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Wipes

US Industry Study with Forecasts for **2013 & 2018**

Study #2453 | February 2009 | \$4700 | 262 pages

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Wipes will continue to benefit from features such as ease-of-use, disposability, portability, and reduced risk of cross-contamination, but growth will decelerate from the 2003-2008 period.

US demand to grow 3.9% annually through 2013

Demand for wipes in the US is forecast to increase 3.9 percent per annum to \$2.3 billion in 2013. Wipes will continue to benefit from features such as ease-of-use, disposability, portability, and reduced risk of cross-contamination. Nevertheless, growth will decelerate from the rates achieved during the 2003 to 2008 period, due to slower economic growth, increasing market maturity and a shift in preferences to more environmentally friendly consumer goods and cleaning methods. In response to the "green" trend, wipes manufacturers will continue to develop more environmentally friendly products, such as those that are biodegradable.

New products, expanding uses to drive demand

Convenience and innovation will remain driving forces in the consumer market, with household cleaning, 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 suffer 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. These wipes also offer a fast and easy cleaning alternative for consumers with little free time. However, wipes that do not provide the cost and convenience benefits demanded by consumers are expected to drop out of the market.

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

Surfactants to be fastest growing chemical in wipes

Advances for the chemicals that saturate or are deposited into wipes will derive from the increasing diversity of chemical formulations adapted to a wipes format as companies seek to take advantage of the strong consumer interest generated by these convenient, and relatively new, wipe products. Surfactants will experience the fastest gains, resulting from an ongoing shift away from solvent formulations. Furthermore, surfactants offering biocidal properties will drive overall value gains due to increasing concerns regarding bacterial contamination in industrial and consumer applications.

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Sample Text, Table & Chart

CONSUMER MARKETS

Baby Wipes -- Demand for baby wipes is expected to increase slightly to \$1.9 billion in 2013, up from \$1.8 billion in 2008. Manufacturers' level of production is expected to increase slightly to 1.9 billion units in 2013, up from 1.8 billion units in 2008. Though baby wipes are a major product in the personal care segment, demand is expected to grow slowly over the forecast period, primarily due to the fact that baby wipes have reached market saturation in many areas. Many consumers use baby wipes for a variety of products, with only a small number of consumers still making their own wipes or using other alternatives. In a number of families making their own wipes or using alternatives to expand slightly due to the growing "green" trend, as consumers look for ways to reduce their waste output. A slowdown in growth of more than one percent per year in the under age three population is expected to further restrict volume gains through 2003.

At the retail level, demand for baby wipes is expected to increase to \$1.9 billion in 2013. Growth will be limited by the increasing popularity of large refill packs and strong competition from private label brands. Private label brands will continue to gain market share in the baby wipes category, particularly during the recessionary macroeconomic climate of the 2008-2009 period, as consumers look for ways to cut back on spending without eliminating products that provide convenience in their daily lives.

As convenient, hygienic, gentle and portable cleaning items, baby wipes historically were used by customers for a host of other personal, household and travel purposes. However, with the ongoing proliferation of task-specific consumer wipes, such as those specially designed for hand cleaning, makeup removal and other sundry purposes, use of baby wipes in non-diaper applications has been significantly reduced over the years. The popularity of task-specific wipes will likely continue through the forecast period, restricting gains in baby wipes.

SAMPLE
TEXT

TABLE V-3

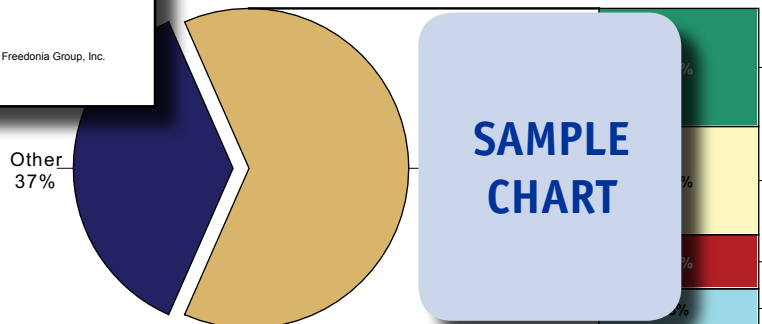
SPECIAL PURPOSE WIPES DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Manufacturers' Shipments (bil 2000\$) ?					
special purpose wipes/000\$ shpts					
Special Purpose Wipes (mil units)					
cents/unit					
Special Purpose Wipes Demand					
Clean Room					
Surface Preparation					
Printing					
Other					
% special purpose					
Total Manufacturing Wipes Demand					

SAMPLE
TABLE

CHART VII-1

WIPES CONVERTER MARKET SHARE, 2008 (\$1.9 billion)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-2
SUBSTRATES DEMAND IN WIPES

Item	1998	2003	2008	2013	2018
Raw Materials Demand (mil lb)	264	478	558	625	720
% substrates					4
Substrates Demand (mil lb)					0
Substrates Demand (mil sq yd)	2				5
cents/sq yd					4
Substrates Demand (mil \$)					0
Spunlaced Nonwovens					5
Airlaid Nonwovens					5
Other Substrates					0
% substrates					9
Raw Materials Demand (mil \$)	458	978	918	1070	1450



COMPANY PROFILES

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

SAMPLE PROFILE

Annual Sales (company, 2/09)
 Employment
 Key Products: Wipes

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, Brazil, the United Kingdom and Japan.

The Company is active in the US wipes industry through the manufacture and distribution of pre-moistened sanitizing and cleaning wipes, which are sold under the PURELL, GOJO and GOJO FAST WIPES brand names. PURELL products include pre-moistened sanitizing wipes, sanitizing hand wipes and cleansing and sanitizing towels sold to a variety of industrial markets, such as foodservice, hospitality and healthcare. The Company's PURELL sanitizing wipes are treated with PURELL instant hand sanitizer, which kills 99.99 percent of common germs. GOJO's PURELL sanitizing hand wipes are individually wrapped for on-the-go use. PURELL cleansing and sanitizing towels are 10-inch-by-10.25-inch antibacterial towels that are used in military personnel personal hygiene and other applications. In fall 2007, GOJO discontinued PROVON moisturizing bath cloths and personal wash-

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"Demand for spunlaced nonwovens in wipes applications is projected to increase 5.2 percent per year, reaching \$270 million in 2013. Advances will be driven by the substrate's softness, strength, performance capabilities, and amenability to complex design patterns such as embossing. Furthermore, though spunlaced currently is generating interest mostly in personal care applications, the substrate is expected to make further inroads in the household cleaning wipes segment as well. Future gains might be limited, however, by ..."

--Section VI, pg. 146

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OTHER STUDIES

World Nonwovens

This study analyzes the global nonwovens industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by process (spunmelt, carded, wetlaid, airlaid), application (disposables, nondisposables), market (e.g., personal hygiene, wipes, filtration, medical/surgical, construction), world region and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2482 03/2009..... \$5600

Coated Fabrics

US coated fabrics demand will reach 655 million square yards in 2012. Sales will be spurred by gains in motor vehicle production, protective clothing output and building construction. Vinyl- and other nonrubber-coated fabrics will remain dominant, while natural rubber-, neoprene-, silicone rubber- and other rubber-coated fabrics will grow the fastest. This study analyzes the \$3 billion US coated fabrics industry, with forecasts for 2012 and 2017 by product, substrate and market. It also details market share and profiles industry players.

#2448 01/2009..... \$4800

Geosynthetics

US geosynthetics demand will reach \$2.1 billion in 2012 based on rebounding road and highway construction and other public works spending. High-performance products such as geomembranes, geogrids and preformed geocomposites will outpace less costly types. Value demand will grow the fastest in the transportation infrastructure market. This study analyzes the \$1.7 billion US geosynthetics industry, with forecasts for 2012 and 2017 by product, market and region. It also details market share and profiles industry players.

#2435 01/2009..... \$4600

World Textile Fibers

Global demand for manufactured fibers will rise 4.7% annually through 2012. Polyester will continue to dominate output while specialty products such as spandex, aramid and carbon fibers grow the fastest. The industry will remain concentrated in Asia, where the fastest growth is also expected. This study analyzes the 46 million metric ton world textile fiber industry, with forecasts for 2012 and 2017 by fiber type, world region and major country. It also evaluates company market share and profiles industry players.

#2402 10/2008..... \$5700

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

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