World Wipes

Industry Study with Forecasts for 2018 & 2023

Study #3251 | March 2015 | $6300 | 344 pages
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## World Wipes

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

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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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Brazil: Markets -- In 2013, demand for wipes in Brazil totaled $276 million, accounting for 38 percent of wipes sales in Central and South America. The country's dominant regional position is attributable to the large size of its population and economy. Brazil also has a significant manufacturing base, including in motor vehicles, where wipes can be used during the manufacturing process. The country experienced strong gains over the 2008-2013 period, with sales of wipes rising 8.0 percent annually.

Unlike in more developed nations, the penetration of consumer 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 rising market penetration of disposable diapers, which boosted consumer familiarity with and preference for disposable baby care products and 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 products of higher quality, 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 traditional 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 countries of Central and South America. Sales of manufacturing wipes grew significantly over the 2008-2013 period, restrained by a weak production environment.

**TABLE VII-3**

**BRAZIL: MARKET ENVIRONMENT FOR WIPEs**

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Domestic Product (bil 2012$)</td>
<td>1856</td>
<td>2349</td>
<td>2674</td>
<td>3090</td>
<td>3695</td>
</tr>
<tr>
<td>GDP/capita</td>
<td>10270</td>
<td>12290</td>
<td>13380</td>
<td>14880</td>
<td>17230</td>
</tr>
<tr>
<td>Population (mil persons)</td>
<td>180.7</td>
<td>191.2</td>
<td>199.9</td>
<td>207.7</td>
<td>214.5</td>
</tr>
<tr>
<td>Population Under 5 Years Old (mil persons)</td>
<td>17.3</td>
<td>16.0</td>
<td>14.9</td>
<td>14.5</td>
<td>14.0</td>
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<tr>
<td>Female Population (mil persons)</td>
<td>91.5</td>
<td>97.0</td>
<td>101.6</td>
<td>105.8</td>
<td>109.4</td>
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<tr>
<td>% under 5</td>
<td>9.6</td>
<td>8.4</td>
<td>7.5</td>
<td>7.0</td>
<td>6.5</td>
</tr>
<tr>
<td>% female</td>
<td>50.6</td>
<td>50.7</td>
<td>50.8</td>
<td>50.9</td>
<td>51.0</td>
</tr>
<tr>
<td>persons/household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Households (million)</td>
<td>52.5</td>
<td>59.2</td>
<td>64.4</td>
<td>68.9</td>
<td>73.3</td>
</tr>
<tr>
<td>Personal Consumption Expend (bil 2012$)</td>
<td>1067</td>
<td>1362</td>
<td>1678</td>
<td>1945</td>
<td>2335</td>
</tr>
<tr>
<td>Manufacturing Value Added (bil 2012$)</td>
<td>242</td>
<td>292</td>
<td>300</td>
<td>351</td>
<td>425</td>
</tr>
<tr>
<td>Healthcare Expenditures (bil $)</td>
<td>129</td>
<td>197</td>
<td>296</td>
<td>435</td>
<td>635</td>
</tr>
<tr>
<td>Motor Vehicles in Use (million)</td>
<td>21.3</td>
<td>27.5</td>
<td>39.6</td>
<td>52.1</td>
<td>66.1</td>
</tr>
<tr>
<td>$ wipes/capita</td>
<td>0.65</td>
<td>0.98</td>
<td>1.38</td>
<td>1.93</td>
<td>2.47</td>
</tr>
<tr>
<td>$ wipes/mil $ PCE</td>
<td>111</td>
<td>138</td>
<td>164</td>
<td>206</td>
<td>227</td>
</tr>
<tr>
<td>$ wipes/000$ MVA</td>
<td>0.49</td>
<td>0.64</td>
<td>0.92</td>
<td>1.14</td>
<td>1.25</td>
</tr>
<tr>
<td>Wipes Demand (mil $)</td>
<td>118</td>
<td>188</td>
<td>276</td>
<td>400</td>
<td>530</td>
</tr>
<tr>
<td>% Brazil</td>
<td>37.9</td>
<td>38.7</td>
<td>38.3</td>
<td>38.6</td>
<td>38.5</td>
</tr>
<tr>
<td>C &amp; S America Wipes Demand (mil $)</td>
<td>311</td>
<td>486</td>
<td>720</td>
<td>1035</td>
<td>1375</td>
</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.
Converting Wet Wipes Srl
Viale delle Industrie 15
20070 Dresano
Italy
39-2-9827-4043
http://www.gsconverting.com

Annual Sales: $60 million (estimated)
Employment: 200 (estimated)
Key Products: personal, pet, and home care wipes

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,

### TABLE VII-4

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (mil persons)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>$ wipes/capita</td>
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<tr>
<td>Wipes Demand</td>
<td></td>
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<tr>
<td>Consumer Wipes:</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Care</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baby Wipes</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Other Personal Care Wipes</td>
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<td>Household &amp; Other Wipes</td>
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<td>Industrial Wipes:</td>
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<td>Healthcare</td>
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<td>Manufacturing</td>
<td></td>
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</tr>
<tr>
<td>Commercial &amp; Other Wipes</td>
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</tbody>
</table>

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This study analyzes the world coated fabric industry. It presents historical data demand (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.

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.

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.

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 share and profiles industry players.

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.

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Related Studies

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Related Studies

World Coated Fabrics
This study analyzes the world coated fabric industry. It presents historical data demand (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.

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.

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.

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 share and profiles industry players.

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.