Wipes

US Industry Study with Forecasts for 2018 & 2023

Study #3188 | September 2014 | $5300 | 341 pages
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Increased consumer spending will favor higher value, more task-specific wipes in the consumer market, and rising manufacturing activity will fuel related wipes demand in the industrial market.

US demand to rise 3.6% annually through 2018

US demand for wipes is expected to expand 3.6 percent per year through 2018 to $2.9 billion. Improving economic conditions will support increasing demand for wipes used in both consumer and industrial markets. Increased consumer spending will promote the use of higher value, more task-specific wipes in the consumer market, and accelerating manufacturing activity will fuel related wipes demand in the industrial market. The market will continue to see ongoing introductions of new or innovative wipes, although the number of product introductions is expected to slow due to the large variety of wipes already available on the market.

Consumer segment to be driven by non-baby wipes

Overall gains in the key consumer wipes segment will be restrained by the sluggish pace of the dominant and mature baby wipes segment. In contrast, products such as personal hygiene, pre-moistened facial cleansing, disinfecting, and wet floor care wipes are expected to see rapid gains. Growth in these segments will be fueled by rising market penetration as consumers increasingly incorporate these products into their routines. Advances will also be driven by consumers who downgraded during the recession-plagued 2008-2013 period returning to more expensive, task-specific wipes. Introduction of new, innovative products, such as flavored wipes for cleaning children’s faces, will continue to provide growth opportunities, although the vast majority of new products are expected to remain small volume items in niche markets.

Growth in the industrial market through 2018 will be spurred in part by the Environmental Protection Agency’s passage of the Wiper Rule in July 2013. This rule allows solvent-contaminated disposable wipes to be labeled as non-hazardous solid waste, decreasing the total financial burden of using disposable wipes and making disposable wipes more competitive with reusable, laundered shop towels. Going forward, greater demand for disposable industrial wipes is expected as more states adopt the new regulations.

Concerns about cross-contamination stemming from health care acquired infections (HAIs) and harmful food bacteria such as *E. coli* boosted sales of disinfecting wipes in the health care and foodservice settings during the 2008-2013 period. Wipes’ disposable and sanitary nature make them well suited for such tasks compared to laundered textile alternatives. Going forward, sales of disinfecting wipes will continue to see favorable gains in both the health care and foodservice markets, benefiting in part from denial of Medicare payouts for hospital readmissions, a number of which come from HAIs.
DISINFECTANT WIPES -- Sales of disinfectant wipes to the health care market are expected to increase 5.0 percent per year through 2018, reaching 231 million. Sales of disinfectant wipes to the health care market are expected to increase 5.0 percent per year through 2018, reaching 231 million. Health care facilities use a wide array of specially formulated disinfectants, including alcohol prep pads, skin preparation, antibacterial hand sanitizers, and hard surface cleaners to disinfect skin, bathrooms, and medical equipment. These products are expected to record the most rapid gains through 2018, spurred by the introduction of new disinfectants designed to attack a wide and ever-changing range of micro-organisms. These products have benefited from ongoing concerns over the spread of HAIs, prompting medical facilities to maintain higher levels of disinfecting wipes to prevent cross-contamination. Advances in market penetration for wipes will be limited as liquid cleaners maintain their stronghold in some large scale cleaning applications (e.g., floor care) typically conducted by the janitorial staff.

During the 2008-2013 period, hard surface disinfectant wipes surpassed the more mature alcohol prep pads to become the largest product category in the disinfectant wipes segment, fueled primarily by concerns over HAIs and the general convenience and ease of use that these products provide. Disinfectant wipes are used on hard surfaces to kill bacteria, viruses, and molds before they can be transferred to a person or another surface, as part of a plan to minimize cross-contamination. Many types of active ingredients are used in these formulations, including quaternary ammonium compounds, bleach, and hydrogen peroxide, as well as commodity alcohols such as isopropanol. Spunmelt nonwovens, including SMS types, are gaining use in hard surface disinfectant wipes, where they are valued for their high strength and abrasion resistance. Although airlaid nonwovens can also be used, demand for wipes made with this material has been limited due to the tendency of the short pulp fiber to slough onto the surfaces on which the wipe is used, leaving lint behind.
Sample Profile, Table & Forecast

COMPANY PROFILES

Cascades Incorporated
404 Marie-Victorin Boulevard
Kingsley Falls, Quebec J0A 1B0
Canada
819-363-5100
http://www.cascades.com
Sales: US$3.7 billion (2013)
Employment: 12,200 (2013)
Key Products: commercial and industrial wipes

Cascades is an international producer of paper and packaging, specializing in the manufacture, conversion, and marketing of high end and specialty products. The Company operates through two segments: Tissue Papers and Packaging Products.

The Company competes in the US wipes industry via the Tissue Papers segment, which had sales of $956 million in 2013. Of the Tissue Papers segment’s total 2013 sales, the US accounted for 70 percent, or about $670 million. The segment manufactures commercial and industrial wipes via the Away-From-Home product group, which accounted for 48 percent, or about $320 million, of the segment’s US sales. Among the Away-From-Home product group’s wipes are ADEPT, FLEX, PRESTO-WIPES, TUFF-JOB, NORTH RIVER, WORKPAC, GOLDEN DUSTERS, LIKE-RAGS, PRIVILEGE, BUSBOY, HYWORX, and SPORTZ types.

Products -- ADEPT tissue wipes from Cascades comprise 100 percent virgin fiber-based paper types intended for lint-free delicate component and surface cleansing in laboratories, research facilities, hospitals, and manufacturing environments. These wipes are offered in

TABLE VI-3
SPUNLACED NONWOVEN DEMAND IN WIPES
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
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<tbody>
<tr>
<td>Substrate Demand in Wipes (mil lb)</td>
<td>465</td>
<td>575</td>
<td>605</td>
<td>665</td>
<td>720</td>
</tr>
<tr>
<td>% spunlaced nonwovens</td>
<td>20.4</td>
<td>24.3</td>
<td>32.2</td>
<td>33.1</td>
<td>34.0</td>
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<tr>
<td>Spunlaced Nonwoven Demand (mil lb)</td>
<td>95</td>
<td>140</td>
<td>195</td>
<td>220</td>
<td>245</td>
</tr>
<tr>
<td>Spunlaced Nonwoven Demand (mil sq yd)</td>
<td>870</td>
<td>1165</td>
<td>1535</td>
<td>1690</td>
<td>1830</td>
</tr>
<tr>
<td>cents/sq yd</td>
<td>22.0</td>
<td>24.1</td>
<td>28.0</td>
<td>29.3</td>
<td>32.8</td>
</tr>
<tr>
<td>Spunlaced Nonwoven Demand</td>
<td>191</td>
<td>281</td>
<td>430</td>
<td>495</td>
<td>600</td>
</tr>
<tr>
<td>Consumer</td>
<td>146</td>
<td>219</td>
<td>350</td>
<td>390</td>
<td>465</td>
</tr>
<tr>
<td>Industrial</td>
<td>45</td>
<td>62</td>
<td>80</td>
<td>105</td>
<td>135</td>
</tr>
<tr>
<td>% spunlaced nonwovens</td>
<td>26.7</td>
<td>29.1</td>
<td>37.6</td>
<td>37.4</td>
<td>38.8</td>
</tr>
<tr>
<td>Substrate Demand in Wipes</td>
<td>715</td>
<td>967</td>
<td>1145</td>
<td>1325</td>
<td>1545</td>
</tr>
</tbody>
</table>

This Freedonia study, Wipes, offers historical data (2003, 2008, 2013) plus forecasts for 2018 and 2023 for wipe demand by product type and substrate in consumer and industrial markets. The study also assesses key market environment factors, examines industry structure, evaluates company market share and profiles 42 competitors in the US wipes industry.

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Profiles industry players.

2018 and 2023 by raw material, product and market. The study also evaluates company market share and profiles industry competitors.

World Wipes

Global demand for wipes is forecast to increase 5.2 percent annually through 2018 to $13.5 billion. Because wipes are considered convenience products rather than necessities, developed nations represent a disproportionate share of sales. However, developing markets will account for a rising share of wipes sales going forward. This study analyzes the $10.5 billion world wipes industry, with forecasts for 2018 and 2023 by product, world region, and for 14 countries. The study also evaluates company market share and profiles industry players.

#3251 ............ March 2015 .................. $6300

Plastic Film

US demand for plastic film will grow 1.5 percent per year through 2018 to 15.4 billion pounds, valued at $24.9 billion. Linear low density polyethylene will remain the most common film resin and maintain solid growth, while polypropylene and other resins such as degradable types will outpace it from smaller bases. The food packaging market will exhibit the fastest gains. This study analyzes the 14.3 billion pound US plastic film industry, with forecasts for 2018 and 2023 by resin and market. The study also evaluates company market share and profiles industry players.

#3243 ............ January 2015 .................. $5300

Infection Prevention Products & Services

US demand for infection prevention products and services will expand 4.8 percent annually to $24.6 billion in 2018. Safety enhanced medical devices and infectious waste disposal items will be the fastest growing supplies, while protective apparel and textiles remain the largest segment. Infection prevention services will outpace both supplies and equipment. This study analyzes the $17.8 billion world disposable medical supply industry, with forecasts for 2018 and 2023 by product, world region, and for 16 countries. The study also evaluates company market share and profiles industry competitors.

#3205 ............ September 2014 .................. $6400

Disposable Medical Supplies

US demand for disposable medical supplies is forecast to expand 4.1 percent annually to $49.3 billion in 2018. Drug delivery and related products will remain the fastest growing and largest single category. Among other supplies, safety enhanced devices and infection resistant nonwovens will see the most rapid growth. This study analyzes the $40.3 billion US disposable medical supplies industry, with forecasts for 2018 and 2023 by raw material, product and market. The study also evaluates company market share and profiles industry players.

#3111 ............ February 2014 .................. $5300

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- Chemicals
- Construction & Building Products
- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Health Care & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
- Plastics
- Other Polymers
- Security
- Services
- Textiles & Nonwovens
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