

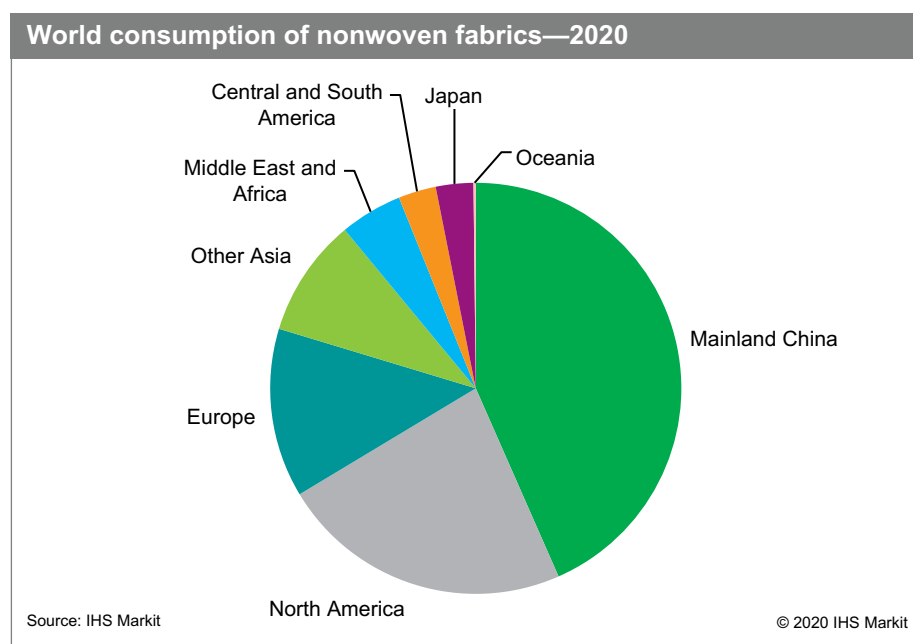
Nonwoven Fabrics

16 November 2020

Abstract

Nonwovens are generally categorized by their use in either disposable (medical/surgical products such as face masks, hygiene products such as baby diapers, adult incontinence products, and feminine hygiene products, as well as use in wipes, filtration products, and other uses such as industrial garments) or durable (geotextiles, building/construction, automotive parts, flooring/furnishings/bedding, and other uses such as apparel interlinings) applications. Disposable applications (led by medical/surgical and hygiene products, and wipes) account for the majority of nonwovens use with 65–70% of the total; durable applications (led by geotextiles/construction, automotive parts, and flooring/furnishings/bedding) make up 30–35% of total nonwovens consumption.

The following pie chart shows world consumption of nonwoven fabrics:



This report discusses fiber consumption in nonwovens by fiber (acrylic, cotton, rayon/lyocell, nylon, polyester, polyethylene, and polypropylene) and by end use. Wood pulp, glass fiber, and high-performance aramid fibers are excluded from these discussions, as are conventional fiberfill stuffing and batting applications.

In 2020, the global COVID-19 pandemic has had a major impact on the nonwovens market. For disposable nonwovens, markets have increased significantly throughout the world. Production and consumption have increased as nonwovens are used in applications to combat the virus. For example, medical/surgical uses such as face masks, hospital gowns,

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medical apparel, etc. have been in high demand during the crisis. This has led to a surge in mainland China for medical/surgical applications for both export and domestic use.

In contrast, the COVID-19 pandemic has led to a negative effect on the nonwovens market in durable applications. In 2020, the pandemic has led to declines in the global economy, as major industries such as construction, transportation (including automotive), and industrial applications have been impacted.

The boost in demand in 2020 in mainland China for medical/surgical uses has resulted in a greater share of the global market. By 2025, mainland China will account for about one-third of global nonwovens consumption. Growth will also occur in other markets such as filtration, construction, and packaging applications.

In North America, the continued fight against the COVID-19 pandemic will drive growth for nonwoven uses in the medical/surgical, wipes, and filtration areas. There will also be modest recovery and growth in the automobile, construction, flooring/furnishings/bedding, and other durable applications.

In Europe and Japan, modest growth for most nonwoven uses will occur over the next few years. It is expected that there will be relatively higher growth in other regions such as Southeast Asia, the Indian Subcontinent, and the Middle East and Africa. Nonwoven uses in medical/surgical, wipes, and hygiene markets will support this growth.

Overall, the global nonwovens market is expected to grow about 4% per year in the next few years. It will be driven by continued measures to stop the spread and transmission of the COVID-19 virus through the use of masks, hospital and protective coverings, and disinfecting wipes. Population growth will continue to support nonwovens use in baby diapers, while the growing aging population will lead to increased demand for adult incontinence products. There is also an expected recovery and growth for durable nonwovens uses such as in construction and automobiles, as well as consumer goods.

For more detailed information, see the table of contents, shown below.

IHS Markit's Chemical Economics Handbook – *Nonwoven Fabrics* is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Global summary;
regional coverage



Producers with
annual capacities
and plant sites



Production figures
and trends



Consumption and
forecasts by end use
application



Manufacturing
processes and
environmental issues



Trade – imports
and exports

Key benefits

IHS Markit's Chemical Economics Handbook – *Nonwoven Fabrics* has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade, and economics.

This report can help you

- Identify trends and driving forces influencing chemical markets
- Forecast and plan for future demand

- Understand the impact of competing materials
- Identify and evaluate potential customers and competitors
- Evaluate producers
- Track changing prices and trade movements
- Analyze the impact of feedstocks, regulations, and other factors on chemical profitability

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