$23.1 billion nonwoven wipes industry continues positive trajectory despite challenges, Smithers expert study

Sustainability and new regulatory demands will not deflect the ongoing growth in demand for baby, personal care, home care and industrial wipes. The global market will be worth $23.06 billion in retail sales in 2024, consuming a total of 1.70 tons (metric) of nonwoven substrates, according to data from The Future of Global Wipes to 2029 – a new market report from Smithers.

Detailed market segmentation and expert analysis of nonwoven material, consumer and business trends allows Smithers to authoritatively forecast future growth will occur at a 6.2% compound annual growth rate (CAGR). This will push overall market value to $30.96 billion in 2029. Consumption by weight across the same period, will increase to 2.31 million tons.

This is consistent with an enduring growth trajectory, a residual effect remains from the major sales boost during Covid, when surface cleaning became a core measure to prevent virus spread.

For 2024-2029, there are a series of challenges for the sector that will reward technical innovation – primarily, the concerns over the environmental impact of wipes. Brands in personal care and other consumer segments are prioritizing sustainability in material choice and product performance. The EU's Single-use Plastics Directive is also having a major effect on nonwoven wipe processes and products.

Sustainability favors certain constructions – such as hydroentangled wetlaid or airlaid processes – that can incorporate higher volumes of wood fibers. The same imperative will foster green material sets such as biodegradable polypropylene wipes; polylactic acid, polyhydroxyalkanoates or other biopolymer-based bicomponent bonding fibers; biopolymer-based binders; and more planet-friendly packaging.

The immediate business challenge is navigating oversupply in world nonwoven capacity. Multiple wipe production lines were commissioned during Covid-19, putting world capacity well ahead of contemporary demand.

Spunlace is the major nonwoven variant, accounting for 62.0% of market by weight, and can produce softer more stretchable wipes without the use of binders. Despite relatively high raw material costs, spunlace has the fastest growth rate across the forecast period. Spunlace production supply and demand is balanced,

or subject of oversupply, in most regions; with more new lines planned in both China and Turkey. This will put some pressure on manufacturer margins, but higher prices are being paid for newer greener constructions, such as hydroentangled wetlaid and carded airlaid carded spunlace.

The second largest segment is airlaid (11.0% of nonwoven wipe consumption by weight in 2024). These have strong sustainability credentials, containing as much as 90% wood pulp, and dispersible polyacrylate latex binders allow these wipes to be both flushable and biodegradable.

Airlaid's growth outlook is unimpressive however, there is an undersupply situation in 2024, with no significant expansion for wipe grades scheduled; while recent M&A activity has reduced the number of large airlaid producers.

Coform wipes (7.7%) will see the second best growth across 2024-2029. Initially developed by Kimberly-Clark, many patents for this technology have now expired, leading to new entrants targeting baby wipes primarily, where coform offers excellent consumer acceptance, softness, wet bulk and emboss-ability.

Wetlaid (7.5%) lead by double recrepe (DRC), has seen strong growth in wipes as volume has switched from consumer and away-from-home tissue to industrial wipes. There are only three DRC lines globally however, and little expectation of additions, meaning future market expansion will be limited.

The Future of Global Wipes to 2029 gives unparallelled strategic and technical guidance into the evolution of this diverse market. Commercial, technical, and regulatory factors are analyzed critically to quantify the market, by value and volume, segmented across all important metrics:

• Nonwoven variant/process – Spunlace, Airlaid, Needlepunch, Coform, Spunlaid, Wetlaid, Carded

• Raw material – Wood pulp; Rayon/lyocell; Cotton; PP fiber; PP polymer; PET; Bico fiber; Standard binder; Specialty binder; Other

• End-use application – Baby; Personal care, Adult moist toilet tissue, Toddler toilet care, Feminine hygiene, Cosmetic & facial, Bath & adult incontinence, Other personal care; Cleaning & disinfecting, Wet floor, Electrostatic, Furniture/glass, Automotive, Other home care; Industrial, Food-service, General-purpose, Healthcare, Specialty

• Geographic region/National market – North America, US, Canada, Mexico; South America, Brazil, Other South America; Western Europe, UK, France, Germany, Spain, Italy, Benelux, Scandinavia, Other Western Europe; Eastern Europe, Russia, Poland, Turkey, Other Eastern Europe; Asia, China, India, Japan, Other Asia; Rest of the World.