photo: E-Rags

Coated Fabrics

US Industry Study with Forecasts for **2012 & 2017**

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Sales of coated fabrics through 2012 will be spurred by a rebound in motor vehicle production (from a weak base), rising protective clothing output and growth in building construction.

US demand to reach 655 million sq yards by 2012

US demand for coated fabrics is expected to grow 2.1 percent per annum, reaching 655 million square yards in 2012. Sales will be spurred by a rebound in motor vehicle production from weak years in 2007 and 2008. In addition, rising protective clothing output and growth in building construction will contribute to overall gains. In value terms, coated fabric sales will rise 3.4 percent yearly to $3.0 billion in 2012. Value gains will be driven by rising raw material costs and increased sales of costlier, better performing products.

Protective clothing to be fastest growing market

Coated fabric demand is largely determined by the performance of underlying end-user markets. In 2007, the motor vehicle market -- including upholstery, trim, airbags and truck covers -- accounted for the largest share of coated fabric demand, with 28 percent. Coated fabric sales in the motor vehicle industry will increase by 2012 as a result of gains in motor vehicle production (following a weak short term outlook). However, the fastest growth in coated fabric demand will come from the protective clothing market. Increased sales in this segment will stem from rising military spending, concerns over the preparedness of first responders in emergency situations and modest growth in the food, chemical and pharmaceutical industries.

US Coated Fabric Demand, 2012
(655 million square yards)

Rubber-coated fabrics to outpace nonrubber-coated

Of the three major fabric types, nonrubber-coated fabrics accounted for more than three-quarters of all sales in 2007. Within this category, vinyl-coated fabrics are the most commonly used material. Vinyl is a relatively low-cost, durable and easy to clean coating, and as a result is utilized in a wide range of applications, including awnings, banners, covers, tarpaulins and upholstery, among others.

However, rubber-coated fabrics, including those coated with natural rubber, neoprene, silicone rubber and butyl rubber, will post the fastest gains through 2012. Rubber's resistance to degradation and flexibility make rubber-coated fabrics the material of choice for airbags and certain types of protective clothing. Growth in these applications will lead to considerable sales opportunities for manufacturers of rubber-coated fabrics. Fabric-backed wallcoverings will post the slowest gains through 2012 as a result of intense competition from paint and nonfabric-backed wallcoverings. However, growth will be better than during the 2002 to 2007 period, as a result of increasing construction expenditures. New product development activity will spur sales of fabric-backed wallcoverings as well, by creating products that are easier to apply or more stylish.

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Sample Text, Table & Chart

TABLE V-3

COATED NYLON FABRIC DEMAND BY MARKET
(million square yards)

Item	1997	2002	2007	2012	2017
Manufacturers' Shipments (bil 2000$)	3				
sq yds fabric/mil $ mfg					
Coated Nylon Fabric Demand					
Automobiles & Light Trucks					
Trucks & Buses					
Non-Motor Vehicle Transport Equip					
Protective Clothing					
Other Markets					
Industrial					
% nylon					
Coated Fabric Demand					

SAMPLE TABLE

PRODUCTS

Rubber-Coated Fabrics

Sales of rubber-coated fabrics in the US market will inc… percent annually to $… advances w… improvement over th… during the 20… period and will outpa… es. Gains wi… by a recovery in mot… ell as by an i… number of airbags pe… ng sales will… growing protective c… re are a num… plications for rubber-c… increasing r… shipments and nonresidential fixed investment will bolster de… industrial rubber-coated fabric products such as conveyor bel…

SAMPLE TEXT

Market gains will be constricted somewhat by competition from other materials, principally nonrubber-coated fabrics and uncoated products like rubber sheets. Rubber-coated fabric sales will also be held back by their relatively high cost compared with nonrubber-coated fabrics. Furthermore, rubber-coated fabrics generally require glue to adhere seams in finished products, while many nonrubber-coated fabrics can be heat bonded. As a result, rubber-coated fabrics will continue to account for a relatively minor share of total coated fabric demand -- twelve percent -- in 2012.

The US is a net importer of rubber-coated fabrics, with a $113 million trade deficit in 2007. The trade deficit is expected to increase through 2012. These products tend to be more commodity oriented than nonrubber-coated fabrics and as a result are increasingl… in Latin America and Asia, where manufacturers benefit fro… advantages. US manufacturers' shipments of rubber-coated … advance less than one percent per year through 2012, edging … million, trailing demand growth.

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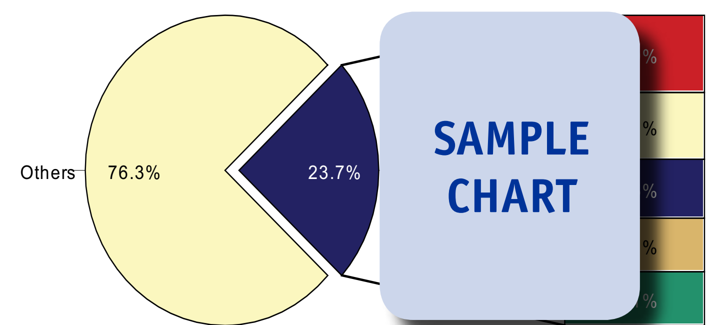
CHART VII-1

COATED FABRIC MARKET SHARE, 2007
($2.6 billion)



Sample Profile, Table & Forecast

TABLE VI-7

MARINE & OTHER NON-MOTOR VEHICLE TRANSPORTATION EQUIPMENT MARKET FOR COATED FABRICS (million square yards)

Item	1997	2002	2007	2012	2017
Non-MV Transp Shpts (bil 2000$)	15				1.4
sq yds fabric/000$ shpts	(				26
Non-MV Trans Coated Fab Demand					49
By Application:					
Marine Equipment					31
Other Transportation Equipment					18
By Fabric:					
Coated Polyester					34
Coated Nylon					9
Other Coated Fabrics					6
% other transport					.9
Coated Fabric Demand	5				715

SAMPLE TABLE

COMPANY PROFILES

Herculite Products Incorporated
Aberdeen Road
Emigsville, PA 17318
717-764-1192
http://www.herculite.com

Annual S
Employ

Key Pro … litary, industrial,
marine, … are use

Her … ayered fabrics. The
Compan … Emigsville, Pennsyl-
vania), a

SAMPLE PROFILE

The Company participates in the coated fabric industry through the manufacture of a variety of coated and laminated fabrics for military and industrial, tents, marine, graphic printing and architectural applications, among others. Herculite's military and industrial use fabrics are marketed under the HERCULITE brand name. These fabrics feature woven or knitted polyester scrims and resistance to ultraviolet (UV) light, abrasion, water and flames. The HERCULITE line also includes translucent industrial fabrics; agricultural curtains that regulate ventilation and provide insulation inside barns; and custom and specialty fabrics. Industrial fabrics also include tent types sold through the ARCHITENT and SHOWTIME lines. ARCHITENT fabrics are made using a proprietary polyvinyl chloride (PVC) formulation with a mildewcide treatment. These fabrics feature UV and wick resistance, low cold temperature flexibility, high-gloss embossing and an optional FLUOROSHIELD topcoat. FLUOROSHIELD is a polyvinylidene

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"Coated fabric demand in the non-motor vehicle transportation market is expected to increase at a 1.4 percent annual rate to 46 million square yards in 2012. Gains will trail both those of the 2002 to 2007 period and overall coated fabric demand. Suppliers will benefit from growth in shipments of marine, aerospace and other equipment. Aerospace equipment shipments will experience the strongest growth. However, coated fabrics are used much more extensively in marine equipment, and as a result, marine equipment shipments have a greater effect on coated fabric demand. While marine equipment shipments are not expected to register robust growth, a healthy aftermarket exists."
--Section VI, pg. 142

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Other Studies

Wipes

This study analyzes the US wipes industry. It presents historical demand data for 1998, 2003 and 2008 and forecasts for 2013 and 2018 by market (e.g., personal care, household care, automotive, pet care, manufacturing, health care, commercial), substrate (e.g., spunlaced nonwovens, airlaid nonwovens), and chemical (e.g., emollients, surfactants). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2453 .... 02/2009.................... $4700

Geosynthetics

US geosynthetics demand will reach $2.1 billion in 2012 based on rebounding road and highway construction and other public works spending. High-performance products such as geomembranes, geogrids and preformed geocomposites will outpace less costly types. Value demand will grow the fastest in the transportation infrastructure market. This study analyzes the $1.7 billion US geosynthetics industry, with forecasts for 2012 and 2017 by product, market and region. It also details market share and profiles industry players.

#2435 .... 01/2009.................... $4600

World Textile Fibers

Global demand for manufactured fibers will rise 4.7% annually through 2012. Polyester will continue to dominate output while specialty products such as spandex, aramid and carbon fibers grow the fastest. The industry will remain concentrated in Asia, where the fastest growth is also expected. This study analyzes the 46 million metric ton world textile fiber industry, with forecasts for 2012 and 2017 by fiber type, world region and major country. It also evaluates company market share and profiles industry players.

#2402 .... 10/2008.................... $5700

Recreational Boating

US recreational boating demand will grow 5.3% yearly through 2011. Powerboats will drive the boat category, led by outboard and sterndrive types. Propulsion systems will be the fastest growing segments. The South offers the best prospects based on its warmer climate and favorable demographics. This study analyzes the $15.7 billion US recreational boating industry, with forecasts for 2011 and 2016 by material, product and region. It also evaluates company market share and profiles leading competitors.

#2249 .... 09/2007.................... $4500

Outdoor Furniture & Grills

US demand for outdoor furniture and grills will grow 4% yearly through 2011. Demand will benefit from the increasing popularity of patios, porches and decks, and from lifestyle trends such as "cocooning" and "outdoor rooms". Patio heating products will lead gains, followed by the much larger grill segment. This study analyzes the $6.2 billion US outdoor furniture and grill industry, with forecasts for 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2221 .... 09/2007.................... $4400

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