



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)

Coated Fabrics

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

Study #2448 | January 2009 | \$4800 | 312 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	4
Manufacturing Outlook.....	9
Textiles Outlook.....	12
Consumer Spending Trends	15
Demographics.....	17
Environmental & Regulatory Considerations.....	20

COATED FABRIC OVERVIEW

General	24
Supply & Demand.....	26
Market Volatility	27
Pricing Patterns.....	31
International Environment.....	33
World Supply & Demand.....	34
Western Europe.....	35
Asia/Pacific	36
Other Regions.....	37
US Foreign Trade	38
Exports.....	41
Imports	43
Coating Processes	45
Gap Coating.....	46
Reverse-Roll Coating	47
Rotary Screen Coating	47
Others	48
Competitive Products.....	50
Coated Fabrics' Advantages.....	53
Technological Developments	56

PRODUCTS

General	58
Nonrubber-Coated Fabrics.....	62
Vinyl-Coated Fabrics.....	65
Characteristics	67
Suppliers	68
Polyethylene-Coated Fabrics	68
Characteristics	70
Suppliers	70
Polytetrafluoroethylene-Coated Fabrics.....	71
Characteristics	72
Suppliers	73
Polypropylene-Coated Fabrics	73
Characteristics	74
Suppliers	75
Acrylic-Coated Fabrics	76
Applications	77
Suppliers	78

Polyurethane-Coated Fabrics.....	78
Characteristics	79
Suppliers	80
Pyroxylin-Coated Fabrics	81
Other.....	83
Rubber-Coated Fabrics	84
Polychloroprene-Coated Fabrics.....	87
Silicone-Rubber Coated Fabrics	88
Other.....	89
Fabric-Backed Wallcoverings	90
Characteristics	92
Suppliers.....	93

SUBSTRATES

General	94
Polyester	97
Nylon.....	100
Cotton	103
Other	106
Fiberglass.....	108
Fabric Blends	109
Nonwovens	109
All Other	110

MARKETS

General	112
Motor Vehicles.....	115
Industry Outlook	116
Coated Fabric Demand	118
Automobiles & Light Trucks.....	120
Airbags	124
Upholstery, Trim & Accessories	127
Auto Tops & Light Truck Covers	130
Medium & Heavy Trucks & Buses.....	132
Truck Covers & Sides.....	135
Upholstery, Trim & Other.....	138
Marine & Other Non-Motor	139
Vehicle Transportation	139
Industry Outlook	140
Coated Fabric Demand	142
Marine Equipment	144
Tops & Covers.....	146
Sails	146
Upholstery	147
Inflatable Boats	147
Suppliers	148
Other Transportation Equipment	149
Protective Clothing	150
Applications	154
Materials	155
Technological Developments.....	157

Furniture	159
Industry Outlook	160
Coated Fabric Demand	162
Applications	165
Suppliers	166
Industrial	167
Nonresidential Fixed Investment	168
Coated Fabric Demand	170
Applications	172
Suppliers	173
Wallcoverings	174
Industry Outlook	174
Coated Fabric Demand	177
Characteristics	181
Nonresidential	182
Residential.....	183
Suppliers	184
Books	185
Industry Outlook	186
Coated Fabric Demand	188
Types	191
Suppliers	192
Commercial & Rental Tents	192
Awnings & Canopies	196
Building Construction Outlook	197
Coated Fabric Demand	199
Markets	201
Materials.....	202
Other Markets.....	204
Clothing.....	205
Flags & Banners	206
Geosynthetics	207
Printing Blankets	208
Recreational Products.....	209
Roofing Fabrics	209
Tarpaulins	211
Travelware.....	212
All Other Markets.....	213

INDUSTRY STRUCTURE

General	214
Industry Composition	215
Market Share	219
Competitive Strategies.....	226
Research & Development.....	228
Manufacturing	229
Marketing	231
Distribution	234
Cooperative Agreements.....	236
Mergers & Acquisitions.....	238

(continued on next page)

Table of Contents

(continued from previous page)

COMPANY PROFILES

Bayer AG	241
Beckmann Converting	242
Berry Plastics	243
Blue Mountain Wallcoverings	245
BondCote Corporation	246
Bradford Industries	248
Canadian General-Tower	249
Chemprene Incorporated	251
Cooley Group	252
DuPont (EI) de Nemours.....	255
Fiberweb plc	259
Forbo Holding	261
Gore (WL) & Associates	262
Haartz Corporation	264
Hallwood Group	266
Herculite Products.....	269
Holliston LLC.....	271
International Textile.....	274
Johnston Textiles.....	276
Koch Industries	277
Kuraray Company	278
Leggett & Platt.....	279
Morbern Incorporated	280
OMNOVA Solutions.....	281
Polymer Group	284
Saint-Gobain	286
Seaman Corporation	290
Shawmut Corporation	292
Spradling International.....	294
Taconic Corporation.....	295
Takata Corporation	296
Trelleborg AB	298
Twitchell Corporation.....	299
Uniroyal Engineered Products.....	300
Zodiac SA	302
Additional Coated Fabric Companies.....	304

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators	9
2 Manufacturers' Shipments	12
3 Textile Industry Shipments	15
4 Consumer Spending Indicators.....	17
5 Demographic Indicators	20

COATED FABRIC OVERVIEW

1 Coated Fabric Supply & Demand.....	27
2 Coated Fabric Market, 1997-2007.....	30
Cht Coated Fabric Market, 1997-2007.....	30
3 Coated Fabric Pricing	33
Cht Coated Fabric Demand by Region, 2007 ...	35
4 Foreign Trade in Coated Fabrics	41
Cht Coated Fabric Exports by Destination, 2007	43
Cht Coated Fabric Imports by Source, 2007	45
5 Advantages & Disadvantages of Coated Fabrics	56

PRODUCTS

1 Coated Fabric Supply & Demand by Product	61
Cht Coated Fabric Demand by Type, 2007.....	62
2 Nonrubber-Coated Fabric Supply & Demand.....	64
Cht Nonrubber-Coated Fabric Imports & Exports, 1997-2017.....	65
3 Vinyl-Coated Fabric Demand.....	66
4 Polyethylene-Coated Fabric Demand	69
5 Polytetrafluoroethylene- Coated Fabric Demand	71
6 Polypropylene-Coated Fabric Demand.....	74
7 Acrylic-Coated Fabric Demand	76
8 Polyurethane-Coated Fabric Demand.....	79
9 Pyroxilin-Coated Fabric Demand	82
10 Other Nonrubber-Coated Fabric Demand...	83
11 Rubber-Coated Fabric Supply & Demand...	86
Cht Rubber-Coated Fabric Imports & Exports, 1997-2017.....	87
12 Fabric-Cacked Wallcovering Supply & Demand.....	92

SUBSTRATES

1 Coated Fabric Demand by Substrate.....	96
--	----

Cht Coated Fabric Demand by Substrate, 2007	97
2 Coated Polyester Fabric Demand by Market	100
3 Coated Nylon Fabric Demand by Market..	103
4 Coated Cotton Fabric Demand by Market	106
5 Other Coated Fabric Demand by Market..	107

MARKETS

1 Coated Fabric Demand by Market	114
Cht Coated Fabric Demand by Market, 2007..	115
2 Motor Vehicle Indicators.....	118
3 Motor Vehicle Market for Coated Fabrics.	120
4 Light Vehicle Market for Coated Fabrics..	123
Cht Light Vehicle Market for Coated Fabrics, 1997-2017	124
Cht Light Vehicle Upholstery, Trim & Accessories Market for Coated Fabrics, 2007	130
5 Medium & Heavy Truck & Bus Market for Coated Fabrics	134
Cht Medium & Heavy Truck & Bus Market for Coated Fabrics, 1997-2017	135
6 Marine & Other Non-Motor Vehicle Transportation Equipment Outlook	142
7 Marine & Other Non-Motor Vehicle Transportation Equipment	144
8 Protective Clothing Market for Coated Fabrics	153
9 Furniture Shipments	161
10 Furniture Market for Coated Fabrics	164
11 Nonresidential Fixed Investment.....	170
12 Industrial Market for Coated Fabrics	172
13 Wallcovering Shipments.....	177
14 Wallcovering Market for Coated Fabrics ..	180
Cht Wallcovering Market for Coated Fabrics by Application, 1997-2017	181
15 Book Publishing & Printing Shipments...	188
16 Book Market for Coated Fabrics.....	190
17 Commercial & Rental Tent Market for Coated Fabrics	196
18 Building Construction Expenditures	199
19 Awning & Canopy Market for Coated Fabrics	201
20 Other Markets for Coated Fabrics.....	205

INDUSTRY STRUCTURE

1 Coated Fabric Sales by Company, 2007...	218
Cht Coated Fabric Market Share, 2007	221
2 Selected Cooperative Agreements.....	238
3 Selected Acquisitions & Divestitures.....	240

[Click here to purchase online](#)

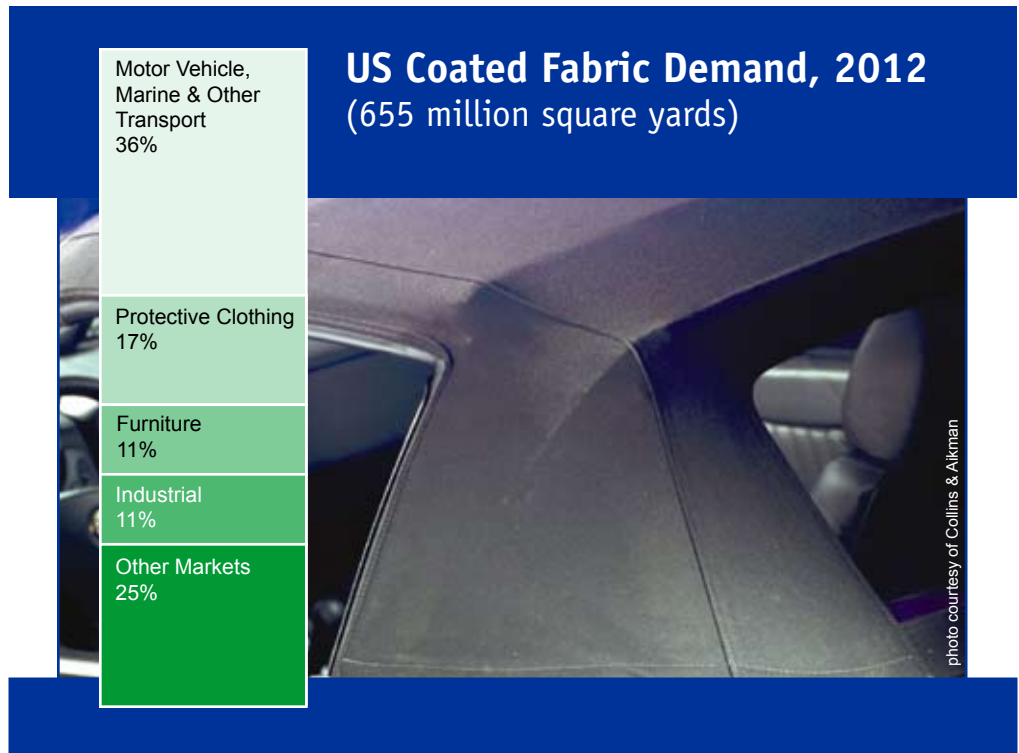
Sales of coated fabrics through 2012 will be spurred by a rebound in motor vehicle production (from a weak base), rising protective clothing output and growth in building construction.

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.



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 degrada-

tion 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.

Copyright 2009 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

PRODUCTS

Rubber-Coated Fabrics

Sales of rubber-coated fabrics in the US market will increase 1.5 percent annually to \$1.5 billion by 2012, up from \$1.4 billion in 2007. Advances in technology during the 2000s improved the performance of rubber-coated fabrics, and this improvement over the next five years will be significant. Demand will be supported by a recovery in motor vehicle production, as well as by an increase in the number of airbags per vehicle. Growing protective clothing applications for rubber-coated fabrics are a significant factor in increasing shipments and nonresidential fixed investment will bolster demand for industrial rubber-coated fabric products such as conveyor belts.

**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 increasingly imported from Latin America and Asia, where manufacturers benefit from lower labor costs and other advantages. US manufacturers' shipments of rubber-coated fabrics will advance less than one percent per year through 2012, edging to \$1.5 billion, trailing demand growth.

84

Copyright 2009

TABLE V-3

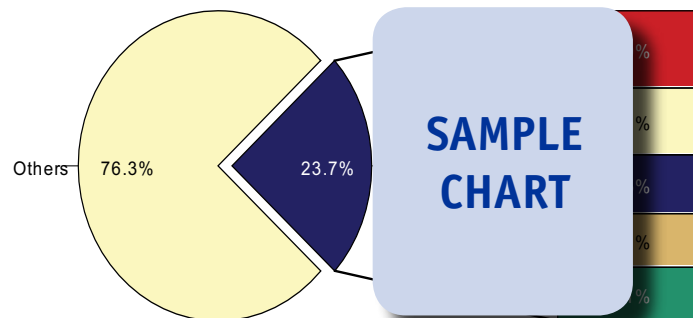
COATED NYLON FABRIC DEMAND BY MARKET
(million square yards)

Item	1997	2002	2007	2012	2017
Manufacturers' Shipments (bil 2000\$) 3000 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**

CHART VII-1

COATED FABRIC MARKET SHARE, 2007
(\$2.6 billion)



**SAMPLE
CHART**

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\$)	157	157	157	157	157
sq yds fabric/000\$ shpts	157	157	157	157	157
Non-MV Trans Coated Fab Demand				49	49
By Application:					
Marine Equipment				31	31
Other Transportation Equipment				18	18
By Fabric:					
Coated Polyester				34	34
Coated Nylon				9	9
Other Coated Fabrics				6	6
% other transport				9	9
Coated Fabric Demand	5	5	5	15	15



COMPANY PROFILES

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

Annual Sales
 Employment

Key Products
 marine, graphic printing, architectural

Her...
 Compan...
 vania), a

SAMPLE PROFILE

...ilitary, industrial, are use

...layered fabrics. The Emigsville, Pennsylv-

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 scrim 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

269 Copyright 2009 The Freedonia Group, Inc.

"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 after-market exists."
 --Section VI, pg. 142

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2300, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2448

Coated Fabrics \$4800

Corporate Use License (add to study price) * + \$2300

Additional Print Copies @ \$500 each * Total (including selected option) \$_____

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card # [input boxes]

Expiration MM [input] YY [input]

Signature _____

Name _____

Title _____

Company _____

Division _____

Street (No PO Box please)

City/State/Zip _____

Country _____

Phone _____ Fax _____

Email _____

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature _____

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2300; one additional user, add \$500; two additional users, add \$1000; three additional users, add \$1500.

Signature _____

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)