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Nonwovens

US Industry Study with Forecasts for **2013 & 2018**

Study #2559 | November 2009 | \$4900 | 350 pages

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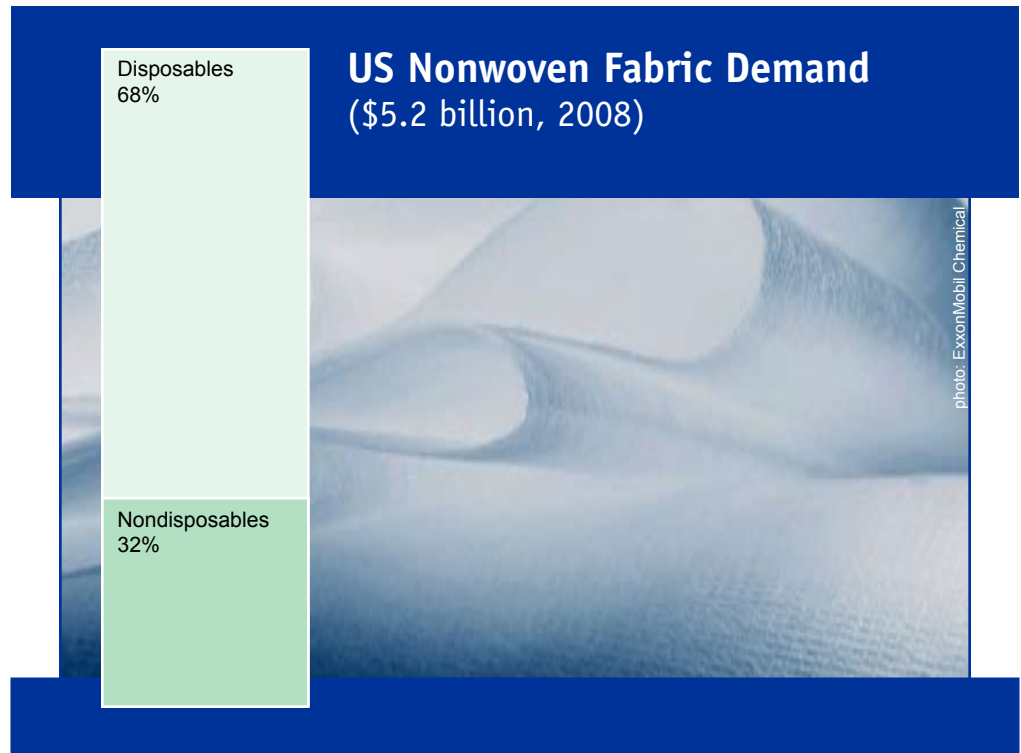
Gains will be driven by higher spending on wipes and other consumer disposables, and by an aging population that will require more medical/surgical and adult incontinence nonwovens.

US nonwoven fabric demand to rise 3.7% annually through 2013

Demand for nonwoven roll goods is projected to rise at a 3.7 percent annual rate to \$6.3 billion in 2013. US population, household and personal income growth will result in higher expenditures for wipes and other consumer disposables. The aging of the US population, leading to sizable increases in the number of people 65 years and older, will boost demand for nonwovens used in medical/surgical and adult incontinence products. A rebound in certain manufacturing sectors will also provide opportunities. On the other hand, the US represents a mature market for a number of nonwoven goods, including baby wipes and baby diapers, which will dampen overall sales gains through 2013, as will competition from other types of materials.

Spunmelt to remain largest product segment

Spunmelt will remain the largest product segment, accounting for 57 percent by value. Gains will be driven by good growth opportunities in the large spunbonded materials segment, as spunbonded nonwovens are the material of choice in major markets such as baby diapers. In addition, gains will benefit from increased penetration of markets now served by competitive products.



Meltblown nonwovens will benefit from greater use in the filtration market. Advances for carded nonwovens will be dampened by declining demand for chemical and thermal bonded varieties, as these materials have largely been replaced by spunbonded types in major markets like diaper cover stock. However, demand for nonwoven fabrics bonded by the spunlacing process, almost all of which are carded webs, will increase at an above-average rate through 2013, providing some offsetting support. These nonwovens are finding greater use in applications where consumer comfort is of primary importance.

Airlaid, wetlaid types face stiff competition

Gains in airlaid nonwovens will benefit from increased use in absorbent food pads, adult incontinence products, filters, various disposable medical supplies and wipes, but will be restrained somewhat by competition from other nonwoven fabrics. Wetlaid nonwoven fabrics also face stiff competition from other materials. However, heightened demand for better performing nonwoven materials in battery separators, filters and roofing, all of which use wetlaid glass nonwovens, will provide some impetus to future market gains.

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Sample Text, Table & Chart

DISPOSABLES MARKETS

Protective Apparel

Demand for nonwovens in disposable protective apparel to advance to \$1.5 billion in 2013. Growth will be promoted by technological advancements which will lead to better performance fabrics. Projected growth in pharmaceuticals, electronics from the electronic equipment manufacturing each of which requires dust or debris control. Further gains will be restrained by the introduction of lower cost materials, market and competition from nondisposable protective apparel in solutions. Additionally, rising imports of more inexpensive apparel from China, Mexico and Central America will inhibit US sales of protective apparel.

Although it is not suitable for all protective apparel applications, disposable nonwoven protective clothing is often preferred to reusable types where appropriate because it has lower initial costs. However, long term costs are not necessarily lower since nondisposable products can be cleaned and reused multiple times, but disposable products are used only once. There are also protective considerations. Disposable nonwovens provide better protection since there are no opportunities to contaminate other areas before the fabric is cleaned. Additionally, sometimes the chemical contaminants leach into the fabric matrix itself. In these instances, even after the fabric is cleaned, the chemical is potentially leaching out onto the other side and contaminating the wearer when the suit is put back on. Nonwovens also generally improve wearer comfort because the materials are breathable, lightweight and soft.

Key markets for nonwoven disposable protective clothing include emergency response, chemical handling, hazardous waste control, agriculture, food processing and clean room apparel. Although protective

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**SAMPLE
TEXT**

TABLE IV-1

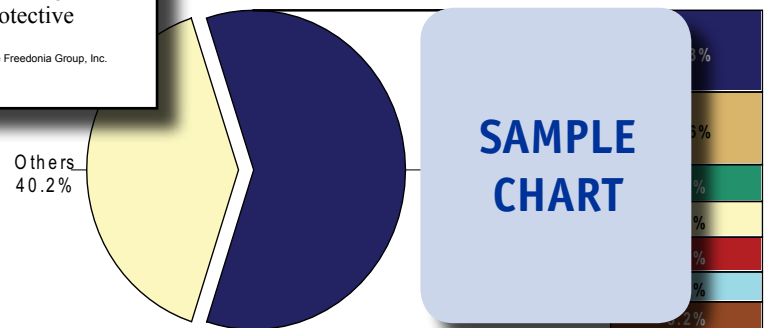
NONWOVEN FABRIC DEMAND BY WEB FORMATION PROCESS (million dollars)

Item	1998	2003	2008	2013	2018
Textile Mill Product Shipments (bil \$)	550	550	550	550	550
% nonwovens					
Nonwoven Fabric Shipments net exports					
Nonwoven Fabric Demand					
Spunmelt					
Carded					
Wetlaid					
Airlaid					
cents/sq yd					
Nonwoven Fabric Demand (mil sq yds)					
lbs/000 sq yd					
Nonwoven Fabric Demand (mil lbs)	1800	2100	2500	2800	2700

**SAMPLE
TABLE**

CHART VIII-1

NONWOVEN FABRIC MARKET SHARE, 2008 (\$5.2 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VII-9
FURNISHINGS DEMAND FOR NONWOVEN FABRICS
 (million dollars)

Item	1998	2003	2008	2013	2018
Furniture Shipments (bil \$)	6	6	6	6	2.8
\$ nonwovens/000\$ furniture	2	2	2	2	62
Furnishings Nonwovens Demand					00
By Application:					
Mattresses					95
Upholstered Furniture					73
Other					32
By Type:					
Spunbonded					14
Other Nonwovens					86
% furnishings					10
Nondisposables Nonwovens Demand	12	12	12	12	490



COMPANY PROFILES

Sabee (R.) Company LLC
 1718 West Eighth Street
 Appleton, WI 54914
 920-882-7350
<http://www.rsabeecompany.com>

Annual Sales:
 Employment:

Key Products: polypropylene and cellulose nonwoven materials.

R. Sabee manufactures nonwoven machinery and products for the pet care markets. The Company produces BLUE RIBBON and PICK OF THE LITTER crate liners using nonwoven materials. These liners are designed to be tear-resistant and absorbent. Other nonwoven pet care products from the Company include PICK OF THE LITTER disposable pet placemats featuring strong, absorbent tissue lined with a blended moisture-barrier poly; and BLUE RIBBON and PICK OF THE LITTER housetraining pads made with an absorbent, bonded construction designed to reduce top sheet separation and clumping.

SAMPLE PROFILE

“Spunbonded polypropylene and polyester are the nonwovens most widely used in the production of mattresses. Needlepunched nonwovens are used in applications, such as spring insulators, which require a heavier weight material. Demand for nonwovens in mattresses is expected to advance 3.4 percent per year to \$154 million in 2013.”

--Section VII, pg. 211

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OTHER STUDIES

World Filters

Global demand for filters is forecast to expand 5.1% annually through 2013. Market advances in the developing areas will considerably outpace increases in the US, Western Europe and Japan. Sales of air purification filters will be the fastest growing segment while internal combustion engine and related filters remain the largest. This study analyzes the \$45.5 billion world filter industry, with forecasts for 2013 and 2018 by product, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2568 11/2009..... \$6100

Filters

US demand for filters will rise 3.3% yearly through 2013, spurred in part by stricter environmental laws and more reclamation and recycling of production inputs to cut costs. Air filters will outpace fluid and internal combustion engine filters. Motor vehicles will remain the largest market while the utilities segment grows the fastest. This study analyzes the \$10.5 billion US filters industry, with forecasts for 2013 and 2018 by media, product and market. It also evaluates market share and profiles industry players.

#2524 08/2009..... \$4800

World Nonwovens

Global demand for nonwoven fabrics is forecast to rise 6.9% yearly through 2012. Gains in developing parts of Asia/Pacific, Eastern Europe, Africa/Mideast and Latin America will outpace demand in developed countries. Spunmelt nonwovens, the largest segment, will also grow the fastest. This study analyzes the \$21.2 billion world nonwovens industry, with forecasts for 2012 and 2017 by formation process, application, market, world region and for 19 national markets. It also evaluates market share and profiles industry players.

#2482 03/2009..... \$5600

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

World Textile Fibers

Global demand for manufactured fibers will rise 4.7% annually through 2012. Polyester will continue to dominate output while speciality 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

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