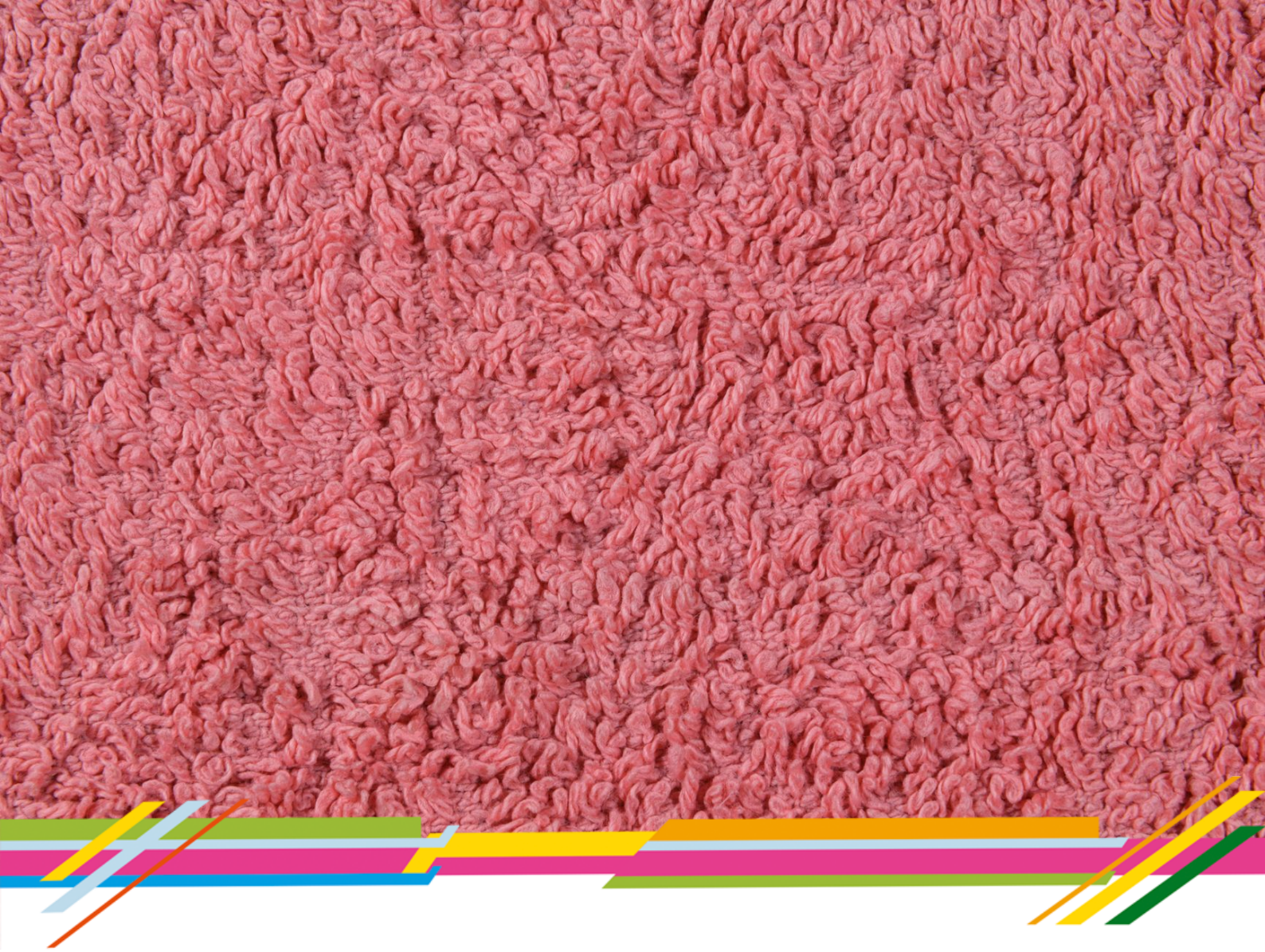

Global Terry Towel Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 14.9 bn
Forecast (2031)	USD 20.7 bn
CAGR (2021-2031)	5.7%
Study period	2021-2031
Largest region	North America · 31.6%
Fastest-growing region	Asia-Pacific · 7.3%
Market concentration	Low
Licence	Individual / Company

The global terry towel market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Cotton remains the defining material platform, while hospitality replenishment, premium home textiles, e-commerce and traceable fiber sourcing are reshaping product economics. North America is the largest regional market, and Asia-Pacific is the fastest-growing region as urban household formation and branded retail penetration accelerate. The report quantifies demand by product type, material, end user, distribution channel and geography and benchmarks the competitive positions of leading integrated manufacturers.

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Executive summary

The global terry towel market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Cotton remains the defining material platform, while hospitality replenishment, premium home textiles, e-commerce and traceable fiber sourcing are reshaping product economics. North America is the largest regional market, and Asia-Pacific is the fastest-growing region as urban household formation and branded retail penetration accelerate. The report quantifies demand by product type, material, end user, distribution channel and geography and benchmarks the competitive positions of leading integrated manufacturers.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global terry towel market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Cotton products accounted for XX% of 2025 market value, supported by absorbency, established laundering performance and broad consumer recognition.
- Bath towels and bath sheets represented XX% of 2025 sales, making them the market's largest product category.
- Residential buyers contributed XX% of market value, while hospitality was the largest institutional end-use segment at XX%.
- North America held XX% of global market value in 2025; Asia-Pacific will record the fastest regional CAGR at XX% through 2031.
- Global exports classified under HS 630260, covering cotton terry toilet and kitchen linen, were approximately USD XXX billion and XXX tonnes in 2024, according to UN Comtrade data.
- UN Tourism recorded XXX international tourist arrivals in 2024, restoring hotel occupancy and accelerating institutional towel replacement.
- Textile Exchange reported global cotton production of XXX tonnes in 2025, including XXX tonnes produced through certified programs.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Terry Towel Market Trends and Growth Drivers

Terry towel economics are determined by the interaction of cotton input costs, pile weight, wet-processing efficiency, labor productivity and channel margin. Product differentiation is strongest where suppliers translate these manufacturing variables into visible consumer or institutional benefits: softness, absorbency, drying time, color retention and lifetime wash performance.

Demand is becoming more polarized. Value retail continues to reward scale and private-label efficiency, while premium residential and hospitality customers pay for long-staple fibers, lower-twist yarns, heavier GSM and verified sourcing. Mid-market suppliers without cost leadership or a defensible performance story face the greatest margin pressure.

Sustainability is moving into product specification and supplier qualification. Water consumption, wastewater treatment, restricted-substance compliance, renewable energy and fiber traceability increasingly determine vendor eligibility, particularly in Europe and among multinational hotel and retail groups.

Growth drivers

Hospitality Recovery Accelerates Towel Replenishment

Global tourism returned to scale with XXX international arrivals in 2024, lifting room occupancy, laundry cycles and replacement rates across hotels and resorts. New hotel openings and property renovations create concentrated demand for coordinated bath, hand, pool and spa towel programs, particularly in Asia-Pacific and the Middle East.

Premium Bathroom Textiles Raise Average Selling Prices

Consumers increasingly differentiate towels by GSM, yarn twist, staple length, pile density and certification rather than size alone. Premium cotton, oversized bath sheets and coordinated color collections expand revenue per household and protect branded suppliers from entry-level price competition.

Online Retail Broadens Brand and Assortment Access

Digital channels allow specialist brands and vertically integrated producers to market towel bundles, monograms and material stories without securing national shelf space. Reviews, visual merchandising and replenishment subscriptions also improve conversion for products whose performance can be communicated through absorbency, softness and durability claims.

Urban Household Formation Expands the Buyer Base

The global urban population reached approximately XXX people in 2025, increasing demand for formal housing, bathrooms and organized home-textile retail. Rising incomes in India, Southeast Asia and selected African markets support movement from unbranded utility towels toward branded mid-market assortments.

Institutional Buyers Prioritize Cost per Use

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Hotels, hospitals and fitness operators are evaluating towels against wash durability, drying time, lint release and replacement frequency. Engineered cotton-rich constructions and lighter quick-dry products gain share when they reduce laundry energy, labor and linen-loss costs across hundreds of wash cycles.

Traceable Cotton Supports Premium Procurement

Certified cotton production reached XXX tonnes in 2025, improving the sourcing base for verified fiber programs. Retailers and hospitality groups are translating traceability targets into supplier scorecards, creating preferred-vendor opportunities for mills with documented chain-of-custody systems.

Restraints

Cotton Price Volatility Compresses Margins

Cotton is the dominant material and represents a substantial portion of finished-towel cost, leaving manufacturers exposed to harvest conditions, inventory cycles and currency movements. Retail contracts often reset more slowly than raw-material prices, transferring near-term volatility to mill margins.

Wet Processing Raises Water and Compliance Costs

Scouring, bleaching, dyeing and finishing require significant water, heat and chemical management. Tighter wastewater, restricted-substance and buyer-audit requirements increase capital needs and favor scaled facilities with effluent treatment, heat recovery and chemical-control systems.

Retailer Consolidation Sustains Price Pressure

Large mass merchants, marketplaces and hospitality purchasing groups aggregate demand and use competitive tenders to compress supplier pricing. Producers without differentiated brands, proprietary constructions or integrated spinning remain especially exposed to private-label substitution.

Durability Extends Consumer Replacement Cycles

Higher-quality yarns, reinforced hems and improved colorfastness extend usable product life. The resulting reduction in replacement frequency moderates mature-market unit growth even as it supports higher initial price points.

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Terry Towel Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Hospitality Recovery Accelerates Towel Replenishment	XXX	XXX	XXX
Premium Bathroom Textiles Raise Average Selling Prices	XXX	XXX	XXX
Online Retail Broadens Brand and Assortment Access	XXX	XXX	XXX
Urban Household Formation Expands the Buyer Base	XXX	XXX	XXX
Institutional Buyers Prioritize Cost per Use	XXX	XXX	XXX
Traceable Cotton Supports Premium Procurement	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Cotton Price Volatility Compresses Margins	XXX	XXX	XXX
Wet Processing Raises Water and Compliance Costs	XXX	XXX	XXX
Retailer Consolidation Sustains Price Pressure	XXX	XXX	XXX
Durability Extends Consumer Replacement Cycles	XXX	XXX	XXX

Source: XXX

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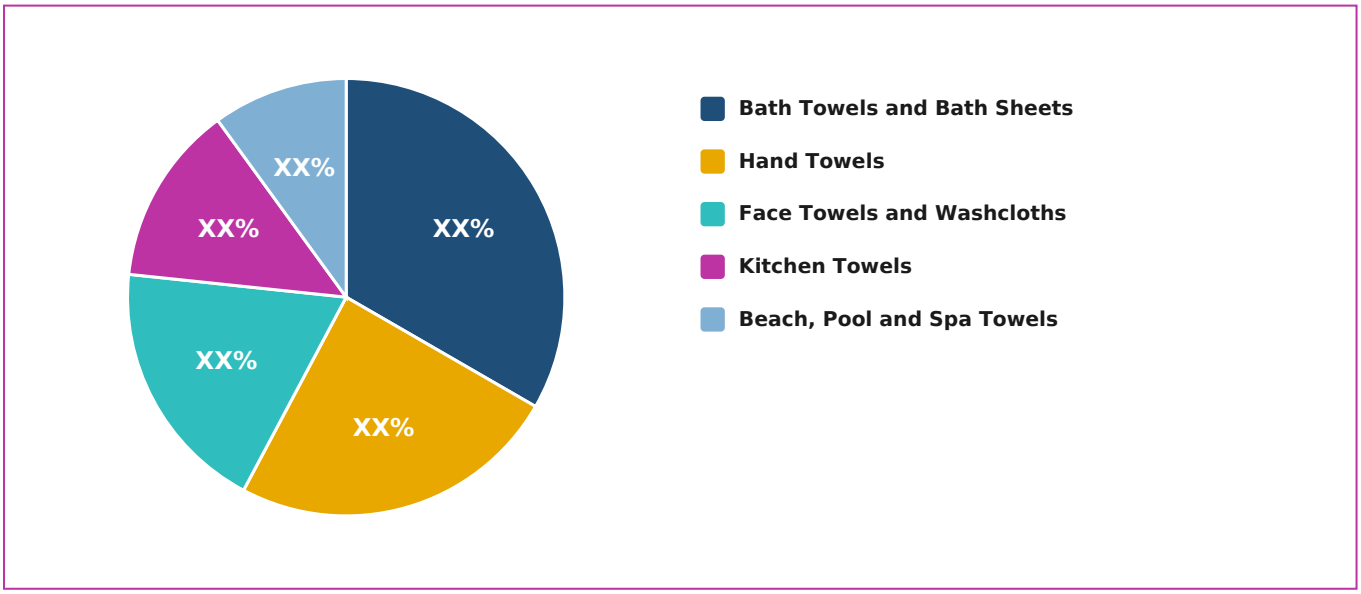
Terry Towel Market Segmentation Analysis by Product, Material and End Use

By Product Type

Bath towels dominate because they combine the highest household penetration with the broadest price ladder, from value multipacks to luxury long-staple cotton. Hand towels and washcloths benefit from coordinated set purchases and more frequent replacement. Beach, pool and spa towels will outpace the market as tourism, wellness facilities and branded leisure products expand.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Bath Towels and Bath Sheets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hand Towels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Face Towels and Washcloths	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Kitchen Towels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beach, Pool and Spa Towels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Material

Cotton remains the performance and merchandising benchmark because its loop structure provides absorbency, softness and familiar laundering behavior. Cotton-polyester blends are concentrated in

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hospitality and healthcare, where tensile strength and drying efficiency matter. Bamboo-viscose and other alternative cellulosics grow from a small base through premium softness positioning, while microfiber serves quick-dry, sports and compact-travel niches.

Value by material, USD bn

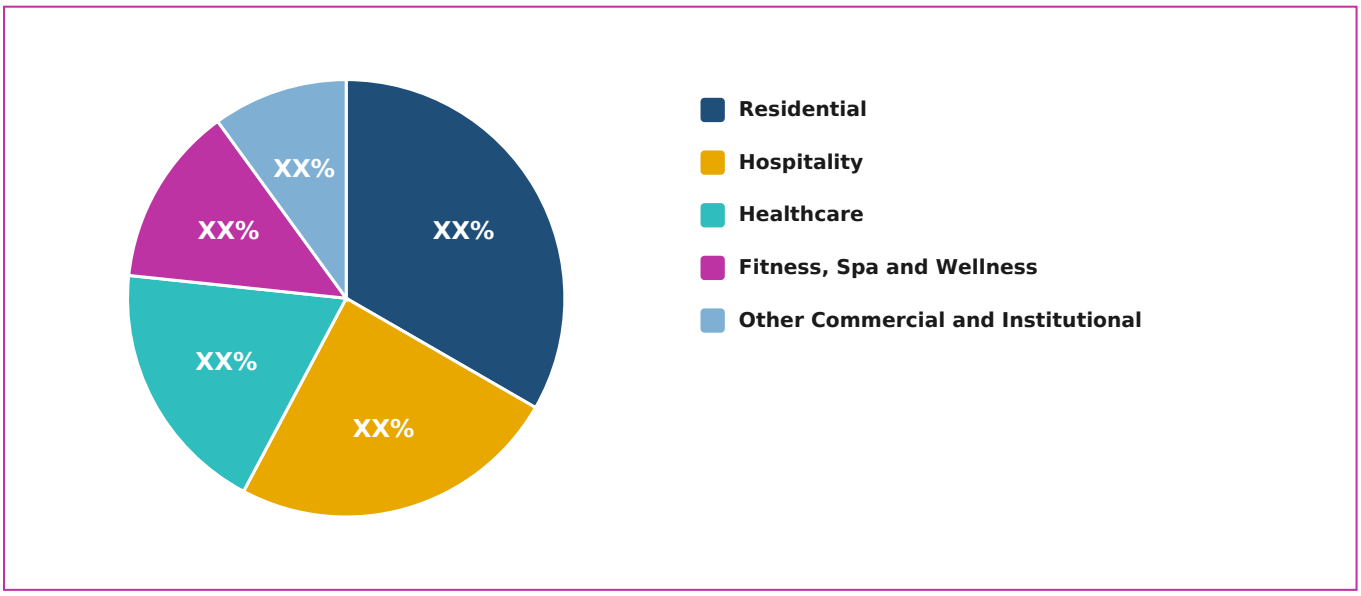
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cotton	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cotton-Polyester Blends	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Microfiber and Other Synthetics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bamboo Viscose and Other Cellulosics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End User

Residential demand is broad and recurring, driven by household formation, replacement and bathroom décor purchases. Hospitality provides the clearest acceleration as occupancy, branded room supply and pool and spa amenities grow. Healthcare favors durable cotton-rich constructions, while gyms and wellness operators require compact, colorfast and quick-dry assortments.

Value share by end User, 2025



Source: XXX

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Value by end User, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Residential	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hospitality	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Healthcare	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fitness, Spa and Wellness	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Commercial and Institutional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Department stores, hypermarkets and home-specialty retailers remain important because touch and color assessment influence towel selection. Online retail is gaining rapidly through bundles, reviews, direct-to-consumer brands and broader premium assortments. Wholesalers and direct institutional contracts remain central to hospitality and healthcare, where specifications, replenishment reliability and landed cost outweigh consumer merchandising.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Offline Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wholesalers and Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct Institutional Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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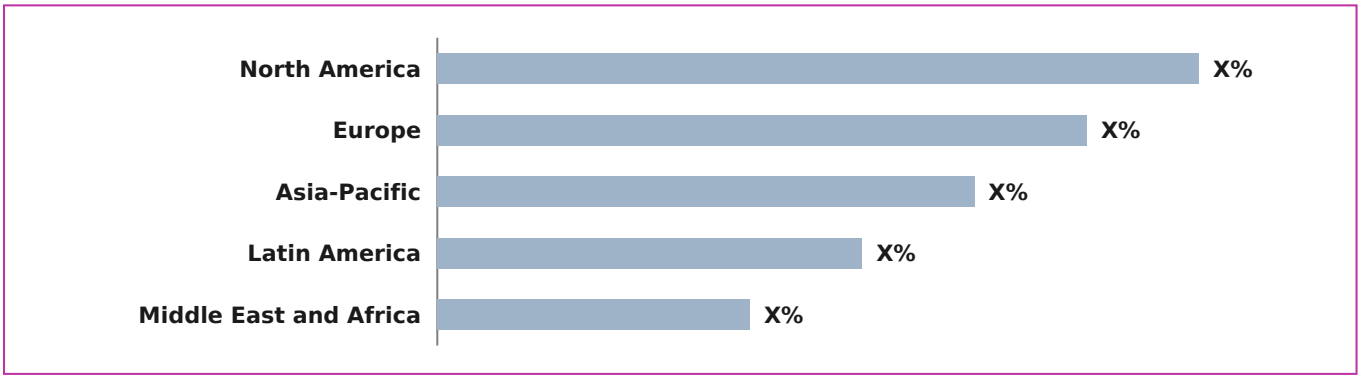
Terry Towel Market Regional Analysis and Country Outlook

North America accounted for XX% of 2025 market value, supported by high towel ownership per household, frequent bathroom refurbishment and a deep private-label retail ecosystem. The United States anchors regional demand, with premium bath sheets, coordinated towel sets and institutional products generating a higher value per unit than the global average. Mexico combines expanding domestic consumption with nearshore production serving US hospitality and retail programs.

Asia-Pacific represented XX% of market value and will grow at XX% annually through 2031. China remains the region's largest consumption and production base, while India combines a rapidly formalizing domestic market with world-scale vertically integrated export capacity. Indonesia, Vietnam and the Philippines benefit from urban household formation, expanding modern retail and new hotel pipelines.

Europe contributed XX% of 2025 revenue, led by Germany, the United Kingdom, France, Italy and Spain. Demand is increasingly shaped by durability, certified cotton, chemical safety and forthcoming product-information requirements. The Middle East presents a concentrated hospitality opportunity in the Gulf states, while Latin American growth is strongest in Brazil and Mexico through organized retail, tourism and mid-income household consumption.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Terry Towel Market Competitive Landscape and Company Share

The market is fragmented: the five largest suppliers generated XX% of 2025 revenue. Welspun Living and Trident lead the integrated export-manufacturing tier, supported by spinning, weaving, wet processing, product development and long-standing relationships with major retailers. Loftex, Standard Textile, 1888 Mills, Venus Group and Springs Global hold strong positions in selected consumer, hospitality and healthcare channels.

Competitive advantage is moving beyond installed loom capacity. Retailers and contract buyers increasingly award business on traceability, shade consistency, replenishment speed, testing compliance, design responsiveness and verified reductions in water and energy use. Institutional specialists differentiate through cost-per-use engineering, quick drying, reinforced construction and pre-laundered products.

M&A remains selective because brands, sourcing platforms and customer access often carry more strategic value than standalone commodity capacity. Leading suppliers are prioritizing automation, fashion and jacquard capability, renewable energy, direct-to-consumer channels and regional warehousing. Private-label scale will remain important, but proprietary materials and recognizable consumer brands provide the strongest margin defense.

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Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Welspun Living Limited	XXX	XXX	XXX	XXX
Trident Limited	XXX	XXX	XXX	XXX
Loftex China Ltd.	XXX	XXX	XXX	XXX
Standard Textile Co., Inc.	XXX	XXX	XXX	XXX
1888 Mills, LLC	XXX	XXX	XXX	XXX
Venus Group, Inc.	XXX	XXX	XXX	XXX
Springs Global Participações S.A.	XXX	XXX	XXX	XXX
Himatsingka Seide Limited	XXX	XXX	XXX	XXX
Indo Count Industries Limited	XXX	XXX	XXX	XXX
Sharadha Terry Products Limited	XXX	XXX	XXX	XXX
Sunvim Group Co., Ltd.	XXX	XXX	XXX	XXX
Frette S.p.A.	XXX	XXX	XXX	XXX

Source: XXX

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Terry Towel Market Forecast, Scenarios and Growth Opportunities

The market will add USD XXX billion between 2025 and 2031. Approximately two-thirds of incremental value will come from Asia-Pacific, North America and hospitality-linked demand, while premium materials and higher-performance construction will raise the global average selling price. Bath towels remain the revenue anchor, but pool, spa and premium hand-towel ranges will grow faster.

Under the base case, stable cotton availability, continued tourism growth and moderate household spending produce a XX% CAGR. A high-growth scenario driven by faster hotel construction, stronger consumer premiumization and lower cotton costs lifts the 2031 market to USD XXX billion; a downside scenario characterized by prolonged discretionary weakness and energy-cost inflation yields USD XXX billion.

Winning suppliers will combine vertical integration with differentiated product engineering and verifiable sourcing. Durable quick-dry towels, traceable cotton, digitally enabled replenishment and flexible small-batch coloration will outperform conventional undifferentiated products. Mills that quantify laundry savings and product lifetime will gain a structural advantage in hospitality and healthcare tenders.

Opportunities

- Quick-dry and lower-laundry-energy institutional towels
- Traceable organic and regenerative cotton collections
- Premium direct-to-consumer towel bundles
- Localized hospitality supply programs
- Recycled-content cotton-polyester constructions
- Antimicrobial-free hygiene engineering and easy-care finishes

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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