

PROJECTS SURVEY 2025

TWM's annual Projects Survey charts all new capacity being added, ordered or in final planning stages during 2024-2025, as well as noting any projects already planned for 2026 and 2027.

COUNTRY	COMPANY	INVESTMENT	PM No	NEW/REBUILD	START-UP DATE	CAP. CHANGE (tonnes/yr)
Algeria	Algeria Tissue Mill	-	1	New	2024	23,500
Argentina	Celupaper	Buenos Aires	5	New	2025	23,400
Bangladesh	City Group	Dhaka	1	New	2025	40,000
Brazil	Bracell Cellulose	-	4	New	2024	-
Brazil	Bracell Cellulose	-	3	New	2024	-
Brazil	Bracell Cellulose	-	2	New	2024	-
Brazil	Bracell Cellulose	-	1	New	2024	-
Brazil	Suzano Papel e Celulose	Aracruz	-	New	2026	60,000
Colombia	GrandBay Papeles Nacionales	Pereira	5	New	2025	40,000
China	Asia Symbol	Jiangmen, Guandong	7	New	2024	23,500
China	Asia Symbol	Jiangmen, Guandong	8	New	2024	23,500
China	Asia Symbol	Jiangmen, Guandong	9	New	2024	23,500
China	Asia Symbol	Jiangmen, Guandong	10	New	2024	23,500
China	Asia Symbol	Jiangmen, Jiangxi	11	New	2024	23,500
China	Asia Symbol	Jiangmen, Jiangxi	12	New	2024	23,500
China	Asia Symbol	Jiangmen, Jiangxi	13	New	2024	23,500
China	Asia Symbol	Jiangmen, Jiangxi	14	New	2024	23,500
China	Confidential	Confidential	-	New	2024	-
China	Confidential	Confidential	-	New	2025	25,200
China	Confidential	Confidential	-	New	2025	25,200
China	C&S Paper	Jiangsu	1	New	2025	-
China	C&S Paper	Jiangsu	2	New	2025	-
China	Guangxi Tissue Industry Co.	Baise	1	New	2024	20,000
China	Guangxi Tissue Industry Co.	Baise	2	New	2024	20,000
China	Guangxi Tissue Industry Co.	Baise	3	New	2024	20,000
China	Guangxi Tissue Industry Co.	Baise	4	New	2024	20,000
China	Hengan	Chongqing	3	New	2024	30,000
China	Hengan	Chongqing	4	New	2024	30,000
China	Hengan	Chongqing	5	New	2024	30,000
China	Hengan	Chongqing	6	New	2024	30,000
China	Hengan	Fujian	32	New	2024	40,000

	PM TRIM (m)	PM SPEED (m/min)	SUPPLIER	COMMENTS
	2.85	1,800	Baosuo	Crescent Former
	2.75	1,300	Toscotec	MODULO-PLUS
	-	2,200	Toscotec	AHEAD 2.2
	5.6	2,000	Andritz	PrimeLine™ W 2000 (ShoePress)
	5.6	2,000	Andritz	PrimeLine™ W 2000 (ShoePress)
	5.6	2,000	Andritz	PrimeLine™ W 2000 (ShoePress)
	5.6	2,000	Andritz	PrimeLine™ W 2000 (ShoePress)
	5.6	2,000	Valmet	Advantage DCT 200HS
	3.6	2,200	Toscotec	AHEAD 2.2
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.8	1,500	Andritz	PrimeLineHyTAD
	2.85	1,600	Valmet	IntelliTissue 1600
	2.85	1,600	Valmet	IntelliTissue 1600
	3.5	1,650	Andritz	PrimeLineCOMPACT M 1600
	3.5	1,650	Andritz	PrimeLineCOMPACT M 1600
	2.8	1,500	Baosuo	Crescent Former
	2.8	1,500	Baosuo	Crescent Former
	2.8	1,500	Baosuo	Crescent Former
	2.8	1,500	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,500	Toscotec	TADVISION

An impressive 132 new projects are listed in this year's annual Projects Survey, which charts the accumulation of tissue capacity data collected across the global industry during 2024, and the projects expected to start-up in 2025 and 2026.

A further 15 projects are also already noted for start-up in 2027, totalling 147 projects between 2024-2027.

This compares with 108 new projects listed in the three years for 2024's survey – which charted all new capacity being added, ordered or in final planning stages during 2023-2024, and projected for 2025 – the 102 tissue projects listed in 2023's survey, 157 listed in 2022's survey, and the 146 tissue machine projects that were listed in 2021's.

TWM's annual Projects Survey gains significant intel from the magazine's six annual Country Reports, which in 2024 included in-depth interviews with tissue mills in India, Türkiye, the United Kingdom, Indonesia, Africa, and Latin America.

Wide ranging news coverage throughout 2024 and into 2025 has also reported on the latest tissue machinery investments from across every continent. In many cases, information and investment strategy have come from leading executives themselves.

While the survey represents a detailed snapshot of production strategies in all the major tissue regions, as always caution must be considered with the survey's findings due in large part to its sheer scope. The figures included here are based on the best information provided, and this has

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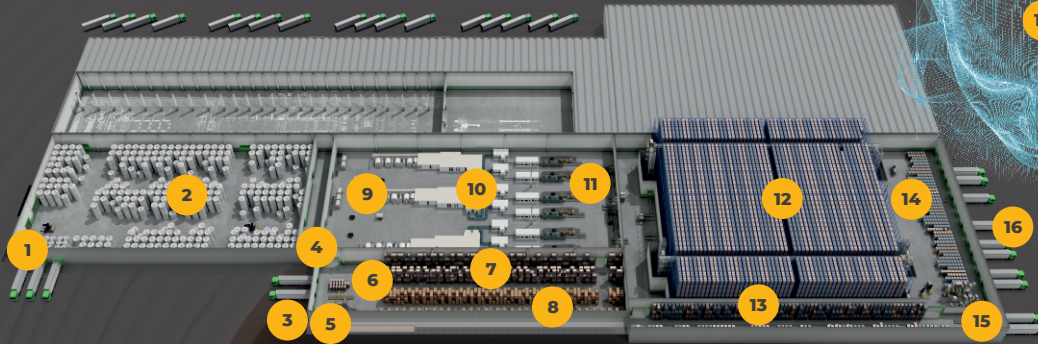
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THE ENTIRE FLOW IS MANAGED BY OUR **LGVs/AGVs SYSTEM**

- | | | |
|------------------------------------|---|--------------------------------|
| 1 PARENT REEL RECEIVING / SHIPMENT | 7 PACKAGING/RAW MATERIALS STORAGE | 13 STORAGE SOLUTIONS WITH LGVs |
| 2 PARENT REEL WAREHOUSE | 8 EMPTY PALLET STORAGE | 14 STAGING |
| 3 TRUCK UNLOADING WITH LGVs | 9 PRODUCTION LINE INFEED WITH PACKAGING MATERIALS | 15 FINISHED PRODUCTS INBOUND |
| 4 PACKAGING/RAW MATERIALS INBOUND | 10 CONVERTING AREA | 16 TRUCK LOADING WITH LGVs |
| 5 EMPTY PALLET INSPECTION | 11 PALLETIZING, STRETCH WRAPPING & LABELING SYSTEMS | 17 SOFTWARE PLATFORM |
| 6 PALLET SHAPE CONTROL | 12 HIGH-DENSITY WAREHOUSES - AS/RS | |

INTEGRATED ECOSYSTEM

Satisfy every customer's needs in terms of **quality, service and traceability** is the key to sustain the **tissue industry** in the future.

Our Group will share with you **years of experience**. With extensive know-how and expertise in the development of **fully automated and integrated smart factories**, we aim to take your business to the next level. Swing by and discover our latest **innovations**, explore the **newest trends** in the intralogistics world and attend conferences around key issues such as **sustainability, integration and digitalization**.

COUNTRY	COMPANY	INVESTMENT	PM No	NEW/ REBUILD	START-UP DATE	CAP. CHANGE (tonnes/yr)
China	Jiangsu Hongzehu Paper Co.	Huai'an	3	New	2024	20,000
China	Jiangshan Huasheng Paper Co.	Houma, Shanxi	1	New	2024	17,000
China	Jiangshan Huasheng Paper Co.	Houma, Shanxi	2	New	2024	17,000
China	Lee & Man (Guangxi Chongzuo Liwen)	Chongzuo	16	New	2024	30,000
China	Lee & Man (Guangxi Chongzuo Liwen)	Chongzuo	17	New	2024	30,000
China	Lee & Man (Guangxi Chongzuo Liwen)	Chongzuo	18	New	2024	30,000
China	Lee & Man (Guangxi Chongzuo Liwen)	Chongzuo	19	New	2024	30,000
China	Lee & Man (Guangxi Chongzuo Liwen)	Chongzuo	20	New	2024	30,000
China	Longpai Paper Plastics Products Co.	Guigang, Guangxi	5	New	2025	20,000
China	Shanxi Qiangwei Paper Co.	Jinzhong	1	New	2024	21,000
China	Shanxi Qiangwei Paper Co.	Jinzhong	2	New	2024	21,000
China	Sun Paper	Nanning, Guangxi	3	New	2024	23,500
China	Sun Paper	Nanning, Guangxi	4	New	2024	23,500
China	Sun Paper	Nanning, Guangxi	5	New	2024	23,500
China	Sun Paper	Nanning, Guangxi	6	New	2026	23,500
China	Sun Paper	Nanning, Guangxi	7	New	2026	23,500
China	Sun Paper	Nanning, Guangxi	8	New	2026	23,500
China	Sun Paper	Nanning, Guangxi	9	New	2026	23,500
China	Taisheng Group (Hufeng Paper)	Leshan, Sichuan	7	New	2025	30,000
China	Taisheng Group (Hufeng Paper)	Leshan, Sichuan	8	New	2025	30,000
China	Taisheng Group (Jiangxi Taisheng)	Jiujiang, Jiangxi	9	New	2025	30,000
China	Taisheng Group (Jiangxi Taisheng)	Jiujiang, Jiangxi	10	New	2025	30,000
China	Taisheng Group (Nanping Taisheng)	Nanping, Fujian	11	New	2025	30,000
China	Taisheng Group (Nanping Taisheng)	Nanping, Fujian	12	New	2025	30,000
China	Taisheng Group (Suzhou Taisheng)	Suzhou, Anhui	15	New	2025	30,000
China	Taisheng Group (Suzhou Taisheng)	Suzhou, Anhui	16	New	2025	30,000
China	Taisheng Group (Suzhou Taisheng)	Suzhou, Anhui	17	New	2025	30,000
China	Taisheng Group (Suzhou Taisheng)	Suzhou, Anhui	18	New	2025	30,000
China	Taisheng Group (Zhencheng Paper)	Jingzhou, Hubei	13	New	2025	30,000
China	Taisheng Group (Zhencheng Paper)	Jingzhou, Hubei	14	New	2025	30,000
China	Taiwan Chiufuyu Industry Company	Taiwan	1	New	2024	17,500
China	Taiwan Chiufuyu Industry Company	Taiwan	2	New	2024	17,500
China	Taiwan Yuen-Foong-Yu	Taipei, Taiwan	1	New	2025	30,000
China	Taiwan Yuen-Foong-Yu (dingfeng base)	Taiwan	2	New	2025	23,500
China	Taiwan Yuen-Foong-Yu (dingfeng base)	Taiwan	3	New	2025	23,500
China	Xianhe Co.	Shishou, Hubei	1	New	2024	21,000
China	Xianhe Co.	Shishou, Hubei	2	New	2024	21,000
China	Yusen Gansu	Pingliang	1	New	2025	33,700
China	Yusen Gansu	Pingliang	2	New	2025	33,700
China	Yusen Gansu	Pingliang	3	New	2025	33,700
China	Zhumadian Zhongnan Paper Co.	Suipingm Henan	6	New	2025	22,000

	PM TRIM (m)	PM SPEED (m/min)	SUPPLIER	COMMENTS
	2.85	1,500	Baosuo	Crescent Former
	2.8	1,300	Baosuo	Crescent Former
	2.8	1,300	Baosuo	Crescent Former
	3.6	1,800	Baosuo	Crescent Former
	3.6	1,800	Baosuo	Crescent Former
	3.6	1,800	Baosuo	Crescent Former
	3.6	1,800	Baosuo	Crescent Former
	3.6	1,800	Baosuo	Crescent Former
	2.85	1,500	Baosuo	Crescent Former
	2.85	1,600	Baosuo	Crescent Former
	2.85	1,600	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
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	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	2.85	1,400	Baosuo	Crescent Former
	2.85	1,400	Baosuo	Crescent Former
	3.65	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	2.85	1,600	Baosuo	Crescent Former
	2.85	1,600	Baosuo	Crescent Former
	3.5	1,600	Valmet	IntelliTissue 1600
	3.5	1,600	Valmet	IntelliTissue 1600
	3.5	1,600	Valmet	IntelliTissue 1600
	3.65	1,300	Baosuo	Crescent Former

included extensive research into the global tissue industry over the past few years, as well as a reliance on reliable responses from the many companies contacted to detail their present and future developments.

And as is often the case, many of last years predicted start-ups have been delayed and are now planned for 2025, and some of the 'new' capacity announced this year includes some of last year's estimate.

Additionally, some companies declined to comment on their projects at this time. There are also a substantial number of confidential projects, about which companies preferred not to disclose details.*

NOTABLE POINTS TO INCLUDE

As with every recent year, China leads the way with capacity expansion, this year with a total of 62 projects – including TAD machines – that either came onstream in 2024 or are expected to later in 2025 and 2026. This compared to last year's 57 projects.

Of note also is the substantial investment in Indonesia made by Sinar Mas Group's Asia Pulp & Paper which has plans to start up 24 Baosuo-supplied tissue machines at its OKI facility in Sumatra during 2026 and 2027.

In Brazil, 2023's survey noted two tissue projects expected to come on stream, while last year noted seven. Bracell Cellulose alone confirmed that four of those six tissue machines started-up in 2024. For this year's survey, Suzano Papel e Celulose is expecting to start-up its Valmet-supplied Advantage DCT 200HS in 2026.

Mexico's Grupo Corporativo Papelera, Papel San Francisco, and Softys are all expecting or have started up capacity in 2024 or 2025.

Across the Middle East, Saudi Arabia's Crown Paper, MEPCO, Saudi Paper Group have all invested in new capacity, as has a confidential project in the UAE.

In the UK, Turkish headquartered Eren Holding's three tissue machines are expected to come onstream at its plant in Shotton, Wales, in 2026, whilst Fourstones Paper Mill Crescent Former

COUNTRY	COMPANY	INVESTMENT	PM No	NEW/ REBUILD	START-UP DATE	CAP. CHANGE (tonnes/yr)
Confidential	Confidential	Confidential	1	Rebuild	2025	-
Confidential	Confidential	Confidential	1	New	2026	-
Confidential	Confidential	Confidential	-	New	2025	70,000
Confidential	Confidential	Confidential	-	New	2025	60,000
Confidential	Confidential	Confidential	-	New	2027	-
Confidential	Confidential	Confidential	-	New	2027	-
Confidential	Confidential	Confidential	-	New	2025	-
Egypt	Confidential	Giza	1	New	2024	26,000
Europe	Confidential	Confidential	2	New	2026	70,000
France	Confidential	Confidential	-	Major Rebuild	2025	30,000
France	MPH1865	Annonay	2	New	2024	38,000
Ghana	Triton	Kokomlemle	1	New	2025	23,800
Greece	Intertrade Hellas	Oyinofta	2	New	2026	80,000
India	Confidential	Confidential	-	New	2026	-
India	Gayatrishakti Tissue	Vapi, Gujarat	1	New	2024	35,000
India	Jani Sales	Gujarat	1	New	2024	17,000
India	Kamakshi Papers	Amroha	1	New	2025	17,000
India	Kamakshi Papers	Amroha	2	New	2025	17,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	1	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	2	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	3	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	4	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	5	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	6	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	7	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	8	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	9	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	10	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	11	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	12	New	2026	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	13	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	14	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	15	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	16	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	17	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	18	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	19	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	20	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	21	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	22	New	2027	22,000

In Southeast Asia, Vietnam's Shunfa Paper Co., Xuong Giang, and Xuan Mai Paper have or will be starting up four machines between them, supplied by Andritz – a PrimeLineCOMPACT S 1300 and a PrimeLineCOMPACT S 1800 – and Crescent Formers supplied by China's Baosuo.

In America, five machines are listed to have come on stream or planned to: a confidential customer, which has ordered an AHEAD 2.2L supplied by Toscotec, Grupo Corporativo Papelera's A.Celli-supplied iDEAL 2000 with Forged Yankee, Irving Consumer Products' Valmet-supplied Advantage ThruAir machine, Sofidel's Valmet-supplied Advantage DCT 200HS in Circleville, and Procter & Gamble's Utah-based Andritz-supplied PrimeLineTAD.

*All aggregates taken from the survey should be treated with some caution. While all care has been taken to publish comprehensive data, it is inevitable that projects will be missing or details incomplete. Many projects have also been delayed, so start-up data used in last year's Project Survey has had to be repeated.

We welcome your help to ensure as comprehensive a survey as possible for 2026.



COUNTRY	COMPANY	INVESTMENT	PM No	NEW/ REBUILD	START-UP DATE	CAP. CHANGE (tonnes/yr)
Indonesia	Sinar Mas Group APP-OKI	Sumatra	23	New	2027	22,000
Indonesia	Sinar Mas Group APP-OKI	Sumatra	24	New	2027	22,000
Japan	Confidential	Confidential	6	New	2024	46,000
Jordan	Khattab Group	Amman	-	New	2024	21,000
Latin America	Confidential	Confidential	-	New	2026	30,000
Malaysia	Nextgreen Enviro	Kuala Lumpur	1	New	2025	17,000
Malaysia	Nextgreen Enviro	Kuala Lumpur	2	New	2025	17,000
Malaysia	NTPM Holdings	Penang	16	New	2024	-
Mexico	Grupo Corporativo Papelera	Mexico City	5	Rebuild	2024	-
Mexico	Papel San Francisco	Mexicali	10	New	2025	30,000
Mexico	Softys	Altamira	5	New	2025	-
Middle East	Confidential	Confidential	-	New	2026	-
Oceania	Confidential	Confidential	-	Major Rebuild	2024	-
Oman	Jihong Technology	Oman	-	New	2026	30,000
Oman	Jihong Technology	Oman	-	New	2026	23,500
Poland	VelvetCare	Klucze	-	New	2025	70,000
Saudi Arabia	Crown Paper	Dammam	1	New	2025	70,000
Saudi Arabia	MEPCO/Juthur Paper Manufacturing	King Abdullah Economic City	6	New	2026	60,000
Saudi Arabia	Saudi Paper Group	Dammam	5	New	2025	80,000
Sweden	Metsä Tissue	Mariestad	-	New	2025	70,000
UAE	Confidential	Abu Dhabi	2	New	2024	26,000
UK	Eren Holding	Shotton, Wales	1	New	2026	70,000
UK	Eren Holding	Shotton, Wales	2	New	2026	70,000
UK	Eren Holding	Shotton, Wales	3	New	2026	70,000
UK	Fourstones Paper Mill	Fife, Scotland		New	2024	60,000
USA	Confidential	Confidential	-	New	2026	65,000
USA	Grupo Corporativo Papelera	Montgomery	6	New	2026	-
USA	Irving Consumer Products	Macon	-	New	2027	75,000
USA	Sofidel	Circleville	3	New	2025	70,000
USA	Procter & Gamble	Utah	16B	New	2024	-
Venezuela	HK Import and Export	Aragua	1	New	2024	17,000
Vietnam	Shunfa Paper Co.	Ninhbinh	1	New	2025	17,000
Vietnam	Shunfa Paper Co.	Ninhbinh	2	New	2025	17,000
Vietnam	Xuong Giang	-	12B	New	2024	-
Vietnam	Xuan Mai Paper	-	2	New	2024	-

	PM TRIM (m)	PM SPEED (m/min)	SUPPLIER	COMMENTS
	2.65	1,800	Baosuo	Crescent Former
	2.65	1,800	Baosuo	Crescent Former
	3.6	1,800	Kawanoe Zoki / Valmet	DCT135HS
	2.8	1,600	Baosuo	Crescent Former
	2.85	1,900	Toscotec	AHEAD 1.8
	2.85	1,300	Baosuo	Crescent Former
	2.85	1,300	Baosuo	Crescent Former
	3.4	1,600	Baosuo	Crescent Former
	2.8	1,800	A.Celli	Forged Yankee Dryer
	2.8	2,200	Valmet	Advantage DCT 100TS
	-	2,200	Toscotec	AHEAD 2.2
	-	1,500	Toscotec	AHEAD 1.6
	-	-	Toscotec	-
	3.65	1,800	Baosuo	Crescent Former
	2.85	1,800	Baosuo	Crescent Former
	5.6	2,200	Valmet	Advantage DCT 200TS
	5.6	2,200	Valmet	Advantage DCT 200TS
	5.4	2,200	Andritz	PrimeLine TM W 2200 - XT
	5.6	2,200	Toscotec	AHEAD 2.2L
	5.6	2,200	Valmet	Advantage DCT 200TS
	3.5	1,600	Baosuo	Crescent Former
	-	-	Tbc	-
	-	-	Tbc	-
	-	-	Tbc	-
	2.75	1,700	Tbc	Crescent Former
	4.7	2,200	Toscotec	AHEAD 2.2L
	2.65	2,000	A.Celli	iDEAL 2000 with Forged Yankee
	-	-	Valmet	Advantage ThruAir
	5.6	2,000	Valmet	Advantage DCT 200HS
	5.4	1,627	Andritz	PrimeLineTAD
	2.85	1,300	Baosuo	Crescent Former
	2.85	1,400	Baosuo	Crescent Former
	2.85	1,400	Baosuo	Crescent Former
	1.3	1,300	Andritz	PrimeLineCOMPACT S 1300
	1.8	1,800	Andritz	PrimeLineCOMPACT S 1800

147

Projects in this year's
survey for start-up
between 2024-2027



62

Chinese projects listed
in this year's survey



24

Investments listed for
Sinar Mas Group's
APP's OKI facility in
Indonesia



4

UK projects listed in
this year's survey

