

Global Industrial Paper Machine Clothing (PMC) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Industrial Paper Machine Clothing (PMC) market size is expected to reach \$ 3574 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032).

Industrial Paper Machine Clothing (PMC) refers to solution-based, custom-designed fabrics and belts that are essential for the formation, dewatering, drying, and transport of the paper sheet through a paper machine. Installed in different sections of the papermaking line, these products directly affect sheet quality, production efficiency, energy consumption, and machine runnability. PMC is typically produced from high-performance synthetic fibers or selected natural fibers and engineered to withstand continuous mechanical stress, abrasion, chemical exposure, and elevated operating temperatures inherent in modern papermaking processes.

In 2025, global Industrial Paper Machine Clothing (PMC) production reached approximately 75.8 k units, with an average global market price of around US\$ 35.6 k per Ton.

PMC products are primarily manufactured from high-performance fibers such as polyester, polyamide, and other specialty polymer filaments that deliver strength, dimensional stability, heat resistance, and chemical durability. Leading global suppliers of such materials include DuPont, Indorama Corporation, Toray Industries, and Mitsubishi Chemical Holdings Corporation, which provide advanced polymer resins and industrial fibers widely used in the manufacture of forming fabrics, press felts, and dryer fabrics.

PMC products are consumed by pulp and paper producers serving household and

sanitary paper, printing and writing paper, wrapping and packing paper, and other specialty grades. In China, representative large-scale customers include Hengan Group, C & S Paper, Nine Dragons Paper, and Lee & Man Paper Manufacturing Ltd, all of which operate extensive paper machine fleets and regularly procure forming fabrics, press fabrics, and dryer fabrics.

Because PMC products are highly customized, technologically complex, and closely integrated with customer papermaking processes, the segment typically commands higher gross margins than conventional industrial textiles. Leading global manufacturers usually report gross margins in the range of 30% to 50%.

Industrial Paper Machine Clothing (PMC), which includes forming fabrics, press fabrics and dryer fabrics, represents a highly specialized segment of the papermaking value chain and plays a decisive role in sheet formation, water removal efficiency and drying performance on modern paper machines. Among these product categories, forming fabrics remain the dominant segment of the global PMC market, accounting for approximately 45% of total market share in 2025, reflecting their critical function at the wet end of the machine and their frequent replacement cycles in high-speed operations. Press fabrics and dryer fabrics form the remaining portions of demand, driven by continuous upgrades in press section technology, shoe press installations and the pursuit of improved runnability and energy efficiency in the dryer section, which together sustain a stable replacement and innovation cycle across all three categories.

From the application perspective, PMC demand is closely tied to downstream paper grades, including household and sanitary paper, printing and writing paper, wrapping and packing paper, and other specialty paper products. Wrapping and packing paper stands out as the leading application market, representing roughly 60% of global PMC consumption in 2025, underpinned by the rapid growth of e-commerce logistics, food and beverage packaging and industrial shipping requirements worldwide. Household and sanitary paper continues to provide resilient baseline demand due to population growth, urbanization and rising hygiene standards, while printing and writing paper shows more mature and selective replacement demand patterns. Other specialty paper grades, such as filtration, d?cor and technical papers, add incremental but technologically demanding niches for PMC suppliers.

Market expansion is being driven by several structural factors, including ongoing capacity additions in packaging paper, especially in Asia-Pacific, the continuous modernization of paper machines toward higher speeds and wider widths, and the increasing adoption of advanced press technologies that require premium fabrics and

belts. Sustainability objectives across the pulp and paper industry are also supporting PMC demand, as mills seek fabrics that improve dewatering efficiency, reduce steam consumption in drying and extend service life, thereby lowering overall energy use and carbon emissions. In addition, the growing focus on recycled fiber processing is creating further opportunities for specialized forming and press fabrics capable of handling higher contaminant loads and abrasive furnish.

At the same time, the PMC market faces a number of restraining factors that moderate growth. Capital expenditure cycles in the pulp and paper industry remain sensitive to macroeconomic conditions, which can delay machine rebuilds and fabric upgrades during downturns. Price pressure from large integrated paper producers, combined with rising costs for high-performance polymer raw materials, can compress margins for suppliers, particularly in highly competitive regions. Mature demand in printing and writing grades also limits incremental volume growth, while the technical complexity of PMC products requires continuous investment in research, manufacturing capability and service networks, raising entry barriers but also increasing fixed-cost intensity for existing players.

This report studies the global Industrial Paper Machine Clothing (PMC) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Industrial Paper Machine Clothing (PMC) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Industrial Paper Machine Clothing (PMC) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Industrial Paper Machine Clothing (PMC) total production and demand, 2021-2032, (Tons)

Global Industrial Paper Machine Clothing (PMC) total production value, 2021-2032, (USD Million)

Global Industrial Paper Machine Clothing (PMC) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Industrial Paper Machine Clothing (PMC) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Industrial Paper Machine Clothing (PMC) domestic production, consumption, key domestic manufacturers and share

Global Industrial Paper Machine Clothing (PMC) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Industrial Paper Machine Clothing (PMC) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Industrial Paper Machine Clothing (PMC) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Industrial Paper Machine Clothing (PMC) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Albany International, ANDRITZ AG, AstenJohnson, Heimbach, Nippon Filcon, Voith, ICHIKAWA, Valmet, Sichuan Vanov, Anhui Taipingyang, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Industrial Paper Machine Clothing (PMC) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (K USD/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Industrial Paper Machine Clothing (PMC) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Industrial Paper Machine Clothing (PMC) Market, Segmentation by Type:

Forming Fabrics

Press Fabrics

Dryer Fabrics

Global Industrial Paper Machine Clothing (PMC) Market, Segmentation by Structure:

Papermaking Felts

Papermaking Fabrics

Global Industrial Paper Machine Clothing (PMC) Market, Segmentation by Sales Channel:

Direct Sales

Distributor Sales

Global Industrial Paper Machine Clothing (PMC) Market, Segmentation by Application:

Household and Sanitary Paper

Printing and Writing Paper

Wrapping and Packing Paper

Other

Companies Profiled:

Albany International

ANDRITZ AG

AstenJohnson

Heimbach

Nippon Filcon

Voith

ICHIKAWA

Valmet

Sichuan Vanov

Anhui Taipingyang

Jiangsu Jinni

AnHui HuaChen

Liaocheng Jingwei

Henan Jingxin

Hebei Hehuang Net Industry

Henan Sloong Fabrics

Henan Huafeng Fabric

Dongguan Yexing

Xuzhou Jinguan

Taian Songyuan

Henan Hengfeng (Zhoukou Hengyun)

Shenqiu Xinghua

Key Questions Answered:

1. How big is the global Industrial Paper Machine Clothing (PMC) market?
2. What is the demand of the global Industrial Paper Machine Clothing (PMC) market?
3. What is the year over year growth of the global Industrial Paper Machine Clothing (PMC) market?
4. What is the production and production value of the global Industrial Paper Machine Clothing (PMC) market?
5. Who are the key producers in the global Industrial Paper Machine Clothing (PMC) market?
6. What are the growth factors driving the market demand?

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