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Wipes

US Industry Study with Forecasts for **2016 & 2021**

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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

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Wipes will continue to benefit from their ease of use, disposability, portability, and reduced risk of cross-contamination, although disposability could restrain sales based on environmental concerns.

US demand to rise 5.1% annually through 2016

Demand for wipes in the US is forecast to rise 5.1 percent per year to \$2.5 billion in 2016. Sales of wipes will be aided by ongoing improvements in the economy, such as a rebound in manufacturing activity and an acceleration in consumer spending. Wipes will continue to benefit from features such as ease of use, disposability, portability, and reduced risk of cross-contamination. While disposability has been a primary advantage in the growth of wipes, it also has the potential to restrain sales as more consumers become attuned to environmental concerns, such as solid waste generation, biodegradability, and recyclability. In response to environmental concerns, product innovations are increasingly centered on the incorporation of recycled fibers, natural ingredients, or biodegradable materials, which also boost value gains.

Hygiene, cleaning wipes to pace consumer segment

During the 2007-2009 recession, consumers economized by using private label wipes, by shifting away from task-specific wipes to general-purpose products, or by returning to traditional cleaning methods (e.g., chemical cleaning product with rags, paper towels, or tissues). Going forward, convenience, consumer acceptance, and innovation will remain driving forces in the consumer market, with personal hygiene and general purpose household cleaning

US Wipes Demand, 2016 (\$2.5 billion)



wipes projected to register the fastest gains. Personal hygiene wipes will enjoy increased market penetration; the concept of wet bathroom tissue as part of a standard bathroom routine is gaining acceptance especially since the industry has become diligent in developing not only flushable but also dispersible products. Growth in general purpose disinfectant wipes will be propelled by the appeal of one-step cleaning. The large and more established baby wipes category is primarily driven by gains in the infant population. Further growth will be slowed as many consumers who used less expensive baby wipes for non-diaper applications during the recession return to task-specific wipes as conditions improve.

Manufacturing to be fastest growing industrial wipes

The industrial wipes market will continue to improve from its lackluster performance during the 2007-2009 recession, benefiting from an acceleration in manufacturing activity through 2016. As such, wipes geared towards the manufacturing market are projected to achieve above average gains through the forecast period. In addition, demand for industrial wipes will benefit from product innovations and expanding applications. Among industrial wipes, manufacturing and health care types will remain the two largest segments, together accounting for nearly three-quarters of demand.

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Sample Text, Table & Chart

CONSUMER MARKETS

Cleansing Wipes -- Demand for facial cleansing wip
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 In 2016, cleans
 are expected to account for 59 percent of all facial wipes val

Multiple action facial cleansing wipes are popular among busy consumers who want to take care of their skin but have limited time. Similar to the larger skin care market, wipes producers will most likely develop products catering to men's skin care needs, as this population segment is increasingly interested in purchasing value-added cleansing products. Further gains will be limited by competition from conventional washcloths used in conjunction with bar soaps, liquid facial cleansers and other more traditional cleansing products, which are generally less expensive than disposable wipes.

Mirroring trends in the overall US cosmetic and toiletry industry, facial cleansing wipes increasingly include value-added cosmeceutical ingredients designed to enhance or improve the complexion. In the long term, the use of chemicals that reduce the signs of aging, fight wrinkles, ameliorate skin discoloration, and offer other benefits that consumers will see and feel will experience the most rapid gains through 2016. Chemicals such as retinoids, alpha hydroxy acids, antioxidants, collagen, hyaluronic acid, and peptides are among the chemicals that are projected to find greater use in the form of facial cleansing wipes.

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**SAMPLE
TEXT**

TABLE V-1

INDUSTRIAL WIPES DEMAND BY MARKET (million dollars)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil 2005\$)	10,000	12,000	14,000	16,000	18,000
Industrial Wipes Demand (bil units)	1,000	1,200	1,400	1,600	1,800
Industrial Wipes Demand (cents/unit)	100	100	100	100	100
Industrial Wipes Demand					
Health Care	1,000	1,200	1,400	1,600	1,800
Manufacturing	1,000	1,200	1,400	1,600	1,800
Commercial	1,000	1,200	1,400	1,600	1,800
Other Industrial	1,000	1,200	1,400	1,600	1,800
% industrial Wipes Demand	10%	10%	10%	10%	10%

**SAMPLE
TABLE**

CHART VII-1

US WIPES CONVERTER MARKET SHARE (\$1.9 billion, 2011)

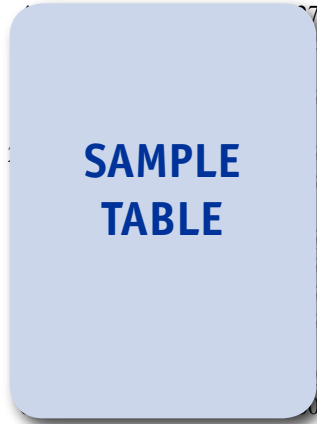


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-2
SUBSTRATE DEMAND IN WIPES
(million dollars)

Item	2001	2006	2011	2016	2021
Raw Materials Demand (mil lb) % substrates					7
Substrate Demand (mil lb)					
Substrate Demand (mil sq yd) cents/sq yd					
Substrate Demand Spunlaced Nonwovens					
Airlaid Nonwovens					
Other Substrates					
% substrates					
Raw Materials Demand					0



COMPANY PROFILES

Cascades Incorporated
 404 Marie-Victorin Boulevard
 Kingsey Falls, Quebec J0A 1B0
 Canada
 819-363-
 http://wv

Sales: \$
 US Sales
 Employr

Key Proc



Cascades is an international producer of high-end and specialty paper and packaging products. The Company operates through four groups: Boxboard, Containerboard, Tissue, and Specialty Products.

The Company is active in the US wipe industry via the Tissue Group, which had 2011 sales of \$880 million. The Tissue Group produces commercial and industrial wipes under such brand names as ADEPT, PRIVILEGE, DUSTERZ, GOLDEN DUSTERS, TUFF-JOB, BUSBOY, LIKE-RAGS, PRESTO-WIPES, WORKPAC, and HYWORX. Cascades' ADEPT tissue wipes are paper types designed for delicate component and surface cleansing in laboratories, research facilities, hospitals, and manufacturing environments. PRIVILEGE wipes from the Company are airlaid and double crepe types intended to replace such linens as napkins and hand towels. DUSTERZ wipes are antistatic floor dusting cloths, while GOLDEN DUSTERS are yellow dusting cloths. Cascades' TUFF-JOB wipes include four ply scrim, four ply scrim reinforced, and hand cleaning types designed with durability properties for all purpose wiping. The Company's BUSBOY wipes are intended for foodservice applications. For example,

"Demand for spunlaced nonwovens in wipes applications is forecast to rise 5.4 percent per year to \$370 million in 2016. Though spunlaced nonwovens are currently used mostly in personal care applications, gains will result from continued inroads in the household cleaning wipes segment and industrial market. In addition, spunlaced nonwovens are gaining share (in volume terms) over other nonwoven substrates due to ..."
 --Section VI, pg. 183

OTHER STUDIES

Nonwovens

Demand for nonwovens is forecast to rise 5.7% per year to \$7.1 billion in 2016. The fastest market gains will occur in the nondisposables market, especially construction. Disposables will remain the dominant market, where filtration will lead gains. Spunmelt nonwovens will continue as the largest product segment and carded will be the second largest. This study analyzes the \$5.4 billion US nonwoven fabric industry, with forecasts for 2016 and 2021 by material, process and market. The study also evaluates company market share and profiles industry players.
 #2983January 2013 \$5200

World Industrial & Institutional Cleaning Chemicals

World demand for industrial and institutional (I&I) cleaning chemicals will rise 4.7 percent yearly to \$44.4 billion in 2016. North America and Western Europe will remain dominant but developing regions will grow faster. Disinfectants and sanitizers will benefit from use in fast growing health care and food processing markets. This study analyzes the \$35.3 billion world I&I cleaning chemical industry, with forecasts for 2016 and 2021 by product, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.
 #2945October 2012 \$6100

Coated Fabrics

US coated fabrics demand will rise 3.5 percent annually to 635 million square yards in 2016. Motor vehicles will remain the largest market, with good prospects for airbags. Renewed construction activity will benefit wallcoverings, furniture, and awnings and canopies. Polypropylene and polyethylene coated fabrics will be the fastest growing products. This study analyzes the 535 million square yard US coated fabric industry, with forecasts for 2016 and 2021 by coating, substrate and market. The study also evaluates company market share and profiles industry players.
 #2936September 2012..... \$5100

World Nonwovens

Global sales of nonwoven fabrics are forecast to increase 6.9 percent annually to 9.3 million metric tons in 2015. Market gains in developing areas will outpace gains in the US, Western Europe and Japan. Spunmelt nonwovens will remain the largest segment, while airlaid nonwovens grow the fastest. This study analyzes the 6.7 million metric ton world nonwovens industry, with forecasts for 2015 and 2020 by web formation process, application, market, world region and for 19 countries. The study also evaluates company market share and profiles industry players.
 #2816December 2011 \$5900

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies is forecast to grow 2.2 percent annually through 2015, an improvement over the 2005-2010 decline. Manual cleaning products will see the fastest gains of any major segment, driven by microfiber cloths, wipes, wet mops and squeegees. Institutional buildings will be the fastest growing market. This study analyzes the \$5.9 billion US janitorial equipment and supply industry, with forecasts for 2015 and 2020 by type, market and US region. The study also evaluates company market share and profiles industry competitors.
 #2770August 2011 \$4900

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