



[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 & Corporate
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[About Freedonia,
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Coated Fabrics

US Industry Study with Forecasts for **2011 & 2016**

Study #2936 | September 2012 | \$5100 | 321 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	4
Manufacturing Outlook.....	7
Textiles Outlook.....	11
Consumer Spending Trends	13
Demographics.....	16
Environmental/Regulatory Considerations	20

OVERVIEW

General	24
Supply & Demand.....	25
Historical Market Trends	27
Pricing Patterns	31
International Environment.....	33
World Supply & Demand	34
US Foreign Trade.....	37
Coating Processes	40
Gap Coating	41
Reverse-Roll Coating	42
Rotary Screen Coating.....	42
Other Coating Processes.....	43
Competitive Products.....	45
Coated Fabrics' Advantages.....	48
Technological Developments	50
Raw Materials.....	50

PRODUCTS

General	55
Polymer-Coated Fabrics	59
Vinyl-Coated Fabrics	62
Characteristics & Applications	65
Suppliers	66
Polyethylene-Coated Fabrics	67
Characteristics & Applications.....	68
Suppliers	69
Polyurethane-Coated Fabrics	69
Characteristics & Applications	71
Suppliers	72
Polypropylene-Coated Fabrics.....	72
Characteristics & Applications.....	73
Suppliers	74
Polytetrafluoroethylene-Coated Fabrics	74
Characteristics & Applications	76
Suppliers	77
Acrylic-Coated Fabrics.....	78
Characteristics & Applications.....	79
Suppliers	81
Other Polymer-Coated Fabrics.....	81

Rubber-Coated Fabrics	82
Polychloroprene-Coated Fabrics	84
Silicone Rubber-Coated Fabrics.....	85
Other Rubber-Coated Fabrics.....	86
Fabric-Backed Wallcoverings	87
Characteristics.....	88
Suppliers	90

SUBSTRATES

General	91
Polyester	93
Nylon.....	95
Cotton	97
Other Substrates	99
Fiberglass	100
Fabric Blends	102
Nonwovens	102
All Other Substrates	103

MARKETS

General	105
Motor Vehicles.....	109
Industry Outlook.....	110
Coated Fabric Demand	113
Light Vehicles.....	115
Airbags	119
Upholstery, Trim, & Accessories... ..	121
Auto Tops & Light Truck Covers	123
Medium & Heavy Trucks & Buses.....	125
Truck Covers & Sides.....	127
Upholstery, Trim, & Other.....	129
Marine & Other Non-Motor	130
Vehicle Transportation	130
Industry Outlook.....	131
Coated Fabric Demand	134
Marine Equipment	135
Tops & Covers.....	137
Sails	137
Upholstery.....	138
Inflatable Boats	139
Other Transportation Equipment.....	140
Protective Clothing	141
Applications.....	144
Materials	145
Technological Developments	147
Industrial	148
Nonresidential Fixed Investment.....	149
Coated Fabric Demand	151
Applications.....	153
Suppliers	154
Furniture	154
Industry Outlook.....	155
Coated Fabric Demand	157
Applications.....	159
Suppliers	161

Books	162
Industry Outlook.....	162
Coated Fabric Demand	163
Types	165
Suppliers	166
Commercial & Rental Tents	167
Wallcoverings	170
Industry Outlook.....	170
Coated Fabric Demand	172
Characteristics.....	174
Applications.....	175
Suppliers	177
Awnings & Canopies	177
Building Construction Outlook	178
Coated Fabric Demand	180
Applications.....	182
Materials	183
Other Markets.....	185
Clothing	186
Flags & Banners.....	187
Geosynthetics.....	188
Printing Blankets	189
Recreational Products	189
Roofing	190
Tarpaulins.....	191
Travelware	192
All Other Markets	192

INDUSTRY STRUCTURE

General	194
Market Share	197
Competitive Strategies.....	204
Research & Development.....	207
Manufacturing	208
Marketing	209
Distribution	213
Cooperative Agreements.....	214
Mergers & Acquisitions.....	217

COMPANY PROFILES

Autoliv Incorporated	221
Bayer AG	222
Beckmann Converting	224
Berry Plastics	225
Blue Mountain Wallcoverings	227
BondCote Corporation.....	228
Bradford Industries	231
Canadian General-Tower	233
China General Plastics.....	236
Cooley Group.....	237
Dash Multi-Corporation	240
DuPont (EI) de Nemours.....	241
Fiberweb plc	248
Forbo Holding	250

(continued on following page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

Gamma Holding	252
Glen Raven	255
Gore (WL) & Associates	256
Graniteville Specialty Fabrics	258
Haartz Corporation	260
Hallwood Group	263
Herculite Products	266
Holliston LLC.....	269
Hyosung Corporation	273
International Textile	275
Johnston Textiles	278
Koch Industries	279
Kuraray Company	281
Morbern Incorporated	282
Nassimi LLC.....	283
OMNOVA Solutions.....	284
Polymer Group	288
Saint-Gobain	291
Seaman Corporation	295
Shawmut Corporation	297
Spradling International.....	300
Takata Corporation	302
Tonoga Incorporated	304
Trelleborg AB	306
Twitchell Corporation.....	308
Uniroyal Engineered Products.....	309
Zodiac Aerospace	311
Zodiac Marine & Pool.....	312
Additional Companies in the Coated Fabric Industry.....	314

List of Tables

EXECUTIVE SUMMARY

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

MARKET ENVIRONMENT

1 Macroeconomic Indicators	7
2 Manufacturers' Shipments.....	11
3 Textile Mill Products Shipments.....	13
4 Personal Consumption Expenditures ..	16
5 Population & Households	20

OVERVIEW

1 Coated Fabric Supply & Demand	27
2 Coated Fabric Market, 2001-2011	30
3 Coated Fabric Pricing.....	33

4 Foreign Trade in Coated Fabrics	40
5 Coated Fabric Raw Material Demand ..	54

PRODUCTS

1 Coated Fabric Supply & Demand by Product	58
2 Polymer-Coated Fabric Supply & Demand.....	61
3 Vinyl-Coated Fabric Supply & Demand	65
4 Polyethylene-Coated Fabric Supply & Demand.....	68
5 Polyurethane-Coated Fabric Supply & Demand.....	70
6 Polypropylene-Coated Fabric Supply & Demand.....	73
7 Polytetrafluoroethylene-Coated Fabric Supply & Demand	76
8 Acrylic-Coated Fabric Supply & Demand.....	79
9 Other Polymer-Coated Fabric Supply & Demand.....	82
10 Rubber-Coated Fabric Supply & Demand.....	83
11 Fabric-Backed Wallcovering Supply & Demand.....	88

SUBSTRATES

1 Coated Fabric Demand by Substrate ..	92
2 Coated Polyester Fabric Demand by Market	95
3 Coated Nylon Fabric Demand by Market	97
4 Coated Cotton Fabric Demand by Market	99
5 Other Coated Fabric Demand by Market	100

MARKETS

1 Coated Fabric Demand by Market	108
2 Motor Vehicle Indicators	113
3 Motor Vehicle Market for Coated Fabrics	115
4 Light Vehicle Market for Coated Fabrics	118
5 Medium & Heavy Truck & Bus Market for Coated Fabrics	127
6 Marine & Other Non-Motor Vehicle Transportation Equipment Outlook	133
7 Marine & Other Non-Motor Vehicle Transportation Equipment Markets for Coated Fabrics.....	135
8 Protective Clothing Market for Coated Fabrics	143

9 Nonresidential Fixed Investment.....	151
10 Industrial Market for Coated Fabrics	152
11 Furniture Shipments	157
12 Furniture Market for Coated Fabrics .	159
13 Book Publishing/Printing Shipments	163
14 Book Market for Coated Fabrics	165
15 Commercial & Rental Tent Market for Coated Fabrics	170
16 Wallcovering Shipments	172
17 Wallcovering Market for Coated Fabrics.....	174
18 Building Construction Expenditures.	180
19 Awning & Canopy Market for Coated Fabrics	182
20 Other Markets for Coated Fabrics	186

INDUSTRY STRUCTURE

1 US Coated Fabric Sales by Company, 2011.....	196
2 Selected Cooperative Agreements ...	217
3 Selected Acquisitions & Divestitures	219

List of Charts

OVERVIEW

1 Coated Fabric Market, 2001-2011	31
2 World Coated Fabric Demand by Region, 2011	37

PRODUCTS

1 Coated Fabric Demand by Product, 2011	59
2 Polymer-Coated Fabric Demand by Type, 2011.....	62

SUBSTRATES

1 Coated Fabric Demand by Substrate, 2011.....	93
---	----

MARKETS

1 Coated Fabric Demand by Market, 2011	109
2 Light Vehicle Upholstery, Trim, & Accessories Market for Coated Fabrics, 2011	123

INDUSTRY STRUCTURE

1 Coated Fabric Market Share, 2011 ...	199
--	-----

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Gains will be driven by a rebound in motor vehicle production -- the largest market for coated fabrics -- as well as by rising manufacturing output and rebounding construction activity.

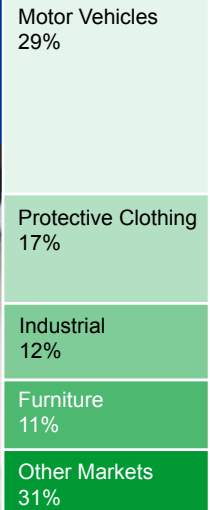
US demand to rise 3.5% annually through 2016

US demand for coated fabrics is forecast to increase 3.5 percent annually to 635 million square yards in 2016, an improvement from the declines of the 2006-2011 period. Gains will be driven by a rebound in motor vehicle production, the largest market for coated fabrics. In addition, renewed economic growth, rising manufacturing output, and rebounding construction activity will provide opportunities. Demand for coated fabrics is projected to expand faster in value terms than in area terms based on price increases. However, price increases are expected to moderate from the pace of the 2001-2011 period, when costs of certain raw materials, such as crude oil-based polymers, rose substantially. Greater competition from lower cost imports, especially from China, will also work to restrain pricing gains.

Coated polyester fabric to remain largest segment

Coated fabrics can be categorized based on the substrate or coating (or film) used. In 2011, coated polyester was the largest substrate category, comprising 46 percent of coated fabric demand in area terms. Sales of coated polyester will benefit from its low cost and versatility. While coated polyester is used in a variety of markets, the light vehicle, furniture, and industrial markets account for the largest share of sales. Through 2016, coated polyester will remain the

US Coated Fabric Demand, 2016 (635 million square yards)



largest substrate category, but coated nylon will achieve the fastest gains in sales. Demand for coated nylon will be promoted by its use in several fast growing markets, such as airbags and protective clothing.

Air bags to pace key motor vehicle market

In 2011, over one-fourth of all coated fabric demand was attributable to the motor vehicle market, based on applications such as airbags, upholstery, headlining, trim, tops, and covers. Airbags are projected to provide the best growth opportunities, driven by an increase in the number of airbags per vehicle -- partially due to government

regulations -- and the inclusion of more airbags into a larger number of vehicle types at varying price points.

Among other markets, those that are most closely tied to renewed construction activity (e.g., wallcoverings, furniture, and awnings and canopies) will achieve above average growth. The protective clothing market will also achieve above average gains, benefiting from accelerating manufacturing output, as processes in many industries (such as chemicals, pharmaceuticals, and electronics) require employees to wear protective gear. Ongoing spending on protective clothing for military personnel and first responders will also boost coated fabric demand.

Sample Text, Table & Chart

MARKETS

Airbags: In 2011, airbags accounted for a 56 percent share of the light vehicle market for coated fabrics, making airbags the largest segment of the light vehicle market. The number of airbags per vehicle has steadily increased since the mid-to-late-1980s, when they first became widely used. New vehicles today may include dual airbags, as well as side, head, knee, and even seat belt mounted airbags. Standard side airbags are mandated in the US, to comply with impact safety standards. A more complex set of side airbags (curtain airbags) which protect the occupant's head in the event of a side impact were required by a standard which was announced in 2007 and phased compliance in for most vehicles through September 2012. Even before the new regulation was announced, automakers had been ramping up installation of side-curtain airbags, with roughly 60 percent of 2006 model year passenger cars having these products. In 2010, all passenger cars had side-curtain airbags in the 2010 model year. In comparison, the market penetration of side-curtain airbags in light trucks and vans has been slower. Only 10 percent of all 2010 model years having these products. The penetration of side-curtain airbags in light trucks and vans over the 2006-2010 period was 10 percent.

Going forward, the demand for coated fabrics in airbags is forecast to increase to 1.1 billion square yards in 2016. Advances will be driven by the growing number of airbags per vehicle. Penetration rates of side-curtain airbags will continue to grow in light trucks and vans. These larger vehicles offer a greater opportunity for growth of coated fabrics in square yardage as they have more seating. In addition, automakers will continue to incorporate dual airbags, such as head, knee, and even seat belt mounted systems in passenger cars, light trucks, and vans. A rebound in the number of vehicles produced from declines posted during the 2006-2010 period also fuel gains in coated fabrics used in airbags

119

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**SAMPLE
TEXT**

TABLE VI-4

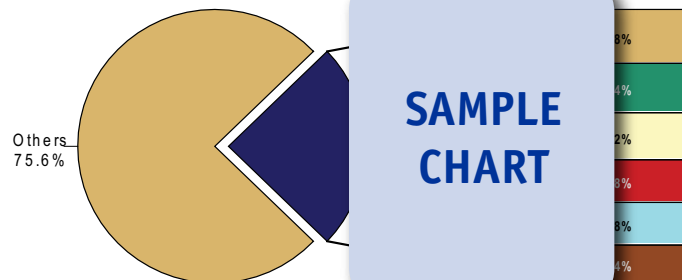
LIGHT VEHICLE MARKET FOR COATED FABRICS (million square yards)

Item	2001	2006	2011	2016	2021
Light Vehicle Production (000)	11	11	11	10	10
sq yds fabric/vehicle					
Light Vehicle Coated Fabric Demand					
By Application:					
Airbags					
Upholstery, Trim, & Accessories					
Upholstery & Sidewalls					
Headlining					
Other Trim & Accessories					
Auto Tops & Light Truck Covers					
By Fabric:					
Coated Nylon					
Coated Polyester					
Other Coated Fabrics					
% light vehicles					
MV Coated Fabric Demand	11	11	11	10	10

**SAMPLE
TABLE**

CHART VII-1

COATED FABRIC MARKET SHARE, 2011 (\$2.6 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-1
COATED FABRIC SUPPLY & DEMAND BY PRODUCT
 (million dollars)

Item	2001	2006	2011	2016	2021
Manufacturers' Shipments (bil \$)	20	25	30	35	40
\$ fabric/mil \$ mfg	10	12	14	16	18
Coated Fabric Demand	15	18	21	24	27
Polymer-Coated Fabrics	10	12	14	16	18
Rubber-Coated Fabrics	3	4	5	6	7
Fabric-Backed Wallcoverings	2	2	2	2	2
+ net exports	1	1	1	1	1
Coated Fabric Shipments	15	18	21	24	27
Polymer-Coated Fabrics	10	12	14	16	18
Rubber-Coated Fabrics	3	4	5	6	7
Fabric-Backed Wallcoverings	2	2	2	2	2



COMPANY PROFILES

Seaman Corporation
 1000 Venture Boulevard
 Wooster, OH 44691
 330-262-1111
<http://www.seaman.com>

Annual Sales: [REDACTED]
 Employment: [REDACTED]

Key Products: [REDACTED] recreational,
 marine, military, geomembrane, and dock seal
 applications

Seaman manufactures coated fabrics and membranes using advanced weaving and coating technologies. The privately held company's products are used for roofing, architectural, recreational, marine, military, and other applications.

The Company participates in the US coated fabrics industry through the production of coated fabrics for roofing, architectural, recreational, marine, military, geomembrane, truck tarp, sign facing, and dock seal applications. Seaman conducts manufacturing operations at plants in Wooster, Ohio and Bristol, Tennessee. In November 2011, the Company announced plans to invest \$7.5 million in the Wooster facility. The investment includes plans to install new manufacturing equipment, and expand research and development activities. Seaman expects to complete the expansion in the third quarter of 2012. Also in November 2011, Seaman completed a \$3 million investment project at the Bristol plant. The investment included the installation of a dry blend bulk handling system to increase the site's compounding capability. The Company also plans to spend \$1 million in each of the next four years on related productivity investments at the Bristol plant.

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"Polytetrafluoroethylene (PTFE)-coated fabric demand totaled \$147 million in 2011, a six percent share of total polymer-coated fabric sales. This product type accounts for the fifth largest share of the total polymer-coated fabric market. Going forward, polytetrafluoroethylene-coated fabric demand is expected to accelerate from a low 2011 base, as the product category was impacted by a poor economic climate during the 2006-2011 period. Limiting further gains is the relatively ..."
 --Section IV, pg. 74

OTHER STUDIES

Automotive Aftermarket in North America

The North American light vehicle aftermarket is projected to rise 3.2 percent annually to \$85.5 billion in 2016. The US will record the slowest gains but will represent four-fifths of the region's total sales growth. Electronics will be the fastest growing product segment. The dominant professional market will outpace the DIY segment. This study analyzes the \$73 billion automotive aftermarket in North America, with forecasts for 2016 and 2021 by country, product and service performer. The study also evaluates company market shares and profiles industry participants.

#2927 August 2012 \$5100

Outdoor Furniture & Grills

US demand for outdoor furniture and grill products is expected to rise 4.0 percent annually to nearly \$7 billion in 2015. The grill and related accessories segment will see the fastest growth, followed by the larger outdoor furniture and accessories segment. An expected rebound in the housing market will offer opportunities in the dominant residential sector. This study analyzes the \$5.7 billion US outdoor furniture and grill industry, with forecasts for 2015 and 2020 by product, market and region. The study also evaluates company market share and profiles industry players.

#2828 January 2012 \$4900

World Geosynthetics

Global demand for geosynthetics is projected to increase 8.3 percent annually to 4.5 billion square meters in 2015. Advances will be driven by increasing use of geosynthetics and the large-scale construction plans in place in many developing countries. China will surpass the US as the world's largest geosynthetics market by 2015. This study analyzes the three billion square meter world geosynthetics industry, with forecasts for 2015 and 2020 by type and market. The study also evaluates company market share and profiles industry players.

#2825 December 2011 \$5900

World Nonwovens

Global sales of nonwoven fabrics are forecast to increase 6.9 percent annually to 9.3 million metric tons in 2015. Market gains in developing areas will outpace gains in the US, Western Europe and Japan. Spunmelt nonwovens will remain the largest segment, while airlaid nonwovens grow the fastest. This study analyzes the 6.7 million metric ton world nonwovens industry, with forecasts for 2015 and 2020 by web formation process, application, market, world region and for 19 countries. The study also evaluates company market share and profiles industry players.

#2816 December 2011 \$5900

Wall Coverings

US demand for wall coverings is projected to advance 8.2 percent annually through 2015, from a weak 2010 base. Wall panels will remain the dominant product type and grow the fastest, with finished gypsum board panels and solid wood panels seeing the best gains. The residential market will outpace the nonresidential sector. This study analyzes the \$1.4 billion US wall covering industry, with forecasts for 2015 and 2020 by product, market and US region. The study also evaluates company market share and profiles industry players.

#2759 July 2011 \$4800

About The Freedonia Group

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