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US Collection

Industrial & Institutional Wipes: United States

October 2019



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About This Report

Scope

This report forecasts to 2023 US industrial and institutional (I&I) wipes demand in nominal US dollars at the converter level. Total demand is segmented by product in terms of:

- wet wipes
- dry wipes

Total demand is also segmented by market as follows:

- general purpose manufacturing
- special purpose manufacturing
- patient care wipes
- hard surface disinfectant wipes
- other healthcare wipes such as skin disinfectant wipes, medical lab wipes, and castile soap wipes
- foodservice wipes
- other commercial and institutional wipes such as those for offices, health and fitness centers, and military facilities

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

For the purpose of this report, “wipe” is defined as a paper or nonwoven substrate that is soaked or otherwise infused with water or chemical additives (wet or dry) for the purpose of cleaning, disinfecting, sanitizing, chemical delivery, and other functions that are carried out on surfaces such as skin, countertops and floors, tools and parts, and many others.

Most wipes are single-use products. However, this report also covers reusable products that can be laundered and reused for a short period of time. Excluded from the scope of this report are standard paper alternatives, such as napkins, paper towels, facial tissues, and toilet tissue, as well as long-term reusable cloths.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Industrial & Institutional Wipes: United States (FF15029) is based on [Wipes](#), a comprehensive industry study published by The Freedonia Group. Reported findings

About This Report

represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | NAICS & SIC Codes Related to Industrial & Institutional Wipes

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
313230	Nonwoven Fabric Mills	2297	Nonwoven Fabrics
		2299	Textile Goods, NEC

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Wipes

Freedonia Industry Studies

Cosmetic & Toiletry Containers in the US

Disposable Medical Supplies in the US

Drug Delivery Products

Foodservice Single-Use Products in the US

Global Disposable Medical Supplies

Global Industrial & Institutional Cleaning Chemicals

Global Nonwovens

Industrial & Institutional (I&I) Cleaning Chemicals

Infection Prevention Products & Services

Natural Flavors & Fragrances

Nonwovens Market in the US

Specialty Surfactants

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Consumer Wipes: United States

Contract Cleaning Services: United States

Demographics: United States

E-Commerce: United States

Foodservice Disposables: United States

Global Medical Apparel & Textiles

Healthcare: United States

Janitorial Equipment & Supplies: United States

Manufacturing: United States

Polypropylene: United States

Restaurants & Foodservice: United States

Freedonia Custom Research

Trade Publications

GCI Magazine

HAPPI Magazine

International Fiber Journal

Nonwovens Industry Magazine

Agencies & Associations

Association of the Nonwoven Fabrics Industry

About This Report

EDANA

Environmental Working Group

Forest Stewardship Council

Secondary Materials and Recycled Textiles (SMART) Association

UL

United States Census Bureau

United States Department of Commerce

United States Environmental Protection Agency

United States Food and Drug Administration

United States International Trade Commission