



2nd Edition

Industrial and Institutional Wipes USA: Market Analysis and Opportunities

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Base Year: 2019

Forecasts to 2024

Regional Coverage: United States

I&I wipes are a rapidly growing market segment that end users often prefer because of wipes' ease of use and convenience. Some wipes have ingredients that are regulated by the EPA and make disinfecting/sanitizing claims. It is crucial for industrial and institutional cleaning chemical suppliers to understand how and when end users use wipes rather than traditional industrial and institutional cleaning chemicals. Similarly, for wipes suppliers, it is crucial to understand which end uses may be ripe for future growth and expansion opportunities.

This Report Helps Subscribers:

- Size the market by product, end use, and supplier, including both wet wipes and dry wipers
- Gain perspective on the relative size of wipes when compared to traditional I&I cleaning chemicals
- Assess the current and future outlook for key product segments and end-use segments
- View a decade of sales estimates with sales in 2014, growth rates to 2019, and forecasts to 2024
- Learn about end users' needs and how they buy I&I wipes
- Understand the settings or cleaning tasks when end users opt for traditional I&I cleaning chemicals and when they opt for wipes
- Uncover future opportunities for growth
- Understand use of wipes by users in both food-service and janitorial areas of facilities



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 - Product categories (see Table 3)
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- Methods of cleaning
- Critical buying factors
- Outlook and appraisal

End-use Segment Profiles

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

- Introduction
- Structure of the industry
- Methods of cleaning
- Role of contract cleaners
- Overall market in 2018 and 2019
- Packaging
- Critical buying factors
- Distribution channels
- Green cleaning and sustainability
- Suppliers
- Future outlook and appraisal

Product Category Profiles

General information on industrial and institutional wipes product categories listed in Table 3, which supplements detailed information found on each category in the end-use profiles. The following information is provided:

- Application
- Consumption
- Brand awareness
- Sales by end-use segment
- Forecast through 2024 by product category and end-use segment

Supplier Profiles

Brief profiles of the suppliers of industrial and institutional wipes listed in Table 2. Profiles include the descriptions of the company’s businesses, location, description of their wipe brands, and sales.

Table 1: End-use Segments

Building service contractors
Fitness facilities (gyms and health clubs)
Foodservice (fast-food, fast-casual restaurants, and commercial and workplace cafeterias)
Healthcare (hospitals, ambulatory surgery centers, nursing homes/skilled nursing facilities, assisted living facilities, and doctors’ and dentists offices)
Industrial facilities (manufacturing plants and warehouses)
Lodging (hotels, motels, and other lodging establishments)
Schools and universities (includes campus dining)
Retailers (grocery/food stores, mass merchandisers, convenience stores, and other retailers)

Table 2: Suppliers

2XL	Jacob Holm
3M	Kimberly-Clark
Clorox Professional Products	Metrex
Contec	New Pig
Diamond Wipes	Newell Rubbermaid
Diversey	PDI/Sani Professional
Ecolab	Procter & Gamble Professional
Georgia Pacific	Progressive Products
GOJO Industries	Reckitt Benckiser Professional
Hillyard	SCA (Essity)
ITW Professional Brands	

Table 3: Product Classes and Categories

FLOOR CARE	HAND CARE
Floor cleaning wipes	Hand-cleaning wipes
Microfiber mops	Hand-sanitizer wipes
HARD SURFACE	OTHER
General-purpose cleaning wipes	Absorption wipes
Disinfectant and sanitizer wipes	Dry nonwoven wipes
Glass cleaning wipes	
Furniture polish wipes	





Scope

Industrial & Institutional Wipes USA: Market Analysis and Opportunities provides a thorough assessment of the U.S. market for I&I disposable wipes and excludes reusable or launderable rags. Wet wipes and dry nonwoven wipers for industrial and institutional use are included. Wipes used to clean, disinfect, sanitize, dust, and maintain the overall appearance of commercial, industrial, and institutional facilities are included. The study addresses products consumed by commercial and institutional end users and contract cleaners—including volume purchased through warehouse clubs and retailers—but excludes household wipes purchased by consumers for household use. This study includes hand cleaning and hand sanitizing wipes.

The report focuses on key trends, changes, challenges, and business opportunities. This analysis also helps subscribers understand how end users purchase and use such products, the role of cleaning contractors, regulatory impacts, and the competitive landscape in this industry. Data is provided for 2019, with forecasts to 2024.

Key Benefits

The report provides comprehensive data and analysis to help subscribers understand market dynamics, identify opportunities and threats in the I&I wipes market, and ultimately improve long-term competitive position. Written for a diverse audience, the report can be utilized extensively by product managers, strategists, and executives in a range of companies at each level of the value chain. Specifically, the report also:

- Provides an objective source to size the market by product, end use, and supplier
- Offers perspective on relative size of wipes compared to traditional I&I cleaning chemicals
- Assesses current and future outlook for key product segments and end-use segments
- Spotlights end users' needs and how they buy and use I&I wipes
- Offers insights on the settings or cleaning needs when end users opt for traditional I&I cleaning chemicals and when they opt for wipes
- Uncovers future opportunities for growth
- Identifies which end-use segments offer growth potential for I&I wipes
- Delivers an understanding of how wipes are used in both foodservice and janitorial areas of facilities



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 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.

Primary Research

We Know Who to Talk to. We Know How to Listen.



During the course of field research, we conducted a two-pronged primary research approach to understanding this market. This methodology has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research represents the major component of the overall research methodology for this report.

- First, our professional consulting staff conducts in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including suppliers, distributors, regulators, industry associations, and other key trade sources.
- Second, in order to understand the market from the end users’ perspective, Kline conducted over 600 structured surveys with a wide range of end users to understand how I&I wipes are used, where they are purchased, and changing trends impacting this market.

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of more than half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

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 60 years.

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