

Global ES Fiber for Hygiene Products Market Growth 2026-2032

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Abstracts

The global ES Fiber for Hygiene Products market size is predicted to grow from US\$ 807 million in 2025 to US\$ 1271 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

ES Fiber for Hygiene Products refers to bicomponent thermal bonding staple fiber for hygiene applications. It is mainly made from two thermoplastic polymers with different melting points, such as PE+PP and PE+PET, and is produced through bicomponent spinning, drawing, crimping, heat setting and cutting. Its typical structure is sheath-core. The low-melting PE component serves as the sheath and softens during through-air bonding or thermal calendering to form bonding points between fibers, while the higher-melting PP or PET component serves as the core to maintain the fiber skeleton and strength. As a result, the fiber web can form soft, bulky, breathable and low-irritation through-air nonwovens with little or no chemical adhesive.

In terms of applications, ES fiber for hygiene products is mainly used in disposable hygiene products such as baby diapers, adult incontinence products, feminine hygiene materials, underpads and medical dressings. It is commonly used as a key fiber material in topsheets, acquisition distribution layers, wrapping layers and bulky support layers. Among them, the PE+PP system is softer, more skin-friendly and suitable for low-temperature bonding, and is often used in topsheets and high-softness hygiene materials. The PE+PET system provides better skeleton strength and dimensional stability, and is often used in acquisition distribution layers, wrapping layers and through-air nonwovens requiring higher stiffness. In addition to traditional PE+PP and PE+PET ES fibers, PLA bicomponent fibers have emerged in the industry as a bio-based and biodegradable alternative route. Functionally, they can also be used to produce through-air bonded nonwovens and represent an important future trend in green and

environmentally friendly materials. In 2025, global output of ES fiber for hygiene products was approximately 551,300 tons, with an average selling price of USD 1,459.86 per ton and a gross margin of approximately 22.52%.

Hot Air Through Bonding Fiber For Hygiene Materials Is Moving From Volume Expansion To Structural Upgrading. Historically, Growth Was Driven Mainly By Higher Penetration Of Baby Diapers And Feminine Hygiene Products. The Current Growth Logic Is Shifting Toward Adult Incontinence Care, Premium Diapers, Sensitive Skin Feminine Hygiene Products, Medical Underpads And Functional Composite Topsheets. ES Fiber Enables Bulky, Soft, Breathable And Binder Free Nonwovens Through The Through Air Bonding Process, Matching Brand Owners Requirements For Skin Friendliness, Low Irritation, Lightweighting And Stable Processability. As Leading Hygiene Brands Upgrade Product Tiers, Demand Is Increasing For Fine Denier, Durable Hydrophilic, Low Rewet, Low Odor And Highly Uniform ES Fibers Used In Topsheets, Acquisition Distribution Layers And Wrapping Layers. As A Result, Competition Is Shifting From Pure Price Competition To Performance, Qualification And Joint Development With Customers.

Industry Opportunities Come From Three Main Directions. First, Global Aging Is Driving A Long Term Expansion Cycle For Adult Incontinence Products, Which Generally Place Higher Emphasis On Absorption Efficiency, Dryness And Skin Friendliness, Resulting In Stronger Usage Intensity Of Hot Air Materials Than Some Low End Baby Diapers. Second, Hygiene Product Penetration Still Has Room To Increase In Southeast Asia, India, The Middle East And Latin America, And Local Hygiene Capacity Expansion Will Drive The Regionalization Of ES Fiber And Hot Air Nonwoven Supply Chains. Third, Hygiene Brands Are Iterating Toward Lower Adhesive Usage, Lower Odor, Lower Carbon Footprint And Recyclability, Creating Qualification Opportunities For PE PP Mono Polyolefin Systems, Biodegradable Or Bio Based Bicomponent Fibers And Functional Finish Fibers. For Manufacturers, The Key To Premium Margin Orders Is The Ability To Supply Globally Qualified Products, Control Denier Variation And Thermal Bonding Windows, And Improve Compatibility With High Speed Carding Lines.

The Main Challenges Lie In Supply Demand Mismatch, Feedstock Volatility And Downstream Bargaining Power. ES Fiber Is A Bicomponent Spinning Product With Relatively High Capital And Process Barriers, But New Capacity In China Has Increased Rapidly In Recent Years, Creating Periodic Price Competition In Standard Grades. At The Same Time, PE PP And PET Feedstock Prices Are Affected By Crude Oil And Petrochemical Cycles. If Diaper And Feminine Hygiene Brand Owners Enter Cost Reduction Cycles, Fiber Producers Cost Pass Through Ability Will Be

Compressed. In The Long Run, The Market Will Not Grow Simply In Line With Nameplate Capacity. Value Will Concentrate In Customer Qualification, Functional Grades, Stable Batch Quality, Overseas Supply Capability And Low Carbon Material Solutions, While Smaller Producers Without Core Customers Or Differentiated Products Will Face Margin Pressure.

LP Information, Inc. (LPI) ' newest research report, the "ES Fiber for Hygiene Products Industry Forecast" looks at past sales and reviews total world ES Fiber for Hygiene Products sales in 2025, providing a comprehensive analysis by region and market sector of projected ES Fiber for Hygiene Products sales for 2026 through 2032. With ES Fiber for Hygiene Products sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world ES Fiber for Hygiene Products industry.

This Insight Report provides a comprehensive analysis of the global ES Fiber for Hygiene Products landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on ES Fiber for Hygiene Products portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global ES Fiber for Hygiene Products market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ES Fiber for Hygiene Products and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ES Fiber for Hygiene Products.

This report presents a comprehensive overview, market shares, and growth opportunities of ES Fiber for Hygiene Products market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Linear Density 0.4D

Linear Density 0.6D

Linear Density 0.8D

Linear Density 1.2D

Linear Density 1.5D

Linear Density 2.0D

Segmentation by Material:

PE+PP

PE+PET

Others

Segmentation by Fiber Structure:

Sheath Core

Side By Side

Segmentation by Application:

Baby Diapers

Adult Incontinence Products

Feminine Hygiene Products

Medical Supplies

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Huvis

Fiber Vision

TOYOBO MC Corporation

Toray Industries Inc.

JNC Corporation(Guangzhou Yiaisi Fiber Co., Ltd.)

Fujian Mr Fiber Joint Co.,Ltd.

Billion Industrial Holdings Limited

Eastbay-group

Jiangsu Jiangnan High Polymer Fiber Co., Ltd.

ZhejiangSunwishChemicalFiberCo.,Ltd.

Fujian Foody New Material Co., Ltd.

Anhui Jinchun Nonwoven Co., Ltd.

Nan Ya Plastics Corporation

Far Eastern New Century

Key Questions Addressed in this Report

What is the 10-year outlook for the global ES Fiber for Hygiene Products market?

What factors are driving ES Fiber for Hygiene Products market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do ES Fiber for Hygiene Products market opportunities vary by end market size?

How does ES Fiber for Hygiene Products break out by Type, by Application?

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