Wipes

US Industry Study with Forecasts to 2011 & 2016

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A continual spate of new product introductions and further segmentation of both consumer and industrial markets will drive gains in US wipes demand through 2011.

US demand to grow 6.1% annually through 2011

Demand for wipes in the US is forecast to increase 6.1 percent per annum to $2.2 billion in 2011, propelled by a continual spate of new product introductions and further segmentation of the market. The number and variety of wipes on the market continue to multiply, with companies competing to rapidly introduce new products that open or create entirely new market sectors ahead of their competitors. The success of wipes in both consumer and industrial markets derives from the ease-of-use, disposability, portability, and reduced risk of cross-contamination these products offer. However, wipes that do not provide the cost and convenience benefits demanded by consumers are expected to drop out of the market.

Small volume consumer wipes to be fastest growing

Convenience and innovation will remain driving forces in the relatively new consumer market, with household cleaning, facial, hand and body, and a number of other, small volume consumer wipes projected to register the strongest growth. Though baby wipes will remain the top selling type of wipe, demand for these products will continue to advance more slowly than most other types due to market maturity and continued replacement by newer, task-specific wipes in non-diaper applications, where baby wipes once enjoyed considerable popularity.

Growth in household care wipes will be propelled by the appeal of one-step, disposable wipes that provide a quick and convenient format for household cleaning chores ranging from outdoor grills to wooden floors to stainless steel appliances.

Following the lead of the consumer market, new product innovations and expanding applications will drive demand for wipes in the industrial market, which will reach $1.1 billion in 2011. Manufacturing and health care will remain the largest segments of this market, with special purpose products such as clean room and surface preparation wipes, as well as personal bathing wipes, projected to see the fastest growth.

Spunlaced nonwovens to lead gains in substrates

Improvements in nonwoven substrates have made possible the task-engineering of wipes for specific properties such as softness, tear resistance, absorbency and static discharge. Though the US wipes market traditionally has favored the use of airlaid substrates in its wipes products, in recent years there has been a shift toward the use of spunlaced nonwovens in a number of applications. Demand for spunlace is expected to continue to advance at above average rates through 2011, due to their softness, strength, performance capabilities, and amenability to complex designs (e.g., embossed patterns).
Special Purpose Wipes

Demand for special purpose manufacturing wipes is expected to increase significantly through 2016, driven by growth in the electronics, pharmaceuticals, automotive, and printing industries. Special purpose wipes are designed to provide higher performance attributes than less expensive general purpose industrial wipers. Typically, special purpose wipes utilize specially engineered substrates and other value-added product processes intended to provide task-specific benefits. For example, for automotive finishing Adele Knits (Winston-Salem, North Carolina) offers ADELE PROKNIT ABSORBENT TUBE WIPERS, specially-knit tube-shaped wipes that eliminate two lint-producing edges. A heat seal process reduces edge particles, while laundering curls the edges, leaving them unexposed in normal use. The finished wipes are then packed in shrink wrapped cartons to keep particles out during shipment.

The manufacturing wipes market is increasingly segmented, with substrates engineered to specific performance/cost requirements and formulations designed to meet the requirements of narrow wiping tasks. This trend reflects the critical cleaning needs of makers of electronics, pharmaceuticals, automobile finishes, printing equipment and a myriad of other manufactured products that utilize wipes. In response to these...
### COMPANY PROFILES

**GOJO Industries Incorporated**

One GOJO Plaza, Suite 500  
Akron, OH 44320  
330-255-6000  
http://www.gojo.com

**GOJO Industries** is a leading worldwide producer and supplier of hand hygiene and related skin care products for commercial, industrial and institutional use. The Company’s product offerings encompass instant hand sanitizers, hand soaps, lotions and other hand care products. In addition, the privately held company supplies dispensing systems and related accessories for use with its hand care products. GOJO has facilities in the US, the United Kingdom, Belgium, France, Japan, China, Mexico, Brazil and Peru.

The Company’s skin care products include several pre-moistened wipes marketed under the GOJO, PURELL and PROVON brand names. The GOJO line encompasses numerous heavy-duty hand cleansers intended for use in manufacturing plants, automotive repair shops and other industrial settings. Among these products are GOJO FAST WIPE pre-moistened heavy-duty hand cleaning towels, which are designed for use when soap and water are not readily available. These wipes feature d-limonene solvents and denatured alcohol, making them suitable for cleaning light greases and oils from hands in job site applications. The PURELL line from GOJO encompasses antimicrobial and antibacterial hand cleaners, including sanitizing hand washcloths.

### TABLE VI-2  
**SUBSTRATES DEMAND IN WIPES**

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
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<td>Raw Materials Demand (mil lb)</td>
<td>304</td>
<td>409</td>
<td>500</td>
<td>610</td>
<td>770</td>
</tr>
<tr>
<td>% substrates</td>
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<td>64.8</td>
<td>68.0</td>
<td>70.5</td>
<td>72.7</td>
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<tr>
<td>Substrates Demand (mil lb)</td>
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<td>1660</td>
<td>1860</td>
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<td>Substrates Demand (mil sq yd)</td>
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<tr>
<td>cents/sq yd</td>
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<td>18.9</td>
<td>20.3</td>
<td>22.6</td>
<td>25.2</td>
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<td>Substrates Demand (mil $)</td>
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<td>Other Substrates</td>
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<td>% substrates</td>
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<td>76.1</td>
<td>75.9</td>
<td>76.9</td>
<td>78.4</td>
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<td>Raw Materials Demand (mil $)</td>
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<td>790</td>
<td>1080</td>
<td>1480</td>
</tr>
</tbody>
</table>

### TABLE VII-1  
**US WIPES CONVERTER MARKET SHARE, 2006 ($1.6 billion)**

- **Mark Leader**: 62%
- **Other**: 38%
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