World Nonwovens

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

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

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INDUSTRY STRUCTURE

China alone will account for 38 percent of all additional nonwoven fabric demand through 2012 and will surpass the US to become the largest nonwovens market in the world.

Global demand to climb 6.9% yearly through 2012

Global demand for nonwoven fabrics is forecast to climb 6.9 percent annually through 2012 to eight million metric tons. Product sales will grow somewhat faster in area terms, rising 7.2 percent per year to 172 billion square meters, reflecting a modest decrease in average nonwovens weight. This will be due primarily to increased demand in developing areas for a variety of lighter weight disposable nonwoven products, supported by manufacturers' efforts to make them more affordable and technological advances that are making new generations of nonwoven fabrics lighter. Sales of nonwovens will expand at a slower 6.1 percent annual rate through 2012, because of a decline in average prices.

Market gains in developing areas to grow fastest

Market gains in developing parts of Asia/ Pacific, Eastern Europe, Africa/Mideast and Latin America will outpace demand in the US, Western Europe and Japan. Product sales in developing areas will be fueled by above-average economic growth, ongoing industrialization efforts and rising living standards. China alone will account for 38 percent of all additional demand through 2012 and will surpass the US to become the largest nonwoven fabric market in the world. Advances are also expected to be healthy in lower-volume markets such as India, Turkey, Russia and Brazil.

Sales of roll goods in developed parts of the world will expand as well. Nonwovens demand will be stimulated by improved economic climates and higher per capita income, resulting in increased manufacturing output and consumer spending, which will boost product sales through 2012. However, new housing starts are expected to remain well below earlier peaks in the US and Japan, and the same will be true for motor vehicle output in most developed nations, limiting associated nonwoven fabric demand. In addition, population levels will be flat or edge down in some European countries, preventing sales of nonwovens used in consumer products from climbing at a faster rate.

Spunmelt nonwovens to post strongest gains

Spunmelt nonwoven fabrics, which accounted for the single largest share of total demand in 2007, will also post the strongest gains through 2012, driven by growth in the use of disposable medical garments and textiles, rising consumption of composite spunbonded/meltblown nonwoven fabrics that combine the performance advantages of each, and greater penetration of markets now served by competitive products. Demand for airlaid nonwovens will also expand at an above-average pace. Airlaid products are generally less expensive than competitive materials, and suppliers will benefit from their increased use.

Sample Text, Table & Chart

ASIA/PACIFIC

India: Nonwoven Fabric Outlook & Suppliers

Looking forward, the market for nonwovens in India
climb
00 metr
the str
e. Sales
will b
associa
upgra
items
geote
cipation
the wo
also lead
consumption of a broad array of convenience-type consum
contributing to increases in related nonwoven fabric demai
as greater medical/surgical nonwovens use. However, the r
births will edge down, and much of the nation's population
extremely poor and unable to afford nonessential products
posable diapers, limiting market advances through 2012.

SAMPLE TEXT

India's nonwoven fabric production will increase at a annual pace to 195,000 metric tons in 2012, growing faster than the regional average and outperforming domestic demand. The industry will benefit from additional investment in local manufacturing facilities by foreign multinationals, bolstering output gains. Ahlstrom, for example, is constructing a spunmelt nonwovens plant in Gujarat to make medical products, with manufacturing operations expected to begin by the end of 2009. In addition, the Indian government plans to invest in 20 nonwoven and technical textile research centers by 2012, which will improve the production capabilities of domestic suppliers, and is setting up 14 Special Economic Zones (SEZs) that will focus on textile-related activities. These SEZs will provide duty-free imports and domestic procurement for goods that are exported, further boosting nonwoven fabric industry output. Competition from foreign suppliers will act as a counterbalance, preventing production from rising at a stronger rate and resulting in further expansion of the country's trade deficit.

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TABLE VI-8

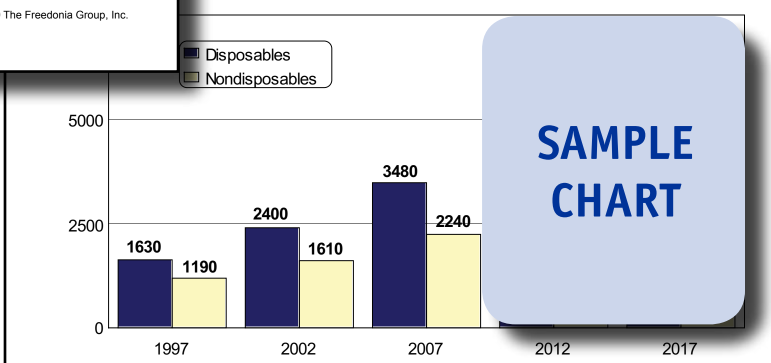
INDIA - NONWOVEN FABRIC DEMAND BY WEB FORMATION PROCESS & MARKET (thousand metric tons)

Item	1997	2002	2007	2012	2017
Nonwoven Fabric Demand					
By Web Formation Process:					
Spunmelt					
Carded					
Airlaid					
Wetlaid					
By Market:					
Personal Hygiene					
Wipes					
Construction					
Filtration					
Medical/Surgical					
Other					
% India					
Asia/Pacific Nonwoven Fabric Demand	8				

SAMPLE TABLE

CHART III-6

NONWOVEN FABRIC DEMAND BY APPLICATION (thousand metric tons)



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Sample Profile, Table & Chart

TABLE VI-7

INDIA - NONWOVEN FABRIC SUPPLY & DEMAND
(thousand metric tons)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006$)					
per capita GDP					
Population (mil persons)					
65 Years & Older					
% 65 Years & Older					
Female Population (mil persons)					
15-49 Years					
% 15-49 Years					
births/000 women age 15-49					
Live Births (mil)					
Manufacturing Value Added (bil 2006$)					
Textile Fiber Demand					
kg nonwovens/mil$ GDP					
kg nonwovens/capita					
kg nonwovens/kg textile fibers					
Nonwoven Fabric Demand					
net exports					
Nonwoven Fabric Production					
% India					
Asia/Pacific Nonwovens Production					

SAMPLE TABLE

COMPANY PROFILES

Fibertex A/S
Svendborgvej Two
9220 Aalborg
Denmark
45-9635-3535
http://w

Sales: $ ... lskabet
Employ ... kabet S

Key Pr ... own no

Fi ... d spun
vens fo ... ions. T
operates ... Personal Care. Fibertex is owned by Aktieselskabet Schouw & Company (Denmark).

SAMPLE PROFILE

The Company participates in the world nonwoven fabric i... try through both divisions. The Technical division, which had 2... sales of $107 million, including eliminations, makes needlepun... nonwovens for a wide range of automotive, construction, filtrat... furniture, flooring, geotextile and horticultural end uses. For ex... products for automotive end uses include FIBERBACK high st... FIBERMOULD high-performance, FIBERLAY noise-reductio... enhanced adhesion and FIBERACOUSTIC acoustic-control ty...

Fibertex's Technical division has production activities in D... and the Czech Republic. In 2008, the Company completed a pr... enhance these facilities. In Denmark, a high-capacity needlepun... duction line was added to the site in Aalborg to replace older e... while an air-lay line was added to the plant in the Czech Repub...

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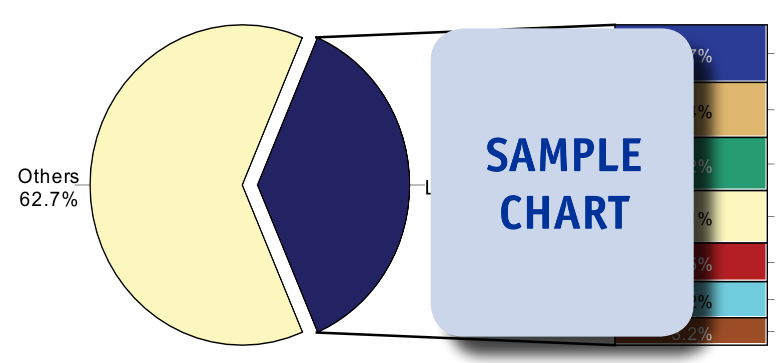
CHART VIII-1

WORLD NONWOVEN FABRIC MARKET SHARE BY COMPANY, 2007
($21.2 billion)



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Other Studies

Wipes

Demand for wipes in the US is forecast to increase 3.9% per annum through 2013. Wipes will continue to benefit from features such as ease-of-use, disposability, portability, and reduced risk of cross-contamination. Baby wipes will remain the top selling type while newer, task-specific wipes in non-diaper applications grow faster. This study analyzes the $1.9 billion US wipes industry, with forecasts for 2013 and 2018 by market, substrate, and chemical. It also evaluates company market share and profiles industry players.

#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

Filters in China

Demand for filters in China will jump 14.4% annually through 2011. Air filters will post the fastest gains, spurred by rising output of products that include filters or are made in clean-air factories. The motor vehicle market will remain dominant while the water and waste treatment segment of the utilities and consumer markets grows the fastest. This study analyzes the ¥20.9 billion Chinese filter industry, with forecasts for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players

#2310 .... 05/2008..................... $5100

World Filters

Global filter demand will climb 5.6% annually through 2011. Developing areas will lead gains based on faster-growing economies and the enactment of stricter environmental laws. China, India and Russia will post some of the strongest sales growth. Air and fluid filters will be the fastest growing types. This study analyzes the $37 billion world filter industry, with forecasts for 2011 and 2016 by product, market, world region and for 26 countries. It also evaluates company market share and profiles major players.

#2295 .... 03/2008..................... $5800

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