Wipes

US Industry Study with Forecasts for 2014 & 2019

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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.

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.
Primary & Emergency Care

Demand for primary and emergency care wipes is forecast to rise 4 percent per annum to $355 million in 2014, spurred by the convenience, sterility, and reduced risk of cross-contamination and cross-infection that disposable wipes provide. In addition, the rising incidence of diabetes and other conditions requiring blood samples, injectable medication, disinfecting, and cleansing procedures will stimulate demand. However, most hospitals are expected to continue to rely on woven cloths and cotton swabs for much of 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. Pre-moistened types, which eliminate the risk of spilling or splashing contaminated water and do not require rinsing off the patient’s skin after use, will register gains.
Sample Profile, Table & Forecast

COMPANY PROFILES

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

Annual Sales: $35 million (estimated)
Employment: over 200 (estimated)

Key Products: pre-saturated, laundered synthetic, nonwoven, microfiber and other wipes

Contec is a privately held 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.

**TABLE IV-2**

**PERSONAL CARE WIPES DEMAND BY APPLICATION**

<table>
<thead>
<tr>
<th>Item</th>
<th>1999</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
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<tbody>
<tr>
<td>Resident Population (million)</td>
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<td></td>
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<td>personal care wipes/capita</td>
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<td>Personal Care Wipes Demand (bil units)</td>
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<td>cents/unit</td>
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<td>Personal Care Wipes Demand</td>
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<tr>
<td>Baby Wipes</td>
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<td>Hand &amp; Body Wipes</td>
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<tr>
<td>Facial Wipes</td>
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<td>Other</td>
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"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
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