



Freedonia Focus Reports  
Global Collection

# Global Meltblown Nonwovens

June 2020



CLICK TO ORDER  
FULL REPORT  
**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Global Overview &amp; Forecasts</b>	<b>4</b>
Impact of COVID-19	4
Demand by Application	6
Filters	8
Medical/Surgical Products	9
Other Applications	10
<b>3. Regional Segmentation &amp; Forecasts</b>	<b>12</b>
Regional Demand Overview	12
United States & Canada	13
Europe	14
Asia/Pacific	14
Other Regions	15
<b>4. Industry Structure</b>	<b>16</b>
Industry Characteristics	16
Market Leaders	17
Berry Global	17
Freudenberg	18
Kimberly-Clark	19
<b>5. About This Report</b>	<b>20</b>
Scope	20
Sources	20
Industry Codes	21
Freedonia Methodology	21
Resources	23

# List of Tables & Figures

---

Figure 1   Global Meltblown Nonwoven Market Outlook, 2019 – 2024	3
Figure 2   Global Meltblown Nonwoven Demand by Application, 2015 – 2024 (US\$ bil)	6
Table 1   Global Meltblown Nonwoven Demand by Application, 2015 – 2024 (US\$ bil)	6
Figure 3   Global Meltblown Nonwoven Demand by Application, 2015 – 2024 (%)	7
Figure 4   Global Meltblown Nonwoven Demand by Region, 2015 – 2024 (US\$ bil)	12
Table 2   Global Meltblown Nonwoven Demand by Region, 2015 – 2024 (US\$ bil)	12
Figure 5   Global Meltblown Nonwoven Demand by Region, 2015 – 2024 (%)	15
Table 3   Selected Meltblown Nonwoven Production Expansions & Shifts, 2020	19
Table 4   NAICS & SIC Codes Related to Meltblown Nonwovens	21
Table 5   HS Codes Related to Meltblown Nonwovens	21

# About This Report

---

## Scope

This report forecasts to 2020 and 2024 global demand for meltblown nonwovens by application and major world region in nominal US dollars. Reported applications encompass:

- filters
- medical/surgical products
- other applications such as wipes, personal hygiene products, and construction

Major world regions include United States and Canada, Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, application, and regional demand are provided for 2015-2019.

This report analyzes the merchant market for meltblown nonwovens. For the purposes of this report, demand includes both meltblowns used alone as well as those that are combined with one or more other nonwovens to produce composite nonwovens such as spunbond-meltblown-spunbond (SMS). Sales of composite nonwovens are broken down according to their constituent web types and the portion of the product that is made of meltblown is included. Excluded are nonwovens made by other formation processes.

This report also includes demand for meltblown nonwovens – both those produced capatively and those from the merchant market – used to make both medical and nonmedical masks. Masks include both respirators – which are tight-fitting face masks such as N95, FFP2, and KN95 – and loose-fitting face masks often called surgical or medical masks. The latter are called masks for the purpose of this report to differentiate them from respirators.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Global Meltblown Nonwovens* (FW15030) is based on [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

## About This Report

- government/public agencies
- intergovernmental and non-governmental organizations
- 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 4 | NAICS & SIC Codes Related to Meltblown Nonwovens**

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
313230	Nonwoven fabric mills	2297	Nonwoven fabrics

Source: US Census Bureau

**Table 5 | HS Codes Related to Meltblown Nonwovens**

HS Code	Definition
5602	Felt, whether or not impregnated, coated, covered or laminated
5603	Nonwovens, whether or not impregnated, coated, covered or laminated

Source: United Nations Statistics Division

## 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.

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

## About This Report

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 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.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Global Meltblown Nonwovens: COVID-19 Impact Analysis*

### Freedonia Industry Studies

*Disposable Medical Supplies in the US*

*Global Disposable Masks & Respirators: COVID-19 Impact Analysis*

*Global Disposable Medical Gloves: COVID-19 Impact Analysis*

*Global Disposable Medical Supplies*

*Global Filters*

*Global Industrial & Institutional Cleaning Chemicals*

*Global Industrial & Institutional (I&I) Disinfectants & Sanitizers: COVID-19 Impact Analysis*

*Global Nonwovens*

*Global Pharmaceutical Packaging*

*Global Protective Packaging*

*Industrial & Institutional (I&I) Cleaning Chemicals in the US*

*Medical Device Packaging*

*Pharmaceutical Packaging*

*Wipes*

### Freedonia Focus Reports

*COVID-19 Market Impact Analysis*

*Deathcare: United States*

*Demographics: United States*

*Disposable Medical Supplies: United States*

*Global Demographics*

*Global Healthcare*

*Healthcare Insurance: United States*

*Healthcare: United States*

*Kidney Dialysis Centers: United States*

*Medical Equipment & Supplies: United States*

*Medical Services: United States*

*Pharmaceuticals: United States*

### Freedonia Custom Research

### Trade Publications

*HAPPI Magazine*

*Infection Control Today*

*International Fiber Journal*

*International Filtration News*

## About This Report

*Medical Device & Diagnostic Industry*

*Nonwovens Industry*

*Specialty Fabrics Review*

*Textile World*

### **Agencies & Associations**

American Filtration and Separations Society

American Hospital Association

American Medical Association

European Disposables and Nonwovens Association

European Medical Association

Eurostat

International Monetary Fund

International Nonwovens and Disposables Association

National Bureau of Statistics of China

Organisation for Economic Co-Operation and Development

United Nations Statistics Division

United States Census Bureau

United States Department of Health and Human Services

United States International Trade Commission

World Bank

World Health Organization