

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



Wipes

US Industry Study with Forecasts to **2011 & 2016**

Study #2155 | February 2007 | \$4300 | 251 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

| | |
|---------------------------------------|----|
| General | 4 |
| Macroeconomic Overview..... | 4 |
| Demographic Trends | 7 |
| Household Trends..... | 9 |
| Consumer Spending Trends | 11 |
| Manufacturing Outlook..... | 13 |
| Health Care Trends | 16 |
| Retail Sector Trends | 19 |
| Retail Wipes Market Overview..... | 21 |
| Competitive Wiping | |
| Products Overview | 24 |
| Pricing Trends | 26 |
| Environmental & Regulatory Issues ... | 27 |
| International Activity | 30 |

PRODUCT & MARKET OVERVIEW

| | |
|-----------------------|----|
| Product Outlook..... | 32 |
| Wet Wipes | 35 |
| Dry Wipes | 37 |
| Market Overview | 39 |

CONSUMER MARKETS

| | |
|------------------------------|----|
| General | 42 |
| Personal Care..... | 44 |
| Cosmetic & Toiletry | |
| Industry Outlook..... | 45 |
| Wipes Demand | 47 |
| Baby Wipes | 49 |
| Products & Materials | 51 |
| Retail Market Trends..... | 53 |
| Producers | 55 |
| Facial Wipes | 56 |
| Cleansing Wipes | 58 |
| Other Facial Wipes | 62 |
| Hand & Body Wipes | 65 |
| Moist Towelettes..... | 67 |
| Personal Hygiene Wipes | 70 |
| Bathroom Hygiene Wipes | 72 |
| Feminine Hygiene Wipes | 74 |
| General Purpose Bath Wipes . | 75 |
| Other Personal Hygiene Wipes | 76 |

| | |
|----------------------------------|-----|
| Medicated Wipes..... | 77 |
| Other Hand & Body Wipes | 80 |
| Other Personal Care Wipes..... | 82 |
| Household Care..... | 84 |
| Specialty Household Cleaners | |
| Industry Outlook..... | 85 |
| Wipes Demand | 87 |
| General Purpose Cleaning Wipes.. | 91 |
| Floor Care Wipes..... | 94 |
| Other Household Care Wipes..... | 97 |
| Other Consumer | 100 |
| Automotive Wipes | 102 |
| Pet Care Wipes..... | 103 |
| All Other Consumer Wipes | 104 |

INDUSTRIAL MARKETS

| | |
|----------------------------------|-----|
| General | 106 |
| Manufacturing | 108 |
| Special Purpose Wipes..... | 111 |
| Clean Room Wipes | 113 |
| Surface Preparation Wipes..... | 114 |
| Printing Wipes | 116 |
| Other Special Purpose Wipes | 117 |
| General Purpose Wipes | 118 |
| Health Care..... | 120 |
| Primary & Emergency Care | 124 |
| Long Term Care | 125 |
| Commercial Wipes | 126 |
| Foodservice Wipes | 127 |
| Other Commercial Wipes | 129 |
| Other Industrial..... | 132 |

RAW MATERIALS

| | |
|--------------------------|-----|
| General | 134 |
| Substrates | 135 |
| Spunlaced Nonwovens..... | 137 |
| Airlaid Nonwovens..... | 140 |
| Other Substrates | 143 |
| Chemicals | 145 |
| Emollients..... | 147 |
| Surfactants | 149 |
| Other Chemicals | 151 |

INDUSTRY STRUCTURE

| | |
|---------------|-----|
| General | 154 |
|---------------|-----|

| | |
|-------------------------------|-----|
| Market Share | 157 |
| Converters' Level..... | 157 |
| Kimberly-Clark | 158 |
| Nice-Pak | 159 |
| Procter & Gamble | 159 |
| Rockline..... | 159 |
| Retail Level..... | 160 |
| Industry Restructuring | 162 |
| Competitive Strategies..... | 164 |
| New Product Development | 164 |
| Product Line Extension..... | 165 |
| Low Cost Position..... | 167 |
| Product Placement..... | 168 |
| Market Segmentation | 170 |
| Cooperative Agreements | 172 |
| Manufacturing | 173 |
| Contract Manufacturing..... | 175 |
| Packaging Trends | 176 |
| Marketing & Advertising..... | 178 |
| Distribution | 179 |

COMPANY PROFILES

| | |
|----------------------------------|-----|
| Ahlstrom Corporation..... | 182 |
| Berkshire Corporation | 183 |
| Buckeye Technologies | 185 |
| Clorox Company | 186 |
| Contec Incorporated..... | 187 |
| DeRoyal Industries | 189 |
| DuPont (EI) de Nemours..... | 190 |
| Fibematics Incorporated..... | 193 |
| Freudenberg & Company..... | 194 |
| GOJO Industries | 196 |
| HDK Industries | 197 |
| Illinois Tool Works..... | 198 |
| Johnson & Johnson..... | 203 |
| Johnson (SC) & Son | 205 |
| Kimberly-Clark Corporation | 207 |
| Koch Industries | 211 |
| National Towelette | 213 |
| New Pig Corporation..... | 214 |
| Nice-Pak Products | 216 |
| Playtex Products | 219 |
| Polymer Group | 220 |
| Procter & Gamble..... | 221 |
| Rockline Industries | 225 |
| Royal Paper Converting | 227 |

(continued on next page)

COMPANY PROFILES

(continued from previous page)

| | |
|--|-----|
| Sage Products..... | 228 |
| STERIS Corporation..... | 229 |
| Svenska Cellulosa..... | 230 |
| 3M Company | 232 |
| Triad Group | 235 |
| Tufco Technologies..... | 237 |
| Tyco International..... | 238 |
| Unilever Group | 240 |
| Other Companies in the Wipes Industry | 242 |

List of Tables/Charts

EXECUTIVE SUMMARY

| | |
|-----------------------|---|
| 1 Summary Table | 3 |
|-----------------------|---|

MARKET ENVIRONMENT

| | |
|--|----|
| 1 Macroeconomic Indicators..... | 7 |
| 2 Demographic Indicators..... | 9 |
| 3 Household & Housing Stock | 11 |
| 4 Personal Consumption Expenditures & Disposable Personal Income | 13 |
| 5 Manufacturers' Shipments | 16 |
| 6 Health Care Indicators..... | 18 |
| 7 Retail Sales | 21 |
| 8 Retail Wipes Market | 23 |
| 9 Competitive Wiping Products Demand | 26 |
| 10 Wipes Prices | 27 |

PRODUCT & MARKET OVERVIEW

| | |
|---|----|
| 1 Wipes Demand by Type & Substrate..... | 34 |
| Cht Wipes Demand by Type, 1996-2016 | 35 |
| 2 Wet Wipes Demand by Market & Application | 37 |

| | |
|---|----|
| 3 Dry Wipes Demand by Market & Application | 39 |
| 4 Wipes Demand by Market | 41 |

CONSUMER MARKETS

| | |
|---|-----|
| 1 Consumer Wipes Demand by Market | 43 |
| Cht Consumer Wipes Demand by Market, 2006..... | 44 |
| 2 Cosmetic & Toiletry Supply & Demand..... | 47 |
| 3 Personal Care Wipes Demand by Application | 49 |
| 4 Baby Wipes Demand..... | 51 |
| Cht Baby Wipes Retail Sales, 2006 ... | 55 |
| 5 Facial Wipes Demand..... | 58 |
| 6 Facial Cleansing Wipes Demand | 62 |
| 7 Other Facial Wipes Demand | 65 |
| 8 Hand & Body Wipes Demand..... | 67 |
| 9 Moist Towelettes Demand..... | 70 |
| 10 Personal Hygiene Wipes Demand | 71 |
| 11 Medicated Wipes Demand..... | 79 |
| 12 Other Hand & Body Wipes Demand | 81 |
| 13 Other Personal Care Wipes Demand | 84 |
| 14 Specialty Household Cleaner Shipments..... | 87 |
| 15 Household Care Wipes Demand by Application | 90 |
| Cht Household Care Wipes Demand by Application, 2006 | 91 |
| 16 General Purpose Cleaning Wipes Demand | 94 |
| 17 Floor Care Wipes Demand..... | 97 |
| 18 Other Household Care Wipes Demand | 100 |
| 19 Other Consumer Wipes Demand | 102 |

INDUSTRIAL MARKETS

| | |
|--|-----|
| 1 Industrial Wipes Demand by Market | 107 |
|--|-----|

| | |
|--|-----|
| Cht Industrial Wipes Demand by Market, 2006..... | 108 |
| 2 Manufacturing Wipes Demand by Application | 110 |
| 3 Special Purpose Wipes Demand | 112 |
| 4 General Purpose Wipes Demand | 120 |
| 5 Health Care Wipes Demand..... | 123 |
| 6 Commercial Wipes Demand | 127 |
| 7 Foodservice Wipes Demand..... | 129 |
| 8 Other Commercial Wipes Demand | 132 |
| 9 Other Industrial Wipes Demand | 133 |

RAW MATERIALS

| | |
|--|-----|
| 1 Raw Materials Demand in Wipes | 135 |
| 2 Substrates Demand in Wipes..... | 136 |
| Cht Substrates Demand in Wipes, 2006 | 137 |
| 3 Spunlaced Nonwovens Demand in Wipes | 140 |
| 4 Airlaid Nonwovens Demand in Wipes | 143 |
| 5 Other Substrates Demand in Wipes | 145 |
| 6 Chemicals Demand in Wipes | 146 |
| Cht Chemicals Demand in Wipes, 2006 | 147 |
| 7 Emollients Demand in Wipes..... | 149 |
| 8 Surfactants Demand in Wipes | 150 |
| 9 Other Chemicals Demand in Wipes | 153 |

INDUSTRY STRUCTURE

| | |
|---|-----|
| 1 US Wipe Sales by Company, 2006..... | 156 |
| Cht US Wipes Converter Market Share, 2006..... | 158 |
| Cht US Wipes Retail Market Share, 2006..... | 162 |

[Click here to purchase online](#)

A continual spate of new product introductions and further segmentation of both consumer and industrial markets will drive gains in US wipes demand through 2011.

US demand to grow 6.1% annually through 2011

Demand for wipes in the US is forecast to increase 6.1 percent per annum to \$2.2 billion in 2011, propelled by a continual spate of new product introductions and further segmentation of the market. The number and variety of wipes on the market continue to multiply, with companies competing to rapidly introduce new products that open or create entirely new market sectors ahead of their competitors. The success of wipes in both consumer and industrial markets derives from the ease-of-use, disposability, portability, and reduced risk of cross-contamination these products offer. However, wipes that do not provide the cost and convenience benefits demanded by consumers are expected to drop out of the market.

Small volume consumer wipes to be fastest growing

Convenience and innovation will remain driving forces in the relatively new consumer market, with household cleaning, facial, hand and body, and a number of other, small volume consumer wipes projected to register the strongest growth. Though baby wipes will remain the top selling type of wipe, demand for these products will continue to advance more slowly than most other types due to market maturity and continued replacement by newer, task-specific wipes in non-diaper applications, where baby wipes once enjoyed considerable popularity.



Growth in household care wipes will be propelled by the appeal of one-step, disposable wipes that provide a quick and convenient format for household cleaning chores ranging from outdoor grills to wooden floors to stainless steel appliances.

Following the lead of the consumer market, new product innovations and expanding applications will drive demand for wipes in the industrial market, which will reach \$1.1 billion in 2011. Manufacturing and health care will remain the largest segments of this market, with special purpose products such as clean room and surface preparation wipes, as well as personal bathing wipes, projected to see the fastest growth.

Spunlaced nonwovens to lead gains in substrates

Improvements in nonwoven substrates have made possible the task-engineering of wipes for specific properties such as softness, tear resistance, absorbency and static discharge. Though the US wipes market traditionally has favored the use of airlaid substrates in its wipes products, in recent years there has been a shift toward the use of spunlaced nonwovens in a number of applications. Demand for spunlace is expected to continue to advance at above average rates through 2011, due to their softness, strength, performance capabilities, and amenability to complex designs (e.g., embossed patterns).

Sample Text, Table & Chart

INDUSTRIAL MARKETS

Special Purpose Wipes

Demand for special purpose manufacturing wipes is expected to increase to 1.5 billion units in 2016, up from 1.1 billion in 2006. This growth is driven by general industrial cleaning and special purpose applications such as lithographic and ink jet printing. Furthermore, new and improved offering task-specific benefits will continue to create niche market drive overall gains. Advances will be moderated by competition from more conventional and less expensive cleaning systems, such as cloth towels saturated with solvent or detergent.

SAMPLE TEXT

Special purpose wipes are designed to provide higher performance attributes than less expensive general purpose industrial wipes. Typically, special purpose wipes utilize specially engineered substrates and other value-added product processes intended to provide task-specific benefits. For example, for automotive finishing Adele Knits (Winston-Salem, North Carolina) offers ADELE PROKNIT ABSORBENT TUBE WIPERS, specially-knit tube-shaped wipes that eliminate two lint-producing edges. A heat seal process reduces edge particles, while laundering curls the edges, leaving them unexposed in normal use. The finished wipes are then packed in shrink wrapped cartons to keep particles out during shipment.

The manufacturing wipes market is increasingly segmented, with substrates engineered to specific performance/cost requirements and formulations designed to meet the requirements of narrow wiping tasks. This trend reflects the critical cleaning needs of makers of electronics, pharmaceuticals, automobile finishes, printing equipment and a myriad of other manufactured products that utilize wipes. In response to these

TABLE IV-3

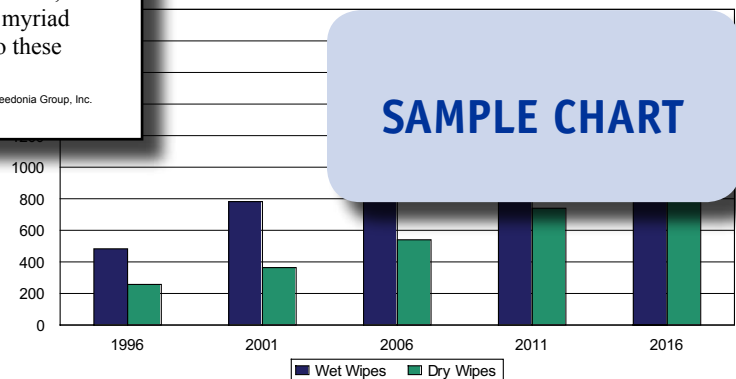
PERSONAL CARE WIPES DEMAND BY APPLICATION
(million dollars)

| Item | 1996 | 2001 | 2006 | 2011 | 2016 |
|---|------|------|------|------|------|
| Resident Population (mil) | 260 | 275 | 290 | 305 | 320 |
| personal care wipes/capita | 1.0 | 1.1 | 1.2 | 1.3 | 1.4 |
| Personal Care Wipes Demand (bil) cents/unit | 361 | 584 | 855 | 1120 | 1470 |
| Personal Care Wipes Demand | | | | | |
| Baby Wipes | | | | | |
| Facial Wipes | | | | | |
| Hand & Body Wipes | | | | | |
| Other | | | | | |
| % personal care | 5 | 6 | 7 | 8 | 9 |
| Total Consumer Wipes Demand | 361 | 584 | 855 | 1120 | 1470 |

SAMPLE TABLE

TABLE III-1

US WIPES DEMAND BY TYPE, 1996-2016
(million dollars)



SAMPLE CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

GOJO Industries Incorporated

One GOJO Plaza, Suite 500
 Akron, OH 44316
 330-255-6000
<http://www.gojo.com>

Annual Sales: \$1.0 billion

Employment: 1,000 persons

Key Products: washcloths

**SAMPLE
PROFILE**

GOJO Industries is a leading worldwide producer and supplier of hand hygiene and related skin care products for commercial, industrial and institutional use. The Company's product offerings encompass instant hand sanitizers, hand soaps, lotions and other hand care products. In addition, the privately held company supplies dispensing systems and related accessories for use with its hand care products. GOJO has facilities in the US, the United Kingdom, Belgium, France, Japan, China, Mexico, Brazil and Peru.

The Company's skin care products include several pre-moistened wipes marketed under the GOJO, PURELL and PROVON brand names. The GOJO line encompasses numerous heavy-duty hand cleansers intended for use in manufacturing plants, automotive repair shops and other industrial settings. Among these products are GOJO FAST WIPES pre-moistened heavy-duty hand cleaning towels, which are designed for use when soap and water are not readily available. These wipes feature d-limonene solvents and denatured alcohol, making them suitable for cleaning light greases and oils from hands in job site applications. The PURELL line from GOJO encompasses antimicrobial and antibacterial hand cleaners, including sanitizing hand

196

Copyright 2007 The Freedonia Group, Inc.

TABLE VI-2

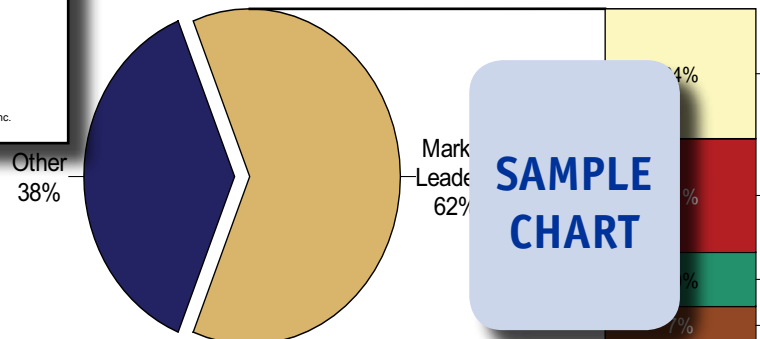
SUBSTRATES DEMAND IN WIPES

| Item | 1996 | 2001 | 2006 | 2011 | 2016 |
|-------------------------------|-------|-------|-------|-------|-------|
| Raw Materials Demand (mil lb) | 304 | 409 | 500 | 610 | 770 |
| % substrates | 64.1 | 64.8 | 68.0 | 70.5 | 72.7 |
| Substrates Demand (mil lb) | 195 | 266 | 340 | 430 | 560 |
| Substrates Demand (mil sq yd) | 1,100 | 1,400 | 1,700 | 2,100 | 2,600 |
| cents/sq yd | 1.8 | 1.9 | 2.0 | 2.1 | 2.2 |
| Substrates Demand (mil \$) | 350 | 480 | 610 | 760 | 980 |
| Spunlaced Nonwovens | 150 | 200 | 250 | 310 | 390 |
| Airlaid Nonwovens | 100 | 130 | 160 | 200 | 250 |
| Other Substrates | 100 | 150 | 200 | 250 | 340 |
| % substrates | 43 | 42 | 41 | 40 | 39 |
| Raw Materials Demand (mil \$) | 370 | 500 | 630 | 790 | 1,000 |

**SAMPLE
TABLE**

TABLE VII-1

US WIPES CONVERTER MARKET SHARE, 2006 (\$1.6 billion)



**SAMPLE
CHART**

OTHER STUDIES

Nonwovens

US demand for nonwoven roll goods will grow 4.5% annually through 2011, driven by healthy gains in key markets such as filtration, construction and wipes. Spunbonded nonwovens will remain the dominant product based on performance advantages, new applications and more demand for composite nonwovens featuring spunbonded webs. This study analyzes the \$4.7 billion US nonwovens industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major firms.

#2271 11/2007..... \$4600

Specialty Films

US specialty film demand will grow 4.8% annually through 2010. Gains will be driven by higher value materials, the rapid adoption of modified atmosphere packaging and improved film coating and metallization. Barrier films will remain dominant while biodegradable and water soluble films will grow the fastest from a small base. The study analyzes the \$5.8 billion US specialty film industry to 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

#2158 02/2007..... \$4400

Coated Fabrics

US demand for coated fabrics will grow 3.2% annually through 2010. Gains will be helped by a recovery in nonresidential wallcoverings, awnings and canopies, and by continued strength in protective clothing and motor vehicle airbags. Nonrubber coated fabrics will stay dominant while fabric-backed wallcoverings will grow the fastest. This study analyzes the \$2.7 billion US coated fabric industry to 2010 and 2015 by product, substrate and market. It also evaluates company market share and profiles major producers.

#2143 02/2007..... \$4400

Geosynthetics

US geosynthetic demand will grow 4.4% annually through 2010, based on a recovery in nonbuilding construction and a wider range of uses. Geotextiles will remain dominant while geogrids, geonets and geocomposites will grow the fastest. The construction market will continue as the largest end use and show the fastest gains. The study analyzes the US geosynthetic industry to 2010 and 2015 by product, market and region. It also evaluates company market share and profiles major geosynthetic manufacturers.

#2153 01/2007..... \$4300

Industrial & Institutional Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals will grow 3.8% annually through 2010. Value gains will be boosted by more multifunctional and concentrated types. Disinfectants and sanitizers will grow the fastest based on heightened safety and health concerns. Specialty surfactants and additives will pace raw materials. This study analyzed the \$8.3 billion I&I cleaning chemical industry to 2010 and 2015 by material, product and market. It also details company market share and profiles major players.

#2117 10/2006..... \$4400

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)