



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

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

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

[Order Form 7](#)

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World Nonwovens

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

Study #2482 | March 2009 | \$5600 | 385 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Economic Performance	5
World Economic Outlook	7
World Demographic Trends	10
Population	11
Female Population	13
Households	16
World Manufacturing Outlook	18
World Filter Shipments	19
World Health Expenditures	21
World Construction Trends	23
World Textile Fibers Outlook	25
Pricing Patterns	28
Nonwoven Fabric Technological Developments	30
Competitive Materials	32
Legal & Regulatory Environment	34

WORLD SUPPLY & DEMAND

General	37
Regional Overview	38
Demand	40
Production	45
International Trade	47
Demand by Web Formation Process	49
Spunmelt	50
Carded	53
Airlaid	56
Wetlaid	58
Demand by Application	60
Disposables	62
Nondisposables	64
Demand by Market	66
Personal Hygiene	68
Wipes	70
Construction	73
Filtration	75
Medical/Surgical	77
Other	79

NORTH AMERICA

General	82
Nonwoven Fabric Supply & Demand	83
Nonwoven Fabric Outlook & Suppliers	85
United States	88
Canada	95
Mexico	99

WESTERN EUROPE

General	105
Nonwoven Fabric Supply & Demand	106
Nonwoven Fabric Outlook & Suppliers	109
Germany	112

United Kingdom	117
France	122
Italy	126
Spain	131
Netherlands	136
Belgium	141
Other Western Europe	146

ASIA/PACIFIC

General	152
Nonwoven Fabric Supply & Demand	154
Nonwoven Fabric Outlook & Suppliers	156
China	159
Japan	166
India	171
South Korea	176
Taiwan	180
Other Asia/Pacific	186

OTHER REGIONS

Latin America	191
Brazil	196
Other Latin America	200
Eastern Europe	205
Russia	212
Poland	216
Other Eastern Europe	221
Africa/Mideast	226
Turkey	233
Other Africa/Mideast	237

INDUSTRY STRUCTURE

General	243
Industry Composition	244
Market Share	247
Competitive Strategies	251
Research & New Product Development	253
Manufacturing	255
Marketing & Distribution	257
Cooperative Agreements	259
Mergers & Acquisitions	262

COMPANY PROFILES

Ahlstrom Corporation	266
Albis SpA	270
Andrew Industries	271
Asahi Kasei	274
Avgol Industries	276
Berkshire Hathaway	278
Buckeye Technologies	281
Companhia Providencia Industria e Comercio	282
Concert Industries	283
DuPont (EI) de Nemours	285
Fibertex A/S	289
Fiberweb plc	291
First Quality Enterprises	295
Foss Manufacturing	296
Freudenberg & Company	298
Guangdong Jofo Group	304

Hollingsworth & Vose	306
Holm (Jacob) & Sons	309
Japan Vilene	310
Kimberly-Clark Corporation	313
Koch Industries	318
Low & Bonar	320
Lydall Incorporated	323
Milliken & Company	326
Mitsui Chemicals	328
Owens Corning	329
Pegas Nonwovens	331
Petropar SA	333
Polymer Group	335
Propex Incorporated	339
Royal Ten Cate	341
Sandler AG	343
Suominen Corporation	345
Toray Industries	347
Toyobo Company	348
TWE Group	350
Vita Group	352
Other Companies Mentioned in Study	354

List of Tables/Charts

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region	10
2 World Population by Region	13
3 World Female Population by Region	15
Cht World Female Population	16
4 World Households by Region	17
5 World Manufacturing Value Added by Region	19
6 World Filter Shipments by Region	21
7 World Health Expenditures by Region	23
8 World Construction Expenditures by Type & Region	25
9 World Textile Fiber Demand by Region	27
Cht World Textile Fiber Demand by Region, 2007	28
Cht Nonwoven Fabric Pricing, 1997-2007	30

WORLD SUPPLY & DEMAND

1 World Nonwoven Fabric Market Environment	39
2 World Nonwoven Fabric Demand by Region	42
Cht World Nonwoven Fabric Demand by Region, 2007	43
Cht Additional Nonwoven Fabric Demand - 2012 vs. 2007	43
Cht World Nonwoven Fabric Demand in Metric Tons - Projected 2007-2012 Annual Rate of Growth	44
3 World Nonwoven Fabric Production by Region	46
Cht World Nonwoven Fabric Production by Region, 2007	47

(continued on next page)

List of Tables/Charts

(continued from previous page)

4	World Nonwoven Fabric Net Exports by Region	48
5	World Nonwoven Fabric Demand by Web Formation Process	50
Cht	World Nonwoven Fabric Demand by Web Formation Process, 2007	50
6	World Spunmelt Nonwoven Fabric Demand by Region	53
7	World Carded Nonwoven Fabric Demand by Region	56
8	World Airlaid Nonwoven Fabric Demand by Region	58
9	World Wetlaid Nonwoven Fabric Demand by Region	60
10	World Nonwoven Fabric Demand by Application	61
Cht	World Nonwoven Fabric Demand by Application	62
11	World Demand for Nonwoven Fabrics Used in Disposable Applications by Region	64
12	World Demand for Nonwoven Fabrics Used in Non-disposable Applications by Region	66
13	World Nonwoven Fabric Demand by Market	67
Cht	World Nonwoven Fabric Demand by Market, 2007	68
14	World Personal Hygiene Market for Nonwoven Fabrics by Region	70
15	World Wipes Market for Nonwoven Fabrics by Region	72
16	World Construction Market for Nonwoven Fabrics by Region	74
17	World Filtration Market for Nonwoven Fabrics by Region	77
18	World Medical/Surgical Market for Nonwoven Fabrics by Region	79
19	World Demand for Nonwoven Fabrics in Other Markets by Region	81

NORTH AMERICA

1	North America - Nonwoven Fabric Supply & Demand	84
Cht	North America - Nonwoven Fabric Demand by Country, 2007	85
2	North America - Nonwoven Fabric Demand by Web Formation Process, Application & Market	87
3	United States - Nonwoven Fabric Supply & Demand	91
4	United States - Nonwoven Fabric Demand by Web Formation Process, Application & Market	94
5	Canada - Nonwoven Fabric Supply & Demand	97
6	Canada - Nonwoven Fabric Demand by Web Formation Process & Market	99
7	Mexico - Nonwoven Fabric Supply & Demand	102
8	Mexico - Nonwoven Fabric Demand by Web Formation Process & Market	104

WESTERN EUROPE

1	Western Europe - Nonwoven Fabric Supply & Demand	108
Cht	Western Europe - Nonwoven Fabric Demand by Country, 2007	109
2	Western Europe - Nonwoven Fabric Demand by Web Formation Process, Application & Market	111
3	Germany - Nonwoven Fabric Supply & Demand	114
4	Germany - Nonwoven Fabric Demand by Web Formation Process & Market	116
5	United Kingdom - Nonwoven Fabric Supply & Demand	119
6	United Kingdom - Nonwoven Fabric Demand by Web Formation Process & Market	121
7	France - Nonwoven Fabric Supply & Demand	124
8	France - Nonwoven Fabric Demand by Web Formation Process & Market	126
9	Italy - Nonwoven Fabric Supply & Demand	129
10	Italy - Nonwoven Fabric Demand by Web Formation Process & Market	131
11	Spain - Nonwoven Fabric Supply & Demand	134
12	Spain - Nonwoven Fabric Demand by Web Formation Process & Market	136
13	Netherlands - Nonwoven Fabric Supply & Demand	139
14	Netherlands - Nonwoven Fabric Demand by Web Formation Process & Market	141
15	Belgium - Nonwoven Fabric Supply & Demand	144
16	Belgium - Nonwoven Fabric Demand by Web Formation Process & Market	146
17	Other Western Europe - Nonwoven Fabric Supply & Demand	149
18	Other Western Europe - Nonwoven Fabric Demand by Web Formation Process & Market	151

ASIA/PACIFIC

1	Asia/Pacific - Nonwoven Fabric Supply & Demand	155
Cht	Asia/Pacific - Nonwoven Fabric Demand by Country, 2007	156
2	Asia/Pacific - Nonwoven Fabric Demand by Web Formation Process, Application & Market	158
3	China - Nonwoven Fabric Supply & Demand	162
4	China - Nonwoven Fabric Demand by Web Formation Process, Application & Market	165
5	Japan - Nonwoven Fabric Supply & Demand	168
6	Japan - Nonwoven Fabric Demand by Web Formation Process, Application & Market	170
7	India - Nonwoven Fabric Supply & Demand	173
8	India - Nonwoven Fabric Demand by Web Formation Process & Market	175
9	South Korea - Nonwoven Fabric Supply & Demand	178
10	South Korea - Nonwoven Fabric Demand by Web Formation Process & Market	180

11	Taiwan - Nonwoven Fabric Supply & Demand	183
12	Taiwan - Nonwoven Fabric Demand by Web Formation Process & Market	185
13	Other Asia/Pacific - Nonwoven Fabric Supply & Demand	188
14	Other Asia/Pacific - Nonwoven Fabric Demand by Web Formation Process & Market	190

OTHER REGIONS

1	Latin America - Nonwoven Fabric Supply & Demand	193
2	Latin America - Nonwoven Fabric Demand by Web Formation Process, Application & Market	195
3	Brazil - Nonwoven Fabric Supply & Demand	198
4	Brazil - Nonwoven Fabric Demand by Web Formation Process & Market	200
5	Other Latin America - Nonwoven Fabric Supply & Demand	203
6	Other Latin America - Nonwoven Fabric Demand by Web Formation Process & Market	205
7	Eastern Europe - Nonwoven Fabric Supply & Demand	208
Cht	Eastern Europe - Nonwoven Fabric Demand by Country, 2007	209
8	Eastern Europe - Nonwoven Fabric Demand by Web Formation Process, Application & Market	211
9	Russia - Nonwoven Fabric Supply & Demand	214
10	Russia - Nonwoven Fabric Demand by Web Formation Process & Market	216
11	Poland - Nonwoven Fabric Supply & Demand	219
12	Poland - Nonwoven Fabric Demand by Web Formation Process & Market	221
13	Other Eastern Europe - Nonwoven Fabric Supply & Demand	224
14	Other Eastern Europe - Nonwoven Fabric Demand by Web Formation Process & Market	226
15	Africa/Mideast - Nonwoven Fabric Supply & Demand	229
16	Africa/Mideast - Nonwoven Fabric Demand by Web Formation Process, Application & Market	232
17	Turkey - Nonwoven Fabric Supply & Demand	235
18	Turkey - Nonwoven Fabric Demand by Web Formation Process & Market	237
19	Other Africa/Mideast - Nonwoven Fabric Supply & Demand	240
20	Other Africa/Mideast - Nonwoven Fabric Demand by Web Formation Process & Market	242

INDUSTRY STRUCTURE

1	Nonwoven Fabric Sales for Selected Manufacturers, 2007	246
Cht	World Nonwoven Fabric Market Share by Company, 2007	247
2	Selected Cooperative Agreements	260
3	Selected Acquisitions & Divestitures	264

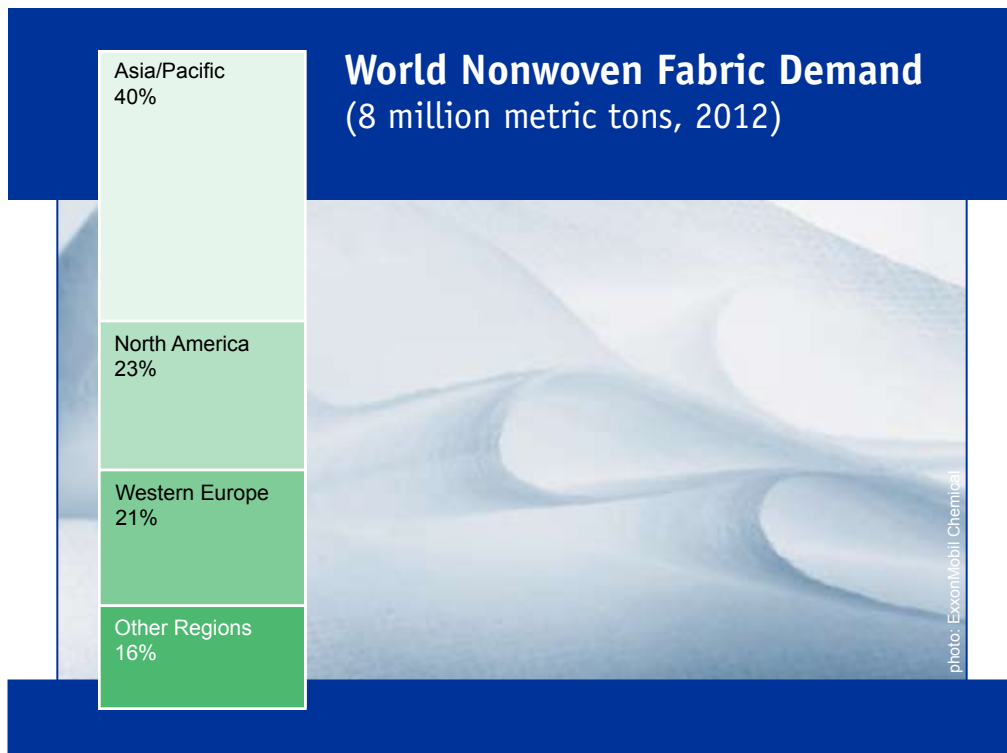
China alone will account for 38 percent of all additional nonwoven fabric demand through 2012 and will surpass the US to become the largest nonwovens market in the world.

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 will climb to 195,000 metric tons in 2012, up from 130,000 metric tons in 2007. Sales will be boosted by the growing association of nonwovens with upgraded infrastructure and items like geotextiles, geotextiles, and geotextiles. Participation in the world market will also lead to the consumption of a broad array of convenience-type consumer products contributing to increases in related nonwoven fabric demand, as greater medical/surgical nonwovens use. However, the population births will edge down, and much of the nation's population is extremely poor and unable to afford nonessential products like disposable diapers, limiting market advances through 2012.

India's nonwoven fabric production will increase at an 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.

TABLE VI-8

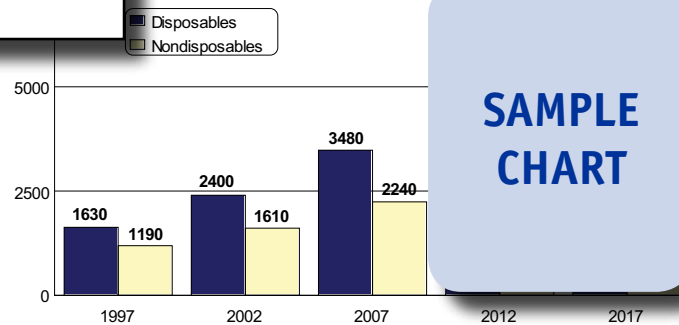
INDIA - NONWOVEN FABRIC DEMAND BY WEB FORMATION PROCESS & MARKET (thousand metric tons)

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 & Supply					

SAMPLE TABLE

CHART III-6

NONWOVEN FABRIC DEMAND BY APPLICATION (thousand metric tons)



SAMPLE CHART

Sample Profile, Table & Chart

COMPANY PROFILES

Fibertex A/S

Svendborgvej Two
 9220 Aalborg
 Denmark
 45-9635-3535
 http://www.fibertex.com

Sales: \$1,000 million
 Employment: 1,000

Key Products: Nonwovens

Fibertex A/S is a leading manufacturer of nonwovens and spun fibers for a wide range of applications. The company operates through two divisions: Technical and Personal Care. Fibertex is owned by Aktieselskabet Schouw & Company (Denmark).

The Company participates in the world nonwoven fabric industry through both divisions. The Technical division, which had 2007 sales of \$107 million, including eliminations, makes needlepunch nonwovens for a wide range of automotive, construction, filtration, furniture, flooring, geotextile and horticultural end uses. For example, products for automotive end uses include FIBERBACK high strength, FIBERMOULD high-performance, FIBERLAY noise-reduction and enhanced adhesion and FIBERACOUSTIC acoustic-control type.

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

TABLE VI-7
INDIA - NONWOVEN FABRIC SUPPLY & DEMAND
 (thousand metric tons)

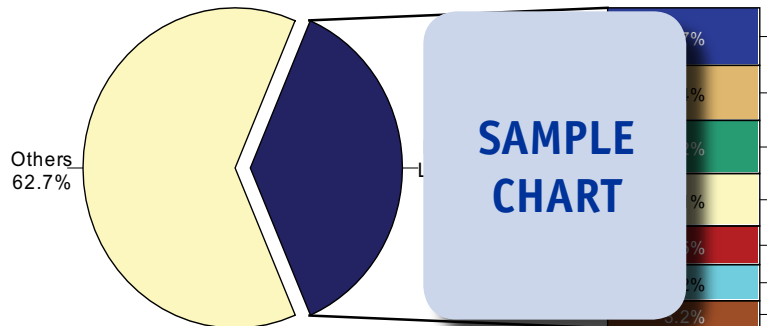
Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006\$)	140	180	200	220	240
per capita GDP	1	1	1	1	1
Population (mil persons)	1	1	1	1	1
65 Years & Older	4	4	4	4	4
% 65 Years & Older	4	4	4	4	4
Female Population (mil persons)	5	5	5	5	5
15-49 Years	5	5	5	5	5
% 15-49 Years	5	5	5	5	5
births/000 women age 15-49	1	1	1	1	1
Live Births (mil)	1	1	1	1	1
Manufacturing Value Added (bil 2006\$)	1	1	1	1	1
Textile Fiber Demand	4	4	4	4	4
kg nonwovens/mil\$ GDP	0	0	0	0	0
kg nonwovens/capita	0	0	0	0	0
kg nonwovens/kg textile fibers	0	0	0	0	0
Nonwoven Fabric Demand	1	1	1	1	1
net exports	0	0	0	0	0
Nonwoven Fabric Production	1	1	1	1	1
% India	0	0	0	0	0
Asia/Pacific Nonwovens Production	8	8	8	8	8

SAMPLE TABLE

SAMPLE PROFILE

CHART VIII-1

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



SAMPLE CHART

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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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