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# Coated Fabrics

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US Industry Study with Forecasts to **2010 & 2015**

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Study #2143 | February 2007 | \$4400 | 320 pages

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### INDUSTRY STRUCTURE

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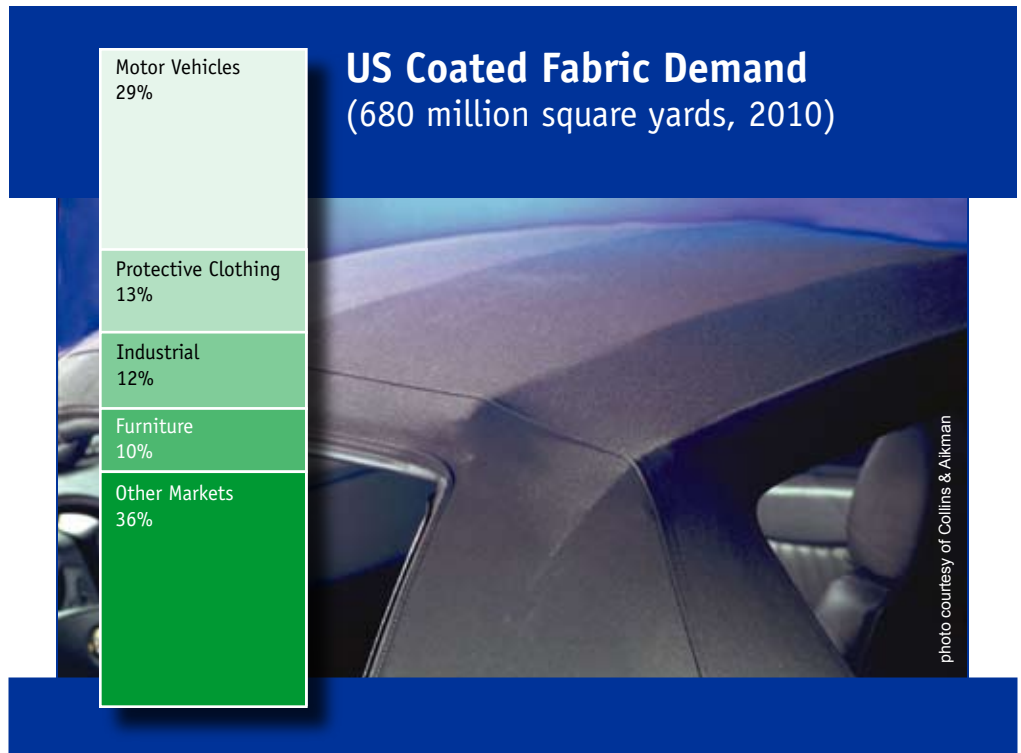
*A recovery in nonresidential wallcoverings, awnings and canopies, and continued strength in protective clothing and motor vehicle airbags, will support gains in US coated fabric demand.*

## US coated fabric demand to grow 3.2% annually through 2010

Demand for coated fabrics is projected to increase 3.2 percent annually through 2010 to 680 million square yards. A recovery in nonresidential construction spending will propel advances in wallcoverings, awnings and canopies, and a more general rebound in nonresidential fixed investment will aid demand in the industrial and other markets. Gains will also be helped by continued strength in the protective clothing and motor vehicle airbag markets. However, the industry faces competition from engineered textiles, which feature chemical treatments or coatings that are applied at the thread or fiber level rather than after the fabric has been produced.

## The two smaller coated fabric segments to post the strongest gains

Of the three major fabric types, nonrubber-coated fabrics accounted for more than 80 percent of coated fabric sales in 2005. Within this category, PVC-coated fabric is the leading type, benefitting from good performance at a modest price in a wide variety of applications. Rubber-coated fabrics, including those coated with natural rubber, neoprene, silicone rubber or butyl rubber, will post above average gains through 2010, benefitting from growth in motor vehicle



airbags, industrial equipment and protective clothing. Fabric-backed wallcoverings are expected to post the strongest gains over the same period, due to product innovations and a rebound in nonresidential construction.

## Coated nylon to be most rapidly growing substrate

Coated fabrics made from polyester substrates will continue to be the most widely used product type, based on their low cost and versatility. However, sales of coated nylon, a stronger and lighter substrate which is often used in the production of high growth goods such as airbags and protective clothing, are projected to post stronger gains.

## Protective clothing, awning and canopy markets to post above-average gains

In 2005, the motor vehicle market, including upholstery, trim, airbags and truck covers, accounted for the largest share of coated fabric demand, with 29 percent. The protective clothing market is projected to achieve the fastest growth through 2010, benefitting from increased demand for safety suits by the military, first responders and workers in chemical and electronic industries. Other markets expected to post above-average growth include industrial equipment, awnings and canopies, and commercial tents.

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## Sample Text, Table & Chart

### PRODUCTS

#### Acrylic-Coated Fabrics

Shipments of acrylic-coated fabrics are projected to advance more than 10 percent over the next five years, reaching 1.5 billion square yards in 2015. Growth is primarily in the automotive and architectural markets, which are expected to account for 70 percent of total shipments. Acrylic-coated fabrics are used in a wide range of applications, including vehicle covers, awnings, banners, flags, boat covers, outdoor furniture, and geosynthetics, where the material's resistance to fading and degradation from exposure to ultraviolet radiation is an important advantage.

Acrylic-coated fabrics have grown to become the leading type of coated fabric used to produce hardbound books. Pyroxylin-coated fabrics used to be the primary type of coated fabric in this market, but they release volatile organic compounds (VOCs) as they cure. In contrast, acrylic-coated fabrics, which have been a commercially available alternative since the early 1980s, are water soluble and do not require the use of solvents, so they do not release VOCs as they cure. However, once the acrylic-coated fabric is dry, it is no longer water soluble, but is instead water repellent. Upon curing, the material performs similarly to fabrics coated with pyroxylin and other solvent-based coatings. In the hardback bookbinding market, other competitive materials include starch-filled fabrics and coated kraft papers.

In other markets in which acrylic-coated fabrics are offered, vinyl-coated fabrics continue to be the dominant type of material selected

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TABLE IV-2

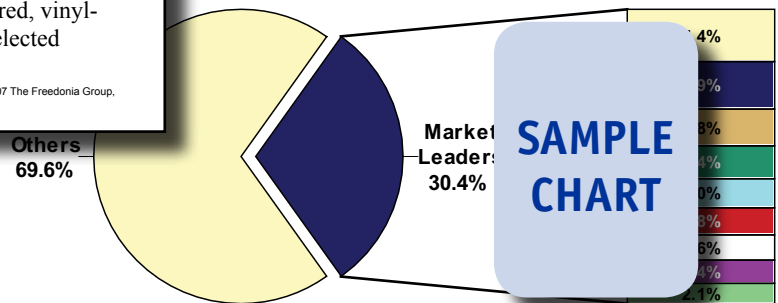
### NONRUBBER-COATED FABRIC SUPPLY & DEMAND (million dollars)

| Item                                   | 1995 | 2000 | 2005 | 2010 | 2015 |
|--|------|------|------|------|------|
| Manufacturers' Shipments (bil \$)      | 3301 | 3987 | 4337 | 4965 | 5750 |
| \$ fabric/mil \$ mfrs' shipments       | 503  | 457  | 495  | 472  | 441  |
| Nonrubber-Coated Fabric Sales          |      |      |      |      |      |
| + net exports                          |      |      |      |      |      |
| Nonrubber-Coated Fabric Shipments      |      |      |      |      |      |
| Vinyl-Coated Fabrics                   |      |      |      |      |      |
| Acrylic-Coated Fabrics                 |      |      |      |      |      |
| Polyurethane-Coated Fabrics            |      |      |      |      |      |
| Pyroxylin-Coated Fabrics               |      |      |      |      |      |
| PP-, PE-, PTFE- & Other Coated Fabrics |      |      |      |      |      |
| % nonrubber                            |      |      |      |      |      |
| Coated Fabric Shipments                |      |      |      |      |      |

SAMPLE TABLE

CHART VII-1

### NONRUBBER-COATED FABRIC MARKET SHARE, 2005 (\$2.7 billion)



SAMPLE CHART

## Sample Profile, Table & Forecast

TABLE V-2

COATED POLYESTER FABRIC DEMAND BY MARKET  
 (million square yards)

| Item                                  | 1995 | 2000 | 2005 | 2010 | 2015 |
|---------------------------------------|------|------|------|------|------|
| Manufacturers' Shipments (bil 2000\$) | 3459 | 3987 | 3807 | 4230 | 4640 |
| sq yds fabric/mil \$ mfrs' shpts      | 74.0 | 74.7 | 82.2 | 84.4 | 86.4 |
| Coated Polyester Fabric Demand        |      |      |      |      |      |
| Automobiles & Light Trucks            |      |      |      |      |      |
| Trucks & Buses                        |      |      |      |      |      |
| Marine & Other Non-MV Transport       |      |      |      |      |      |
| Furniture                             |      |      |      |      |      |
| Protective Clothing                   |      |      |      |      |      |
| Industrial                            |      |      |      |      |      |
| Wallcoverings                         |      |      |      |      |      |
| Awnings & Canopies                    |      |      |      |      |      |
| Commercial Tents                      |      |      |      |      |      |
| Other Markets                         |      |      |      |      |      |
| % polyester                           |      |      |      |      |      |
| Coated Fabric Demand                  | 457  | 537  | 500  | 550  | 590  |



### COMPANY PROFILES

#### Haartz Corporation

87 Hayward Road  
 Acton, MA 01726  
 978-264-2600  
<http://www.haartz.com>



Annual Sales: \$1.1 billion (2007)  
 Employment: 1,000

Key Products: Coated fabrics for automotive and marine applications

Haartz manufactures engineered coated fabrics and other materials for automotive, marine and industrial applications. It is privately held.

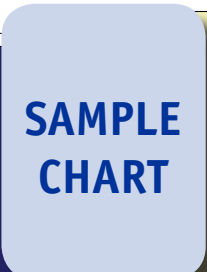
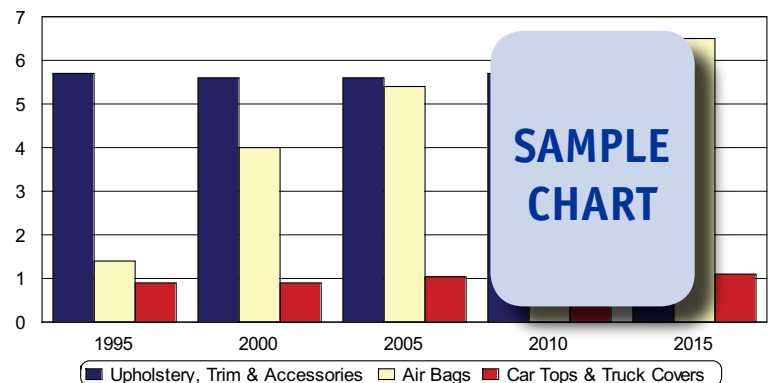
In 2005, Haartz was the ninth largest supplier of coated fabrics in the US market with 2.1 percent of sales. The Company's coated fabrics include a variety of products primarily used in exterior automotive and marine applications. Other engineered coated materials products are available for various industrial applications.

**Product Overview** -- Exterior automotive products made by Haartz include roof and convertible toppings; and tonneau, nose and tire covers. Among the Company's various ultraviolet (UV) light-resistant automotive roof toppings are vinyl-coated fabric toppings that mimic the appearance of convertible toppings; traditional vinyl-coated fabrics for full and partial roof treatments; and CAMBRIA solution-dyed acrylic fabrics with waterproof elastomeric inner layers.

Convertible toppings made by Haartz encompass cloth, vinyl, and sport utility vehicle (SUV) varieties. The cloth toppings are produced under such brand names as STAYFAST, LANDMARK, TWILLFAST and SONNENLAND. In general, these products are designed to offer

CHART VI-2

LIGHT VEHICLE MARKET FOR COATED FABRICS, 1995-2015  
 (square yards per vehicle)





**OTHER STUDIES**

**Nonwovens**

US demand for nonwoven roll goods will grow 4.5% annually through 2011, driven by healthy gains in key markets such as filtration, construction and wipes. Spunbonded nonwovens will remain the dominant product based on performance advantages, new applications and more demand for composite nonwovens featuring spunbonded webs. This study analyzes the \$4.7 billion US nonwovens industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major firms.

#2271 ..... 11/2007..... \$4600

**World Wipes**

Global wipes demand will grow 6.1% yearly through 2011. Developed markets in the US, Western Europe and Japan will remain dominant, while faster growth will occur in developing nations such as China and India. Baby wipes will stay the largest type while household, personal care and health care wipes lead gains. This study analyzes the \$5.8 billion world wipes industry, with forecasts for 2011 and 2016 by product, world region and for 14 countries. It also details market share and profiles major producers.

#2231 ..... 08/2007..... \$5400

**Specialty Films**

US specialty film demand will grow 4.8% annually through 2010. Gains will be driven by higher value materials, the rapid adoption of modified atmosphere packaging and improved film coating and metallization. Barrier films will remain dominant while biodegradable and water soluble films will grow the fastest from a small base. The study analyzes the \$5.8 billion US specialty film industry to 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

#2158 ..... 02/2007..... \$4400

**Geosynthetics**

US geosynthetic demand will grow 4.4% annually through 2010, based on a recovery in nonbuilding construction and a wider range of uses. Geotextiles will remain dominant while geogrids, geonets and geocomposites will grow the fastest. The construction market will continue as the largest end use and show the fastest gains. The study analyzes the US geosynthetic industry to 2010 and 2015 by product, market and region. It also evaluates company market share and profiles major geosynthetic manufacturers.

#2153 ..... 01/2007..... \$4300

**World Flooring & Carpets**

World floor covering demand will rise 4.1% yearly through 2010. China will surpass the US to become the top market, and sales will also be strong in India, Indonesia, Turkey, Iran, the Ukraine and Saudi Arabia. Developed areas will grow slower. Nonresilient flooring will outpace resilient flooring and carpets and rugs. This study analyzes the \$126 billion world flooring and carpet industry to 2010 and 2015 by product, market, world region and for 31 countries. It also evaluates market share and profiles major firms.

#2139 ..... 12/2006..... \$5500

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