

NEW Forecasts (2019 & 2024) for 19 countries

World Nonwovens

Study # 3365

January 2016

\$6300

Global demand to increase 5.4% per year through 2019

Global demand for nonwovens is forecast to rise 5.4 percent yearly to 11.1 million metric tons in 2019. Demand will be driven by the expected increase in the manufacture of key products made from nonwovens such as baby diapers, adult incontinence products, filters, consumer and industrial wipes, disposable medical gowns, and various automotive components. Additionally, higher penetration rates of many of these end products, such as baby diapers in developing countries and adult incontinence products in developed countries, will promote rising nonwoven requirements. Growth will also benefit from the competitive advantages such as light weight and durability that nonwovens have over alternative materials. Further gains in tonnage will be limited due to the increasing use of lower basis weight nonwovens. For instance, China has recently begun to shift to premium spunmelt nonwovens in disposable baby diapers, which allows for a lighter, thinner, and softer diaper.

Demand in developed world to lag global average

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 2.5 percent per year, well below the global average. These countries have well developed manufacturing sectors, populations with high personal incomes, and well established, mature nonwovens markets. Nevertheless, nonwovens will offer opportunities as these materials find expanded usage in various applications, such as motor vehicles and wallpaper substrates, at the expense of

World Nonwovens Demand, 2014 (10.2 million metric tons)



alternative materials. However, in the developing world, nonwovens demand is forecast to grow at nearly three times the rate of more established regions through 2019. The manufacturing sectors of developing economies tend to rise rapidly, benefiting nonwovens used in the making of nondisposable goods. In addition, gains will benefit from growth in middle class cohorts who are better able to afford consumer goods, such as personal hygiene products and wipes, that are key markets for nonwovens. For example, greater penetration rates of disposable baby diapers in developing countries is aiding local production of these products.

China & India to lead strong gains in Asia/Pacific region

Despite having a low intensity of usage (per capita) compared to North America and Western Europe, Asia/Pacific was the

largest regional market for nonwovens in 2014, with 48 percent of the global total, and will account for over half by 2019. Growth will be spurred in large part by China, which will account for 46 percent of global advances through 2019 and 36 percent of total worldwide sales that year. Manufacturing capacity for products that consume significant amounts of nonwovens continues to expand throughout the country. Like China, India is expected to exhibit strong gains, albeit from a much smaller base, as it continues to rapidly develop its manufacturing and construction sectors. In addition, rising incomes and standards of living in both countries will provide incentives for individuals to purchase convenience items, promoting the production and sale of disposable baby diapers, feminine hygiene products, and baby wipes, among other items made with significant amounts of nonwovens.

Central and South America, Eastern Europe, and the Africa/Mideast region each accounted for less than 10 percent of the global nonwovens market in 2014. Both the Central and South America and the Africa/Mideast regions will post gains in excess of the global average, based on favorable growth in domestic sales.

Study coverage

This upcoming Freedonia industry study, *World Nonwovens*, is priced at \$6300. It presents historical data (2004, 2009 and 2014) plus forecasts (2019 and 2024) for supply and demand, as well as demand by web formation process, application and market, in 6 regions and 19 countries. The study also considers market environment factors, evaluates company market share and profiles 37 industry competitors worldwide.

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#3365 - World Nonwovens

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

COMPANY PROFILES
 Profiles 37 global industry players such as AVINTIV, Kimberly-Clark, Ahlstrom, DuPont & Freudenberg

ASIA/PACIFIC

products market, among others. Carded nonwovens are the second largest product type in China. Gains in carded nonwovens demand will benefit from its use in the production of wipes and construction-related products, such as geotextiles. Airlaid nonwovens find use in wipes and feminine hygiene products, as well as a variety of household goods such as tabletop covers. Airlaid nonwovens demand will be limited due to a decline in the number of women of reproductive age. Wetlaid nonwovens demand will benefit from its use in filtration media, as well as in a variety of durable goods such as batteries.

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

Item	2004	2009	2014	2019	2024
Nonwoven Fabric Demand					
By Web Formation Process:					
Spunmelt					
Carded					
Airlaid					
Wetlaid					
By Application:					
Disposables					
Nondisposables					
By Market:					
Personal Hygiene					
Wipes					
Construction					
Filtration					
Medical/Surgical					
Motor Vehicles					
Other					
\$/kg					
Nonwoven Fabric Demand (mil \$)					
% China					
Asia/Pacific Nonwovens Demand (mil \$)					

SAMPLE TABLE
 Presents historical data (2004, 2009, 2014) as well as Freedonia forecasts for 2019 & 2024; data illustrated with the aid of more than 100 tables & charts

WESTERN EUROPE

Germany: Nonwoven Fabric Supply & Demand

Nonwoven fabric demand in Germany totaled 275,000 metric tons in 2014, making it the largest market in Western Europe and the fifth largest market in the world behind China, the US, Japan, and Brazil. Intensity of product use in Germany is above the regional average in per capita terms, reflecting the country's stance as a leading industrial power. For example, Germany maintains large motor vehicle, aerospace equipment, industrial machinery, food and beverage, and chemical manufacturing industries, many of which use products made from nonwovens.

Product sales advanced 2.5 percent per annum from 2009 to 2014. Gains were supported by above average economic growth and growth in spending on construction and manufacturing activities in the country. In addition, the size of Germany's 65 years and older population expanded steadily during this period, bolstering sales of incontinence products and other health care-related nonwovens. On the other hand, the country posted outright declines in the number of women of reproductive age and births, limiting nonwoven requirements in the production and sale of feminine hygiene products, disposable baby diapers, and baby wipes.

Demand for nonwoven fabric advanced annually through 2019. Market outlooks of any construction activity are limiting the potential of women of reproductive

SAMPLE TEXT
 Explanations to support each table's numbers & projections

percent the weakest ring, and through 2019, the number of women of reproductive

Germany has the largest nonwoven fabric producing industry in Western Europe and the third largest industry in the world behind China and the US. Production of nonwoven fabrics by plants in Germany totaled 415,000 metric tons in 2014, accounting for 27 percent of total Western European output. The nation is a major international supplier, running a trade surplus of 140,000 metric tons in

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World Coated Fabrics

Global demand for coated fabrics will rise 4.6 percent per year to 6.5 billion square meters in 2019. The Asia/Pacific region will remain dominant, while the Central/South America and Africa/Mideast regions will grow the fastest from small bases. The dominant polymer-coated fabric segment will outpace rubber-coated types. This study analyzes the 5.2 billion square meter world coated fabric industry, with forecasts for 2019 and 2024 by product and market for six regions and 19 countries. The study also evaluates company market share and profiles industry players.

#3276.....June 2015..... \$6300

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 Medical Disposables

Global demand for medical disposables is forecast to rise 6.6 percent annually to \$245 billion in 2018. The Asia/Pacific region will remain the largest and fastest growing market. Products used to treat widely prevalent chronic conditions such as kidney failure, urinary incontinence and arthritis-related pain will grow the fastest. This study analyzes the \$178 billion world disposable medical supply industry, with forecasts for 2018 and 2023 by product, world region, and for 16 countries. The study also evaluates company market share and profiles industry competitors.

#3205.....September 2014..... \$6400

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 participants.

#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

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