	30,000	PMT	2008
	Alex Converta Company	PM1	1,500	2.85	24,000	Recard	2018
	Carmen Tissues	PM1	800	1.7	6,000	ACelli	1995
	Interstate Paper Industries	PM1	1,800	2.86	25,500	ACelli	2008
		PM2	1,800	2.86	25,500	ACelli	2010
		PM3	1,000	2.7	12,500	Recard	2012
	Hayat Kimya Group	PM6	2,200	5.6	70,000	Valmet	2017
		PM11	2,200	5.6	70,000	Valmet	2025
	Mediterranean Tissue Mill	PM1	1,500	1.8	15,000	Beloit	2011
		PM2	1,400	2.75	25,000	OverMade	2014
	Solo Soft for Hygienic Paper	PM1	1,700	2.85	27,000	Hicredit	TBA
Turkey	Aktül Kagit Uretim Pazarlama	PM1	2,200	5.6	60,000	Valmet	2011
		PM2	2,200	5.6	60,000	Valmet	2016
		PM3	2,200	5.6	60,000	Valmet	2022

Country	Company	Tissue Machine	Operating Speed (m/min)	Width (m)	Production Capacity (tons/year)	Supplier	Startup Year
Turkey	Parteks Kagit	PM2	900	2.75	6,000	Beloit	1996
		PM3	1,600	2.85	26,000	Toscotec	2014
	Hayat Kimya San ve Tic. A.S.	PM1	2,200	5.55	70,000	PMT & Valmet	2006
		PM2	2,200	5.6	70,000	Valmet	2010
		PM5	2,200	5.6	70,000	Valmet	2015
		PM8	2,200	5.6	70,000	Valmet	2021
	Lila Kagit San. ve Ti. A.S.	PM1	2,200	5.64	70,000	Valmet	2007
		PM2	2,200	5.64	70,000	Valmet	2012
		PM3	2,200	5.64	70,000	Valmet	2020
		PM4	2,200	5.64	70,000	Valmet	2021
	Ipek Kagit Tissue / Eczacibasi	PM1	900	2.2	15,000	ER-WE-PA	1970
		PM2	1,600	2.7	35,000	Beloit	1991
		PM3	2,000	5.4	60,000	Beloit	2000
		PM4	2,200	5.6	70,000	Valmet	2015
		PM5	2,200	5.6	70,000	Valmet	2022
	Levent Kagit San. ve Tic. A.S.	PM2	1,400	4.40	24,000	Voith	2002
	Europap Tezol Kagit San ve Tic	PM1	1,600	2.85	25,000	Recard	2016
		PM2	1,800	2.85	30,000	Recard	2009
		PM3	2,000	2.85	30,000	Valmet	2015
		PM4	2,100	2.92	40,000	Toscotec	2023
	Viking Kagit ve Seluloz A.S.	PM1	550	4.5	15,000	ER-WE-PA	1971
		PM2	1,500	2.76	27,000	Valmet	1999
	Essel Kagit	PM1	1,600	2.8	25,000	ACelli	2006
		PM2	1,800	3.1	32,000	Recard	2015
		PM3	2,000	5.7	90,000	Toscotec	2021
	Eka Kagit	PM2	1,500	2.85	25,000	Over/ABK	2014
		PM3	2,000	2.85	30,000	Over	2016
KSA	Saudi Paper Manufacturing	PM1	1,700	2.75	21,000	Recard	1992
		PM2	2,100	2.85	30,000	Toscotec	2023
		PM3	1,600	3.6	24,000	Recard	2001
		PM4	2,200	5.4	55,000	Valmet	2008
		PM5	2,200	5.6	60,000	Toscotec	2024
	Al Faris Paper Mill	PM1	2,000	2.85	28,000	Papcel	2019
	Juthor Paper Manufacturing	TM4	2,200	5.6	60,000	Toscotec	2023
		TM6	2,100	5.47	60,000	Andritz	2026
	Crown Paper Mill	PM4	2,200	5.6	60,000	Valmet	2025



MAKING STRIDES IN NONWOVEN TECHNOLOGY FOR MODERN HYGIENE APPLICATIONS

The nonwovens market plays a pivotal role in various industries, with hygiene products standing out as a key segment. State-of-the-art nonwovens in hygiene offer unique properties such as softness, breathability, and superior absorbency. They are an integral part of products such as diapers, feminine hygiene products and adult incontinence solutions. It is essential that these end products have a high level of performance and provide a very comfortable experience for the user. There is also a strong focus on sustainable materials and handling at the end of the product life cycle. These outstanding properties and demands for hygiene products require excellent engineering in this increasingly changing and growing market.

ANDRITZ NONWOVEN & TEXTILE AS A PIONEER FOR INNOVATION AND SUSTAINABLE SOLUTIONS

ANDRITZ Nonwoven & Textile is a leading technology supplier in the hygiene sector with a broad product portfolio offering sophisticated solutions in the areas of airlaid, air-through bonding, spunbond, spunlace, Wetlace™ and hygiene converting. At the core of ANDRITZ's expertise are design processes and excellent services to meet market and customer requirements for product quality and properties. Another focus is on arranging and configuring the main process components in a production line so that they work in harmony to deliver the exact product desired: cost-efficient, flexible, and reliable production lines covering the full spectrum.

LATEST TECHNOLOGY HIGHLIGHTS IN HYGIENE CONVERTING MACHINERY

Within the area of hygiene converting machinery, ANDRITZ Diatec is at the forefront of developing innovative converting solutions for the production of baby diapers, adult incontinence products, sanitary napkins for feminine care and more. As the market for these products becomes more demanding and dynamic, ANDRITZ has designed converting machines that offer high flexibility in terms of diversified product structure, the ability to process a wide range of different materials, while maintaining the highest price/performance ratio. This not only meets consumer demands for comfort and environmental friendliness, but also sets the stage for the future of personal care products.

The state-of-the-art technology ensures reliable and efficient production processes, making ANDRITZ a trusted partner in the industry. With a dynamic organization, the company delivers cost-effective and flexible solutions tailored to our customers' requirements.

CUTTING-EDGE DEVELOPMENT FOR PREMIUM QUALITY UNDERPADS

One recent innovation is the new Airlaid Underpad eXcelle line featuring in-line airlaid technology. It is a cutting-edge solution specifically designed to produce premium-quality airlaid underpads used in hygiene applications. It combines



advanced airlaid technology with efficient process design, enabling manufacturers to produce lightweight, absorbent, and eco-friendly underpads with high precision and consistency. This is made possible through leveraging the synergy between ANDRITZ Diatec and ANDRITZ Dan-Web, whose technical expertise in the field of airlaid is internationally renowned.

ONE STEP AHEAD IN SUSTAINABILITY: RECYCLING OF INDUSTRIAL DIAPER WASTE

ANDRITZ has developed a comprehensive process to recycle SAP, fluff pulp and other components of Absorbent Hygiene Products (AHP), while maintaining high material quality. This recycling process is the result of a joint effort within ANDRITZ Nonwoven and Textile and contributes to the development of more sustainable practices for the disposal and recycling of industrial AHP waste.

The newly developed line separates SAP, fluff pulp and other components of AHP and can recycle SAP and fluff pulp in a closed loop to produce new AHP. High quality of the recycled material is ensured. This contributes to the responsible management of industrial AHP waste.

ANDRITZ Diatec's expertise in diaper converting technology seamlessly blends with ANDRITZ Laroche's proficiency in recycling processes. By joining forces to introduce an industrial AHP recycling line, the two companies are taking a significant step toward a more sustainable future and turning waste into value.

NEXT GENERATION BONDING AND COMFORT TECHNOLOGIES

Another example is the neXbond ultrasonic bonding technology. This new technique combines tensioned elastics entrapped between two layers of nonwoven fabric. It delivers a uniquely soft and skin-friendly waistband for diapers and leg cuffs without using glue or adhesives. Compared to adhesives, neXbond ultrasonic technology yields a top-quality bonding with no creep or product damage, and with greater precision.

The end-user benefits from products that are gentle on the skin, with a high quality of softness, breathability, elastic

performance, and a sense of discretion and high comfort because they adapt to every movement, rather than belts that contain adhesives. Moreover, the chemical-free process minimizes allergic reactions and skin irritation.

THE POOP POCKET: A GAME-CHANGER IN DIAPER INNOVATION

A notable recent development is the ANDRITZ technology to produce diapers with a Poop Pocket. This premium feature can be integrated into baby diapers (T-shaped or training pants). ANDRITZ Diatec has developed a couple of alternative solutions to better meet market needs and product requirements. Remarkable results have already been achieved in several production lines: improved product performance, high process stability, and flexibility for different raw materials.

LIFECYCLE SUPPORT TO KEEP EQUIPMENT RUNNING AT PEAK PERFORMANCE

ANDRITZ complements its high-performance machinery with SYNERGY™ service agreements, ensuring continuous operational efficiency. These service packages, tailored to the lifecycle of each customer's equipment, include expert visits, preventive maintenance, retrofits, and upgrades to keep your operation running smoothly and reliably.

ANDRITZ customers benefit from fast and efficient remote support from anywhere, priority access via the dedicated customer care portal, and 24/7 emergency hotline support. Recovery services also provide on-site technical support, spare parts, and emergency repairs with field service technicians. Optimization and digitalization services ensure smart, secure, and long-term support, including strategic planning, warranty extensions, and expert audits. Reliability services maximize equipment uptime with continuous on-site or remote support from expert technicians and partners.

By providing customized service solutions, ANDRITZ ensures that its customers achieve uninterrupted productivity, operational excellence, and a competitive edge in the hygiene industry.



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- Turnkey solutions for unwinding, treatment, winding and packaging.

