photo: Hangzhou Golden Lily Non-woven Coth Co., Ltd.

World Nonwovens

Industry Study with Forecasts for **2015 & 2020**

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INDUSTRY STRUCTURE

Growth rates in developing regions will remain higher than those projected for developed areas, primarily due to continued industrialization efforts and increasing personal income.

Global sales to rise 6.9% annually through 2015

Global sales of nonwoven fabrics are forecast to increase 6.9 percent annually to 9.3 million metric tons in 2015. This rate is a slight acceleration from the 2005-2010 period, but changes in demand growth vary widely on a regional basis. For the most part, developed areas are accelerating from the pace set between 2005 through 2010, reflecting a low base as global recessionary conditions restrained nonwoven fabric demand in 2008 and 2009 before improving somewhat in 2010. Growth rates in developing regions will remain higher than those projected for developed areas, primarily due to continued industrialization efforts and increasing personal income.

Markets in developing areas to outpace demand in developed countries

Market gains in developing parts of Asia, Eastern Europe, the Africa/Mideast region, and Central and South America will outpace gains 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 almost half of additional global volume demand through 2015. Lower-volume markets such as India and Brazil are also expected to achieve growth above the global average.

Sales of roll goods in developed parts of the world will expand as well. For instance, nonwovens demand in Western Europe will be stimulated by an improved economic climate and higher per capita incomes. However, 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 and airlaid nonwovens to lead gains

Spunmelt nonwoven fabrics, which passed carded fabrics to account for the largest share of total demand in 2010 with 44 percent, will post above-average gains through 2015. Growth will be driven by the greater use of disposable medical items, rising consumption of composite spunbonded/meltblown nonwoven fabrics that combine the performance advantages of each, and greater penetration of markets served by competitive products. Carded fabrics were the second largest segment in 2010 with 42 percent. Demand for airlaid nonwovens is projected to achieve the fastest growth through the forecast period, but from a much smaller base. Airlaid products are generally less expensive than competitive materials, and suppliers will benefit from increased use in absorbent food pads, adult incontinence products, filters, hospital bed pads, napkins, sanitary pads and wipes.

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Sample Text, Table & Chart

ASIA/PACIFIC

South Korea: Nonwoven Fabric Outlook & Supplier

Sales of nonwoven roll goods in South Korea are projec
at a
gain
acce
ing.
in ec
popu
provide opportunities for nonwoven adult incontinence and r
gical products. However, the number of females between the
and 49 will decline and births will be flat through 2015, limit
Korean demand for nonwoven fabrics used in personal hygie
Nevertheless, in 2010 Unicharm opened a factory for nonwo
ing hygiene products in South Korea. Further restraining der
nonwovens is the fact that manufacturing activity, such as loc
motor vehicles, is projected to slow.

SAMPLE TEXT

Nonwoven fabric production by plants in South Korea i
to increase 5.2 percent per annum to 290,000 metric tons in 2
the forecast pace for demand. Industry output will be driven
nonwovens demand domestically and in key export markets
and Japan). Local manufacturers' efforts to upgrade the qual
products will also contribute to output gains. However, com
from foreign suppliers will prevent production from expandi
rate. Nevertheless, output growth will be large enough to lea
ditional widening of the nation's trade surplus in nonwovens

Notable South Korean manufacturers of nonwoven fabr
Arim Industry, Hyupsung Fiber, NTpia, Sambo and Samil N
Fabric. Among the foreign firms with factories in the countr
strom, DuPont, Freudenberg and Japan Vilene (through a joi
arrangement), Kimberly-Clark and Toray Industries. Ahlstro

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TABLE VI-9

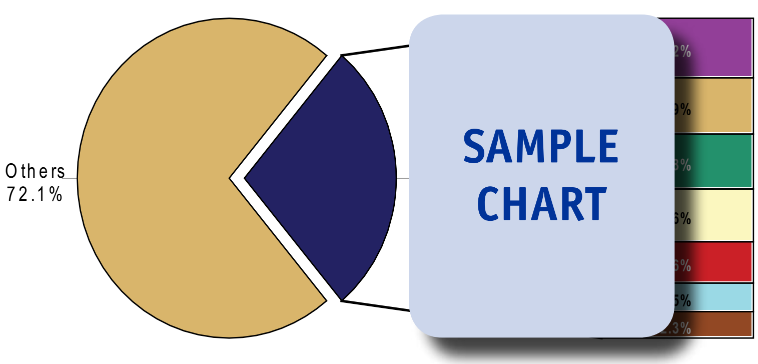
SOUTH KOREA -- NONWOVEN FABRIC SUPPLY & DEMAND
(thousand metric tons)

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009$)	95				
per capita GDP					0
Population (mil persons)					7
65 Years & Older					8
% 65 years & older					7
Female Population (mil persons)					0
15-49 Years					2
% 15-49 years					8
births/000 women age 15-49					9
Live Births (mil)					8
Manufacturing Value Added (bil 2009					4
Textile Fiber Demand					0
kg nonwovens/mil $ GDP					2
kg nonwovens/capita					4
kg nonwovens/kg textile fibers					9
Nonwoven Fabric Demand					0
net exports					0
Nonwoven Fabric Production					0
% South Korea					1
Regional Nonwoven Fabric Production	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]10

SAMPLE TABLE

CHART VIII-1

WORLD NONWOVEN FABRIC MARKET SHARE BY COMPANY
($27.3 billion, 2010)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE VI-10

SOUTH KOREA -- NONWOVEN FABBRIC DEMAND BY WEB FORMATION PROCESS & MARKET (thousand metric tons)

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
Nonwoven Fabric Demand					0
By Web Formation Process:					
Spunmelt					3
Carded					0
Airlaid					8
Wetlaid					9
By Market:					
Personal Hygiene					9
Wipes					7
Construction					0
Filtration					9
Medical/Surgical					5
Other					0
% South Korea					3
Asia/Pacific Nonwoven Fabric Demand	1093	1701	2805	4440	6950

COMPANY PROFILES

Fibertex Nonwovens A/S
Svendborgvej 16
Aalborg 9220
Denmark
45-96-35-3
http://www

SAMPLE PROFILE

Revenues: lska
Company)
Employme

Key Produ

Fibertex Nonwovens was formed in January 2011 following the spin-off of the Fibertex Industrial Nonwovens and Fibertex Personal Care divisions of Fibertex A/S (Denmark) by Aktieselskabet Schouw & Company (Denmark). At that time, the Fibertex Industrial Nonwovens division began operating as Fibertex Nonwovens, a manufacturer of needlepunched and spunmelt nonwovens for industrial and technical applications. The Company is owned by Aktieselskabet Schouw.

The Company is involved in the world nonwovens industry through the production of needlepunch nonwovens for a broad range of automotive, construction, filtration, furniture, flooring, geotextile and horticultural applications. For example, Fibertex Nonwovens' products for automotive end uses include FIBERBACK high-strength, FIBERMOULD high-performance, FIBERLAY noise-reduction, T1Z enhanced adhesion and FIBERACOUSTIC acoustic control types.

Fibertex Nonwovens carries out manufacturing operations in Denmark, the Czech Republic, France and South Africa. In Denmark,

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"South Korea is the third largest producer of nonwoven fabrics in the region behind China and Japan, with 2010 industry output of 225,000 metric tons. The country is also a net exporter of nonwovens, running a trade surplus equivalent to 22 percent of domestic production in 2010. Important export markets include China, Japan, the US, Vietnam and Taiwan. Output gains have not been as strong as increases in local demand over the last decade, but they have been sufficient to allow South Korea to maintain a trade surplus."
--Section VI, pg. 202

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Other Studies

Filters

US filter demand is expected to increase 7.1 percent annually through 2015. Gains will be driven in part by ongoing aftermarket sales and the growing penetration of motor vehicle cabin air filters, diesel emissions filters, and home air and water filters. Demand for filters in the industrial and manufacturing market and key motor vehicle market will be among the fastest growing. This study analyzes the $8.9 billion US filter industry, with forecasts for 2015 and 2020 by media, product and market. The study also evaluates company market share and profiles industry players.

#2801 .... November 2011 .... $5100

Geosynthetics

US demand for geosynthetics is projected to advance 6.8 percent annually through 2015. Nonwoven and woven/knit geotextiles will remain the dominant segment and offer good growth prospects, driven by construction and transportation infrastructure markets. Geonets will achieve the fastest gains from a much smaller base. This study analyzes the 904 million square yard US geosynthetics industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2744 .... May 2011 .... $4900

Filters in China

Demand for filters in China is projected to grow 13.5 percent annually through 2014, supported by rapid growth in transportation equipment production and stocks, and by energy conservation and emission reduction regulations. Internal combustion engine filters will remain the dominant product segment and will post the strongest gains. This study analyzes the 35.2 billion yuan filter industry in China, with forecasts for 2014 and 2019 by type and market. The study also evaluates company market share and profiles 36 industry participants.

#2740 .... March 2011 .... $5300

Consumer Water Purification & Air Cleaning Systems

US demand for consumer water purification and air cleaning systems will rise 5.2 percent per year through 2014. Conventional filters will remain the dominant water purification system, while higher-value reverse osmosis and distillation systems grow the fastest. Electrostatic cleaners will lead gains in the air segment. This study analyzes the $1.3 billion US consumer water purification and air cleaning system industry, with forecasts for 2014 and 2019 by technology, product and regional market. It also evaluates company market share and profiles industry players.

#2720 .... March 2011 .... $5100

Wipes

US wipes demand will rise 4.3 percent annually through 2014. Growth will decelerate from the 2004 to 2009 period, due to maturing markets and a shift toward more environmentally friendly consumer goods and cleaning methods. Disinfectant and electrostatic wipes will be the fastest growing types, and the industrial market will outpace the consumer segment. This study analyzes the $1.8 billion US wipes industry, with forecasts for 2014 and 2019 by market, substrate and chemical. It also evaluates company market share and profiles industry participants.

#2697 ....December 2010 .... $4900

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