

NEW Forecasts for 2019 & 2024 in 19 countries

World Coated Fabrics

Study # 3276

June 2015

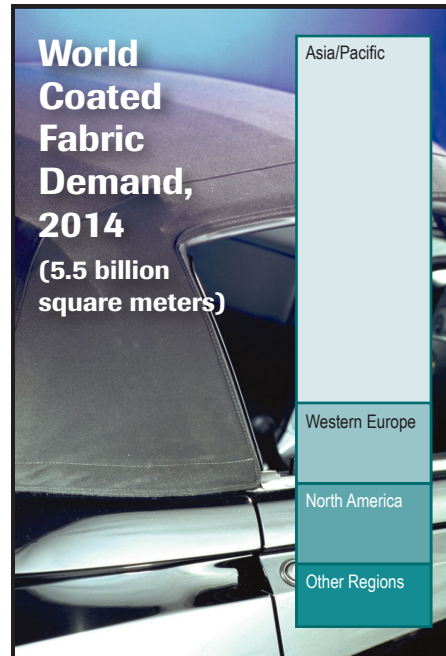
\$6300

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.

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