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World Wipes

Industry Study with Forecasts for **2011 & 2016**

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Developed areas will continue to lead the global wipes market based on a significant manufacturing base, a large affluent population and lifestyle trends focused on time-saving products.

Global wipes demand to grow 6.1% annually

Demand for wipes, both consumer and industrial, is forecast to increase 6.1 percent per annum to \$7.8 billion in 2011. The majority of the global wipes market is in the developed areas of the US, Western Europe and Japan, which accounted for 72 percent of global demand in 2006. Just the US and Western Europe together accounted for 64 percent of the total. Propelled by a significant manufacturing base, a large affluent population and lifestyle trends focused on time-saving products, these areas will continue to lead the global wipes market.

Nevertheless, more rapid gains will be linked to developing nations such as China and India. Many developing areas are experiencing rapid economic and industrial expansion, providing opportunities for wipes used in manufacturing processes, as well as in janitorial activities in service sectors and various other businesses. In addition, these areas are experiencing urbanization, and increases in personal income levels, resulting in an expansion of the middle class, and allowing a greater number of individuals the monetary resources to indulge in value-added consumer items such as facial cleansing wipes and household cleaning wipes. China alone will increase its demand for wipes to nearly \$500 million in 2011 and will surpass Japan as the leading market in the Asia/Pacific region soon after that.



Gains in both consumer and industrial markets to advance at similar rates

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. Consumer wipes demand is projected to rise 6.1 percent per year to \$4.8 billion in 2011. The large baby wipes market will be limited by market maturity -- particularly in developed countries -- and declining birth rates throughout the world. Though the overall category will be restrained by slowing growth in demand for baby wipes, strong gains by wipes in household, hand and body, and a number of

niche applications will continue to propel advances. Despite the generally higher cost of wipes (in comparison to conventional alternatives, such as towels), consumers in developed countries have demonstrated a clear willingness to pay for the added convenience.

Demand for industrial wipes is forecast to approach \$3 billion in 2011, increasing 6.0 percent annually. New and innovative offerings providing task-specific performance properties will increasingly replace established cleaning alternatives. However, the higher cost of disposable wipers vis-a-vis conventional shop towels will limit gains in certain cost-sensitive industries and countries.

Sample Text, Table & Chart

ASIA/PACIFIC

from 1996 to 2006. Wipes suppliers have benefitted from reforms that have attracted investment capital into the spur manufacturing and office-based industries, both of which use wipes in a variety of applications.

**SAMPLE
TEXT**

Demand for wipes is expected to expand annually to 2016, with growth rates of any country in the region. Market growth is being industrialization to fuel the manufacturing processes, as well as other activities designed to maintain the growing number of offices and office buildings. Despite industrialization efforts, the region will remain highly oriented toward agriculture. In an effort to diversify on this large segment of the country's economy, wipes suppliers will continue to promote items designed specifically for the agriculture industry, such as teat wipes used to sanitize a cow's teats during milking. A continued rise in income levels will provide individuals with the money necessary to indulge in higher grade toiletries such as facial cleansing wipes. More women are likely to enter the workforce, placing time constraints on household chores. In addition, higher income levels will allow a greater number of households to have finished flooring. Both of these factors will lead to greater demand for household cleaning wipes, such as floor cleaning and general purpose cleaning wipes, as well as baby wipes (where women will have less time for laundering re-usable cloths). An increase in motor vehicle ownership will provide opportunities for motor vehicle cleaning wipes.

Limiting gains in wipes demand will be an underdeveloped infrastructure, where a large segment of the population will not be able to find the products. Also, child rearing practices in which infants are generally toilet trained at just over one year old, in addition to lower birth rates, will restrict the target population base of baby wipes.

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TABLE VI-8

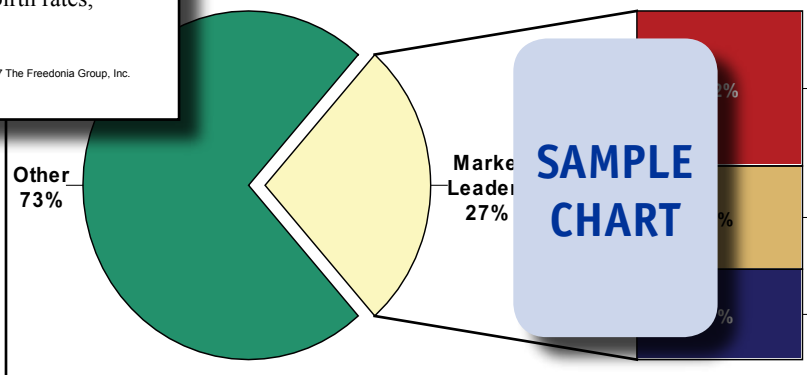
INDIA -- WIPES DEMAND BY MARKET
(million dollars)

Item	1996	2001	2006	2011	2016
Population (mil persons)	937	1028	1111	1194	1277
\$ wipes/capita	0.02	0.03	0.06	0.10	0.14
Wipes Demand					
Consumer Wipes:					
Baby Wipes					
Personal Care Wipes					
Household & Automotive Wipes					
Industrial Wipes:					
Manufacturing Wipes					
Health Care Wipes					
Other Industrial Wipes					
% India					
Asia/Pacific Wipes Demand					

**SAMPLE
TABLE**

CHART VIII-1

INDIAN WIPES CONVERTER MARKET SHARE, 2006
(\$5.8 billion)

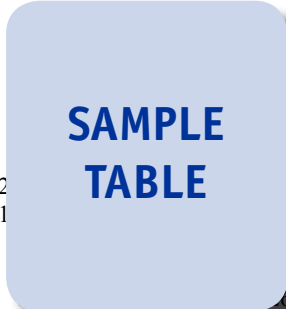


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-7
INDIA -- ECONOMIC INDICATORS
 (billion 2005 dollars)

Item	1996	2001	2006	2011	2016
Population (mil persons)					77
Under 5 Years Old (mil persons)					20
Households (million)					70
Gross Domestic Product	2				50
Personal Consumption Expenditures	1				05
Manufacturing Value Added					79
Motor Vehicle Production (000)					50
Motor Vehicles in Use (millions)					6.2



COMPANY PROFILES

Converting Wet Wipes Srl

Viale delle Industrie 15
 20070 Dresano
 39-2-9827-40
<http://www.converting.com>

Annual Sales:
 Employment:

Key Products: reglass wipes



Converting is a privately held producer of branded and private label wet wipes, and other cleaning products. The Company's products are intended for infant care, personal hygiene, cosmetics and home cleaning applications.

The Company's wipes are produced for body, home and professional, and car cleaning end uses. Among these products, body wipes are produced for baby care, as well as adult skin care. Converting Wet Wipes' wipes are available in plastic laminated packs with adhesive labels and covers, refillable dispenser tubes, cylindrical dispenser tubes and packs. The Company also produces the FRANSFER line of baby care, body care and house management products. Among the wipes in this line are MISTER CLEAN wet wipes that are made with a cleansing solution designed for very delicate skins; MISTER CLEAN OCCHIALI wipes, which are used to clean eyeglasses; BABY CLEAN dermatologically tested wet wipes, which are designed to gently clean baby's skin; SENSURE make-up remover wipes manufactured in unwoven fabric and 100-percent cotton varieties; MISTER CLEAN CASA household wipes, which have both degreasing and antibacterial properties; and MISTER CLEAN household dusters and floor clothes.

"Total wipes demand in the Asia/Pacific region is forecast to rise at a 9.0 percent annual pace through 2011 to \$1.8 billion, a moderation from the 1996-2006 period but well above projected market growth worldwide. Advances will reflect generally strong economic conditions and rising per capita income in the region. However, moderations in building construction spending and various industrial output -- such as in motor vehicles -- following an extended period of strong annual gains, will limit increases in wipes demand somewhat. Consumer wipes sales will climb the fastest, benefitting from both ..."
 --Section VI, pg. 138

OTHER STUDIES

Infection Prevention Products & Services

US demand for infection prevention products and services will grow 4% annually through 2011, driven by efforts to combat healthcare-acquired infections. Services will outpace supplies and equipment. Among products, surgical drapes and gowns will remain dominant while waste disposal and sterilization supplies will lead gains. This study analyzes the \$13.8 billion US infection prevention industry, with forecasts for 2011 and 2016 by type and market. It also evaluates market share and profiles major players.

#2234.....08/2007..... \$4400

Disposable Medical Supplies

US demand for disposable medical supplies will grow 4.9% annually through 2011. Best prospects include dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; tissue sealants for wound closure; and daily contact lenses. This study analyzes the US disposable medical supply industry, with forecasts for 2011 and 2016 presented by product, market and raw material. It also evaluates company market share and profiles industry competitors.

#2196.....05/2007..... \$4500

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will reach \$7.6 billion in 2011 based on substantial growth in nonresidential construction and floor space. Manual cleaning products like wipes and automated floor cleaning equipment such as backpack vacuums will lead gains. Industrial buildings will outpace all other markets. This study analyzes the \$6.5 billion US janitorial equipment and supplies industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2181.....03/2007..... \$4400

Wipes

US wipes demand will grow 6.1% annually through 2011, propelled by new products and further market segmentation. Baby wipes will remain the top selling type while disinfectant and medicated wipes will grow faster. Spunlaced nonwovens will lead gains by substrate, while surfactants pace demand among the chemicals which saturate wipes. This study analyzes the \$1.6 billion US wipes industry to 2011 and 2016 by market, substrate and chemical. It also evaluates company market share and profiles major producers.

#2155.....02/2007..... \$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

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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:

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