

Household Paper Products - US - 2022

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This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the household paper market
- Historical and projected market growth
- Innovation and competitive trends
- Consumer usage, attitudes and behaviors surrounding the use of household paper products

Household paper products have almost universal penetration. For that reason, market growth is historically tied to population growth. Yet the pandemic changed everything. Consumers' extreme stocking up behavior in 2020 caught brands off guard. This uncharacteristic demand led to a 20.9% growth rate – something that's quite rare in a category accustomed to growing in the low single digits. Yet consumers can only store so much household paper. Once brands were able to bring supply in sync with demand in 2021, the category growth rate was negative and declined by more than 12% for the year.

Going forward, Mintel expects that the emotional imprinting of the pandemic and precautions against viral threats still to come will keep usage rates slightly above normal as consumers clean more, try to hedge against future product shortages and reduce the number of shopping occasions.

A key challenge for the market will be the cannibalization of smaller segments by the larger segments. More and more, consumers use paper towels instead of paper napkins and young consumers often prefer toilet paper to facial tissue and only buy tissue when they are ill.

The market is also threatened by the greening of the wipes market. As the fiber composition of natural wipes becomes more like paper towels, there will be reduced sustainability tradeoff between the two segments.



“Few events have the power to turn the products of a mature, highly-saturated market into a rare commodity, but that's what COVID-19 did to the household paper market. When the pandemic struck in 2020, the category posted 20.9% growth and added more than \$4 billion in sales for the year.”

– **Jamie Rosenberg, Associate Director, Global Household and Personal Care**

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Even so, the pandemic offers innovation opportunities for higher-margin products. Paper towels that are stronger and infused with cleaning formulas, either wet or dry, have so far been niche. Yet times are changing. Over the long term, this can preempt the threat from greener wipes.

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