Hundreds of private companies are active in the U.S. nonwovens industry.

Nonwovens: Fabrics & Converted Products - Private Companies Report profiles more than 130 private U.S. manufacturers and converters of nonwoven fabrics and nonwoven converted products. This information will assist you to understand the position of private companies in this industry.

Examine the report highlights, sample pages and table of contents on the following pages and see how Nonwovens: Fabrics & Converted Products - Private Companies Report can serve as a valuable decision making tool for your company in accessing acquisitions, joint ventures and cooperative agreements.

Brochure Index

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This new report profiles more than 130 private U.S. companies active in the industry. To frame the industry, Freedonia analysts have prepared an overview of the market and general industry. The analysis explores the key indicators that drive demand, highlights company capabilities and annual sales, identifies private company characteristics and shows regional concentration.
Companies Profiled

* Sample profiles on pages 4 and 5

Acme Pad Corporation
Ad Tape & Label Company Inc.
Adhesives Research Incorporated
Aldine Technologies Industries Inc.
All Felt Products Incorporated
American Engineering Fabrics Inc.
BOOM Environmental Products
American Felt & Filter Company Inc.
American Nonwovens Corporation Inc.
American Fabri-Tec Incorporated
Mississippi Fabritek Incorporated
American Ribbonz Limited
American Textile Mills Incorporated
Nu-Towel Company
American Threshold Industries Inc.
Americo Manufacturing Company Inc.
Asbury Towel Company Incorporated
Astro-Form Corporation
Atlantic Mills Incorporated
Avon Tape Incorporated
Bauer Industries Limited
The Beier Industries Group
Berkshire Corporation
BGF Industries Incorporated
Blocksm & Company
Bondex Incorporated
Andrew Industries
BMP America Incorporated
Boston Felt Company Incorporated
Boyd Converting Company Inc.
Bro-Tex Incorporated
Carlee Corporation
Carpenter Company
Cerex Advanced Fabrics LP
Choice Products of Milwaukee
Colbond Incorporated
Columbus Industries Incorporated
Concept Industries Incorporated
Consolidated Textiles Incorporated
Cooper Fabrics
Crane & Company Incorporated
Creative Foam Corporation
Delaware Valley Corporation
Disposable Products Company LLC
Dixie Manufacturing Corporation
Duro Industries Incorporated
Handler Textile

Dynarex Corporation
EMI Specialty Papers
Emtex Incorporated
Encore Group LLC
CompaniesHospitex
The Pillow Factory
Techstyles Incorporated
Erikson Nonwoven Textiles Incorporated
Fabrite (IF) Laminating Corporation
Facemate Corporation
Fiber Innovation Technology Incorporated
Fiberbond Corporation
FiberCo Incorporated
Filter Fabrics Corporation
Filtration Group Incorporated
Findlay Industries Incorporated
First Quality Enterprises Incorporated
Fishers Textiles
Flo-TEC Incorporated
Atmore Industries Incorporated
Foss Manufacturing Company Inc.

Kunin Felt

Ozite

Freudenberg Nonwovens LP
General Econopak Incorporated
Glenoit Corporation
Global Material Technologies Inc.
Globetec Nonwovens
Gore (WL) & Associates Incorporated
Green Bay Nonwovens
HDK Industries Incorporated
High-Tech Conversions Incorporated
Higher Dimension Medical Incorporated
Hollingsworth & Vose Company
HRS Textiles Incorporated
HTC Incorporated
Kamen Wiping Materials Company Inc.
Kappler Protective Apparel & Fabrics
Karnak Corporation
Knollton Specialty Papers Incorporated
Knollton Nonwovens Incorporated

Kosu

Lamart Corporation
Lamb (J.) Incorporated
Gotham Industries II
Philmont Manufacturing Company
Lantor Incorporated
Light Fabrications Incorporated
Lyman (John R.) Company
Lym-TechScientific
M&C Specialties Company
Malik Industries
Medco Coated Products
Medline Industries Incorporated
Meridian Industries Incorporated
Aurora Textile Finishing Company
Kleen Test Products
Majilite Corporation
Monadnock Paper Mills Incorporated
NanoFiber Technology Incorporated
National Nonwovens

National Wiper Alliance Incorporated
New Pig Corporation
SpillTech Industries Incorporated
Nice-Pak Products Incorporated
Professional Disposables International
Nonwovens Incorporated
Nu-Tex Styles Incorporated
Nyco Fabrics Incorporated
Oliver Products Company
Orcon Corporation
Paper-Pak Products Incorporated
Powell Corporation
Precision Custom Coatings Incorporated
Precision Fabrics Group Incorporated
Protek Health Incorporated
Rollprint Packaging Products Incorporated
Sellars Absorbent Materials Incorporated
Shawmut Mills
Snow Filtration Company LLC
Sommers Incorporated
Fiber Dynamics Incorporated
Sorbert Products Company Incorporated
Southern Mills Incorporated
Sparcon Incorporated
Spunfab Limited
Stearns Technical Textiles Company
Stitches Incorporated
Strick Nonwoven Materials Incorporated
Superior Nonwovens Incorporated
Tapemark Company
Tendasoft Incorporated
Tex Tech Industries Incorporated
Tietex International Limited
Tillotson Healthcare Corporation
The Tranzonic Companies
Absorbc
CCP Industries Incorporated
Hospeco
Hospital Specialty Company
Intex Supply Company
Spintex Company Incorporated
Troy Mills Incorporated
TTL Medical Products
Tuff Spin Fabrics Incorporated
Ultratek Industries
Union Wadding Company
US Felt Manufacturing Company Inc.
US Laminating Corporation
US Nonwovens Corporation
Wendell Textiles Incorporated
Western Nonwovens Incorporated
Bonded Fiber Products Incorporated
California Fiberloft Incorporated
Florida Nonwovens Incorporated
Mid America Fiber Company
Paltex Incorporated
Reliance Products Incorporated
Western Synthetic Fiber Incorporated
White Knight Engineered Products Inc.
White Knight Healthcare Incorporated
Whitestone Corporation
Worthen Industries Incorporated
More than 130 private company profiles are compiled and range from detailed to brief company descriptions. (See Samples)

All companies are individually contacted and the majority of the companies verify the data.

Hard to obtain sales and employment figures, key products and services and an overview of corporate operations are provided.

HRS Textiles Incorporated
2840 Southborough Road
Darlington, SC 29532
County: Florence
County Code: 45041

Phone: 843-393-0882
Fax: 843-393-9000
Web Address: http://www.hrstextiles.com

Key Executive: Harley Lemaster

Key Products: nonwoven fabrics

Census Code SIC(s): 2297; 2396

SIC Description(s): nonwoven fabrics; automotive trimmings, apparel findings and related products

HRS Textiles is a manufacturer and converter of nonwoven fabric. The Company serves the filtration, furniture, apparel, absorbent, automotive and screen printing industries. HRS Textiles offers such services as slitting, coating, calendering, die cutting and laminating. The Company operates a 125,000-square-foot facility in Darlington, South Carolina. This facility can produce over 60 million square yards of fabric annually.

The Company’s nonwovens can be used to produce a variety of filtration devices, including coolant, hot cooking oil and milk filters. Coolant filtration media is used primarily in metal grinding and polishing applications, where fine particles need to be filtered out of coolants and other fluids. HRS Textiles produces this fabric, which is made from a polyester and rayon blend, in 0.7- to 5-1/2-ounce-

Nonwovens: Fabrics & Converted Products - Private Companies Report #1235

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These profiles give you insight into the operations of private companies, and can help you:

- Identify companies for investment, merger, and/or acquisition opportunities based on size, products, and location.
- Evaluate the position of your competitors based on sales and/or employment figures.

---

**PRIVATE COMPANY PROFILES**

**American Threshold Industries Incorporated**
240 Sardis Road
Enka, NC 28728
County: Buncombe
County Code: 37021

Phone: 828-665-4555
Fax: 828-665-4777
Web Address: http://www.athealthcare.com

Annual Sales:  
Employment: 
Key Executive: Brian Hoge, President

Key Products: disposable nonwoven health care products
Census Code SIC(s): 2297; 2389; 3842

**Choice Products of Milwaukee**
5519 West Woolworth Avenue
Milwaukee, WI 53218
County: Milwaukee
County Code: 55079

Phone: 414-358-3334
Fax: 414-353-9686

Annual Sales:  
Employment:  
Key Executive: Robert Cohen, President

Key Products: disposable nonwoven health care products
Census Code SIC(s): 2297
SIC Description(s): nonwoven fabrics

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Market Overview

The Market Overview Section discusses factors influencing supply and demand, including health care and construction trends.

This information helps you:

- Determine what external factors will impact future supply and demand
- Measure your market and sales potential based on supply and demand forecasts.
- Propose new areas for product development based on market trends & innovations.

### Nonwoven Fabrics Markets - Disposable

The disposable products market for nonwoven fabrics is forecast to advance 5.5 percent annually through 2004 to $3.1 billion. Disposable nonwoven markets encompass products used in a wide range of single- and limited-use applications, such as personal hygiene products, medical and surgical products, filtration media and other applications (e.g., protective apparel and fabric softener sheets). The personal hygiene market, the largest market, accounted for 56 percent of disposable nonwoven fabric demand in 1999. This market includes baby diapers, sanitary napkins, adult incontinence products, training pants, consumer wipes and lens cleaners. Other major markets for disposable nonwovens include medical and surgical products, and filtration media. The medical and surgical products market encompasses patient examination apparel and surgical gowns and drapes, staff apparel, surgical masks, shoe covers, underpads, sterilization wrap, wound dressings and surgical sponges. Additional disposable markets for nonwoven fabrics include industrial and household wipers, protective apparel and masks, and fabric softener sheets. Among the major disposable nonwovens markets, the personal hygiene market will see the strongest growth through 2004, primarily due to advances for adult incontinence products. Above-average gains are also expected for filtration applications. The outlook for the various disposable nonwoven fabrics markets is presented in the following table.

<table>
<thead>
<tr>
<th>Market</th>
<th>Outlook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furniture Components</td>
<td>Cost and performance advantages will continue to replace traditional textiles.</td>
</tr>
<tr>
<td>Geotextiles</td>
<td>Healthy outlook, although competition in some applications may limit growth.</td>
</tr>
<tr>
<td>Construction</td>
<td>Deceleration in new residential construction, with the healthy outlook for residential repair and industrial and nonbuilding construction opportunities.</td>
</tr>
</tbody>
</table>
Industry Structure

Gain a better understanding of your competition and analyze your company’s position in the industry with information about the characteristics of leading nonwoven manufacturers including total sales, capabilities and regional concentration.

This information helps you:

- Evaluate diversification opportunities based on product lines of other private companies.
- Understand barriers to entry based on industry concentration.
- Develop positioning strategies based on size of competitors.

<table>
<thead>
<tr>
<th>Corporate Sales (mil $)*</th>
<th>Principal Nonwoven Fabric Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Polyester</td>
</tr>
<tr>
<td>Acme Pad</td>
<td>7.8</td>
</tr>
<tr>
<td>All Felt Products</td>
<td>15</td>
</tr>
<tr>
<td>American Engineering Fabrics</td>
<td>28</td>
</tr>
<tr>
<td>American Felt &amp; Filter</td>
<td>21</td>
</tr>
<tr>
<td>American Nonwovens</td>
<td>13</td>
</tr>
<tr>
<td>Astro-Form</td>
<td>10</td>
</tr>
<tr>
<td>Bauer Industries</td>
<td>10</td>
</tr>
<tr>
<td>Beier Industries Group</td>
<td>200</td>
</tr>
<tr>
<td>BGF Industries</td>
<td>10</td>
</tr>
</tbody>
</table>

* Sales are 1999 estimates of total corporate sales including products other than nonwoven fabrics.

The US nonwoven fabrics market is fairly concentrated and led by a handful of large, well-capitalized companies, most of which are publicly owned with diversified product lines and well-established marketing and distribution programs. The leading US producers are also among the largest players in the worldwide market and are all forward integrated (in varying degrees) into the production of converted nonwoven products. In addition, the largest producers have the capital resources which are necessary for the development and marketing of higher performance, value-added nonwovens.

The seven largest producers of nonwoven fabrics in 1999 were DuPont, Kimberly-Clark, Polymer Group Incorporated (PGI), BBA Nonwovens (BBA Group plc – United Kingdom), Freudenberg, Johns Manville and Dexter. These seven companies held a combined 57 percent of the nonwoven fabrics market. Several of the leaders (namely, PGI, BBA and Johns Manville) have made major acquisitions since 1998, which served to broaden their capabilities and markets. Moreover, as of February 2000, Dexter was the subject of a hostile takeover attempt by International Specialty Products.
Report Highlights

- The majority of the over 200 companies in the US nonwoven fabrics industry are private firms. Some of these companies concentrate solely on the production of roll goods, while others are also forward integrated into the conversion of nonwovens.

- Because no single converter of nonwovens is able to compete in every market, there are ample niche marketing opportunities for smaller private players.

- Seven private concerns each have total annual nonwovens sales of $100 million or more, including fabrics and/or converted products.

- Four private firms have US nonwoven fabric sales of at least $70 million and one private company is among the top four US producers of adult incontinence products.

- Private nonwoven fabric and converted products firms have been involved in a significant number of recent acquisitions, both as purchasers and targets, as industry consolidation continues.

- North Carolina, Georgia, New York and South Carolina have the largest numbers of private nonwoven fabric establishments, with over 20 each. Six other states each have 10 or more private nonwoven fabric establishments.

- US demand for nonwoven fabrics is projected to rise 5.1 percent per year through 2004, reaching $4.9 billion.
About The Freedonia Group

The Freedonia Group, Inc. is a leading international industry report/database company.

Since 1985, Freedonia has published over 1,500 titles covering areas such as building materials, chemicals, plastics, industrial components and equipment, household goods, coatings and adhesives, health care, packaging, security, and many other industries.

Private companies reports encompass not only Freedonia’s notable industry forecasts, but also market shares, product information and sales and employment figures for private companies. Corporate analysts are constantly monitoring privately-held companies to provide the most up-to-date and comprehensive profiles. Freedonia is able to gather and prepare this proprietary information based on our reputation as a leading market research firm.

Advantages of Freedonia Reports

By obtaining Freedonia’s report on private companies in the nonwoven fabrics and converted products industry, you will be able to:

- **Identify companies for possible investment, merger, and/or acquisition opportunities** based on size, products and location.

- **Measure your market and sales potential** based on demand forecasts.

- **Propose new areas for product development** based on material trends.

- **Develop positioning strategies** based on size and geographic location of competitors.

- **Evaluate diversification opportunities** based on product lines of other private companies.

- **Understand barriers to entry** based on industry concentration and market shares.

Freedonia Private Companies Report

Order form on last page
Our Customers

Freedonia's clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies:

- Key Executives
- Corporate Planners
- Market Researchers
- Financial Analysts
- Information Centers
- New Product Developers
- Merger & Acquisition Specialists

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the nonwoven fabrics and converted products industry include: Amoco Fabrics & Fibers, Johns Manville and International Specialty Products.

Because Freedonia is a source for reliable information, our forecasts have been cited in numerous publications such as The Financial Times, The Wall Street Journal, Business Week and USA Today.
Disposable Medical Supplies
Strong sales are projected for angioplasty catheters, IV pump sets, prefilled syringes and other products used to treat age-related disorders. Drug delivery supplies will benefit from the use of drug therapy over costlier patient care. The home health care segment will lead gains as consumers engage in more preventive medicine and self-treatment. This study analyzes the $43 billion US disposable medical supplies industry to 2004 and 2009 by type and end-use. It also details market share and profiles key firms.

#1233 . . . . . . . . . 2/00 . . . . . . . . . $3,800

Filters
Nearly 5% annual advances in US filter demand will be based largely on rising prices, although unit sales will also increase. The shift in focus from filters that protect machinery to those which improve air and water quality have created a new range of filters (e.g., consumer water treatment, car and airplane cabin filters) which will grow faster than traditional products. This study analyzes the $7.2 billion US filters industry to 2003 and 2008 by type and market. It also evaluates market share and profiles key producers.

#1190 . . . . . . . . . 10/99 . . . . . . . . . $3,600

Filters - Private Companies Report
One private firm is among the eight largest US filter producers, and several others are among the second tier of producers. Fifteen private companies each have sales over $75 million, five of which from filter revenues alone. This report profiles over 150 privately-held US firms including Champion Labs, Filtration Group, Hayward Industries, Koch Industries and Marmon Group, and lists them by product and location. The report also forecasts industry demand, evaluates market shares and examines acquisitions.

#1223 . . . . . . . . . 2/00 . . . . . . . . . $3,400

Coated Fabrics
Demand for coated fabrics in the US will reach 635 million square yards in 2003. Advances will be driven by continued strong demand in motor vehicle air bags and upholstery, protective clothing, and awnings and canopies. Polyester will remain the dominant substrate, but nylon will grow faster. This study analyzes the $2.4 billion US coated fabrics industry to 2003 and 2008 by type, substrate and market. It also evaluates market share and profiles key firms.

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Private firms account for five of the top ten spots in this $2.5 billion US industry. In addition, over 20 private producers have total sales of at least $50 million, including products other than coated fabrics. This report profiles over 100 private firms (e.g., Avondale, Bradford Industries, Canadian General-Tower, Haartz, Highland Industries, Industrial Coatings Group). It also evaluates market share, forecasts industry demand, examines acquisition trends, and lists companies by product, market and location.

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Carpets & Rugs
US demand for carpet and rugs will approach 2 billion squares in 2002. Growth will be driven by residential and nonresidential repair and improvements. Gains will also be stimulated by expanding distribution (e.g., home centers, mass merchandisers), and product innovations (e.g., improved stain resistors, recycled or natural fibers). This study analyzes the US carpets and rugs industry to 2002 and 2007 by product, market, and material. It also profiles key companies and evaluates market share.

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