Global demand to increase 5.4% per year through 2019

Global demand for nonwovens is forecast to rise 5.4 percent yearly to 11.2 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 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.
World Nonwovens

Fabric Demand by Region
6 World Spunmelt Nonwoven by Web Formation Process, 2014

World Nonwoven Fabric Demand by Region, 2014

World Nonwoven Fabric Net Exports by Region
5 World Nonwoven Fabric Demand by Region
6 World Spunmelt Nonwoven Fabric Demand by Region

Tables for each region & country present historical data for 2004, 2009 & 2014 as well as forecasts for 2019 & 2024 for the following:
Nonwoven Fabric Supply & Demand
Nonwoven Fabric Demand by Web Formation Process, Application, & Market
... plus macroeconomic indicators

NORTH AMERICA
General
Nonwoven Fabric Supply & Demand
Nonwoven Fabric Demand Outlook
United States
Canada
Mexico

LIST OF TABLES & CHARTS:
1 World Nonwoven Fabric Market Environment
2 World Nonwoven Fabric Demand by Region
Cht  World Nonwoven Fabric Demand by Region, 2014
3 World Nonwoven Fabric Production by Region
Cht  World Nonwoven Fabric Production by Region, 2014
4 World Nonwoven Fabric Net Exports by Region
5 World Nonwoven Fabric Demand by Web Formation Process
Cht  World Nonwoven Fabric Demand by Web Formation Process, 2014
6 World Spunmelt Nonwoven Fabric Demand by Region

WESTERN EUROPE
General
Nonwoven Fabric Supply & Demand
Nonwoven Fabric Demand Outlook
Germany
United Kingdom
France
Italy
Spain
Netherlands
Belgium
Other Western Europe

LIST OF TABLES & CHARTS:
1-2 Western Europe
Cht  Western Europe: Nonwoven Fabric Demand by Country, 2014
3-4 Germany
5-6 United Kingdom
7-8 France

Company Profiles
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

**TABLE VI - 4**

**CHINA: NONWOVEN FABRIC DEMAND BY WEB FORMATION PROCESS, APPLICATION, & MARKET**

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
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<tr>
<td>Nonwoven Fabric Demand</td>
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<td>By Web Formation Process:</td>
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<td>Medical/Surgical</td>
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<td>Motor Vehicles</td>
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<td>Other</td>
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<td>Nonwoven Fabric Demand (mil $)</td>
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<td>% China</td>
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<td>Asia/Pacific Nonwovens Demand (mil $)</td>
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**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

**Freedonia’s methods involve:**

• Establishing consistent economic & market forecasts
• Using input/output ratios, flow charts & other economic methods to quantify data
• Employing in-house analysts who meet stringent quality standards
• Interviewing key industry participants, experts & end users
• Researching a proprietary database that includes trade publications, government reports & corporate literature
• Accessing internal proprietary databases
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 disproportional 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 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.

#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. Flusibility 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