World Coated Fabrics

Study # 3276 June 2015 $6300

World demand to grow 4% per annum through 2019

Global demand for coated fabrics is forecast to rise approximately four percent per year through 2019. Demand will be driven by the expected increase in the manufacture of products such as vehicle seating and airbags, upholstered furniture, protective apparel, and shoes and belts, which are often made from coated fabrics. Gains will benefit from the competitive edge coated fabrics have over alternative materials, offering benefits such as durability, water resistance, low cost and versatility. On-going innovations will further aid growth, resulting in coated fabrics that look and feel more like rival materials such as leather, plastic or rubber sheeting, and uncoated fabrics, while also improving functionality.

China to remain world’s largest national consumer

Advances for coated fabrics in the dominant Asia/Pacific region will be propelled by the continuing development of China, which is the world’s leading producer of upholstered furniture, apparel and accessories, motor vehicles, and other goods that are key markets for coated fabrics. China will remain the largest national consumer for coated fabrics through 2019 as manufacturing capacity for these goods expands to satisfy both increasing exports and domestic demand. Additionally, other countries in the Asia/Pacific region will see rising demand for coated fabrics as some industries that are heavy users of these fabrics shift capacity away from China’s rising manufacturing costs.

North America & Western Europe to remain significant

The significant size of the transportation equipment industries in North America and Western Europe supports coated fabric demand by enabling a high level of production capacity for related components that are most likely to feature coated fabrics, such as motor vehicle airbags, upholstery and trim for motor vehicles, and marine equipment and aircraft. Coated fabrics in these regions will continue to benefit from a greater market penetration of airbags per car, and the ongoing improvements in the look and feel of polyurethane-coated fabrics, which will spur greater use in upholstery and interior trim in light vehicles. Coated fabrics are also important in the developed and industrialized North America and West European regions due to their usage in protective clothing and industrial machinery applications. For example, demand for protective clothing is high. Both regions maintain protective clothing manufacturing capacity close to domestic end users to more easily facilitate custom ordering.

Demand to follow low-cost manufacturing

Despite having favorable coated fabric demand through 2019, developed areas such as the US and Western Europe will continue to lose global market share as more key end use industries shift production capacity to low cost manufacturing locations. China, Poland, and Mexico will be among those that further benefit from this factor. Over the past decade, demand for coated fabrics in Eastern Europe has been driven by Poland’s emergence as a low cost manufacturing country for West European companies. The country has increased its capacity to produce low-to-mid priced upholstered furniture and transportation equipment seating. Coated fabric sales in other East European countries is driven by contract cut-and-sew operations.

Study coverage

This upcoming Freedonia industry study, World Coated Fabrics, is available for $6300. It presents historical demand data (2004, 2009 and 2014) plus forecasts (2019 and 2024) by product, market, world region, and for 19 major countries. The study also considers market environment factors, evaluates company market share and profiles 33 global players such as Canadian General-Tower, OMNOVA Solutions and Sioen.
NEW INDUSTRY STUDY WITH FORECASTS FOR 2019 & 2024

#3276 - World Coated Fabrics

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### ASIA/PACIFIC

**China: Coated Fabric Supply & Demand**

Coated fabric demand in China hit 2.1 billion square meters in 2014, accounting for roughly 35 percent of the Asia/Pacific total in 2014. This figure is projected to reach 4.5 billion square meters by 2024, a 112 percent increase over the 2004-2014 period, driven by rising demand for products incorporating coated fabrics in both the domestic and export markets.

Along with its rising capacity to produce items using coated fabrics, China’s coated fabrics production capabilities also significantly expanded over the 2004-2014 period. During that time, coated fabrics production levels increased more than fourfold to 2.5 billion square meters in 2014. As a result, China is the world’s largest producer of coated fabrics. The country is a net exporter of coated fabrics, running a trade surplus of 350 million square meters that is equivalent to 15 percent of total production.

Production of coated fabrics at facilities in China is projected to advance at a CAGR of roughly 10 percent through 2024, reaching 4.5 billion square meters. Industry output gains will be fueled by continued strength in the local market, coupled with rising demand for coated fabrics in both the domestic and export markets.

**INDUSTRY STRUCTURE**

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Explanations that support each table’s numbers & projections

**SAMPLE TEXT**

Data illustrated with the aid of 90 tables & charts

**COMPANY PROFILES**

Profiles for 33 global competitors such as Canadian General-Tower, Continental, Hyosung, Kuraray, OMNOVA, Saint-Gobain & Sioen

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### NORTH AMERICA

**Furniture**

Furniture will be fueled by steady gains in production levels of these products, and greater market penetration of coated fabrics at the expense of alternative materials, such as leather. Outright declines will occur in the book covering market, since the potential market base for coated fabrics in book coverings will be lower as print media continues to face competition from electronic media. Other smaller markets, such as apparel and accessories, and cases and bags, will face challenges in light of material substitution, a small US manufacturing base for the end products, and competition from low cost imports. However, coated fabrics will experience opportunities in geosynthetics and roofing membranes.

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### World Silicones

This study examines the world silicones industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by market (e.g., electrical and electronic, construction, transportation, health and personal care, chemical), product (e.g., elastomers, fluids, resins, gels), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants. #3277................. May 2015 ............ $6400

### World Wipes

Global demand for wipes is forecast to increase 5.2 percent annually through 2018 to $13.5 billion. Because wipes are considered convenience products rather than necessities, developed nations represent a disproportionate share of sales. However, developing markets will account for a rising share of wipes sales going forward. This study analyzes the $10.5 billion world wipes industry, with forecasts for 2018 and 2023 by product, world region, and for 14 countries. The study also evaluates company market share and profiles industry players. #3251................. March 2015 ............ $6300

### World Emulsion Polymers

Global demand for emulsion polymers will rise 4.6 percent annually to 12.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest-growing market. The paint and coatings segment will remain the largest and fastest-growing application, followed by adhesives in size and growth rate. This study analyzes the 10 million metric ton world emulsion polymer industry, with forecasts for 2018 and 2023 by market, polymer, world region, and for 16 countries. The study also evaluates company market share and profiles industry participants. #3216................. October 2014 ............ $6200

### World Polyethylene

Global polyethylene demand will rise 4.0 percent yearly to 99.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest growing market, driven by China. Following a decade of decline, North America will add nine million tons of production capacity through 2023. This study analyzes the 82 million metric ton world polyethylene industry, with capacity, production and demand forecasts for 2018 and 2023 by product, market, world region, and for 27 countries. The study also evaluates company market share and profiles industry players. #3210................. October 2014 ............ $6200

### 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

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