



CLICK TO VIEW

Table of Contents **2**

List of Tables &
Charts **3**

Study Overview **4**

Sample Text, Table
& Chart **5**

Sample Profile, Table &
Study Coverage **6**

Order Form & Corporate
Use License **7**

About Freedonia,
Custom Research,
Related Studies **8**

World Wipes

Industry Study with Forecasts for **2018 & 2023**

Study #3251 | March 2015 | \$6300 | 344 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

| | |
|--|----|
| General..... | 4 |
| World Economic Overview..... | 5 |
| Recent Historical Trends..... | 5 |
| World Economic Outlook..... | 6 |
| World Demographic Outlook..... | 9 |
| World Population Outlook..... | 10 |
| World Urban Population Outlook..... | 12 |
| Population Under Five Years Old Outlook... | 14 |
| World Female Population Outlook..... | 15 |
| Households..... | 17 |
| World Consumer Spending Outlook..... | 18 |
| World Manufacturing Overview..... | 21 |
| World Motor Vehicle Production..... | 24 |
| World Motor Vehicles in Use..... | 28 |
| World Health Expenditures..... | 29 |
| Competitive Products..... | 33 |
| Environmental & Regulatory Overview..... | 34 |
| Raw Material Trends..... | 37 |
| Spunlaced Nonwovens..... | 38 |
| Airlaid Nonwovens..... | 39 |
| Other Substrates..... | 40 |

OVERVIEW

| | |
|--|----|
| General..... | 42 |
| World Wipes Overview..... | 43 |
| Market Demand..... | 45 |
| Consumer Wipes..... | 47 |
| Personal Care Wipes..... | 49 |
| Baby Wipes..... | 51 |
| Other Personal Care Wipes..... | 54 |
| Household & Other Consumer Wipes..... | 57 |
| Industrial Wipes..... | 59 |
| Healthcare Wipes..... | 62 |
| Manufacturing Wipes..... | 65 |
| Commercial/Other Industrial Wipes..... | 67 |
| Product Demand..... | 69 |
| Production & Trade Considerations..... | 71 |

NORTH AMERICA

| | |
|---------------|----|
| Overview..... | 73 |
|---------------|----|

| | |
|--------------------|----|
| Markets..... | 76 |
| Suppliers..... | 78 |
| United States..... | 80 |
| Canada..... | 88 |
| Mexico..... | 93 |

WESTERN EUROPE

| | |
|---------------------------|-----|
| Overview..... | 99 |
| Markets..... | 102 |
| Suppliers..... | 104 |
| France..... | 105 |
| Germany..... | 111 |
| Italy..... | 117 |
| Spain..... | 123 |
| United Kingdom..... | 130 |
| Other Western Europe..... | 137 |

ASIA/PACIFIC

| | |
|-------------------------|-----|
| Overview..... | 145 |
| Markets..... | 148 |
| Suppliers..... | 150 |
| Australia..... | 151 |
| China..... | 157 |
| India..... | 165 |
| Japan..... | 172 |
| Other Asia/Pacific..... | 179 |

OTHER REGIONS

| | |
|------------------------------------|-----|
| Central & South America..... | 187 |
| Overview..... | 187 |
| Markets..... | 190 |
| Suppliers..... | 191 |
| Brazil..... | 192 |
| Other Central & South America..... | 198 |
| Eastern Europe..... | 205 |
| Overview..... | 205 |
| Markets..... | 208 |
| Suppliers..... | 210 |
| Russia..... | 211 |
| Other Eastern Europe..... | 217 |
| Africa/Mideast..... | 223 |
| Overview..... | 223 |
| Markets..... | 226 |
| Suppliers..... | 229 |

INDUSTRY STRUCTURE

| | |
|-------------------------------|-----|
| General..... | 232 |
| Market Share..... | 235 |
| Converters' Level..... | 236 |
| Retail Level..... | 238 |
| Industry Restructuring..... | 240 |
| Competitive Strategies..... | 242 |
| New Product Development..... | 243 |
| Product Line Extension..... | 244 |
| Low Cost Position..... | 245 |
| Product Placement..... | 247 |
| Market Segmentation..... | 248 |
| Cooperative Agreements..... | 251 |
| Manufacturing Methods..... | 252 |
| Contract Manufacturing..... | 254 |
| Marketing & Distribution..... | 255 |

COMPANY PROFILES

| | |
|---|---------|
| Albaad Massuot Yitzhak..... | 258 |
| American Hygienics..... | 261 |
| Beiersdorf AG..... | 263 |
| C-Airlaid LLC..... | 265 |
| Clorox Company..... | 267 |
| Converting Wet Wipes..... | 273 |
| DuPont (EI) de Nemours..... | 275 |
| Eczacıbaşı İlaç Sanayi ve Ticaret..... | 276 |
| Grupo Productos Internacionales Mabe..... | 278 |
| Henkel AG..... | 280 |
| Holm (Jacob) & Sons..... | 284 |
| Jeyes Group..... | 288 |
| Johnson & Johnson..... | 289 |
| Johnson (SC) & Son..... | 292 |
| Kao Corporation..... | 295 |
| Kimberly-Clark Corporation..... | 298 |
| Koch Industries..... | 302 |
| Nice-Pak Products..... | 306 |
| Polymer Group..... | 310 |
| Pristine Care Products..... | 315 |
| Procter & Gamble..... | 316 |
| Reckitt Benckiser..... | 319 |
| Rockline Industries..... | 321 |
| Suominen Corporation..... | 323 |
| Svenska Cellulosa..... | 326 |
| Unilever Group..... | 329 |
| Other Wipes Companies..... | 332-344 |

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region 9
 2 World Population by Region 12
 3 World Urban Population by Region..... 13
 4 World Population Under Five
 Years Old by Region 15
 5 World Female Population by Region..... 16
 6 World Households by Region..... 18
 7 World Personal Consumption
 Expenditures..... 21
 8 World Manufacturing Value
 Added by Region 24
 9 World Motor Vehicle
 Production by Region 27
 10 World Motor Vehicle Park by Region 29
 11 World Health Expenditures by Region..... 32
 12 Raw Material Trends 38

OVERVIEW

1 World Wipes Demand by Region..... 45
 2 World Wipes Demand by Market 47
 3 World Consumer Wipes Market
 by Segment & Region..... 48
 Cht World Consumer Wipes Market
 by Region, 2013 49
 4 World Personal Care Wipes Market
 by Type & Region..... 51
 5 World Baby Wipes Market by Region..... 54
 6 World Other Personal Care
 Wipes Market by Region..... 57
 7 World Household & Other Consumer
 Wipes Market by Region..... 59
 8 World Industrial Wipes Market
 by Segment & Region..... 61
 Cht World Industrial Wipes Market
 by Region, 2013 62
 9 World Healthcare Wipes
 Market by Region 64
 10 World Manufacturing Wipes
 Market by Region 67
 11 World Commercial & Other Industrial
 Wipes Market by Region..... 69
 12 World Wipes Demand by Product..... 71

NORTH AMERICA

1 North America: Market
 Environment for Wipes..... 75
 Cht North America: Wipes Demand
 by Country, 2013 76
 2 North America: Wipes
 Demand by Market 78
 3 United States: Market
 Environment for Wipes..... 82
 4 United States: Wipes
 Demand by Market 86
 5 Canada: Market Environment for Wipes 90
 6 Canada: Wipes Demand by Market..... 92
 7 Mexico: Market Environment for Wipes 95
 8 Mexico: Wipes Demand by Market..... 97

WESTERN EUROPE

1 Western Europe: Market
 Environment for Wipes..... 101
 Cht Western Europe: Wipes Demand
 by Country, 2013 102
 2 Western Europe: Wipes
 Demand by Market 104
 3 France: Market Environment for Wipes 107
 4 France: Wipes Demand by Market 110
 5 Germany: Market Environment
 for Wipes 113
 6 Germany: Wipes Demand by Market.... 116
 7 Italy: Market Environment for Wipes 119
 8 Italy: Wipes Demand by Market..... 122
 9 Spain: Market Environment for Wipes.. 125
 10 Spain: Wipes Demand by Market 128
 11 United Kingdom: Market
 Environment for Wipes..... 132
 12 United Kingdom: Wipes
 Demand by Market 135
 13 Other Western Europe: Market
 Environment for Wipes..... 139
 14 Other Western Europe: Wipes
 Demand by Market 142

ASIA/PACIFIC

1 Asia/Pacific: Market
 Environment for Wipes..... 147
 Cht Asia/Pacific: Wipes Demand
 by Country, 2013 148
 2 Asia/Pacific: Wipes Demand by Market 150

3 Australia: Market Environment
 for Wipes 153
 4 Australia: Wipes Demand by Market..... 156
 5 China: Market Environment for Wipes.. 159
 6 China: Wipes Demand by Market 163
 7 India: Market Environment for Wipes... 167
 8 India: Wipes Demand by Market 170
 9 Japan: Market Environment for Wipes.. 174
 10 Japan: Wipes Demand by Market 177
 11 Other Asia/Pacific: Market
 Environment for Wipes..... 181
 12 Other Asia/Pacific: Wipes
 Demand by Market 184

OTHER REGIONS

1 Central & South America: Market
 Environment for Wipes..... 189
 2 Central & South America: Wipes
 Demand by Market 191
 3 Brazil: Market Environment for Wipes.. 194
 4 Brazil: Wipes Demand by Market 197
 5 Other Central & South America:
 Market Environment for Wipes 200
 6 Other Central & South America:
 Wipes Demand by Market..... 203
 7 Eastern Europe: Market
 Environment for Wipes..... 207
 8 Eastern Europe: Wipes
 Demand by Market 210
 9 Russia: Market Environment for Wipes 213
 10 Russia: Wipes Demand by Market..... 216
 11 Other Eastern Europe: Market
 Environment for Wipes..... 219
 12 Other Eastern Europe: Wipes
 Demand by Market 222
 13 Africa/Mideast: Market
 Environment for Wipes..... 225
 14 Africa/Mideast: Wipes
 Demand by Market 229

INDUSTRY STRUCTURE

1 Wipes Sales by Company, 2013 234
 Cht World Wipes Converter
 Market Share, 2013 236
 Cht World Wipes Retail
 Market Share, 2013 240
 2 Selected Acquisitions & Divestitures..... 242

Sales of wipes will benefit from rising incomes and urbanization, as these factors will boost the number of consumers who can afford wipes, have access to wipes, and have busier lifestyles -- particularly women.

World demand to rise 5.2% annually through 2018

Global demand for wipes is forecast to increase 5.2 percent annually through 2018 to \$13.5 billion. Worldwide, sales of wipes will benefit from rising incomes and urbanization, as these factors will boost the number of consumers who can afford wipes and those who have access to wipes. Busier lifestyles -- particularly as more women work outside of the home -- will also drive demand for these convenience products. Furthermore, increases in manufacturing activity and modernization in healthcare practices, especially in developing countries, will drive gains as wipes provide better protection from linting or cross contamination than do more traditional cloth or paper products.

Developing markets to gain rising share of demand

In general, wipes benefit from being convenient, disposable, and easy to use. However, because wipes are considered convenience products rather than necessities, developed nations represent a disproportionate share of sales. For instance, although Western Europe and North America had only 12 percent of the world's population in 2013, they combined to account for 52 percent of wipes sales. The US was the largest national market, accounting for 23 percent. However, developing markets will account for a rising share of wipes sales through 2018. For example, China, India,



and Brazil will together represent 29 percent of additional global sales through the forecast period. China had eight percent of global sales in 2013, making it a distant second to the US.

Application-specific wipes to pace developed markets

The consumer market, which accounted for 60 percent of global sales in 2013, sees different trends in the developed and the developing markets. Wipes demand in developed markets is driven by sales of more specialized types. Developed countries have higher per capita incomes so intensity of use and overall market penetration of more basic types of consumer wipes is higher than

in developing countries. As a result, sales gains in developed markets through 2018 will primarily stem from the ongoing introduction of application-specific wipes and those that incorporate high-value features (e.g., organic fabrics, gentler cleaning additives, or low-linting or more easily flushable substrates). Additionally, in developed countries wipes benefit from consumer preference for them over traditional cleaning methods as well as from greater access to a larger variety of wipes via more established distribution networks. In contrast, in developing areas wipes penetration is low, so sales gains will primarily stem from rising adoption of more basic baby wipes and other entry-level wipes products.

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Sample Text, Table & Chart

OTHER REGIONS

Brazil: Markets -- In 2013, demand for wipes in Brazil was \$1.2 billion, representing 1.2 percent of wipes sales in Central and South America. Brazil's dominant regional position is due to its large population and economy. Brazil's economy is growing, including in motor vehicles, construction, and the manufacturing process. The country's population is projected to increase over the 2008-2013 period, with sales of wipes projected to increase by 1.2 percent.

SAMPLE TEXT

Unlike in more developed nations, the penetration of commercial wipes in Brazil remains low. However, over the 2008-2013 period, demand for baby wipes was driven by more widespread product availability and the growing number of consumers able to afford these products as disposable incomes rose. In addition, sales were aided by the market penetration of disposable diapers, which boosted familiarity with and preference for disposable baby care products, including baby wipes. Like baby wipes, sales of other personal care wipes -- particularly those related to facial care -- benefited from rising disposable incomes, particularly as more consumers were willing and able to buy with more expensive spunlaced substrates. Sales of household wipes also grew at a rapid rate between 2008 and 2013 -- although from a much smaller base -- in large part due to widespread use of cleaning practices, such as spray bottles and cloths. As a result, household wipes are primarily purchased by upper income consumers. Further gains in wipes demand were restrained by more limited availability of these products in rural regions of the country.

Healthcare wipes account for the majority of demand in the industrial wipes segment in Brazil. However, unlike most other types of wipes, usage rates of healthcare types lag the average of the other types of Central and South America. Sales of manufacturing wipes grew significantly over the 2008-2013 period, restrained by a weak

TABLE VII-3

BRAZIL: MARKET ENVIRONMENT FOR WIPES

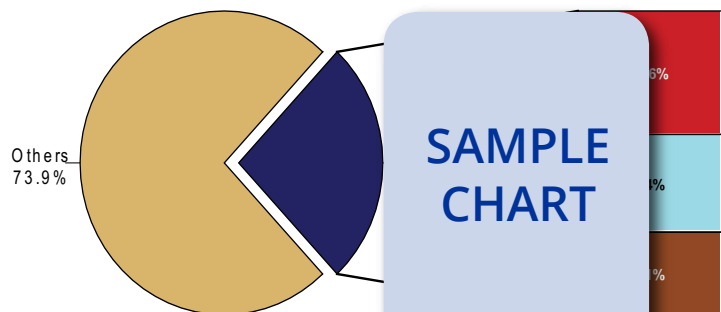
| Item | 2003 | 2008 | 2013 | 2018 | 2023 |
|--|------|------|------|------|------|
| Gross Domestic Product (bil 2012\$) | | | | | |
| GDP/capita | | | | | |
| Population (mil persons) | | | | | |
| Population Under 5 Years Old (mil persons) | | | | | |
| Female Population (mil persons) | | | | | |
| % under 5 | | | | | |
| % female | | | | | |
| persons/household | | | | | |
| Households (million) | | | | | |
| Personal Consumption Expend (bil 2012\$) | | | | | |
| Manufacturing Value Added (bil 2012\$) | | | | | |
| Healthcare Expenditures (bil \$) | | | | | |
| Motor Vehicles in Use (million) | | | | | |
| \$ wipes/capita | | | | | |
| \$ wipes/mil \$ PCE | | | | | |
| \$ wipes/000\$ MVA | | | | | |
| Wipes Demand (mil \$) | | | | | |
| % Brazil | | | | | |
| C & S America Wipes Demand (mil \$) | | | | | |

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD WIPES CONVERTER MARKET SHARE, 2013 (\$10.5 billion)



SAMPLE CHART

Sample Profile & Table, & Study Coverage

TABLE VII-4
BRAZIL: WIPES DEMAND BY MARKET
 (million dollars)

| Item | 2003 | 2008 | 2013 | 2018 | 2023 |
|---------------------------|------|------|------|------|------|
| Population (mil persons) | | | | | |
| \$ wipes/capita | | | | | |
| Wipes Demand | | | | | |
| Consumer Wipes: | | | | | |
| Personal Care | | | | | |
| Baby Wipes | | | | | |
| Other Personal Care Wipes | | | | | |
| Household & Other Wipes | | | | | |
| Industrial Wipes: | | | | | |
| Healthcare | | | | | |
| Manufacturing | | | | | |
| Commercial & Other Wipes | | | | | |

Source: The Freedonia Group, Inc.

SAMPLE PROFILE

SAMPLE TABLE

STUDY COVERAGE

World Wipes is a Freedonia study that offers historical demand data (2003, 2008 and 2013) plus forecasts (2018 and 2023) for macroeconomic indicators and demand by market in six regions and 14 countries. The study also considers market environment factors, examines the industry structure, evaluates company market share and profiles 26 industry competitors worldwide.

COMPANY PROFILES

Converting Wet Wipes Srl

Viale delle Industrie 15
 20070 Dresano
 Italy
 39-2-9827-40
<http://www.gs>

Annual Sales:
 Employment:

Key Products:

Converting Wet Wipes, which operates as GS Converting, is a privately held producer of branded and private label wet wipes, and other cleaning products. The Company's products are intended for infant care, personal hygiene, cosmetics, and home cleaning applications.

The Company competes in the worldwide wipes industry via the manufacture of wipes for personal, pet, and home care end uses, among others. Personal care wipes from GS Converting include baby care, facial cleansing, and body care types. The Company produces such baby care wipes as MISTER CLEAN, BABY CLEAN, and BABY LOTION varieties. MISTER CLEAN wipes comprise BIO organic cotton types enriched with organic plant-based lotion formulations for sensitive skin, in addition to BABY GEL types with easily absorbed emollient gel formulations intended to be moisturizing and soothing. BABY CLEAN wipes from GS Converting include hypoallergenic types with anti-inflammatory ingredients, antibacterial wipes designed to quickly clean and disinfect undamaged skin on a baby's hands and other parts of the body, and ECONATURAL wipes featuring natural plant-based formulations and biodegradable packaging. Other BABY CLEAN wipes consist of sanitizing pacifier wipes, fragrance-free nose wipes,

Related Studies

World Coated Fabrics

This study analyzes the world coated fabric industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (polymer-coated fabrics, rubber-coated fabrics), market (e.g., transportation, protective clothing, industrial, furniture, apparel), world region, and for 19 major countries. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players. **#3276.....April 2015.....\$6300**

Wipes

US wipes demand will rise 3.6 percent yearly through 2018 to \$2.9 billion. Disinfectant and electrostatic wipes will grow the fastest. The industrial market will outpace consumer uses based in part on a relaxed EPA rule that will help disposable wipes compete with reusable, laundered shop towels. Flushability will remain a factor in consumer and health care uses. This study analyzes the \$2.5 billion US wipes industry, with forecasts for 2018 and 2023 by market, substrate and chemical. The study also evaluates company market share and profiles industry participants. **#3188..... September 2014.....\$5300**

Coated Fabrics

US demand for coated fabrics is projected to advance 3.2 percent per year to 680 million square yards in 2018. The large motor vehicle market will drive gains, promoted by a higher number of air bags -- usually employing silicone-coated nylon -- per light vehicle. Smaller markets such as awnings, canopies and wall coverings will grow the fastest. This study analyzes the 580 million square yard US coated fabric industry, with forecasts for 2018 and 2023 by product, substrate and market. The study also evaluates company market share and profiles industry players. **#3176.....July 2014.....\$5300**

World Filters

Global demand for filters is projected to increase a healthy 6.2 percent annually to \$80.0 billion in 2018. Most gains will come from large, developing industrial areas with nascent regulatory schemes, such as China and Indonesia. Manufacturing will be the fastest growing market, with rising production benefiting aftermarket filter demand. This study analyzes the \$59.1 billion world filter industry, with forecasts for 2018 and 2023 by product, market, world region, and for 22 countries. The study also evaluates company market shares and profiles industry players. **#3152.....July 2014.....\$6500**

World Nonwovens

Global demand for nonwovens is forecast to rise 5.4 percent annually to 9.1 million metric tons in 2017. Spunmelt nonwovens will lead gains based on growth in key markets such as disposable infant diapers in developing countries, and adult incontinence products in developed areas. This study analyzes the seven million metric ton world nonwovens industry, with forecasts for 2017 and 2022 by web formation process, application, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players. **#3077.....October 2013.....\$6100**

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 and other world markets. Industries analyzed by Freedonia include:

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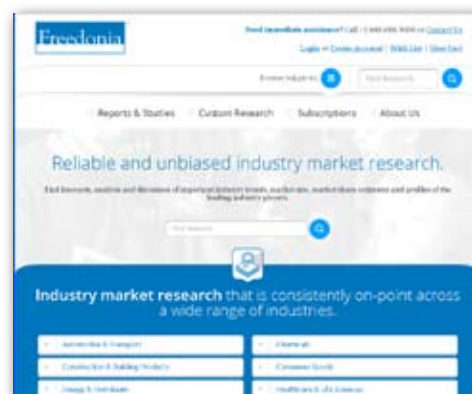
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