World Wipes

Industry Study with Forecasts for 2011 & 2016

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# World Wipes

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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.
from 1996 to 2006. Wipes suppliers have benefitted from economic reforms that have attracted investment capital into the country, helping to spur manufacturing and office-based industries, both of which can utilize wipes in cleaning activities.

Demand is expected to expand annually to 2011, but remain below the growth rates of any country region. Market gains will be driven by ongoing industrialization efforts to fuel the growth of manufacturing processes, as well as general activities designed to maintain the growing number of industrial plants and office buildings. Despite industrialization efforts, India’s economy will remain highly oriented toward agriculture. In an effort to capitalize 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 monies necessary to indulge in higher grade toiletries such as facial cleaning 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 reusable 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.
Sample Profile, Table & Forecast

COMPANY PROFILES

Converting Wet Wipes Srl
Via delle Industrie 15
20070 Dresano
39-2-9827-4043
http://www.convertingwetwipes.com

Annual Sales: $60 million (estimated)
Employment: 200 (estimated)
Key Products: body, home and professional, car and eyeglass wipes

Converting Wet Wipes Srl 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 FRANSPER 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
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