

# ***Cascades Expert Report Away from Home Tissue Edition***

Exclusive perspectives on market performance  
and evolving sustainability practices.

Brought to you by Cascades PRO®'s market experts



**Cascades PRO®**  
Winter 2026

# Welcome to your go-to source for expert insights on market trends and sustainability in the away-from-home tissue industry.

Published quarterly by Cascades’ team of specialists and shared exclusively with our distribution partners, this report delivers in-depth analysis on market performance, consumer sentiment, and the influence of economic conditions. It also highlights key shifts in consumer behavior and the global evolution of sustainable practices. Our mission is to equip you with the most relevant insights and strategic tools to help you thrive — not just in the tissue industry, but beyond.

***Want to learn more about the latest market trends and what they mean for your business?***

Contact your Cascades PRO® representative today to schedule a meeting with your Market Insights Expert.

## ***In this Edition*** Winter 2026

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# Understanding Today's Market, Shaping Tomorrow

Through our discussions with our business partners, we see that our industry is transforming rapidly, and the buying cycle is becoming more complex. All of this is driven by major shifts such as changing purchasing behaviors, artificial intelligence, and new sustainability regulations. Today's buyers are overloaded with information and must reconcile competing—yet seemingly credible—claims from different suppliers.



At Cascades, we strive to be better every day, growing together with our partners. To help our business partners make sense of information and focus on the trends that truly matter, our team of experts monitors developments not only in the tissue market but also in the sectors served by our distributor partners, providing clarity for decision makers.

The Cascades Expert Report – Away from Home Tissue Edition leverages this expertise to support our customers by highlighting key economic, market, and environmental trends, and by covering timely issues affecting the sectors our partners serve.

**François David**  
Vice President Commercial — North America

## Winter 2026 : Special Edition on the Evolution of B2B E-Commerce

The reality of the market is clear: online B2B purchasing is accelerating, and customers now expect a seamless experience. Whether through marketplaces such as Amazon or Walmart, or via other e-commerce platforms, online buying is reshaping transactional dynamics with B2B clients and redefining the rules for both manufacturers and distributors.

In this context, Cascades is investing to strengthen the Cascades PRO® brand across digital platforms and optimize the digital shelf to better support our partners' operations and online sales. Concretely, we are deploying a Product Information Management (PIM) with syndication, enhancing the quality and consistency of our product content for online sales, co-leading digital campaigns, and providing our partners with a Distributor Portal and a monthly newsletter. All these initiatives are designed to reinforce our position as a partner of choice.

This edition of the Cascades Expert Report provides insights to help capture SME demand and turn the digital experience into a lasting competitive advantage, including when using Amazon as an additional sales channel within your mix.

Happy reading.

**Mathieu Morin**  
Director — Digital Marketing & E-Commerce





# ***Away from Home Trends & Performance***

Insights & News — Q3 2025



# Economic trends in the United States

In the third quarter, pressure on the U.S. economy continued to build, with inflation continuing to rise to 3.0% in September, while the unemployment rate rose slightly to 4.3% in August (September data not available).

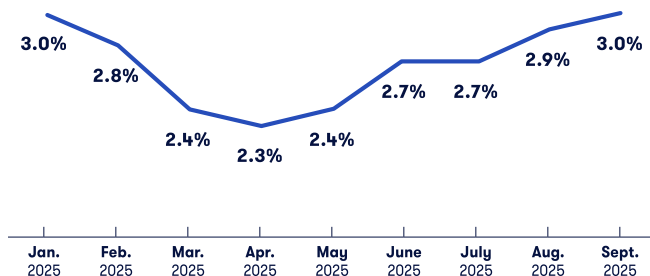
The longest government shutdown ever weighed on the economy and the financial stability of households in the fourth quarter. The paralysis of many public services affected several sectors of activity, and despite the reopening, economic losses could range between \$7 billion and \$14 billion in GDP, according to the Congressional Budget Office.

In addition, declining consumer confidence could slow the recovery in the short term: according to forecasts by the University of Michigan, the consumer confidence index in November is expected to fall back to its historic low, reached for the first and only time in June 2022, at the height of the pandemic when high inflation and economic tensions had greatly increased household uncertainty.

## Gradual rise in inflation

Consumer Price Index (CPI)

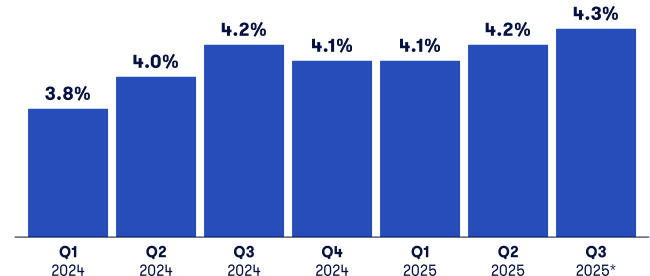
Source: U.S. Bureau of Labor Statistics



## Slight increase in unemployment

Unemployment rate

Source: U.S. Bureau of Labor Statistics

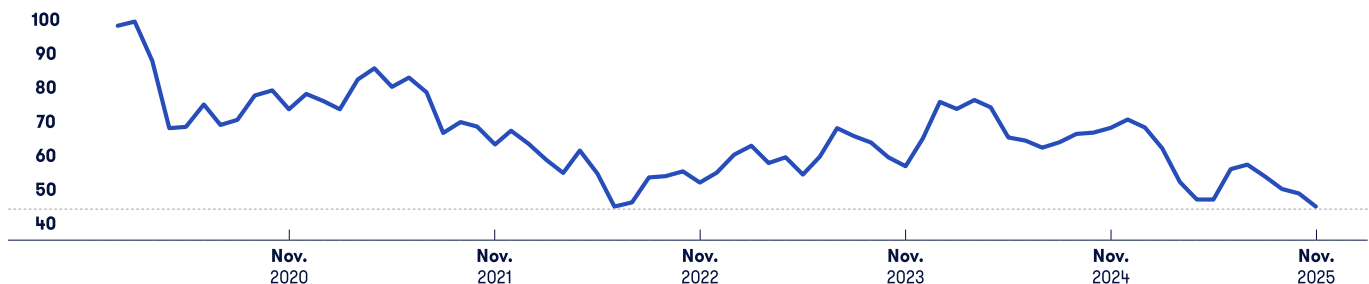


\*Q3 2025: September data not available

## Decline in consumer confidence

Consumer confidence index

Source: University of Michigan





# Economic trends in Canada 🇨🇦

The Canadian economy continues to slow due to significant external uncertainty related to U.S. tariffs and weaker-than-expected domestic demand. The outlook has darkened, particularly as the annual real GDP growth rate now stands at just over 1% in 2025, according to the Government of Canada.

In terms of trade, Canada remains dependent on its U.S. neighbour, despite ongoing tensions. In the third quarter, the share of exports to the United States rose slightly but remained below last year's level (73%, down 3 points), while the share of U.S. imports continued to decline (57%, down 5 points).

Inflation rose to 2.4% in September, following a temporary drop due to the removal of the carbon tax. To support price stability

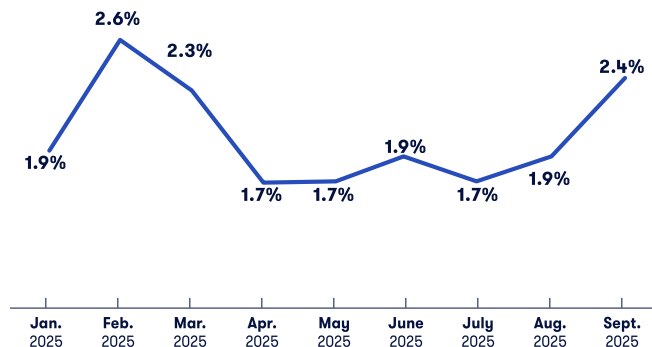
and keep inflation around the 2% target, the Bank of Canada lowered its key interest rate by 0.25 points on October 29.

The labour market is slowing down: the unemployment rate reached 7.0% in the third quarter, its highest level since the pandemic. Net job creation has remained weak since the beginning of the year, reflecting a general slowdown in activity.

## Inflation back to 2.4%

Consumer Price Index (CPI)

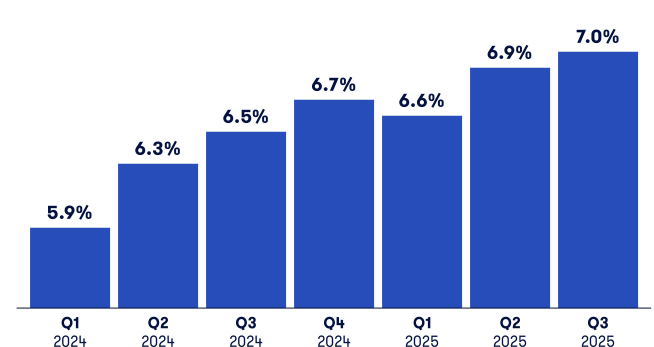
Source: Statistics Canada



## Gradual increase in the unemployment rate

Unemployment rate

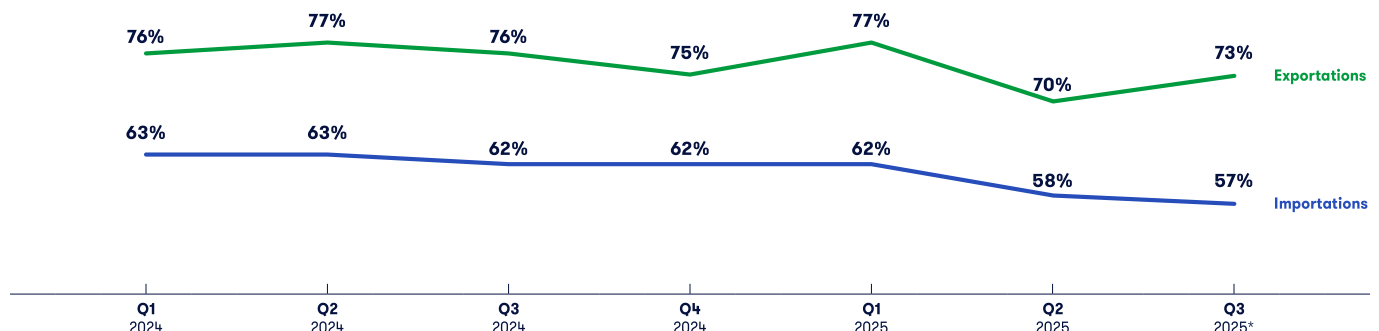
Source: Statistics Canada



## Trade with the United States: Recovery in exports and decline in imports

% of exports to the United States and % of imports from the United States

Source: Statistics Canada



\*Q3 2025: September data not available



# North American tissue market trends

In 2025, tissue sales continue to accelerate in Canada, while stabilizing in the United States.

## Canada

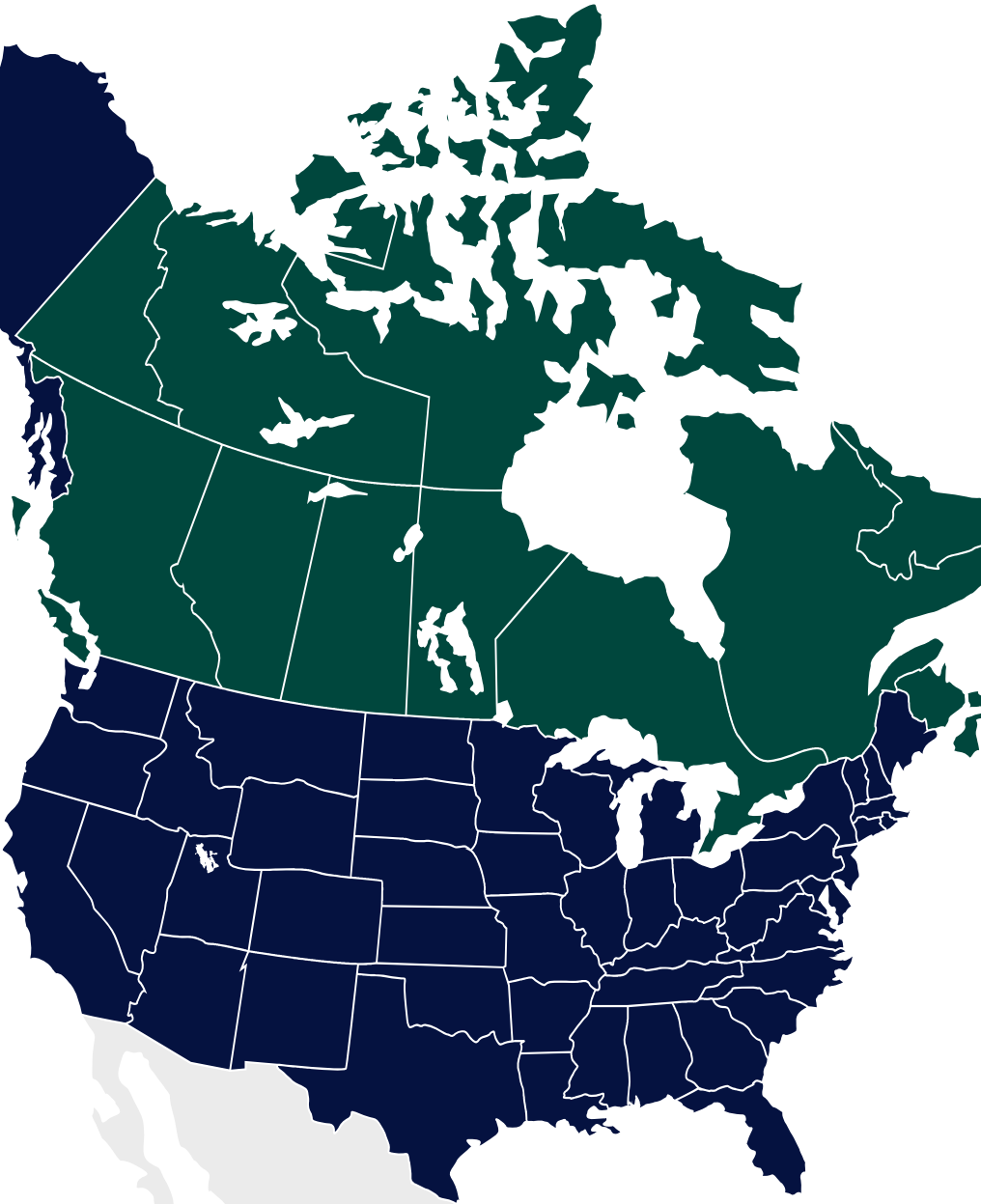


L3M	61,952 ST	(+5 %)
L6M	123,808 ST	(+4 %)
L12M	244,123 ST	(+4 %)

## United States



L3M	557,168 ST	(+0 %)
L6M	1,097,181 ST	(-1 %)
L12M	2,151,413 ST	(-0 %)



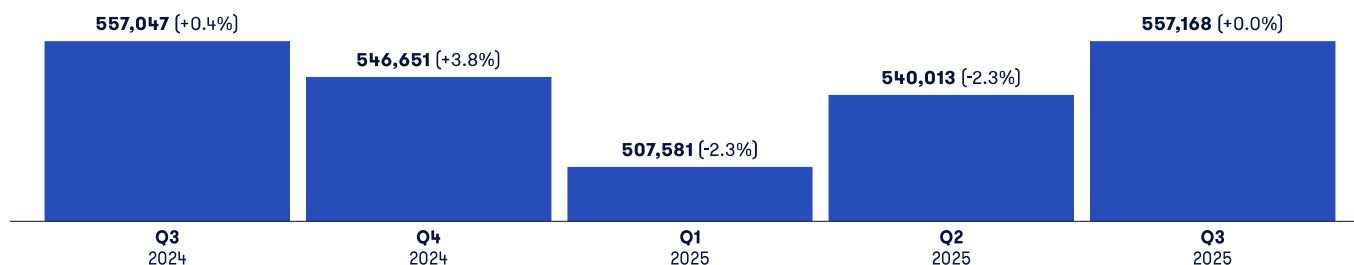
Source  
• Precision Insights, last 12 months to September 30, 2025. All data is in “Short Tons” (paper towels and hand towels, toilet paper and napkins).



# Tissue market trends

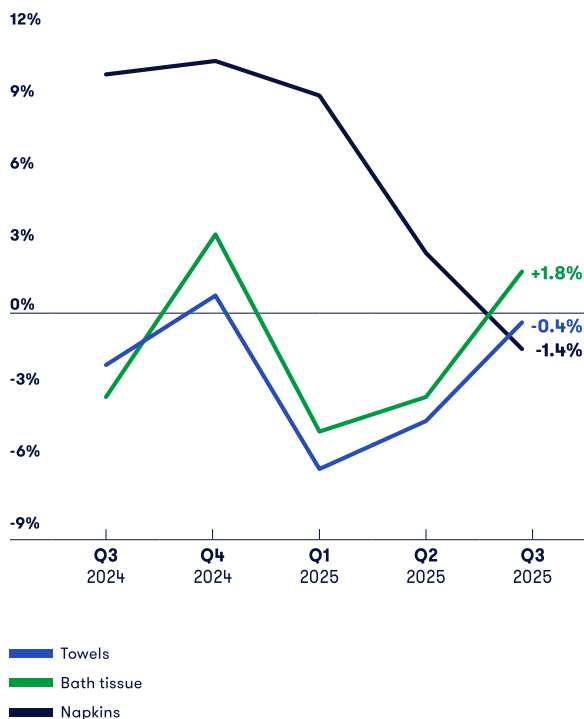
## Sales volume in the away-from-home tissue market stabilized in Q3.

Sales volumes (tons) — Gap vs. same period last year (%)



## Change in momentum: sales of napkins declined following strong growth, while sales of paper towels stabilized and sales of toilet paper rebounded.

Change in sales volumes (in tons) vs. same period last year (%)



### Towels

Sales volume slightly up -0.4% in Q3 2025

- Verticals up: offices, restaurants and industrial
- Verticals down: health care, hospitality and public spaces



### Bath tissue

Sales volume up +1.8% in Q3 2025

- Verticals up: offices, industrial and restaurants
- Verticals down: health and hospitality



### Napkins

Sales volume down -1.4% in Q3 2025

- Verticals up: restaurants
- Verticals down: public spaces

**The paper category continues to rebound following a weak Q1, which was driven by tariff-related uncertainty.**

— Dan Erno, Expert en insights de marché



Source

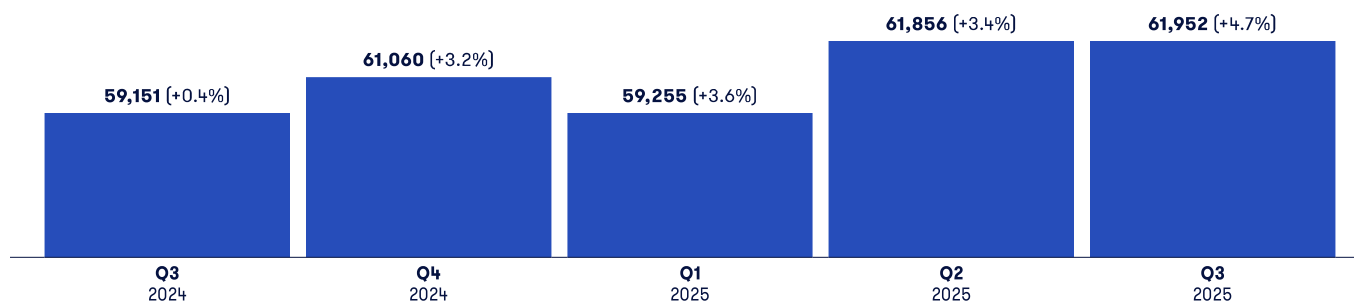
• Precision Insights, last 12 months to September 30, 2025. All data is in "Short Tons" (paper towels and hand towels, toilet paper and napkins).



# Tissue market trends

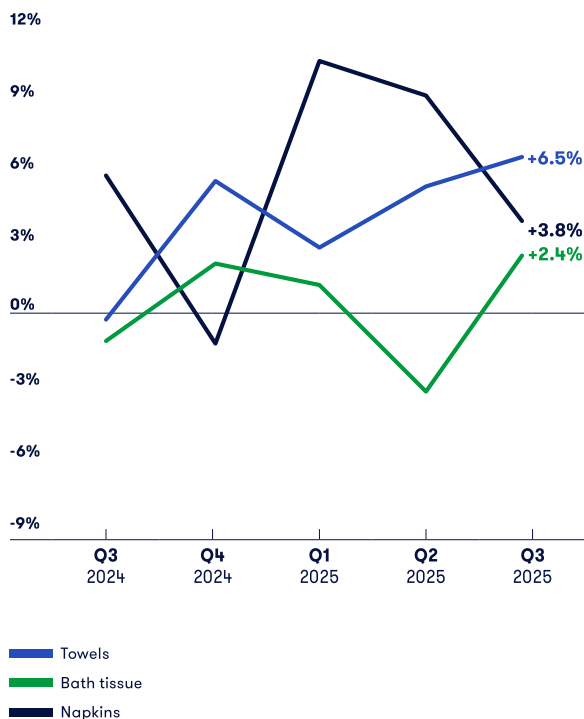
## Sales volume in the away-from-home tissue market continued to grow in Q3.

Sales volumes (tons) — Gap vs. same period last year (%)



## Sales increased across all categories, despite a slowdown in growth for napkins.

Change in sales volumes (in tons) vs. same period last year (%)



### Towels

Sales volume up +6.5% in Q3 2025

- Verticals up: offices, public spaces, retail, industrial and health care
- Verticals down: restaurants



### Bath tissue

Sales volume up +2.4% in Q3 2025

- Verticals up: offices, retail, public spaces and hospitality
- Verticals down: restaurants



### Napkins

Sales volume up +3.8% in Q3 2025

- Verticals up: restaurants and retail
- Verticals down: hospitality, education and industrial

**As anticipated, the significant increase in employees returning to the office across several employers boosted demand in the office space vertical in Q3.**

— Jean-Pascal Voyer, Market Insights Expert



Source

• Precision Insights, last 12 months to September 30, 2025. All data is in "Short Tons" (paper towels and hand towels, toilet paper and napkins).

# Winning in the digital buyer era

The emerging generation of buyers is redefining how business gets done. Having grown up buying everything online, they now expect the same ease, speed and transparency in their professional transactions.

## A new generation is setting the rules

**73 %**

of B2B buyers are  
millennials

**44 %**

of them are also  
final decisionmakers

### What this means for you

This generation no longer selects just a product, but an experience. They expect:

A simple and intuitive browsing experience

Clear information easily accessible online

Fast interactions with no wasted time

If your digital experience feels clunky or inefficient, you may be ruled out before you even get a chance to prove your value.

## Focus on what Amazon doesn't offer: Human expertise

### Competing with Amazon is not a strategy. Differentiating from it is

Amazon excels at selling simple, fastturnover products with polished logistics, but it lacks a personal touch. Distributors have a different ace to play: proximity, field understanding and the ability to deliver solutions tailored to their clients' realities.

### Where digital meets the human touch

It's not about choosing digital or human. The challenge is making them work together. Today, 61% of B2B buyers prefer a selfservice pathway for routine tasks, but rely on expert advice for complex or strategic decisions.

**What sets a distributor apart  
isn't speed, but their ability to support  
clients over time.**



## Your competitive advantage

What sets a distributor apart isn't speed, but their ability to support clients over time. Your strength lies in:

- Field knowledge of operations and customer constraints
- Keen understanding of client needs and tailored responses
- Personalized, responsive service that no platform can replicate

**According to a study conducted for Cascades, over one third of buyers in the tissue sector purchase online, which is significantly lower than demand (61%). This marked gap between interest and current supply reveals a genuine market opportunity.**

— Eve Lamoureux, Customer Insights Expert, Cascades



#### Sources

- LinkedIn, B2B Buyer Report, 2025
- eCommerce Market Insights conducted for Cascades by Precision Insights, 2024
- Gartner, How to Align Sales Engagement Strategies With B2B Buyer Preferences, May 2025
- Tissue Online North America, Dancing with the Gorilla: A Guide to Thriving in the Age of Amazon Business, September 2025.

# Winning in the digital buyer era

(continued)

## 3 ways to stand out from Amazon



### Start with an operational diagnosis

Understand your customer's core challenges before talking about products. That's how you demonstrate your value from the very first conversation.



### Offer guidance services

On-site training, inventory management, order planning support: these are the kinds of services that build long-term loyalty and trust.



### Invest in a seamless online experience

Make reordering easy and efficient so your sales team can focus on high-value opportunities instead of repetitive tasks.

## The winning balance

Top performing distributors combine:

- **Human expert presence** to guide decisions, build trust and nurture longterm relationships
- **Simple, intuitive digital tools** to accelerate discovery, comparison and repeat ordering.

This synergy delivers a customer experience that platforms focused solely on logistics can't replicate.

## Complementary approach: Leveraging Amazon as an additional sales platform

It can also be beneficial to leverage this platform for specific purposes. For example, offering your private label products to small businesses whose purchasing habits resemble those of consumers.

**Cascades' study on Tissue purchasing habits in SMEs on the next page will help you better understand this type of customer.**

#### Sources

- LinkedIn, B2B Buyer Report, 2025
- eCommerce Market Insights conducted for Cascades by Precision Insights, 2024
- Gartner, How to Align Sales Engagement Strategies With B2B Buyer Preferences, May 2025
- Tissue Online North America, Dancing with the Gorilla: A Guide to Thriving in the Age of Amazon Business, September 2025.

# Tissue purchasing habits in SMEs: Balancing simplicity and operational realities

Cascades conducted a study on the purchasing habits of SMEs that operate in both office and industrial environments. The findings reveal a common priority: businesses are looking for practical, reliable and cost-effective hygiene solutions tailored to their day-to-day constraints.

## Two verticals, two buying realities

### Office sector buyers: convenience comes first

Buyers in this segment often behave like retail consumers. Their priorities are as follows: **ease of ordering**, **fast delivery**, and **flexible supply options**. Smaller businesses tend to buy as needed, while midsize businesses are more likely to plan purchases and favour reliable suppliers.

These businesses rely heavily on online platforms, often managed by designated personnel. This centralization boosts efficiency and minimizes stockouts.

Industrial buyers also show **strong supplier loyalty**. Once trust is established, they prefer to stick with one partner rather than multiplying vendors. Their goal is to **strike the right balance between rigour and agility**, keeping processes tight without slowing down operations.

### Small business (25–100 employees)

Buying habits	Decision criteria	Supplier loyalty
Frequent, often weekly purchases based on promotions or urgency.	Price and convenience.	Low, opportunistic behaviour.

### Midsize businesses (50–250 employees)

Buying habits	Decision criteria	Supplier loyalty
Planned and grouped orders, sometimes bundled with other maintenance products.	Reliability, pricing, fast delivery.	Medium to high based on service quality.

Across the board, these buyers seek **simplicity and responsiveness**, but their loyalty remains fragile. It depends largely on the speed of service and logistics flexibility.

### Industrial purchasing: where structure meets practicality

In the industrial sector, purchasing is highly structured and process-driven. Orders are triggered as soon as stock reaches minimum levels, and nearly every step follows a well-established method.

## What this means for distributors

SMEs operating in office or industrial environments represent a high-potential market for hygiene distributors. Sustaining long-term relationships with these clients starts with offering:

- Fast and flexible delivery
- Proactive support for inventory and restocking management
- A user-friendly and intuitive online purchasing platform

# Tissue purchasing habits in SMEs: Balancing simplicity and operational realities

(continued)

## What they're expecting from a performing website

	Fast, intuitive browsing
	Immediate access to key information (price, availability, specs)
	Effective filtering options
	Easy product comparison
	Trustworthy customer reviews (their absence can slow down the decision process)
	A professional, business-focused tone is expected (sites that feel too B2C or cluttered are less trusted)
	Minimum order requirements can be deal-breakers
	Reliability and speed of delivery drive actual decisions

## User habits on online ordering platforms

In both segments, buyers of hygiene products such as toilet paper and paper towels have **limited storage space** and **no inventory tracking process**. They prioritize a simple, clear, and fast purchasing experience, making online platforms especially attractive.

## To remember

**The smoother the platform, the stronger the buyer loyalty. A well-designed digital experience is now a major driver of customer retention and satisfaction.**

**To learn more about this study and explore how to put these insights into action, contact your Cascades representative.**

## Are you missing out?

Did you know that Cascades has five full-time employees dedicated to supporting our distributor partners with market insights to fuel their growth?

**Ask your rep to learn how they can help you.**

### Sources

• Tissue Paper Purchasing in SMEs: Results from an Online Community (MROC), conducted by InBe for Cascades, May 2025

# Holidays 2025: Caution meets celebration

Consumers are adjusting their budgets, not their holiday mindset. Despite tougher economic conditions, North American consumers still plan to embrace the holiday spirit. They're adapting their spending habits to balance joy with restraint, blending online purchases with in-store visits.

Budgets are getting tighter, but the desire to celebrate remains strong. **In the U.S., holiday expenses are expected to drop by about 5%, and in Canada by around 10%.** Still, 77% of consumers plan to give more affordable gifts, but don't intend to cut back on spending for their families.

## Stores still hold their magic

Even under budget pressure, shopping habits remain steady: most consumers plan to visit the same types of stores as in 2024.

Big-box retailers are expected to see a slight uptick in foot traffic, while liquor stores may see a small decline, likely due to more moderate consumption and growing interest in beer over spirits.

## Most popular gift categories

Canada	United States
 <b>68%</b> Gift cards	 <b>72%</b> Gift cards
 <b>45%</b> Toys and games	 <b>53%</b> Clothes
 <b>43%</b> Food and beverages	 <b>47%</b> Toys and games
 <b>39%</b> Alcoholic beverages	 <b>36%</b> Home goods
 <b>36%</b> Clothes	 <b>27%</b> Food and beverages

Meanwhile, online shopping continues to grow as a default behaviour. Consumers are primarily looking for convenience, speed and deals. The ability to compare prices, get fast delivery, or use in-store pickup increases the appeal of the digital ordering journey.

And yet, physical stores still hold a special place in the holiday experience. For many, shopping in person is a ritual: a moment to share, soak in the atmosphere, and enjoy human connection.

## In-store shopping during the 2025 holiday season

(Share of consumers planning to shop in-store)



**Black Friday** remains a major retail moment: **40% of Americans** and **32% of Canadians** say they'll do most of their holiday shopping then.

**Cyber Monday** is growing but still slightly behind in terms of transaction volume, showing that in-person retail still has pulling power, even in an increasingly digital world.

## A key opportunity for hygiene distributors

Heavier foot traffic during the holidays directly increases demand for cleaning, hygiene and disinfection solutions.

### What to remember:

- **More traffic means more surfaces to clean.**
- **Visible cleanliness has a direct impact on the customer experience.**
- **Easy-to-replenish products become a competitive advantage.**

Holiday 2025 will be hybrid and pragmatic, a blend of scroll and stroll where physical retail remains a critical environment to prioritize for hygiene distributors.

**Keep ready for the Holidays — make sure your inventory levels can handle the fluctuations.**

### Sources

- Numerator, Holiday Preview (Canada & United States), Q4 2025 vs Q4 2024
- PWC, Holiday outlook trends (Canada & United States), 2025.



# ***Leadership in Sustainability***

News & Engagements

# Online platforms: A strategic lever to showcase your sustainability actions

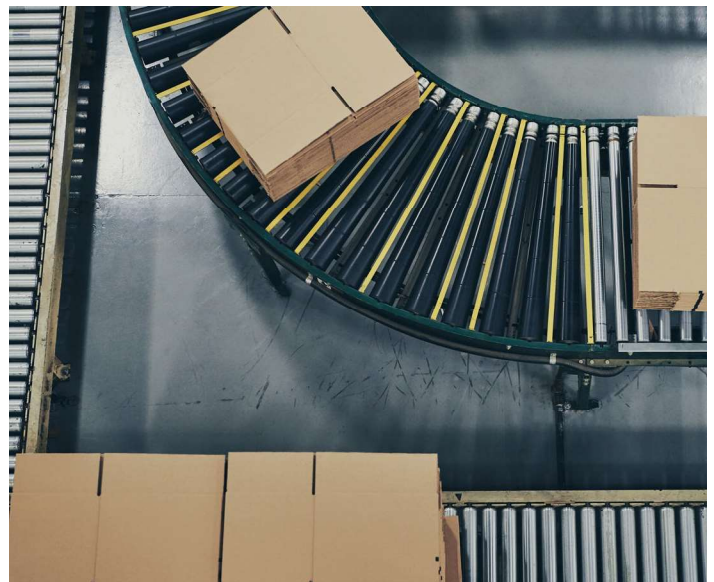
The digital shift is transforming our consumption habits. Accessibility, speed and personalization make it a powerful tool, but this evolution also brings major environmental challenges. Among the most concerning are: packaging that is not always recyclable and can generate waste, greenhouse gas emissions from transportation (especially express delivery), and the energy usage of data centres that support online platforms.

This change in behaviour doesn't only affect consumers. It's also influencing how businesses make purchasing decisions. **Fortunately, digital tools can also become a lever for responsible consumption.** In fact, your online platform can serve as a real point of differentiation for clients seeking more sustainable products. By highlighting key environmental features directly on your product pages and through smart filtering options, you make it easier for buyers to find responsible solutions and fulfill their sustainability expectations.

Promoting sustainable attributes on your online platforms also helps attract new prospects through improved search engine optimization (SEO). It also benefits AI-assisted searches, where artificial intelligence can automatically recommend products aligned with a buyer's environmental priorities.

**These are some of the top sustainability topics companies look for on your digital platforms, aligned with eco-design principles:**

- Reduction of greenhouse gas (GHG) emissions
- Water consumption reduction
- Supply chain traceability
- Circular economy



In conclusion, showcasing the sustainable attributes of your products is a strategic advantage, even in the digital space. More than one-third of companies claim they are willing to switch suppliers if their sustainability criteria are not met. To stand out, support your communications with reliable and transparent data, and demonstrate clear alignment with recognized standards and certifications.

#### Sources

- The European Consumer Organisation, E-commerce: new challenges for the sustainable transition, 2025.
- BloomEnergy, How Data Center Are Tackling Sustainability Challenges, 2025.
- Bain & Company, How to Master the Art of Selling Sustainability, 2025.
- Digital Commerce 360, AI, social selling, and sustainability redefine B2B ecommerce, 2025.
- Harvard Law School Forum on Corporate Governance, CEO and C-Suite ESG Priorities, 2025.
- RSM, Supply Chain Special Report 2025: U.S. and Canada, 2025.
- RSM, Laying the foundation for more circular manufacturing supply chains, 2025.
- EcoVadis, Global Supply Chain Sustainability Risk & Performance Index, 2025.

# Partner with Cascades to power your sustainable solutions

At Cascades, the circular economy is more than a concept: it's a core part of our business model. As a trusted partner for sustainable hygiene solutions, we design products with a reduced environmental footprint, whether through lower GHG emissions or the traceability of our raw materials. All of this is backed by recognized environmental certifications that help build buyer confidence. As a trusted partner in sustainable hygiene solutions, we are committed to reducing the environmental footprint of both our operations and our products. In 2024, our GHG emissions were 30% lower than the North American industry average according to FisherSolve®. Our commitment is reinforced by the recognized environmental certification FSC® that ensure the sustainability of our raw materials.

## Cascades expertise goes beyond tissue

Cascades also offers the support of a dedicated team of experts who accompany you to create eco-designed packaging that helps reduce waste and aligns with your sustainability objectives. Our specialists work with you to optimize your box designs, offering sizes and configurations for your clients that are better suited to order size, helping reduce both costs and your environmental impact.

Aware of the environmental impact of e-commerce packaging, we offer a wide range of durable, right-sized boxes in multiple formats with adjustable dimensions. They're designed to reduce empty space, minimize filler materials, lower shipping costs, and decrease inventory volume, all while providing effective product protection. In 2024, 85.7% of the fibre purchased by Cascades mills to make our products was recycled and 97.8% of manufactured and sold packaging were recyclable, compostable or reusable, demonstrating our clear commitment to a circular approach in our solutions.

Upon request, our boxes can also be FSC® certified, ensuring responsible forest resource management. As a member of Amazon's APASS network,\* we can help you meet the requirements of online retail while integrating sustainable solutions into your supply chain.

For more information, visit the following pages:

[E-commerce Packaging Solutions | Cascades](#)

[E-commerce Packaging Services | Cascades](#)

**To learn how Cascades can support your sustainability objectives, reach out to your representative. They'll collaborate with our team of experts to guide you.**

**You can also consult our most recent sustainability report:**  
[Sustainability Action Plan 2021-2025](#)



\*APASS is a program designed to help suppliers, vendors, and manufacturers obtain Amazon's Frustration-Free Packaging (FFP), Ships-in-Own-Container (SIOC) and Prep-Free Packaging (PFP) certification for their products

Sources

• Fisher International - FisherSolve®, Émission de GES, Cascades vs moyenne de l'industrie papetière nord-américaine, 2024.  
• Cascades, Plan de développement durable 2021—2025, Bilan 2024.

# PROactively sustainable since day one.

True to our name, we're **PRO**s in our field: **PRO**fessional, **PRO**active and committed to minimizing our environmental footprint, so you can reduce yours.

Our products provide reliable and cost-effective protection for proper hygiene anywhere, anytime. From bathroom tissue made from 100% recycled fibers to wipers and hand towel dispensers, we've got the solution for you.



**Cascades PRO**  
**Perform**

*Do more for less.*



**Cascades PRO**  
**Select**

*Paper of a reliable nature.*



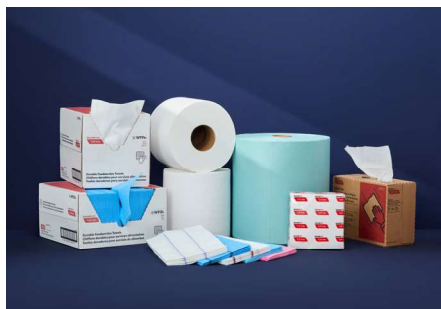
**Cascades PRO**  
**Signature**

*Hygiene's softest touch.*



**Cascades PRO**  
**Tandem**

*The family that protects you all the time.*



**Cascades PRO**  
**Tuff-Job**

*Every job every time.*



*Choose from our  
certified products by trusted  
Third-Parties.*

Contact your **Cascades PRO** representative today to guide you on our **PRO** offering of sustainable products.

**Cascades PRO**  
All clean. All good.

pro.cascades.com  
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