Toilet paper and other tissue consumption is at all-time highs in Australia

GEELONG, AUSTRALIA

- Australia's estimated total tissue and tissue products consumption was about 470.0 kt in 2023-24
- Imports of tissue stock for local conversion lifted just 0.1% over the year-ended February to total 108.0 kt
- In February 2025, tissue stock imports totalled 6,801 tonnes, at a weighted average price of AUDFob1,603/t
- Pre-converted toilet paper imports are at record levels, hovering around the 73,000 tonnes per annum level, having increased almost 32% year-ended February

Compared to most other countries, Australians consume a large quantity of tissue and tissue products. On some measures, second only to the USA.

In 2023-24, IndustryEdge calculates Australia consumed 335.1 kt of tissue stock – for conversion into toilet paper, facial tissues, hand towels and other tissue products. The 33rd consecutive annual edition of the Pulp & Paper Strategic Reviews provides all the annualised details for the last decade, as well as the most recent year.

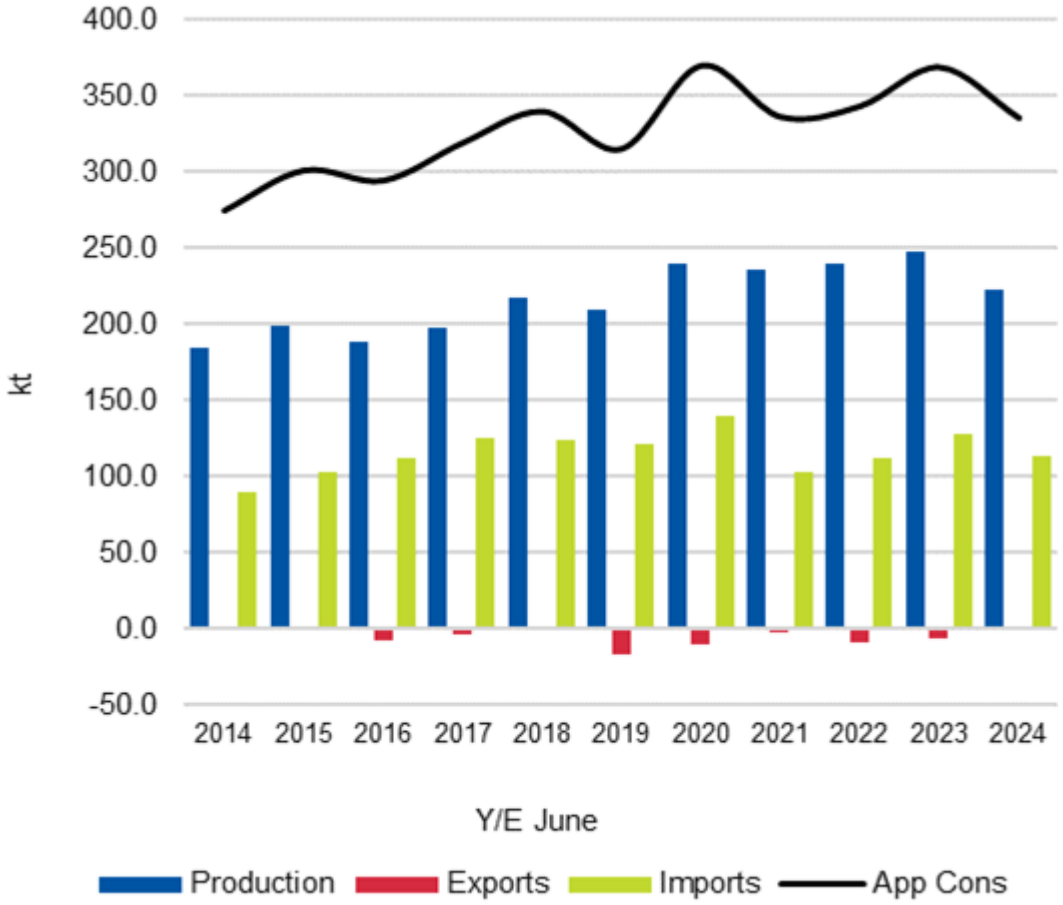
In the same year, Australia also consumed 112.8 kt of imported 'ready to sell' toilet paper and facial tissues, along with hand towel, serviettes and similar products valued at AUD48.2 million, on a free-on-board basis.

In total, IndustryEdge calculates total tissue and tissue product consumption was about 470.0 kt in 2023-24.

Local production of tissue stock (almost all is converted and used in Australia) is dominated by ABC Tissue, Kimberly-Clark and The Sorbent Paper Company. At different times, all local producers will also import tissue stock and also finished tissue products.

In New Zealand, the sole producer is the international business Essity. All the significant local producers have some sales both sides of the Tasman. The chart and table below show the consumption experience for ***tissue stock***, for the last decade,

Australian Apparent Consumption of Tissue Stock: 2014 – 2024 (ktpa)



Source: ABS & IndustryEdge research and estimates

Y/E June '000 Tonnes	Production	Exports*	Local Sales	Imports	App Cons
2014	185	1.3	183.7	90.3	**274.1**
2019	210	16.4	193.6	121.2	**314.8**
2024	223	0.7	222.3	112.8	**335.1**
+/- % pa	**1.9%**	**-5.7%**	**1.9%**	**2.2%**	**2.0%**

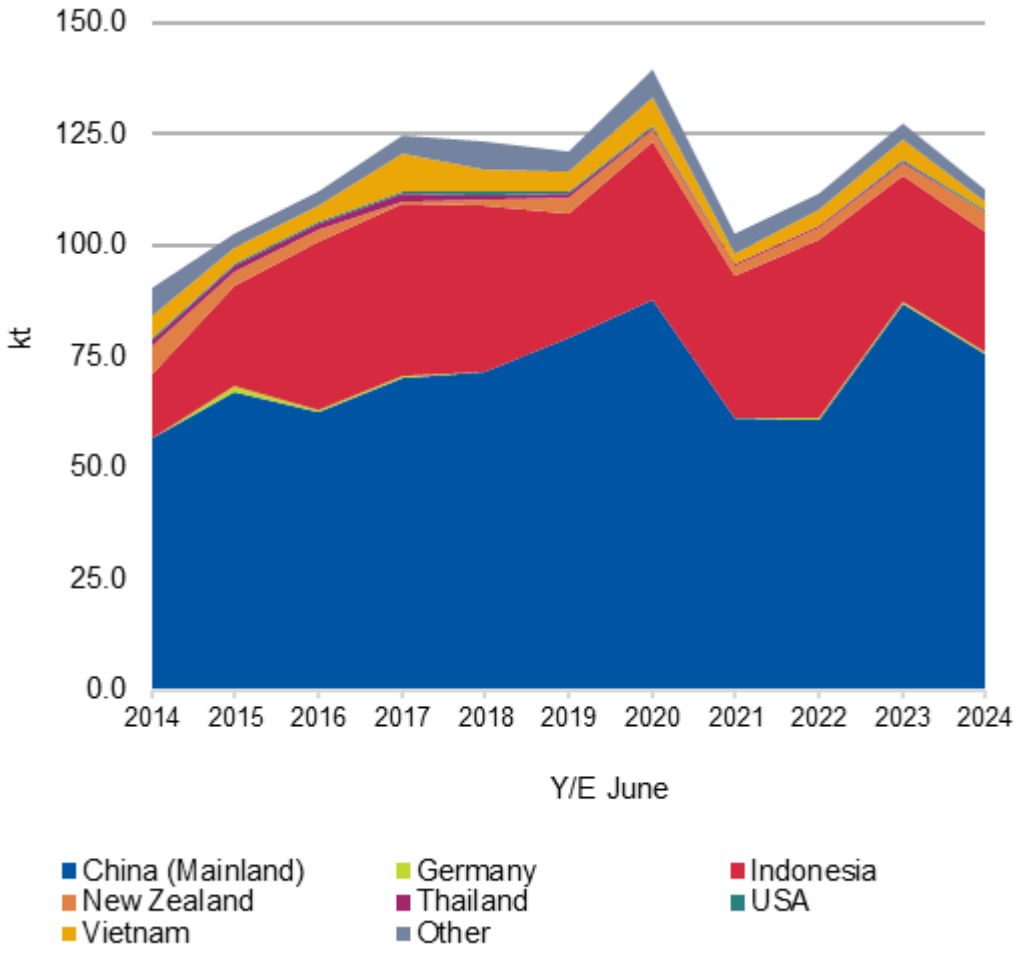
* *In the above table of apparent consumption of tissue stock, export figures include stock that has been manufactured in Australia and in some cases converted to tissue products before shipment.*

IMPORTS

Tissue stock imports dominated by China and Indonesia

As the chart shows, tissue stock imports to Australia have long been dominated by mainland China, supported by consistent shipments from Indonesia.

Australian Imports of Tissue Stock by Country of Origin: 2014 – 2024 (ktpa)



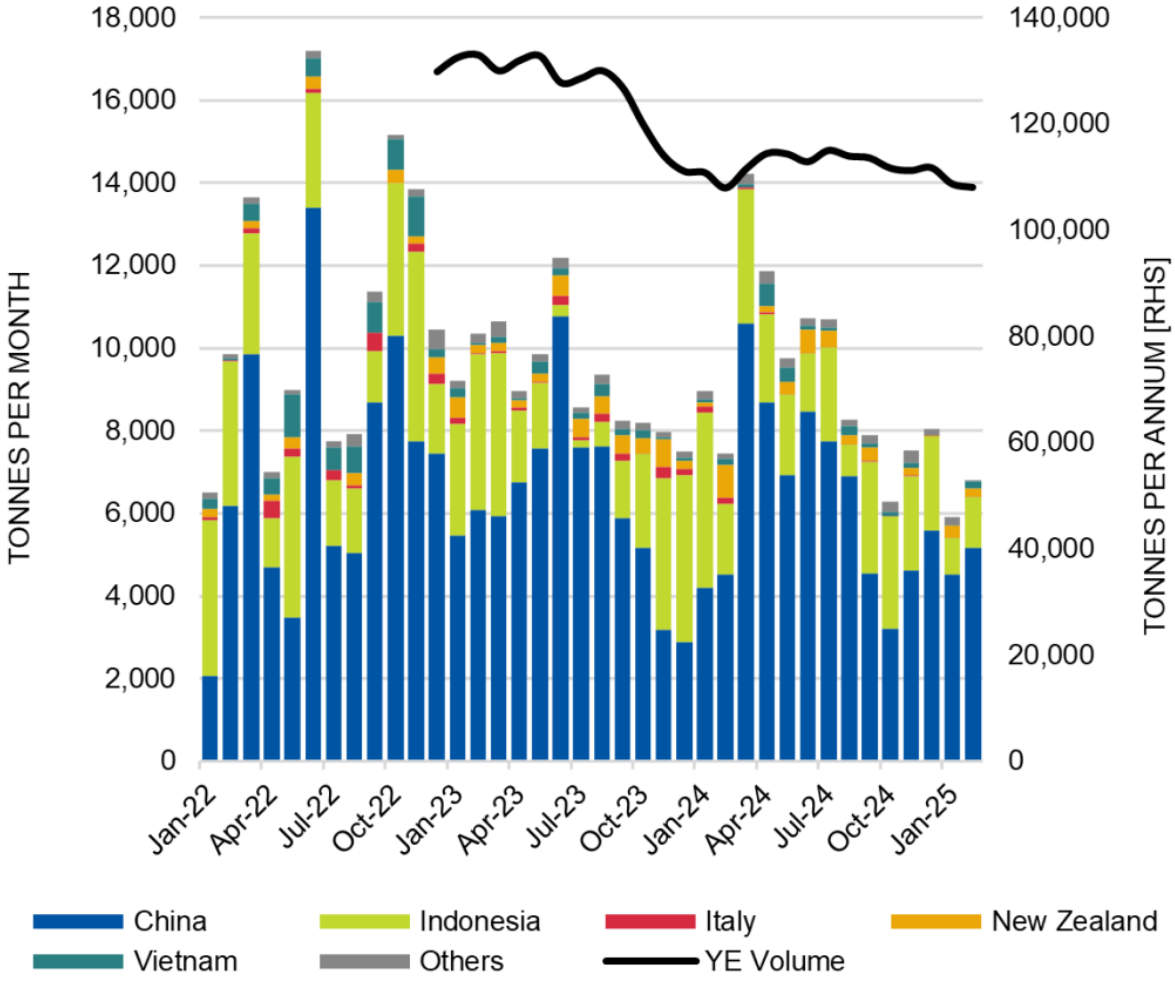
Source: ABS & IndustryEdge estimates

Tissue stock imports rose just 0.1% year-ended February

Demonstrating stability, over the year-ended February 2025, tissue stock imports to Australia lifted just 0.1% to 108.0 kt.

In February, imports totalled 6,801 tonnes, at a weighted average price of AUDFob1,603/tonne. Imports of tissue stock have been deteriorating over the last two years, with January import volumes the lowest in nearly nine years.

Australian Imports of Tissue Stock by Country: Jan ’22 – Feb ’25 (tonnes)



Source: ABS & IndustryEdge estimates

tonnes	China	Indonesia	Italy	NZ	Vietnam	Others	Total
YE Feb '24	72,088.1	25,658.4	1,536.8	4,492.8	1,796.0	2,302.8	107,874.9
YE Feb '25	76,960.6	23,947.5	182.3	2,611.8	1,880.8	2,415.2	107,998.2
%Change	6.8%	-6.7%	-88.1%	-41.9%	4.7%	4.9%	0.1%
Share	*71.3%*	*22.2%*	*0.2%*	*2.4%*	*1.7%*	*2.2%*	*100.0%*

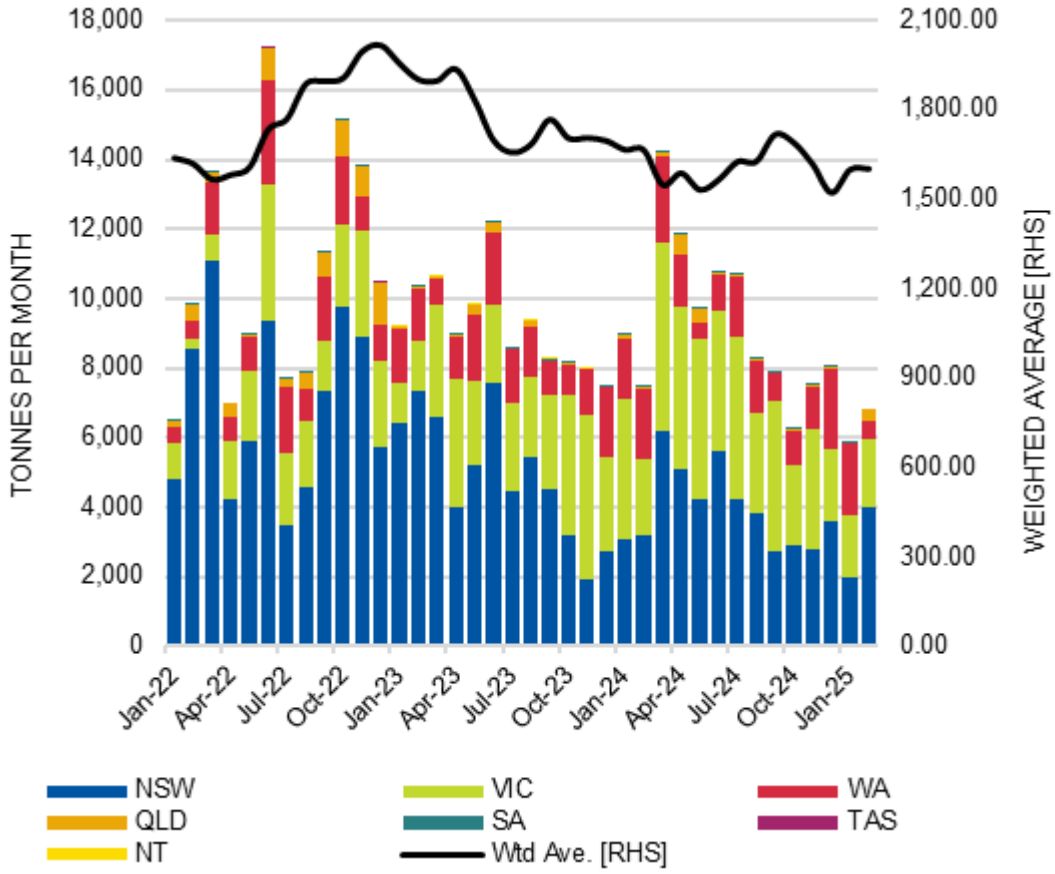
Stock imports to NSW down 9.1%

Tissue stock imports are dominated by three states: NSW, Victoria and WA. Over the year-ended February, imports to NSW fell 9.1%, while those to WA declined 7.5%. The suspicion is that some of these declines may be linked to increased imports of fully converted products.

Manufacturing is centred in the most populous states – NSW, Victoria and Queensland. WA has converting capability to avoid excessive freight costs.

It is notable that the weighted average price is operating toward the bottom of its medium-term range.

Australian Imports of Tissue Stock by State: Jan '22 – Feb '25 (tonnes & AUDFob/t)



Source: ABS & IndustryEdge estimates

tonnes	NSW	VIC	WA	QLD	Other	Total
YE Feb '24	51,948.9	36,779.2	17,882.9	1,028.8	235.1	107,874.9
YE Feb '25	47,218.3	42,279.8	16,539.6	1,676.0	284.5	107,998.2
%Change	-9.1%	15.0%	-7.5%	62.9%	21.0%	0.1%
Share	*43.7%*	*39.1%*	*15.3%*	*1.6%*	*0.3%*	*100.0%*

PRE-CONVERTED TOILET PAPER IMPORTS ARE THE BIG STORY

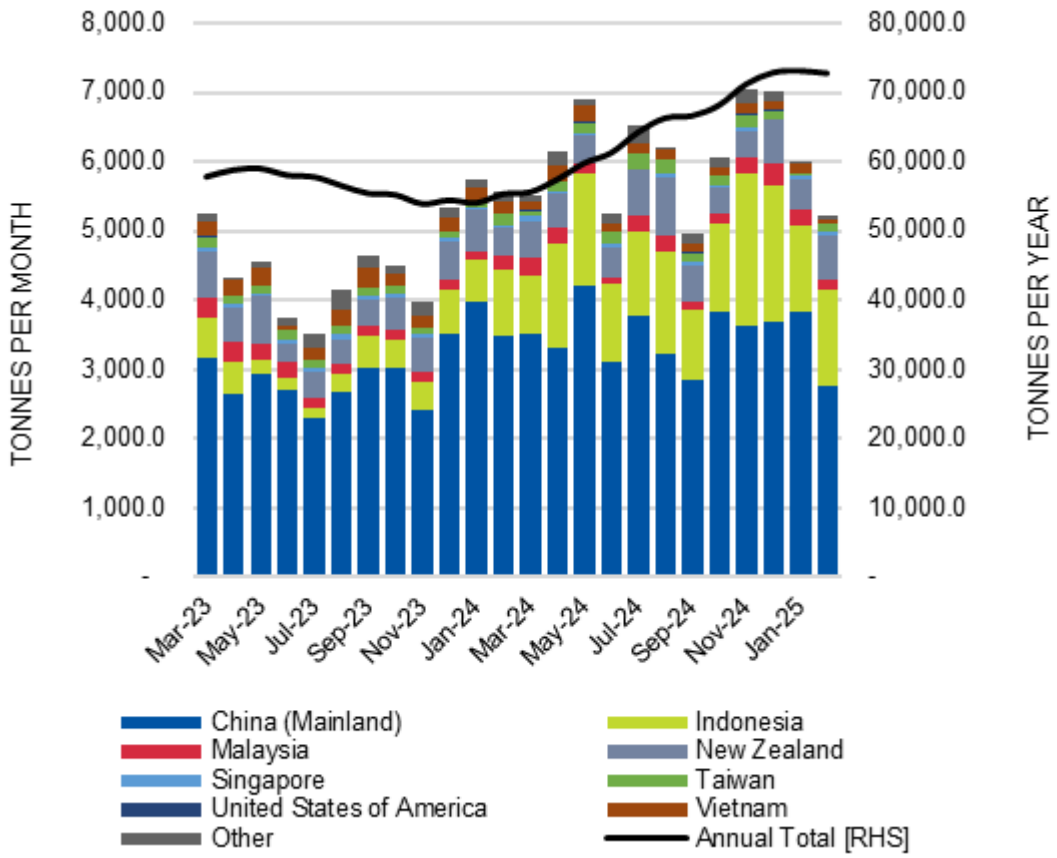
Pre-converted toilet paper imports at record levels – that is a sovereign manufacturing capacity issue!

While the tissue stock consumption and trade data is important and useful, the really big story is the rapid growth in Australia's imports of fully pre-converted tissue imports, especially toilet paper. When the nation thinks about sovereign capacity and security, we consider building products, a range of materials and of course defence. Perhaps its time to take a deeper understanding of sovereign manufacturing capability, because when we drill into details like toilet paper, we can observe that nearly ALL the additional consumption of toilet paper driven by a growing population, is being supplied by imports.

Over the year-ended February 2025, Australia's imports of pre-converted toilet paper totalled 72,900 tonnes, marginally below the record set the prior month.

Imports have increased a very strong 31.8% over the year, with Indonesia tripling its imports to Australia, supported by market leader China and New Zealand, both of which recorded strong increases.

Australian Imports of Converted Toilet Paper by Country: Jan ’22 – Feb ’25 (tonnes & %)



Source: ABS & IndustryEdge estimates

Tonnes	YE Feb ’24	YE Feb ’25	% Change	Share
China (Mainland)	35,832.5	41,791.3	16.6%	57.3%
Indonesia	5,352.8	16,851.7	214.8%	23.1%
Malaysia	2,200.6	2,315.9	5.2%	3.2%
New Zealand	5,719.8	6,371.4	11.4%	8.7%
Singapore	610.5	516.4	-15.4%	0.7%
Taiwan	1,425.2	1,687.6	18.4%	2.3%
USA	99.3	149.8	50.8%	0.2%
Vietnam	2,381.0	1,666.2	-30.0%	2.3%
Other	1,701.9	1,549.3	-9.0%	2.1%
Total	55,323.7	72,899.7	31.8%	100.0%

Imports year-ended February 2025 were valued at AUD164.6 million on a free-on-board basis over the full year, just AUD0.2 million lower than the annualised record set the prior month. The value of converted toilet paper imports has risen 24.8% compared to the prior year and has tripled over the last five years.

Australian Imports of Converted Toilet Paper by Country: Jan ’22 – Feb ’25 (AUDFob/t & %)

AUD Million	YE Feb ’24	YE Feb ’25	% Change	Share
China/HK	80.3	90.4	12.6%	55.0%

Indonesia	11.6	34.7	198.5%	21.1%
Malaysia	5.8	5.3	-7.5%	3.2%
New Zealand	17.0	18.3	7.6%	11.1%
Singapore	2.7	2.3	-13.5%	1.4%
Taiwan	3.7	4.1	13.5%	2.5%
USA	0.2	0.2	2.2%	0.1%
Vietnam	5.4	4.2	-22.9%	2.5%
Other	5.1	4.8	-5.9%	2.9%
Total	131.8	164.6	24.8%	100.0%

Source: ABS & IndustryEdge estimates

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