



Helena ENGQVIST

CONSUMER & HEALTHCARE TRENDS IN THE EUROPEAN WIPE MARKET

Wet Wipes – The Perfect Solution

Wet wipes are the perfect solution in many life situations. Think about the times when you are out and about with your children, on a holiday trip, fixing your car or taking care of your pets. In fact, wet wipes can often serve as a cleaning tool when water is scarce or unreliable, which is a serious problem in many countries.

Consumers have much to say about why they use wipes, here are some spontaneous comments:

A Tour to Europe – A Multi-Faceted Region

The total population in the extended Europe is estimated to some 730 million people, while in the European Union (EU), with its 28 states, the population is just over 500 million. Looking at the age distribution, the number of children below 15 years is more or less the same over the years, while the older generation, 65 years and above, is increasing, which indicates a shrinking young generation and

growing old generation in the future (Figures 1-2).

It Starts In The Cradle ...

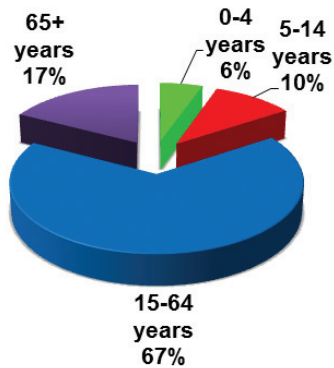
The European wipes market is steadily increasing and was according to Euromonitor International estimated to be worth US\$ 3.65bn in 2012. This market is driven by baby wipes, which stands for almost 70% of total sales with price as a major competitive factor.

Based on volume, baby wipes represent over 80% of all personal care wipes in Europe with higher usage in Western Europe compared to Eastern Europe and variations between countries in the north and the south. In addition, many countries face water stress, i.e. lack of water and water restrictions and then wet wipes come in handy (Figures 3-4).

There are many reasons why consumers like baby wipes; they are soft, smooth and skin friendly, they clean well and not the least, they



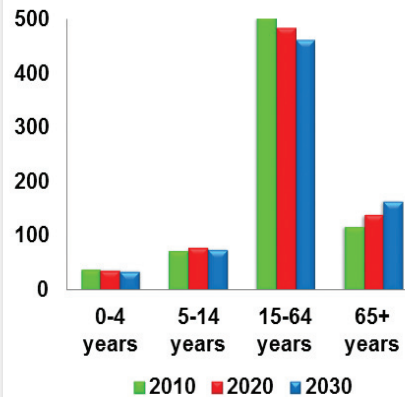
European population by age groups in 2015



Source: UN Population Statistics

[Fig. 1]

European population by age groups in 2010-30



Source: UN Population Statistics

[Fig. 2]



men and women: men tend to use wipes more for hygiene and household while women use them for all purposes – cosmetic, make-up removal, hygiene, household and baby care. In some countries, using wipes can also be a sign of wealth.

In the European market there are 2-3 major brands and a plethora of private label / retail brands, all heavily promoted. Consumers on the other hand buy a mix of branded and private label brands depending on the specific offer.

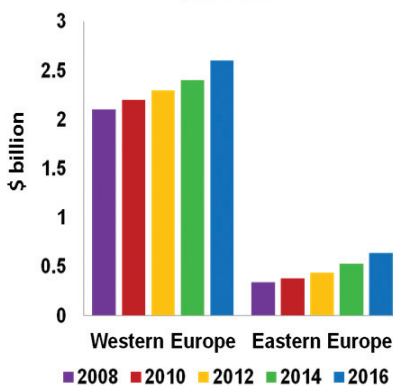
Cosmetic Wipes

Cosmetic wipes represent some 8% of personal care wipes in Europe, with the UK as the biggest market. However, this is lagging behind the US. Although volumes are still low, cosmetic wipes are rapidly increasing in Eastern Europe and Turkey. Given the audience, cosmetic wipes are 3-4 times more expensive than baby wipes and usage rates are around one to two wipes per day. There are big differences between branded products and private labels as well as many types of applications like special cleaning and facial pads, wipes for sun screens, self tanning and baldness.

Moist toilet tissue is one of the fastest growing segments, although still in fairly small volumes with opportunities in increasing market penetration.

European wipes market value \$3.65bn in 2012, steadily increasing

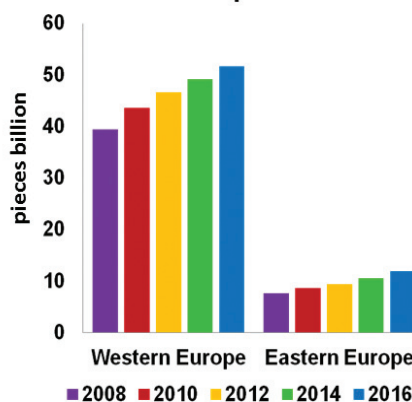
Personal care wipes \$2.75 bn



Source: Euromonitor International

[Fig. 3]

Personal care wipes 56 bn pieces

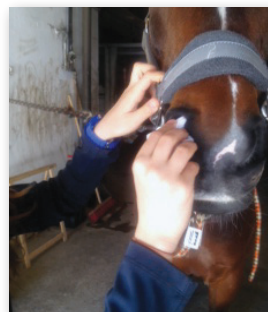


Source: Euromonitor International

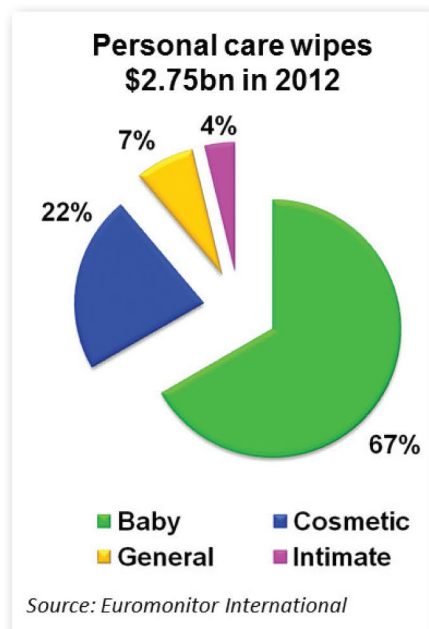
[Fig. 4]

are environmentally friendly and chlorine free. It is common to use 3-4 wipes per diaper change. Interestingly baby wipes are being

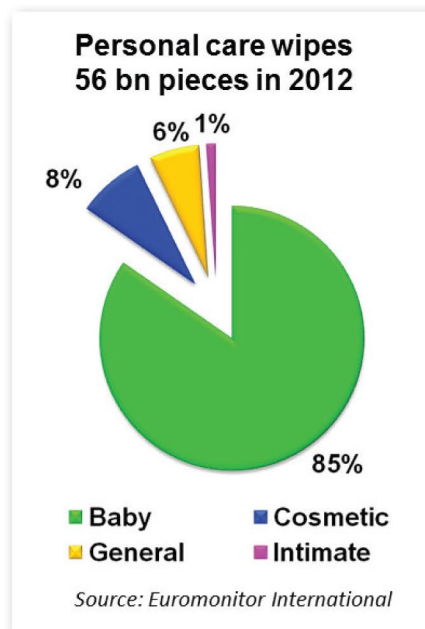
used for much more than just baby care. Adults use them for themselves, make-up removal, household, pets, when doing sports, removing stains.



The list can be very long. Of course there are differences in behavior between



[Fig. 5]



[Fig. 6]



[Fig. 8]

The Medical Devices Directive is focusing on patient safety and products used for disinfection in hospitals and wards and the Biocidal Products Directive runs under the General Products Safety Directive and REACH.

Household Wipes

Household wipes is a large business with many segments and functions for cleaning and disinfecting floor and multi-surface, electrostatic for glass and furniture, automotive and dry mops.

Why do people in the Nordic countries prefer dry household wipes while people in Germany want them wet? The answer is tradition. Dry household wipes are expected to be absorbent, clean well, durable and strong. The expectations with wet household wipes are similar, but these can also be made disinfecting and they stay wet longer.

Challenges and Regulations

Wet wipes consist of two products in one, the nonwoven substrate and the liquid. Consequently several directives are important and the regulations are defined by the fields of use or classifications. In this area all European regulations have been

or are under some kind of review. All components in the lotion used for wipes are regulated by the European REACH Directive, while the CE-mark is only needed on medically related products.

The main focus with the Cosmetics Directive is consumer safety. A new revision was published in July 2013. All consumer wipes for cleaning, maintaining, or deodorising of human skin are included in this directive, but none for professional use. Usage is communicated with specific labels (Figures 7- 8).



[Fig. 7]

To Flush or Not To Flush?

Flushability has become a major issue for sewage management because of clogging in the pipes and at the sewage plants. In this context of the industry, EDANA and INDA continue to work on a joint industry stewardship effort including guidance documents with voluntary labeling. EDANA and INDA have published the 3rd edition of the Guidelines document to ensure the proper functioning of sewerage systems.

Because some things cannot– and are not designed to– be flushed, labels have been established for all packages containing wipes. Figure 9 is the new label for non-flushable products.



[Fig. 9]


Technologies & Materials for Wipes in Europe

Carded spunlaced nonwoven is the most commonly used nonwoven for wipes in Europe: finer fibers, better quality and opacity and combinations of spunlaid, cellulose and carded nonwoven with variations in the basis weight depending on the market. Airlaid materials are less frequently used and wetlaid nonwoven in selected segments. Fibers used in various products range from viscose, cellulose and cotton to polyester, in

different combinations, depending on the end-use. But all efforts aside, consumers have no idea what wipes are made from.

Trends and the future

Wipes meet the need and desire for convenience and efficient water-use. Much effort is put on sustainability. Consumers like smaller pack sizes for "on-the-go". New marketing concepts for the health conscious consumer, men's grooming and specialty wipes for

pets, cars and computers to name a few, are constantly presented to consumers: **"What's good for you is good for me..."** 

[This is an extract on Consumer & Healthcare Trends in the European Wipes Market presented by Helena Engqvist, Engqvist Consulting. The presentation was given at the World of Wipes (WOW®) International Conference in 2013 that was organized by INDA, the Association of the Nonwovens Fabric Industry.]

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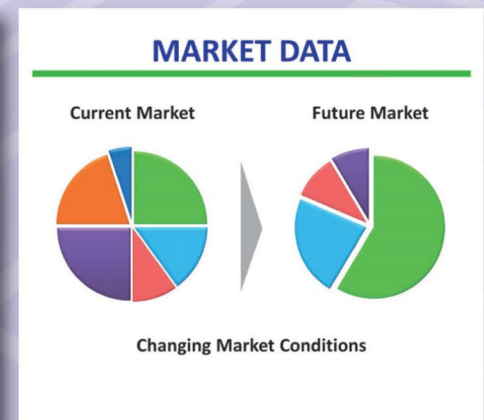
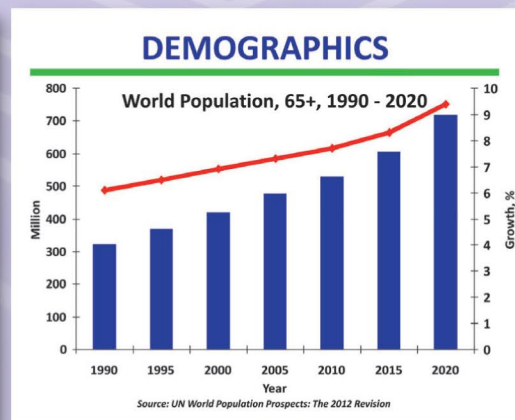
Helena ENGQVIST is a specialist in consumer insight and the development of nonwoven, hygiene and health care products. She has successfully conducted business projects in more than 40 countries for companies such as Novartis, Johnson & Johnson and SCA/Mölnlycke.

Helena and her associates combine technological and marketing expertise to solve complex problems through quantitative and qualitative research, business intelligence and analysis to learn what consumers want and help clients get it to them quickly.

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