

Household Paper Products - US - February 2020

Report Price: £3695 | \$4995 | €4400

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This report looks at the following areas:

Making matters worse, facial tissue and paper napkins continue to lose relevance. The trend of substituting paper towels for napkins and toilet paper for facial tissue has transformed these categories from everyday essentials to discretionary luxuries.

The household paper category's problems are not due to a lack of innovation. Several brands have improved paper-based cleaning products, for example, to expand into the domain of nonwoven wet wipes and dish towels. The problem is that so far, consumers haven't seen the need. As the surface cleaning category responds to prohibitions on single-use plastic, papermakers may still find margin-enhancing domain expansion opportunities. The question is will opportunity come soon enough for renewed category health.

- Private label outperforms the market
- Facial tissue and napkins are losing relevance



"Consumers have hastened their trading down to private label. Store brands have closed the quality gap and a growing percentage of consumers no longer see a functional need for premium-priced name brands and private label has captured record market share."

– Jamie Rosenberg, Senior Global Analyst, Household & Personal Care

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