

# Industrial & Institutional Cleaning Wipes: U.S. Market Analysis and Opportunities

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**Base Year: 2021  
Forecasts to 2026**

**3rd edition**

**Regional Coverage:** • United States

I&I cleaning wipes are a rapidly growing market segment that has grown even faster during the COVID-19 pandemic. Professional end users rely on disposable wipes due to their ease of use, convenience, and ability to disinfect/sanitize. It is crucial for professional cleaning companies to understand the role wipes play in overall building sanitation and cleaning, how COVID-19 has impacted the segment, and what future opportunities exist.

## SCOPE

- › Size the market by product, end use, and supplier, including wet wipes and dry wipes
- › Analyze which segments are growing at the fastest pace
- › Assess current market and future outlook for key product categories and end-use segments
- › Gain perspective on growth using Kline's historical sales estimates from 2018 and uncover future opportunities for growth with forecasts through 2026
- › Structured research with over 600 end users to understand critical buying factors, usage, product form preferences, and anticipated spending changes
- › Learn about end users' needs and how they buy and use wipes
- › Understand settings or cleaning tasks where end users opt for wipes versus traditional cleaning chemicals
- › Full analysis of the impact of COVID-19 on the industry and resultant changes in operations, cleaning, spending, and usage

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## Introduction

- Scope and geographic regions
- Sources and methods
- Rounding and assumptions
- Limitations

## Executive Summary

- Situation analysis
- Key trends
- Impact of COVID-19
- Market size and segmentation
- Analysis of consumption by:
  - End-use segments (Table 1)
  - Suppliers (Table 2)
  - Product classes/categories (Table 3)
- Sustainability trends
- Trends and opportunities
- Competitive landscape
- Distribution channels
- End user survey response data on spending
- Outlook and appraisal through 2026

## End-Use Segment Profiles

Pertinent information and insightful analysis for each of the 10 major end-use segments listed in Table 1. The following information is provided:

- Introduction
- Key market trends
- Market size and growth
- Impact of COVID-19
- Product usage
- Distribution channels
- Critical buying factors
- Structure of the industry
- Outlook to 2026

**TABLE 1. END-USE SEGMENTS PROFILED**

Building service contractors	Lodging establishments
Fitness facilities	Schools and universities (includes K-12 and campus dining)
Foodservice (fast-food/QSRs, fast-casual restaurants, and workplace cafeterias)	Recreational facilities-a
Healthcare (hospitals, ambulatory surgery centers, nursing homes/skilled nursing facilities, assisted living facilities, and physicians' and dentists' offices)	Retailers
Industrial facilities and office buildings	Miscellaneous end users-b

a- Includes amusement parks, bowling alleys, concert halls, country and golf clubs, movie theaters, museums, sporting arenas, and others.

b- Includes bars, pubs, craft breweries, wineries, and other miscellaneous end users.

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## Supplier Profiles

Profiles of the leading 20 suppliers of wipes are shown in Table 2. Profiles include a description of company, sales of wipes by product class, description of product portfolio, and news of recent developments.

## Product Category Profiles

General information on the major product classes and categories listed in Table 3. The following information is provided:

- Applications, definitions, and brands
- Dollar sales by category
- Sales by end-use segment
- Sales by supplier
- Forecast sales to 2026

## End-User Response Data

A summary of survey results for the overall market and each end-use segment, including:

- Survey goals and specifications
- Usage of disposable wipes
- Preferred cleaning methods
- Purchase factors
- Brand awareness
- Purchase channels
- Active ingredients in disinfecting wipes
- Packaging
- Dispensers
- Impact of COVID-19
- Spending
- Size of facilities

**TABLE 2. SUPPLIERS PROFILED**

2XL	GOJO
3M	ITW Pro Brands
Berry Global	Kimberly-Clark Professional
Clorox Professional Products	Metrex
Contec	New Pig
Diamond Wipes	Newell Rubbermaid
Diversey	PDI/Sani Professional
Ecolab	Procter & Gamble Professional
Essity	Progressive Products
Glatfelter	Reckitt Professional



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**TABLE 3. PRODUCT CLASSES AND CATEGORIES PROFILED**

<b>FLOOR CARE</b>	<b>HAND CARE</b>
Disposable dry floor dusting microfiber mops	Hand-cleaning wipes
Disposable wet/damp floor cleaning microfiber mops	Hand-sanitizing wipes
Reusable microfiber mops	
<b>HARD SURFACE</b>	<b>OTHER DRY WIPERS</b>
General-purpose cleaning wipes	Absorption wipers
Disinfectant and sanitizer wipes	Dry nonwoven wipers
Glass-cleaning wipes	Dry electronics wipers
Furniture polish wipes	



## REPORT BENEFITS

This report, written for a diverse audience, serves as an excellent resource for manufacturers and formulators of I&I cleaning wipes. Specifically, it assists subscribers by providing:

A highly reliable, comprehensive assessment of the market based on hundreds of structured surveys of end-use decision makers and in-depth interviews with suppliers and distributors

Insights to help understand market dynamics, identify opportunities and challenges, and ultimately improve the competitive position

An objective assessment of key trends, changes, challenges, impact of COVID-19, and five-year forecast for I&I cleaning wipes

## METHODOLOGY

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

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Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 60 years.

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