



Freedonia Focus Reports
US Collection

Coated Fabrics: United States

February 2019



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About This Report

Scope

This report forecasts to 2023 US coated fabric demand in nominal dollars (for products) and square yards (for markets and substrates). Total demand is segmented by product in terms of:

- polymer-coated fabrics
- rubber-coated fabrics
- fabric-backed wallcoverings

Total demand is also segmented by market as follows:

- motor vehicles
- protective clothing
- industrial
- furniture
- other markets such as marine equipment, other non-motor vehicle transportation equipment, and commercial and rental tents

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Fabrics treated with chemical finishes – such as 3M's **Scotchgard** or other stain- or water-repellent finishes – are not coated fabrics as defined here and are therefore not included. Additionally, textiles that are coated or otherwise treated at the fiber level are not included in this study.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Coated Fabrics: United States (FF15012) is based on *Coated Fabrics*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental non-governmental organizations

About This Report

- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NAICS & SIC Codes Related to Coated Fabrics

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
313320	Fabric Coating Mills	2295	Coated Fabrics, Not Rubberized
314999	All Other Miscellaneous Textile Product Mills	2299	Textile Goods, NEC
		3069	Fabricated Rubber Products, NEC

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers. 1

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

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historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Coated Fabrics

Freedonia Industry Studies

Barrier Films Market in the US

Global Bulk Packaging

Global Industrial Rubber Products Market

Global Nonwovens

Global Rubber Conveyor Belts

Manufacturing (OEM) Coatings Market in the US

Nonwovens Market in the US

North America Automotive Aftermarket

Recreational Boating in the US

Recreational Vehicles in the US

Silicones Market in the US

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Apparel: United States

Furniture: United States

Leather & Fur Products: United States

Motor Vehicles: United States

Polyethylene: United States

Polypropylene: United States

Polyurethane: United States

Polyvinyl Chloride: United States

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Trade Publications

Apparel

Automotive News

Fabric Architecture

Home Furnishing News

Home Textiles Today

InTents

Marine Fabricator

NONWOVENS INDUSTRY

Plastics News

Rubber & Plastics News

Specialty Fabrics Review

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Technical Textiles International

Textile World

Upholstery Journal

Agencies & Associations

Chemical Fabrics and Film Association

Industrial Fabrics Association International

International Textile Manufacturers Federation

United States Census Bureau

United States International Trade Commission

Wallcoverings Association