

Global Bicomponent Fiber Market: Analysis By Material (Polyethylene (PE)/Polypropylene (PP), Polypropylene (PP)/Polyethylene Terephthalate (PET), High-density Polyethylene/Low-density Polyethylene, Polyethylene (PE)/Polyethylene Terephthalate (PET), Polyester/PBT, and Other Materials), By Structure Type (Sheath-Core, Side-by-Side, Island In The Sea, and Other Structure Types), By End User (Hygiene, Automotive, Non-woven Textiles, Construction, and Other End-user Industries), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Bicomponent fiber, or heterophil fiber, is a special class of synthetic fibers/filaments manufactured using two different polymers and then extruded as a single filament. The global bicomponent fiber market refers to the global industry engaged in production, distribution, and sale of specialized fibers across various end-user applications. The global bicomponent fiber market value stood at US\$2.14 billion in 2023, and is expected to reach US\$3.02 billion by 2029.

The global bicomponent fiber market has been positively growing over the years owing to rapid urbanization, rising demand for sustainable high-performance materials in hygiene and healthcare products, rapidly growing textile industry, increasing demand for lightweight and durable materials in automotive and construction sector, rise of bio-

based non woven fibers, increasing awareness about the use of adult diapers and feminine hygiene products, rising disposable income, surge in use of bicomponent fibers in filtration media for air and liquid filtration systems, and increasing popularity of disposable products such as disposable wipes, medical fabrics, and cleaning products. In addition, the increased need for high-performance fabrics with enhanced properties like durability, moisture resistance, and thermal insulation in apparel sector is driving the demand for bicomponent fibers in the fashion, outdoor gear, and sportswear sectors. The global bicomponent fiber market is expected to grow at a CAGR of 5.88% over the projected period of 2024-2029.

Market Segmentation Analysis:

By Material: The report provides the bifurcation of the global bicomponent fiber market into six segments on the basis of material, namely, polyethylene/polypropylene, polypropylene/polyethylene terephthalate, high-density polyethylene/low-density polyethylene, polyethylene/polyethylene terephthalate, polyester/PBT, and other materials. PE/PP is the largest and fastest growing segment of global bicomponent fiber market owing to rising demand for baby diapers and adult incontinence products, rapidly aging population, automotive industry's shift toward lightweight and high-strength materials, strong growth in the filtration industry, rapid growth of geotextiles in infrastructure projects, growing demand for high-loft nonwoven fabrics, rising focus on sustainability, and increasing popularity of disposable medical textiles, such as surgical gowns, face masks, and wound care products.

By Structure Type: The report provides the bifurcation of the global bicomponent fiber market into four segments on the basis of structure type, namely, sheath-core, side-by-side, island in the sea, and other structure types. Sheath-core bicomponent fiber is the largest and fastest growing segment of global bicomponent fiber market owing to growing awareness among consumers regarding the benefits of technical textiles and performance fabrics, rapidly growing textile industry, increasing demand of hygiene products in emerging economies, rising consumer demand for sustainable and eco-friendly products, increasing consumer preference for multi-functional fabrics, increasing demand for sports and activewear, and ongoing incorporation of technologies like 3D knitting and antimicrobial agents into the sheath-core design to produce complex textile structures and help reduce odors and increase hygiene.

By End User: The global bicomponent fiber market can be divided into five segments, on the basis of end user, namely, hygiene, automotive, non-woven textiles, construction, and other end-user industries. Hygiene industry is the largest and fastest

growing end user segment of global bicomponent fibers market, owing to rapidly ageing population, rising birth rates, increased industry emphasis on the use of absorbent and comfortable materials, heightened government focus on health and hygiene, rapidly growing e-commerce and retail channels, increased manufacturer spending on hygiene product marketing, growing consumer focus on personal hygiene, growing emphasis on sustainability in the hygiene products industry, and surging demand for disposable hygiene products in rapidly emerging economies.

By Region: The report provides insight into the global bicomponent fiber market based on regions namely, North America, Europe, Asia Pacific, and rest of the world. Asia Pacific is the largest and fastest growing region of global bicomponent fiber market owing to rapid population growth, increasing disposable income of consumers, presence of robust manufacturing sectors, region's booming hygiene product industry, expanding infrastructure and construction sectors, abundant supply of raw materials like polyester and polypropylene, increasing awareness of hygiene products such as adult diapers and feminine hygiene products, growing middle class working professionals, and huge demand for medical, automotive, and nonwoven textiles from China, India, Japan, and South Korea. Also, lower labor and production costs in countries like China & India attract global textile manufacturers, transforming the region into a global hub for bicomponent fiber production. Asia Pacific is a major export hub for textiles and non-woven materials, especially in countries like China, Vietnam, and South Korea. Asia Pacific bicomponent fiber market is divided into five regions on the basis of geographical operations, namely, China, Japan, India, South Korea, and rest of Asia Pacific, where the China bicomponent fiber market accounted for largest revenue share.

The US bicomponent fiber market is the largest and fastest growing region of North America bicomponent fiber market as a result of rising popularity of athleisure and activewear, increased health consciousness among consumers, robust manufacturing sector, rapidly expanding e-commerce sector, high per capita income, growing consumer preference for sustainable & eco-friendly products, and increasing demand for premium and high-quality sanitary napkins, pads, and baby diapers. In addition, a spiked interest in sports also played an important role in the increased spending on activewear by Americans, including clothing and accessories to support their favorite teams, as well as workout gear to play sports.

Market Dynamics:

Growth Drivers: The global bicomponent fiber market has been rapidly growing over the past few years, due to factors such as growing demand in hygiene industry, positively

expanding textile industry, increasing use in construction industry, rising demand in sportswear and activewear, expanding applications in the automotive industry etc. Growing focus on personal hygiene, rising income levels, increasing number of working women, and surge in awareness among consumers regarding menstrual hygiene, have been positively contributing to the growth of feminine hygiene products, such as tampons, sanitary pads, and menstrual cups, globally, thereby, propelling the consumption of bicomponent fibers used in the production of feminine care products. Also, textiles made from bicomponent fibers can be tailored for specific functions, such as moisture management, temperature control, and flame retardancy. So, positively expanding textile industry, particularly in emerging economies, such as China, India, Bangladesh, and Vietnam, will continue to boost the demand for bicomponent fibers in textile production.

Challenges: However, the global bicomponent fiber market growth would be negatively impacted by various challenges such as, high production cost, limited awareness and adoption, etc. Bicomponent fibers tend to be overlooked in various industries despite their numerous advantages, such as improved performance and customization capabilities. This is primarily due to the prevalence and familiarity of traditional single-component fibers. The limited acknowledgment of these materials may hinder their extensive acceptance, as manufacturers and product designers might resist embracing a novel substance.

Trends: The global bicomponent fiber market is projected to grow at a fast pace during the forecasted period, owing to, increasing integration of automation and AI, growing focus on sustainability and use of environmentally friendly materials, advancements in production technology, increasing use of 3D knitting technology, etc. Bicomponent fibers can be designed using biodegradable polymers or recycled materials. Many companies are shifting toward sustainable production methods, using renewable resources like bio-based polymers or creating fibers that can break down more easily in the environment. So, since these fibers can be recycled more efficiently than traditional single-polymer fibers, the demand for bicomponent fiber is expected to rise in the forecasted period. Also, recent improvements in fiber processing have optimized the thermal bonding characteristics, allowing for stronger and more durable final products. Moreover, adoption of new technologies, such as advanced heat management and energy recovery systems, are making the production of these fibers more energy-efficient, which is not only environmentally beneficial but also helps reduce costs for manufacturers.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. The growth of global bicomponent fiber market was positively impacted during the period 2019-2020, as pandemic was associated with heightened focus on hygiene and personal safety, boosting the demand for products like masks, medical gowns, and other protective gear, many of which utilize bicomponent fibers. Bicomponent fibers provide unique properties like softness, enhanced breathability, high filtration efficiency, and improved absorbency, making them ideal for production of reusable and disposable masks, medical gowns, and sanitary products.

Competitive Landscape:

The global bicomponent fiber market is partially fragmented, with large number of companies, ranging from established brands to smaller regional players and niche manufacturers catering to the industry demand. The key players of the market are:

Dow Inc.
Ems-Chemie Holding AG
Indorama Corporation (Indorama Ventures Limited)
Teijin Limited
Far Eastern New Century Corporation
PTT Global Chemical Public Company Limited (GC)
Toray Industries, Inc
Nan Ya Plastics Corporation
JNC Corporation
CHA Group (CHA Technologies Group)

The market is characterized by the presence of numerous manufacturers, suppliers, and distributors operating on a global scale. Also, major players in the market are trying to incorporate powerful strategies to maintain their market positions. They are investing heavily in R&D to provide their consumers with the most innovative and technologically advanced products. For instance, on November 14, 2023, the LYCRA Company, announced the launch of new LYCRA FiT400 fiber for knits, where the company's latest EcoMade offering is a unique bicomponent fiber engineered to optimize the performance and comfort of knits.

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