

EUROPE'S TISSUE INDUSTRY

Creating Value, Jobs and Hygiene for a Sustainable Europe

The European Tissue Symposium (ETS) commissioned independent experts Steward Redqueen to assess the socioeconomic impact of Europe's tissue industry and its products. The analysis reflects the collective performance of the European tissue sector rather than individual companies. It covers 42 countries across Europe, based primarily on 2024 data or the most recent figures available.



Key Headline Figures

A Cornerstone of Everyday Life and the European Economy

- **€36.6 BILLION** in value added
- **8.2 MILLION tonnes of products produced**
- **€16.4 BILLION** in tax revenues
- **€19.7 BILLION** in annual sales
- **421,100 jobs supported**

Tissue products are an essential part of daily life - used in homes, workplaces, restaurants, hospitals, and public spaces. Behind this everyday convenience lies a major European industry that generates billions in value, employment, and tax revenues while keeping most of its economic benefits within Europe.



A Strong, Local Value Chain

Strength Built on European Partnerships

- For every **€1 spent**, **€0.91 stays in Europe**
- **Upstream** forestry, pulp, machinery, packaging, logistics, energy, recycling
- **€13.5 BILLION** spent on European suppliers, **90% local sourcing**
- **Downstream** retail, wholesalers, distributors
- Each job in the industry supports **7 more across the value chain**

The tissue industry is deeply rooted in Europe's economy. Its extensive supplier and distribution networks sustain thousands of companies - ensuring that value creation and employment remain local and resilient.



Economic Ripple Effect by Sector

Fuelling Growth Across Industries

SECTOR	VALUE ADDED	JOB SUPPORTED
Trade (retail & wholesale)	€9.8 bn	155,200 jobs
Business services	€9 bn	72,100 jobs
Manufacturing	€3.6 bn	54,800 jobs
Transport	€1.6 bn	33,000 jobs
Forestry & agriculture	€2 bn	28,200 jobs

The tissue sector is a powerful growth multiplier stimulating demand and employment in over forty other industries, from forestry and logistics to marketing, finance, and energy.





HYGIENE AND SUSTAINABILITY

Delivering Everyday Benefits
for Europe

Contributing to a Sustainable Europe

Resource Efficient
and Responsible

● Sustainable Sourcing

Most fibres come from **FSC** or **PEFC certified** sustainable sources and paper for recycling.

● Decarbonisation

62%
of energy
from
renewables

95,7%
CHP efficiency

Carbon-neutral target 2050

By using renewable fibres, clean energy, and closed-loop water systems, the tissue industry contributes to the EU's climate and resource-efficiency objectives while maintaining essential everyday products for citizens.



● Waste minimalisation

Circular production ensures **92%** of process water reused;

Most waste streams are recovered and **recycled** within the process.

Production waste **transformed** into biomass energy

Hygiene Benefits with Economic Gains

Clean Hands,
Healthy Economies

Please note that the initial results and data are exploratory.

● **Paper towels**
reduce microbes by
51%
infection risk
49%

● **Air dryers**
increase microbes by
42%
infection risk
142%

Tissue paper plays a direct role in public health. Scientific evidence shows that proper hand drying with paper towels reduces infections translating into economic benefits through fewer sick days and lower healthcare costs.

● Switching all EU public bathrooms to paper towels could:

Prevent
9.8
million flu
Infections annually

Increase EU GDP by
€1.47
BILLION through **higher productivity** and **fewer sick days**

● Switching to paper hand towels could save

£56 in UK hospital costs
relating to Healthcare
MILLION Associated Infections (HCAI's).



● **Resilient and locally sourced**, strengthening value creation and employment across Europe.

● **A sustainable sector** aligned with the EU Green Deal and Bioeconomy Strategy

Europe's tissue industry combines industrial strength with social value ensuring that sustainable, hygienic, and affordable tissue products remain available to every household, workplace, and community.

● **An essential partner** for public health and hygiene, improving

● **Tissue paper products** from toilet paper and kitchen roll through to facial tissues and paper towels - are a staple in our society used in homes, offices and public spaces across Europe



Why This Matters for Europe

A Strategic, Sustainable,
and Socially Valuable
Industry