



# A Clean Evolution: Redefining Value and Priorities in Disposable Wet Wipes

September 2023

## INTRODUCTION

Scope

Key findings

## STATE OF THE INDUSTRY

Wipes demand stays resilient due to staying health vigilance despite transient setback

Rising unit prices consistent albeit uneven across top wipes markets and categories

Baby and moist toilet wipes lead growth over 2021-2022

Asia Pacific's strength driven by demographic tailwinds will drive strong forecast gains

Urbanisation-induced lifestyle changes and income growth remain wipes' top growth drivers

Low per capita potential and population base underpin developing unmet potential

Entrenched hygiene radar sustains sanitising and home care wipes per capita usage

Baby wipes' prospects notable in developing Asia Pacific

Non-toxic, antibacterial and clean claims drive growth in top Asia Pacific developing markets

Cross-category expansion and partnerships stimulate Brazil's category variety and growth

Moist toilet wipes remains developed world-centric, but China is rapidly catching up

Top-growth China market to witness a bathroom renaissance

Plastics concerns and flushability scrutiny pose challenges to moist toilet wipes' expansion

Function and audience diversification help boost wipes' role in toilet hygiene routine

Return of social occasions and value-add lend strength to cosmetic wipes

Cosmetic routine shifts push the skin care positioning further to the front

Skin concerns inform ingredient-led, targeted functional innovations

Popularity of alternative facial cleansing formats can dilute facial wipes consumption

Bargain and quality balancing helps navigate sweet spot in purchase decisions

Interest in health and personalised care regimens favour personal care wipes alternatives

Rising interest in microbial home cleaning runs up against wipes-associated health concerns

Habit persistence helps drive future wipes growth, while pricing has a negative effect

E-commerce expansion offers growth opportunities for wipes

Digital purchase models and promotions elevate wipes' accessibility

## COMPETITIVE LANDSCAPE

Despite stable ranking on the top, wipes remains a fragmented market

Penetration in China presages Essity's and Hengan's global share growth

Digital-first influencer marketing helps smaller players pivot in high-growth niche segment

Category fragmentation most apparent in e-commerce-heavy regions and baby wipes

E-commerce provides a hotspot for smaller niche entrants and white spaces for leaders

Seeking the right digital retail partnership builds overall competitive momentum

Amazon seizes leadership in multiple markets, though local grocers and generalists emerge

Private label shows diverging performance

## REPOSITIONING OF WIPES

Search for value in simplicity benefits wipes

Wellness positioning as a key simplicity manifestation, as health perception broadens

Trending claims in wipes indicate a shift towards plant-based and end-of-life circularity

Leading claims across wipe reveal varied wellness priorities

## INNOVATION AND OPPORTUNITIES

Three shades of clean: Key pillars of value building in disposable wet wipes

Occasion-adaptive self care regimen drives ritualized, holistic branding and portfolio building

Multifunction fortifies value positioning, with diagnostic a potential new innovation frontier

Skin health remains a key priority inspiring ingredient-led value creation across wipes

Microbiome health supports wellness positioning

Fragrance and flavour fortified with botanicals extend to mental wellbeing

Regulatory environment will place more pressure on ingredient transparency ?  
Waste and carbon reduction trend accelerates green positioning  
Regulatory directives guide green actions  
To flush or not to flush, that is the question shaping an uneven green evolution  
Green actions in wipes inspire sustainable packaging by sheet mask players

## CONCLUSION

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A clean evolution: How to win

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