

[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 & Corporate
Use License 7](#)

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



Wipes

US Industry Study with Forecasts for **2014 & 2019**

Study #2697 | December 2010 | \$4900 | 263 pages

www.freedoniagroup.com



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

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Overview.....	4
Demographic Trends	8
Household Trends.....	11
Consumer Spending Trends	13
Cosmetic & Toiletry Industry Outlook	15
Specialty Household Cleaners	
Industry Outlook.....	17
Manufacturing Outlook.....	20
Health Care Facilities.....	23
Retail Sector Trends	26
Retail Wipes Market Overview.....	28
Competitive Wiping	
Products Overview.....	30
Pricing Trends	33
Environmental & Regulatory Issues ...	34
Consumer Wipe Regulations	35
Industrial Wipe Regulations	36
Flushability & Other	
Environmental Issues.....	37
Historical Market Trends.....	38
International Activity & Foreign Trade	40

PRODUCT/MARKET OVERVIEW

Product Outlook.....	43
Wet Wipes.....	47
Dry Wipes	49
Market Overview	51

CONSUMER MARKETS

General	54
Personal Care.....	57
Baby Wipes	61
Products & Materials	64
Retail Market Trends	66
Producers	68
Hand & Body Wipes	69
Personal Hygiene Wipes.....	70
Bathroom Hygiene Wipes	72

Feminine Hygiene Wipes	74
General Purpose Bathing Wipes	75
Other Personal Hygiene Wipes..	76
Moist Towelettes	77
Medicated Wipes	79
Other Hand & Body Wipes	82
Facial Wipes	83
Cleansing Wipes	85
Other Facial Wipes	88
Other Personal Care Wipes	91
Household Care.....	93
General Purpose Cleaning Wipes	97
Floor Care Wipes	100
Other Household Care Wipes.....	103
Other Consumer	106
Automotive Wipes	108
Pet Care Wipes.....	109
All Other Consumer Wipes	110

INDUSTRIAL MARKETS

General	112
Health Care.....	115
Primary & Emergency Care	120
Long Term Care	121
Manufacturing	122
Special Purpose Wipes.....	125
General Purpose Wipes	132
Commercial	135
Foodservice Wipes	136
Other Commercial Wipes	138
Other Industrial.....	141

RAW MATERIALS

General	144
Substrates	145
Spunlaced Nonwovens.....	147
Airlaid Nonwovens.....	151
Other Substrates	153
Chemicals	155
Solvents	157
Surfactants	158
Fragrances	159
Other Chemicals	161

INDUSTRY STRUCTURE

General	164
Market Share	167
Converters' Level.....	168
Retail Level.....	171
Industry Restructuring	174
Competitive Strategies.....	174
New Product Development	175
Product Line Extension.....	176
Low Cost Position.....	177
Product Placement.....	178
Market Segmentation	180
Cooperative Agreements	181
Manufacturing	182
Contract Manufacturing.....	184
Packaging Trends	186
Marketing & Advertising.....	188
Distribution	189

COMPANY PROFILES

Ahlstrom Corporation.....	193
American Hygienics	195
Berkshire Corporation	196
Buckeye Technologies	198
Clorox Company	200
Contec Incorporated.....	202
Covidien plc.....	204
DuPont (EI) de Nemours.....	205
Energizer Holdings	208
Fibematics Incorporated.....	209
Freudenberg & Company.....	211
Glatfelter (PH) Company	213
GOJO Industries.....	214
HDK Industries	215
Holm (Jacob) & Sons.....	216
Illinois Tool Works.....	217
Johnson & Johnson.....	222
Johnson (SC) & Son	225
Kimberly-Clark Corporation	226
Koch Industries	229
National Towelette	231
New Pig.....	233

(continued on following page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

Nice-Pak Products	235
Polymer Group	239
Procter & Gamble	241
Reckitt Benckiser	244
Rockline Industries	246
Royal Paper Converting	247
Sage Products.....	248
STERIS Corporation.....	249
Svenska Cellulosa.....	251
3M Company	253
Triad Group	255
Tufco Technologies.....	257
Unilever Group	259
Additional Companies Mentioned in Study	261

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 Macroeconomic Indicators	8
2 Population & Households	10
3 Households & Household Stock .	13
4 Personal Consumption Expenditures	15
5 Cosmetic & Toiletry Supply & Demand.....	17
6 Specialty Household Cleaner Demand	19
7 Manufacturers' Shipments.....	22
8 Health Care Facilities.....	25
9 Retail Sales.....	28
10 Retail Wipes Market.....	30
11 Competitive Wiping Products Demand	32
12 Wipes Prices.....	34

13 Wipes Market, 1999-2009	39
Cht Wipes Demand, 1999-2009	40

PRODUCT/MARKET OVERVIEW

1 Wipes Demand by Type & Substrate.....	46
Cht Wipes Demand by Type, 1999-2019	47
2 Wet Wipes Demand by Market & Application	49
3 Dry Wipes Demand by Market & Application	51
4 Wipes Demand by Market.....	53

CONSUMER MARKETS

1 Consumer Wipes Demand by Market	56
Cht Consumer Wipes Demand by Market, 2009.....	57
2 Personal Care Wipes Demand by Application	60
Cht Personal Care Wipes Demand by Application, 2009	61
3 Baby Wipes Demand	64
Cht Baby Wipes Retail Sales, 2009 ..	68
4 Hand & Body Wipes Demand	70
5 Personal Hygiene Wipes Demand	72
6 Moist Towelettes Demand	79
7 Medicated Wipes Demand	81
8 Other Hand & Body Wipes Demand	83
9 Facial Wipes Demand	85
10 Facial Cleansing Wipes Demand .	88
11 Other Facial Wipes Demand.....	91
12 Other Personal Care Wipes Demand	93
13 Household Care Wipes Demand by Application	96
Cht Household Care Wipes Demand by Application, 2009	97
14 General Purpose Cleaning Wipes Demand	99
15 Floor Care Wipes Demand	103

16 Other Household Care Wipes Demand	106
17 Other Consumer Wipes Demand	108

INDUSTRIAL MARKETS

1 Industrial Wipes Demand by Market	114
Cht Industrial Wipes Demand by Market, 2009.....	115
2 Health Care Wipes Demand	119
3 Manufacturing Wipes Demand by Application	125
4 Special Purpose Wipes Demand.	127
5 General Purpose Wipes Demand	134
6 Commercial Wipes Demand	136
7 Foodservice Wipes Demand	138
8 Other Commercial Wipes Demand	141
9 Other Industrial Wipes Demand	143

RAW MATERIALS

1 Raw Materials Demand in Wipes	145
2 Substrate Demand in Wipes	147
3 Spunlaced Nonwoven Demand in Wipes	150
4 Airlaid Nonwoven Demand in Wipes	153
5 Other Substrates Demand in Wipes	155
6 Chemical Demand in Wipes	156
7 Solvent Demand in Wipes	158
8 Surfactant Demand in Wipes	159
9 Fragrance Demand in Wipes	160
10 Other Chemicals Demand in Wipes	163

INDUSTRY STRUCTURE

1 US Wipes Sales by Company, 2009	166
Cht US Wipes Converter Market Share, 2009.....	169
Cht US Retail Market Share, 2009 ...	173

Wipes will continue to benefit from features such as ease-of-use, disposability and portability, as well as from the development of more environmentally friendly products.

US demand to rise 4.3% annually through 2014

Demand for wipes, both consumer and industrial, is forecast to increase 4.3 percent per annum to \$2.3 billion in 2014. 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 rates achieved during the 2004 to 2009 period, due to 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 biodegradable and other environmentally friendly products.

Industrial wipes to outpace consumer types

After suffering from slower sales during the recession that began in December 2007, the industrial wipes market will benefit from a rebound in manufacturing activity through 2014. As a result, the industrial wipes market is projected to achieve more rapid gains than the consumer market. In addition to a more favorable economic climate, demand for industrial wipes will benefit from new product innovations and expanding applications. Among industrial wipes, health care and manufacturing types will remain the largest segments of this market, with special purpose products such as surface preparation wipes and patient bathing wipes projected to see the fastest growth.

US Wipes Demand, 2014 (\$2.3 billion)



Baby Wipes	26%
Disinfectant Wipes	16%
General Purpose Industrial Wipes	14%
Medicated Wipes	6%
Other Applications	38%

Hand and body, household cleaning wipes to pace consumer segment

Convenience, consumer acceptance and innovation will remain driving forces in the consumer market, with hand and body, household cleaning, and a number of other, small volume consumer wipes projected to register the strongest growth. Growth in household care wipes, such as general purpose disinfectant 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. Hand and body wipes, such as

bathroom hygiene and general purpose bathing, will enjoy increased market penetration. For example, the concept of wet bathroom tissue as part of a standard bathroom routine is gaining acceptance. Market penetration of general purpose bathing wipes is increasing among individuals who are bedridden or find it difficult to enter and exit a bathtub. While baby wipes will remain the top selling type of consumer wipe, demand growth will continue to be restrained by market maturity, as well as continued replacement by newer, task-specific wipes in non-diaper applications, where baby wipes once enjoyed considerable popularity.

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

INDUSTRIAL MARKETS

Primary & Emergency Care

Demand for primary and emergency care wipes is forecasted to grow at a 5.5% CAGR in 2014, spurred by the constant threat of microbial contamination and cross-infection. In addition, the rising incidence of hospital-acquired infections, including blood samples, injectable drugs, and surgical procedures will stimulate demand. However, the industry is expected to continue to rely on reusable cloths and mop heads due to their cleaning and disinfecting needs due to cost saving benefits, which will moderate demand.

Disinfecting wipes constitute the largest single category of primary and emergency care wipes due to the constant threat of microbial contamination. These wipes are used in such diverse applications as the disinfecting of hard surfaces, intravenous and Foley catheter bag ports, and stethoscope ear and chest pieces. While the markets for alcohol prep pads, benzethonium chloride and iodine wipes are already well established, use of hand and hard surface disinfecting wipes offers good growth opportunities as a result of new, specialized germicidal wipes offering a wider range of action. For example, Metrex Research, a subsidiary of Danaher, offers CAVIWIPES, a range of nonwoven wipes that are proven to kill tuberculosis within five minutes and the hepatitis B virus in three minutes. However, competition from more cost effective alternatives, including hand sanitizing solutions and gels, basins of disinfectant solution for instruments, and spray disinfectants for hard surfaces, will continue to limit gains.

Patient care wipes, including individually wrapped nonwoven washcloth-type wipes, are expected to record gains, spurred by the convenience and sanitation advantages of a disposable wipe. Patient care types, which eliminate the risk of spilling or splashing contaminated water and do not require rinsing off the patient's skin after use.

120

Copyright 2010

SAMPLE TEXT

TABLE VI-2

SUBSTRATE DEMAND IN WIPES

Item	1999	2004	2009	2014	2019
Raw Materials Demand (mil lb)					
% substrates					
Substrate Demand (mil lb)					
Substrate Demand (mil sq yd)					
cents/sq yd					
Substrate Demand (mil \$)					
Spunlaced Nonwovens					
Airlaid Nonwovens					
Other Substrates					
% substrates					
Raw Materials Demand (mil \$)					

SAMPLE TABLE

CHART VII-1

US WIPES CONVERTER MARKET SHARE
 (\$1.8 billion, 2009)

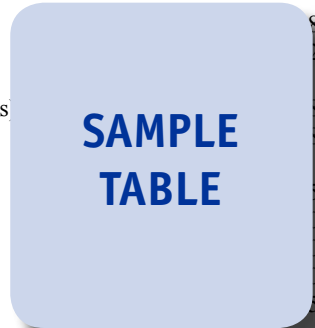


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2
PERSONAL CARE WIPES DEMAND BY APPLICATION
 (million dollars)

Item	1999	2004	2009	2014	2019
Resident Population (million) personal care wipes/capita					
Personal Care Wipes Demand (bil units cents/unit)					
Personal Care Wipes Demand					
Baby Wipes					
Hand & Body Wipes					
Facial Wipes					
Other					



COMPANY PROFILES

Contec Incorporated
 525 Locust Grove
 Spartanburg, SC 29303
 864-503-8333
 http://www.co

Annual Sales:
 Employment:

Key Products: woven, microfiber and other

SAMPLE PROFILE

Contec is a primary manufacturer of wiping and cleaning products for critical environments. The Company primarily serves the pharmaceutical, biotechnology, medical device, data storage, life science, marine, semiconductor, microelectronics, automotive, aerospace and industrial surface preparation industries. Contec maintains a manufacturing and warehouse facility at its headquarters in Spartanburg, South Carolina, as well as the Automotive division headquarters in Toledo, Ohio and a subsidiary in China.

The Company is active in the US wipes market via the production and sale of pre-saturated, laundered synthetic, nonwoven, microfiber and other wipes. These wipes are suitable for automotive, industrial, clean room and other applications.

Contec's pre-saturated wipes are sold under the PROSAT and SATWIPES brand names. PROSAT wipes are treated with an isopropyl alcohol/deionized water cleaning solution for the removal of surface contaminants. These wipes are packaged in flat, resealable pouches. Among other wipes in this line are PROSAT CUSTOM wipes featuring various solvents and fabrics, including knit, woven and nonwoven,

202 Copyright 2010 The Freedonia Group, Inc.

"Demand for baby wipes is expected to rise 2.1 percent per year to \$565 million at the manufacturers' level in 2014, increasing slightly to just over 24 billion units during the same time. Though baby wipes will remain the dominant product in the personal care segment, demand is expected to grow slowly over the forecast period, primarily due to market maturity. Baby wipes have reached market saturation in diaper changes, the largest application for ..."

--Section IV, pg. 61

OTHER STUDIES

Cosmetic Surgery Products

US demand for cosmetic surgery products is expected to advance 7.4% annually through 2014, based on a return to growth in cosmetic procedures. Injectables will remain the largest and fastest growing segment, led by BOTOX COSMETIC, DYSPORT and newer types such as calcium hydroxylapatite. This study analyzes the \$1.8 billion US cosmetic surgery product industry, with forecasts for 2014 and 2019 by procedure, product and raw material. It also evaluates company market share and profiles industry participants.

#2712December 2010 \$4800

Industrial & Institutional (I&I) Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals will increase 4% annually through 2014. Disinfectants and sanitizers will be the fastest growing type as the food industry faces tighter safety requirements. General purpose cleaners and floor care cleaners will remain the largest segments. This study analyzes the \$8.8 billion US I&I cleaning chemical industry, with forecasts for 2014 and 2019 by market, product and raw material. It also evaluates company market share and profiles industry players.

#2683September 2010..... \$4900

World Wound Management Products

Global wound management product demand will rise 4.6% yearly through 2013. Best growth prospects include tissue sealants, foam and alginate wound dressings, growth factors, bioengineered tissue substitutes and anti-adhesion agents. China will be the fastest growing market, while the US remains the largest. This study analyzes the global market for wound management products, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates company market share and profiles industry players.

#2578 February 2010 \$5800

Nonwovens

Demand for nonwoven roll goods in the US is projected to rise 3.7% annually through 2013. Among disposable nonwovens, consumer items will continue to claim the most sales while the filtration market grows the fastest. Within the nondisposables segment, construction will remain the largest market and grow the fastest. This study analyzes the \$5.2 billion US nonwoven fabric industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2559 November 2009 \$4900

Infection Prevention Products & Services

US demand for infection prevention products and services will increase 4.8% annually through 2013. The best growth opportunities are anticipated in safety-enhanced devices that reduce the risk of health care acquired infections. Medical waste disposal and sterilization supplies, as well as high level disinfectants, will also do well. This study analyzes the \$18.6 billion US infection prevention industry, with forecasts for 2013 and 2018 by product, service and market. It also evaluates market share and profiles industry players.

#2526 August 2009 \$4700

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)