



[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 Use License 7](#)

[About Freedonia, Custom Research, Related Studies, 8](#)

World Nonwovens

Industry Study with Forecasts for **2017 & 2022**

Study #3077 | October 2013 | \$6100 | 468 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	5
World Economic Outlook	7
World Demographic Trends	10
Population	11
Female Population	13
Population 65 Years & Older	16
Households	18
World Manufacturing Outlook	19
World Health Expenditures	21
World Construction Trends	25
Pricing Patterns	26
Competitive Materials	28
Legal & Regulatory Environment	30
Regulations & Standards	31
Sustainability	32

OVERVIEW

General	34
Regional Overview	35
Demand	38
Production	41
International Trade	43
Demand by Web Formation Process	45
Spunmelt	47
Carded	52
Airlaid	56
Wetlaid	59
Demand by Application	62
Disposables	64
Nondisposables	67
Demand by Market	69
Personal Hygiene	71
Wipes	75
Construction	76
Filtration	79
Medical/Surgical	82
Other	83

NORTH AMERICA

General	87
Nonwoven Fabric Supply & Demand	88
Nonwoven Fabric Demand Outlook	92
United States	95
Canada	103
Mexico	109

WESTERN EUROPE

General	116
Nonwoven Fabric Supply & Demand	117
Nonwoven Fabric Demand Outlook	121
Germany	124
United Kingdom	132
France	138
Italy	145
Spain	152

Netherlands	159
Belgium	164
Other Western Europe	170

ASIA/PACIFIC

General	177
Nonwoven Fabric Supply & Demand	178
Nonwoven Fabric Demand Outlook	182
China	185
Japan	193
India	199
South Korea	205
Taiwan	210
Other Asia/Pacific	216

OTHER REGIONS

Central & South America	223
Nonwoven Fabric Supply & Demand	224
Nonwoven Fabric Demand Outlook	228
Brazil	230
Other Central & South America	237
Eastern Europe	242
Nonwoven Fabric Supply & Demand	244
Nonwoven Fabric Demand Outlook	247
Russia	249
Poland	256
Other Eastern Europe	262
Africa/Mideast	268
Nonwoven Fabric Supply & Demand	270
Nonwoven Fabric Demand Outlook	274
Turkey	276
Other Africa/Mideast	281

INDUSTRY STRUCTURE

General	289
Industry Composition	290
Market Share	293
Competitive Strategies	299
Research & New Product Development	302
Manufacturing	304
Marketing & Distribution	305
Cooperative Agreements	307
Acquisitions & Divestitures	311

COMPANY PROFILES

Ahlstrom Corporation	315
Albis International	321
Andrew Industries	323
Asahi Kasei	326
Avgol Limited	329
Berkshire Hathaway	331
Companhia Providencia Industria e Comercio	335
DuPont (EI) de Nemours	336
Évora SA	342
Fibertex Nonwovens	345
Fibertex Personal Care	347
Fiberweb plc	348
First Quality Enterprises	352
Foss Manufacturing	354
Freudenberg & Company	357
Glatfelter (PH) Company	364
Guangdong Jofo Group	366
Hassan Tekstil Sanayi ve Ticaret	368
Hollingsworth & Vose	370

Holm (Jacob) & Sons	373
Japan Vilene	374
Kimberly-Clark Corporation	379
Koch Industries	384
Low & Bonar	388
Lydall Incorporated	391
Milliken & Company	395
Mitsui Chemicals	396
Nanliu Enterprise	398
Owens Corning	400
Pegas Nonwovens	402
Polymer Group	405
Propex Operating	409
Royal Ten Cate	411
Sandler AG	414
Suominen Corporation	416
Toray Industries	418
Toyobo Company	421
TWE Group	424
Vita (Lux III) Sàrl	427

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
4 World Population 65 Years & Older by Region	17
5 World Households by Region	19
6 World Manufacturing Value Added by Region	21
7 World Health Expenditures by Region	24
8 World Construction Expenditures by Region	26
Cht World Nonwovens Pricing, 2002-2022	28

OVERVIEW

1 World Nonwoven Fabric Market Environment	37
2 World Nonwoven Fabric Demand by Region	40
Cht World Nonwoven Fabric Demand by Region, 2012	41
3 World Nonwoven Fabric Production by Region	42
Cht World Nonwoven Fabric Production by Region, 2012	43
4 World Nonwoven Fabric Net Exports by Region	44
5 World Nonwoven Fabric Demand by Web Formation Process	46
Cht World Nonwoven Fabric Demand by Web Formation Process, 2012	47
6 World Spunmelt Nonwoven Fabric Demand by Region	49
7 World Carded Nonwoven Fabric Demand by Region	53
8 World Airlaid Nonwoven Fabric Demand by Region	59

(continued on following page)

List of Tables/Charts

9	World Wetlaid Nonwoven Fabric Demand by Region	62
10	World Nonwoven Fabric Demand by Application	63
11	World Demand for Nonwoven Fabrics Used in Disposable Applications by Region...	66
12	World Demand for Nonwoven Fabrics Used in Nondisposable Applications by Region..	68
13	World Nonwoven Fabric Demand by Market	70
Cht	World Nonwoven Fabric Demand by Market, 2012	71
14	World Personal Hygiene Market for Nonwoven Fabrics by Region & Application	74
15	World Wipes Market for Nonwoven Fabrics by Region	76
16	World Construction Market for Nonwoven Fabrics by Region.....	79
17	World Filtration Market for Nonwoven Fabrics by Region	81
18	World Medical/Surgical Market for Nonwoven Fabrics by Region.....	83
19	World Demand for Nonwoven Fabrics in Other Markets by Region	86

NORTH AMERICA

1	North America: Nonwoven Fabric Supply & Demand.....	91
Cht	North America: Nonwoven Fabric Demand by Country, 2012.....	92
2	North America: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	94
3	United States: Nonwoven Fabric Supply & Demand.....	99
4	United States: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	102
5	Canada: Nonwoven Fabric Supply & Demand.....	107
6	Canada: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	109
7	Mexico: Nonwoven Fabric Supply & Demand.....	113
8	Mexico: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	115

WESTERN EUROPE

1	Western Europe: Nonwoven Fabric Supply & Demand.....	120
Cht	Western Europe: Nonwoven Fabric Demand by Country, 2012.....	121
2	Western Europe: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	123
3	Germany: Nonwoven Fabric Supply & Demand.....	128
4	Germany: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	131

5	United Kingdom: Nonwoven Fabric Supply & Demand.....	135
6	United Kingdom: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	138
7	France: Nonwoven Fabric Supply & Demand.....	142
8	France: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	145
9	Italy: Nonwoven Fabric Supply & Demand.....	150
10	Italy: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	152
11	Spain: Nonwoven Fabric Supply & Demand.....	156
12	Spain: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	158
13	Netherlands: Nonwoven Fabric Supply & Demand.....	162
14	Netherlands: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	164
15	Belgium: Nonwoven Fabric Supply & Demand.....	168
16	Belgium: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	170
17	Other Western Europe: Nonwoven Fabric Supply & Demand	174
18	Other Western Europe: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	176

ASIA/PACIFIC

1	Asia/Pacific: Nonwoven Fabric Supply & Demand.....	181
Cht	Asia/Pacific: Nonwoven Fabric Demand by Country, 2012.....	182
2	Asia/Pacific: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	184
3	China: Nonwoven Fabric Supply & Demand.....	189
4	China: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	192
5	Japan: Nonwoven Fabric Supply & Demand.....	196
6	Japan: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	198
7	India: Nonwoven Fabric Supply & Demand.....	202
8	India: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	204
9	South Korea: Nonwoven Fabric Supply & Demand.....	208
10	South Korea: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	210
11	Taiwan: Nonwoven Fabric Supply & Demand.....	214
12	Taiwan: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	216

13	Other Asia/Pacific: Nonwoven Fabric Supply & Demand.....	220
14	Other Asia/Pacific: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	222

OTHER REGIONS

1	Central & South America: Nonwoven Fabric Supply & Demand	227
2	Central & South America: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	229
3	Brazil: Nonwoven Fabric Supply & Demand.....	234
4	Brazil: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	236
5	Other Central & South America: Nonwoven Fabric Supply & Demand	240
6	Other Central & South America: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	242
7	Eastern Europe: Nonwoven Fabric Supply & Demand.....	246
8	Eastern Europe: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	248
9	Russia: Nonwoven Fabric Supply & Demand.....	253
10	Russia: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	256
11	Poland: Nonwoven Fabric Supply & Demand.....	260
12	Poland: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	262
13	Other Eastern Europe: Nonwoven Fabric Supply & Demand	266
14	Other Eastern Europe: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	268
15	Africa/Mideast: Nonwoven Fabric Supply & Demand.....	273
16	Africa/Mideast: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	275
17	Turkey: Nonwoven Fabric Supply & Demand.....	279
18	Turkey: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	281
19	Other Africa/Mideast: Nonwoven Fabric Supply & Demand	286
20	Other Africa/Mideast: Nonwoven Fabric Demand by Web Formation Process, Application, & Market.....	288

INDUSTRY STRUCTURE

1	World Nonwoven Fabric Sales by Company, 2012.....	292
Cht	World Nonwoven Fabric Market Share by Company, 2012.....	294
2	Selected Cooperative Agreements.....	308
3	Selected Acquisitions & Divestitures.....	312

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Developing area demand will outpace developed area markets, driven by the production of nondisposable goods as well as by the consumption of consumer wipes and personal hygiene products.

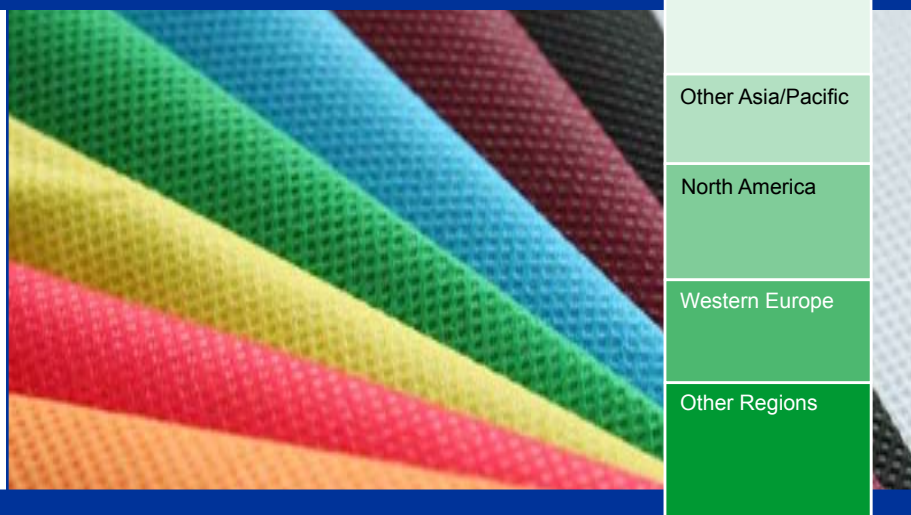
World demand to rise 5.4% annually through 2017

Global demand for nonwovens is forecast to rise 5.4 percent annually to 9.1 million metric tons in 2017. Nonwovens demand in the developed areas of the world, such as the US, Japan, and Western Europe, is projected to grow at a rate of 2.4 percent per year, an improvement from the declines of the 2007-2012 period but still well below the global average. These countries have well developed manufacturing sectors, populations with high personal incomes, and well established, mature nonwovens markets. Nonwovens demand in developing areas of the world is expected to increase 7.2 percent per year through 2017. The manufacturing sectors of developing economies tend to grow rapidly, benefiting nonwovens used in the production of nondisposable goods such as mattresses, motor vehicles, and geotextiles. Additionally, advances will benefit from growth in middle class cohorts who are better able to afford nonwoven consumer goods, such as wipes and personal hygiene products.

China to claim nearly half of all gains in total demand

Asia/Pacific was the largest regional market for nonwovens in 2012, with 41 percent of the global total. Growth will be driven in large part by China, which will account for 46 percent of global gains through 2017 and 31 percent of total world sales that year. Manufacturing

World Nonwoven Fabric Demand (9.1 million metric tons)



capacity for products that consume significant amounts of nonwovens continues to expand throughout the country. For example, several major diaper producers are in the process of building disposable diaper production plants in China in order to supply both domestic and export markets. Like China, India is expected to see strong gains as it continues to rapidly develop its manufacturing and construction sectors. In addition, rising incomes and standards of living will provide incentives for individuals to purchase convenience items, promoting the production of disposable infant diapers, feminine hygiene products, and baby wipes, among other items made with significant amounts of nonwovens.

Demand in West to rebound from recent declines

In 2012, North America and Western Europe each accounted for roughly 20 percent of the global nonwovens market. Demand growth in these regions is expected to rebound from the declines of the 2007-2012 period, which was marked by outright drops in manufacturing and construction activity. As such, gains will benefit from economic improvement and a rebound in the manufacturing and construction sectors. Nevertheless, growth in nonwovens demand in these regions will remain well below the global average.

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Sample Text, Table & Chart

MARKETS

Turkey: Nonwoven Fabric Supply & Demand --
 nonwoven fabric demand in Turkey totaled 121,000 metric tons, accounting for over one-quarter of all Africa/Mideast product sales, representing the single largest market in the region. Intensity of use in the nation (relative to GDP and population) is above both regional and global averages. Turkish nonwovens sales expanded 7.3 percent per year from 2007 to 2012. Market performance during this period reflected strong advances in construction activity, manufacturing, health care expenditures, and per capita income, and was supported by ongoing population growth, boosting sales of an array of consumer and industrial nonwoven goods.

Nonwoven fabric demand in Turkey is projected to expand at a 3.5 percent annual pace through 2022. Continued growth in economic growth and construction activity will promote gains in demand.

With 2012 industry output valued at \$1.5 billion, Turkey is the largest nonwoven fabric market in the region, accounting for 39 percent of total output. Turkey's nonwoven fabric production is in deficit in nonwovens. Turkey's nonwoven fabric production is in deficit in nonwovens. Turkey's nonwoven fabric production is in deficit in nonwovens. Turkey's nonwoven fabric production is in deficit in nonwovens.

Turkey's nonwoven fabric production is in deficit in nonwovens. Turkey's nonwoven fabric production is in deficit in nonwovens. Turkey's nonwoven fabric production is in deficit in nonwovens. Turkey's nonwoven fabric production is in deficit in nonwovens.

277

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**SAMPLE
TEXT**

TABLE VII-17

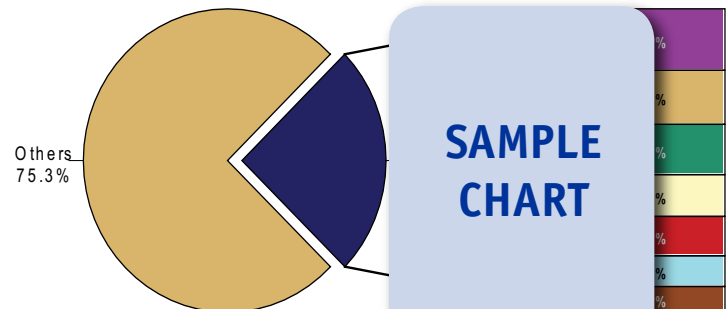
TURKEY: NONWOVEN FABRIC SUPPLY & DEMAND (thousand metric tons)

Item	2002	2007	2012	2017	2022
Gross Domestic Product (bil 2011\$)					
per capita GDP					
Population (mil persons)					
65 Years & Older					
% 65 years & older					
Female Population (mil persons)					
15-49 Years					
% 15-49 years					
births/000 women age 15-49					
Live Births (mil)					
Manufacturing Value Added (bil 2011\$)					
kg nonwovens/mil \$ GDP					
kg nonwovens/capita					
Nonwoven Fabric Demand					
net exports					
Nonwoven Fabric Production					
% Turkey					
Africa/Mideast Nonwovens Production					

**SAMPLE
TABLE**

CHART VIII-1

WORLD NONWOVEN FABRIC MARKET SHARE BY COMPANY (\$29.7 billion, 2012)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Albis International Srl

ss142, nr 102
 13060 Roasio
 Italy
 39-163-811-20

Annual Sales:
 Employment:
 Key Products:
 applications

**SAMPLE
PROFILE**

Albis is a manufacturer of nonwovens for the hygiene, household care, and other markets. The privately held company produces nonwovens in Italy and markets them worldwide.

Albis competes in the world nonwovens industry primarily via the manufacture and sale of nonwoven materials for use in hygiene and household applications. Most of Albis' nonwovens are available in two versions: 100 percent polypropylene or coaxial polypropylene/polyethylene bicomponent types. The coaxial polypropylene/polyethylene bicomponent types feature improved softness, among other benefits. The Company can obtain different performance properties of the coaxial polypropylene/ polyethylene bicomponent nonwovens by altering the polypropylene/ polyethylene ratio of the filaments.

For the hygiene market, Albis makes such nonwoven products as topsheets, barrier leg cuffs, backsheet backings, acquisition/distribution layers, and elastic side panels. The Company's CURATOP topsheets are engineered for use as coverstock and corewrap in sanitary napkins, absorbent diapers, and adult incontinence products. Albis' barrier leg cuffs, which are sold under the CURALEG brand name, are made of spunbond hydrophobic fine filaments. The Company's CURABACK.

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321

TABLE VII-4

BRAZIL: NONWOVEN FABRIC DEMAND BY WEB FORMATION PROCESS, APPLICATION, & MARKET (thousand metric tons)

Item	2002	2007	2012	2017	2022
Nonwoven Fabric Demand					
By Web Formation Process:					
Spunmelt					
Carded					
Airlaid					
Wetlaid					
By Application:					
Disposables					
Nondisposables					
By Market:					
Personal Hygiene					
Wipes					
Construction					
Filtration					
Medical/Surgical					
Other					
% Brazil					
C&S America Nonwoven Fabric Demand					

**SAMPLE
TABLE**

"Demand for nonwovens in Brazil is forecast to increase through 2017. Product demand will be bolstered by an acceleration in economic and construction activity, as well as manufacturing output. However, growth in population, personal incomes, and household creation will not be as strong as in the past, and the number of births will continue to edge down, restraining future sales advances for nonwoven fabrics."

--Section VII, pg. 232

OTHER STUDIES

Wipes

US wipes demand will rise 3.6 percent yearly through 2018 to \$2.9 billion. Disinfectant and electrostatic wipes will grow the fastest. The industrial market will outpace consumer uses based in part on a relaxed EPA rule that will help disposable wipes compete with reusable, laundered shop towels. Flushability will remain a factor in consumer and health care uses. This study analyzes the \$2.5 billion US wipes industry, with forecasts for 2018 and 2023 by market, substrate and chemical. The study also evaluates company market share and profiles industry players.
 #3188 September 2014..... \$5300

Coated Fabrics

US demand for coated fabrics is projected to advance 3.2 percent per year to 680 million square yards in 2018. The large motor vehicle market will drive gains, promoted by a higher number of air bags -- usually employing silicone-coated nylon -- per light vehicle. Smaller markets such as awnings, canopies and wall coverings will grow the fastest. This study analyzes the 580 million square yard US coated fabric industry, with forecasts for 2018 and 2023 by product, substrate and market. The study also evaluates company market share and profiles industry players.
 #3176 July 2014..... \$5300

World Geosynthetics

Global demand for geosynthetics is expected to rise 8.9 percent per year to 5.2 billion square meters in 2017. Developing regions will be the fastest growing markets, with the Asia/Pacific region remaining the largest. Construction will be the largest and fastest growing application, especially in the key China and US markets. This study analyzes the 3.4 billion square meter world geosynthetics industry, with forecasts for 2017 and 2022 by product, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players.
 #3108 December 2013 \$6100

Specialty Films

US demand for specialty films is forecast to advance 5.2 percent per year to \$8.0 billion in 2017. Barrier films will be a key driver in the dominant packaging market, based on a rapid rise in case-ready meat packaging. The construction market will grow the fastest, driven by films used in windows for safety and security as well as light control. This study analyzes the \$6.2 billion US specialty film industry, with forecasts for 2017 and 2022 by function, resin, and market. The study also evaluates company market share and profiles industry competitors.
 #3021 May 2013..... \$4900

Geosynthetics

US geosynthetics demand is forecast to increase 6.6 percent per year to 1.3 billion square yards in 2017, spurred by improved spending on the construction of structures and roads. Geotextiles will remain the largest segment, while more application-specific products (e.g., geogrids, geonets, geosynthetic clay liners, geofaoms) will grow the fastest. This study analyzes the 915 million square yard US geosynthetics industry, with forecasts for 2017 and 2022 by product, market and region. The study also evaluates company market share and profiles industry players.
 #3003 March 2013..... \$5100

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