Nonwovens

US Industry Study with Forecasts for **2016 & 2021**

Study #2983 | January 2013 | $5200 | 335 pages

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US Industry Study with Forecasts for ***2016 & 2021***

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Gains will benefit from an acceleration in area demand and an increase in prices that stems in part from a shift toward higher value nonwovens, especially in the nondisposables markets.

US demand to rise 5.7% annually through 2016

Demand for nonwovens is forecast to rise 5.7 percent per year to $7.1 billion in 2016, benefiting from an acceleration in area demand and an increase in the average price that stems in part from a shift in the product mix toward higher value nonwovens. The market mix will further fuel pricing gains as heavier, more expensive nonwovens are more prevalent in the nondisposables markets, many of which are expected to achieve more rapid gains through 2016 compared to the disposables markets. In area terms, demand for nonwovens is expected to climb 2.2 percent per year to 32 billion square yards. Renewed economic growth, along with rising manufacturing output and rebounding construction activity, will provide opportunities for nonwovens. Further gains will be limited by the maturity of a number of disposable goods markets for nonwovens, including baby diapers.

US Nonwoven Fabric Demand, 2016
($7.1 billion)

Nondisposable markets to be fastest growing

Through 2016, the fastest growth for nonwovens will be in the nondisposables markets where demand will accelerate from a reduced 2011 base. Nonwovens demand in most nondisposables markets was sharply impacted by the 2007 to 2009 recession, marked by declines in construction activity and motor vehicle production, and reductions in manufacturing levels of many durable goods. Construction -- the largest nondisposables market for nonwovens -- will post double-digit gains, fueled by a recovery in building construction, providing opportunities for nonwovens in house wraps, roofing products, and geotextiles. Improved construction spending will also promote nonwovens growth in carpets and rugs, the market which is projected to post the fastest gains, nearly doubling by 2016. Additional gains in nonwovens demand will be provided as the performance/cost benefits of using these materials will continue to be realized. In motor vehicles, for example, nonwovens are finding greater use due to their ability to be made in lower basis weights without losing performance characteristics as automakers fight to reduce vehicle weight to obtain better fuel efficiency.

Disposables markets to remain largest segment

Disposables markets will continue to account for the largest share of sales, representing 68 percent of nonwovens demand in 2016. Sales will benefit from nonwovens' high market penetration in disposable consumer products (e.g., diapers and other personal hygiene products, and wipes), which accounted for one-third of the total disposables market in 2011. The consumer products market is highly influenced by demographic trends; for example, baby diaper sales are closely tied to the infant population, but the intensity of use has not changed much over the years.

Sample Text, Table & Chart

TABLE VI-9

CONSUMER WIPES DEMAND FOR NONWOVEN FABRICS (million dollars)

Item	2001	2006	2011	2016	2021
Consumer Wipes Demand (bil units)					
$ nonwovens/000 consumer wipes					
Consumer Wipes Nonwovens Demand					
By Application:					
Baby Wipes					
Household Care Wipes					
Personal Care Wipes					
Other Consumer Wipes					
By Type:					
Carded Nonwovens					
Meltblown Nonwovens					
Other Nonwovens					
% wipes					
Consumer Nonwovens Demand					

SAMPLE TABLE

DISPOSABLES MARKETS

Personal Care Wipes: Demand for nonwovens in perso
wipes is projected to advance 12.5 percent per year to $45 m
2016, exhibiting above avera and
from greater market penetra wipe
bathroom hygiene wipes an id an
carded are the primary types onal
converting. While spunlace valu
strength and softness, airlai proje
experience opportunities due acteri

SAMPLE TEXT

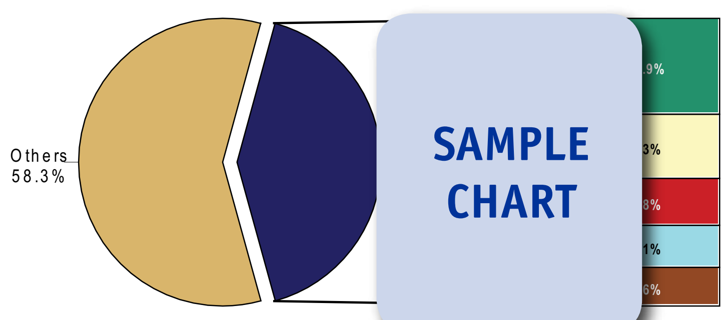
As personal care wipes use grows, disposability of these
is an emerging concern. Disposability of personal care wipe
ily centers on the biodegradability and recyclability of the no
materials used in production. Many nonwovens manufacture
been developing fabrics that are dispersible in water for easier flushing and compatibility with septic systems. Manufacturers are also developing biodegradable or compostable nonwoven wipes offerings. Still other nonwoven wipes, featuring polyester fibers and resin binders, are designed to be recycled back into the production loop.

There are only a few types of personal care wipes that either require flushability or would benefit from becoming flushable, including adult incontinence wipes, adult and toddler moist toilet tissue, bath wipes, and feminine hygiene wipes. Prior to 2008, there was no definition of what constituted "flushable" wipes. In an effort to standardize flushability properties of wipes, two industry associations -- Association
woven Fabrics Industry (INDA) and EDANA (originally, the
Disposables and Nonwovens Association) -- introduced the
tion of guidelines in 2008. At that time, in order to be consi
able, a wipe needed to be able to clear toilets and properly m
drainage pipes, be compatible with wastewater and disposal

148

CHART VIII-1

NONWOVEN FABRIC MARKET SHARE ($5.4 billion, 2011)



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Sample Profile, Table & Forecast

TABLE VII-1

NONDISPOSABLES MARKETS FOR NONWOREN FABRICS
(million dollars)

Item	2001	2006	2011	2016	2021
Gross Domestic Product (bil $)					
$ nonwovens/mil $ GDP					
Nondisposables Nonwovens Demand					
By Market:					
Electrical & Electronics					
Construction					
Furnishings					
Motor Vehicles					
Carpets & Rugs					
Other Nondisposables					
By Type:					
Spunbonded Nonwovens					
Carded Nonwovens					
Other Nonwovens					
% nondisposables					
Nonwoven Fabric Demand					

SAMPLE TABLE

COMPANY PROFILES

American Felt & Filter Company Incorporated
361 Walsh Avenue
New Windsor, NY 12553
845-561-3
http://wv

Annual
Employ

Key Pro ... fabrics

Am ... roduces engineered industria ... ir and liquid filtration, respiratory protection, personal and equipment protection, health care and pollution control applications. The Company is privately held.

SAMPLE PROFILE

AFFCO is involved in the US nonwovens industry via the manufacture of felts, filter media, and stitchbonded fabrics. Felts are made using needlepunch or pressing methods from natural wool materials or such synthetic fibers as polyester, polypropylene, acrylic, modacrylic, rayon, and nylon. Among felt materials made by AFFCO are MED-STAR antimicrobial types, which are available in a medical grade for foot care, lightweight bone fracture casts, and wipes; and in an athletic grade that is used to provide heavy duty shock absorbing padding. The Company also produces PROSTAR felt used in carwash cloths, FELTSTAR mechanical wool and synthetic felts for mechanical applications; DECOSTAR decorative felts, which comprise a wide range of colors; STARLINE felts for pen nib and stamp pad end uses; pipe rehabilitation felts; felt kin liners; and hammer and trim felts for pianos.

AFFCO's nonwoven filter media comprise AIRSTAR, HEAT SHIELD, CALSTAR, and PROSTAR PF types. AIRSTAR media are

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"Demand for nonwovens in the construction market is projected to rise nearly 11 percent per year, reaching $545 million in 2016. This rate is a recovery from the declines of the 2006 to 2011 period and is the second fastest among nondisposables markets. First and foremost, gains will be driven by the rebound in building construction expenditures and an acceleration in spending for nonbuilding projects. Furthermore, both residential and nonresidential improvement and repair spending ..."
--Section VII, pg. 191

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Other Studies

Geosynthetics

This study analyzes the US geosynthetics industry. It presents historical demand data for the years 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., geotextiles, geomembranes, geogrids, geonets), market (e.g., construction, transportation infrastructure, landfills, liquid containment) and region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3003 .... March 2013.................. $5100

Wipes

Demand for wipes in the US is forecast to advance 5.1 percent annually to $2.5 billion in 2016. The consumer market will outpace the industrial segment, driven by personal hygiene wipes and general purpose household cleaning wipes. General purpose industrial wipes will benefit from an acceleration in manufacturing activity. This study analyzes the $1.9 billion US wipes industry, with forecasts for 2016 and 2021 by market, substrate and chemical. The study also evaluates company market share and profiles industry participants.

#2967 .... November 2012 .... $5100

Coated Fabrics

US coated fabrics demand will rise 3.5 percent annually to 635 million square yards in 2016. Motor vehicles will remain the largest market, with good prospects for airbags. Renewed construction activity will benefit wallcoverings, furniture, and awnings and canopies. Polypropylene and polyethylene coated fabrics will be the fastest growing products. This study analyzes the 535 million square yard US coated fabric industry, with forecasts for 2016 and 2021 by coating, substrate and market. The study also evaluates company market share and profiles industry players.

#2936 .... September 2012................ $5100

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

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