

Geotextiles Market Assessment, By Material Type [Natural, Synthetic], By Product [Nonwoven, Woven], By Application [Separation, Reinforcement, Erosion Control, Road Pavement, Others], By End-user [Building and Construction, Agriculture, Railway Infrastructure, Others], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global geotextiles market size was valued at USD 7.42 billion in 2022, which is expected to grow to USD 11.92 billion in 2030 with a CAGR of 6.1% during the forecast period between 2023 and 2030. Geotextiles are progressively designed for construction and building works covering various applications like filtration, drainage, stabilization, and reinforcement. For instance, in 2022, HUESKER International substantially constructed the mechanical protection of gas pipelines using geosynthetic concrete mattresses. The rising infrastructure projects in various countries are significantly propelling the geotextiles market. For instance, under the National Infrastructure Pipeline (NIP), the Indian government has commissioned a huge capital of USD 13.14 billion during 2018-2024, to build long-range pipeline transportation for the rising oil and gas industry.

The geotextiles market is experiencing massive growth due to several key drivers, such as the requirement of large rail networks for goods transportation, advanced road services equipped with safety measures, and sustainable projects for water management. Furthermore, the growth attribution can be recognized due to the impeccable investment in the automobile sector and government projects on building connectivity to every corner of the region in various countries. Farmers are progressively using geotextiles to improve crop yield in the agriculture sector, where soil

erosion can be prevented while ensuring weed control and irrigation systems.

Geotextiles are subsequently used for drainage, filtration, and reinforcement while practicing agriculture. In addition, in civil transportation applications, geotextiles are used for subsurface drainage, asphalt overlay pavement, erosion control, and structural reinforcement. Consequently, the construction industry is propelling the growth of the geotextiles market.

Development of Massive Road Network is Contributing Towards the Market Growth

The advanced and safe road network is one of the prominent reasons for the growth of the country's economy. Geotextiles are considered ideal materials in road construction and pavement repair and fill gaps between the roads to upgrade soil structure. In addition to filling gaps, geotextile materials are progressively used for separation and filtration in road construction, along with preserving the movement of small gravels and sand aggregates. The strength and durability of underlying soil in road construction are accomplished using geotextile materials. Their application is extended to improve paved and unpaved roads in airport runways.

For instance, according to the recent data published by the Construction Products Association (CPA), the global construction industry registered an annual growth rate of 2.0% in 2022. Likewise, the global construction sector will have a year-on-year growth rate of 2.2% in 2023. Additionally, in 2022, the Biden administration cleared a huge amount of USD 550 billion to substantially upgrade various infrastructure projects, including roads, bridges, and dams.

Likewise, according to the data released by the International Transport Forum (ITF), the European Union government has spent over USD 318 billion yearly on transportation over the last decade. In 2020, around 87.2% of inland passenger transport across the European Union was carried by traveling cars, followed by buses, coaches, and trolleybuses, which account for 7.4%. In line with such prominent investments by developed countries, the geotextile market is potentially growing, encouraging more companies.

Rising Application of Nonwoven Geotextiles

Civil engineering projects are an integral part of the development of a nation where a significant contribution can be recognized in enhancing the country's GDP. Nonwoven geotextiles are made from synthetic materials such as polyethylene, polypropylene, and

polyamide that are subsequently used for separation, reinforcement, filters, and fillers in the construction industry. For instance, Tencate Geosynthetics has successfully developed the Mirafi S-series nonwoven polypropylene geotextile that is progressively used in natural, environmental, and energy infrastructure projects like geometric prevention in solid waste landfills, fracking ponds, and significant water management systems. The S-series products are cost-effective and provide economical solutions to numerous civil engineering projects, including graded-aggregate filters.

Likewise, in 2022, under Global Water Partnership (GPW) the management was strictly focused on incorporating 2020-2025 strategy plans where the investment is added around USD 368.86 million. In 2022, GPW encouraged the mobilization of USD 1.5 million for Southern African Development Community (SADC) countries under the GCP Project Preparation Facility. Also, in five years, from 2022 to 2027, the United States Agency for International Development (USAID) will closely work with partnered countries to directly benefit 22 million people with sustainable sanitation services and significantly allot USD 1 billion for financing water security and resilient watersheds. Hence, the concern of sustainable water management and introducing a new range of products has created huge potential for nonwoven geotextile application growth globally.

Asia-Pacific Market is Progressively Contributing to the Growth of Geotextiles Market

The population explosion in Asia-Pacific countries, including India and China, has increased the demand for developing advanced infrastructure projects and the construction industry. The stringent regulations to encourage sustainable practices have been significantly adopted by Asia-Pacific due to the rising sustainability concerns and environmentally friendly projects. The water management system in countries such as India is on top priority to provide access to every section of the society.

For instance, China has always been involved in the list of water-scarce problems experiencing aggravated water scarcity. Jiangsu and Fujian provinces in China have commenced a “water-saving loan” service to encourage and implement water-saving renovation projects with an interest rate of 3.85%. Under the China Belt and Road Initiative (BRI), the investment in road projects 2022 was USD 67.8 billion. In addition, in August 2022, China State Railway Group has progressively commissioned huge investments to enhance the railway network across the country by 2035. Therefore, with such a definite investment, Asia-Pacific is considered a prominent contributor to the geotextiles market growth.

Impact of COVID-19

The shutdown of the construction and transportation industry badly deteriorated economic stability due to the COVID-19 impact in 2020. The unavailability of resources and manpower to build an effective management system significantly affected the growth of geotextiles. However, during the second half of 2020, after the pandemic, the transportation and construction business registered a decent growth, which encouraged industries to utilize geotextile products in their practices. Consecutively, the ease in restrictions and removal of lockdown has shifted the worst phase of the market to probable growth deriving impeccable market opportunities.

Impact of Russia Ukraine War

The prevailing invasion of Russia on Ukraine has drastically changed the geographical demographics since several Western countries placed bans on trade and imports from Russia. The supply chain across Europe was severely affected due to the closure of rail and road transportation services surrounding the Russia border. Consequently, such dreadful conditions led to limited exports and imports growth across Russia and other European countries. The construction industry across Europe was severely hit, especially the production of chemicals that form an essential entity for important applications. Despite the circumstances, the companies adopted certain regulations to restore production and recover the losses during the invasion of Russia.

For instance, according to the recent data published by the European Construction Industry Federation (FIEC), a European Union construction industry association, the house dwelling projects in the European Union region registered a decline of 0.2% in 2022. Thus, imports of Russian products have disrupted the flow activity that subsequently resulted in the decline of the economy. However, the significant efforts from European companies generated a massive opportunity for the geotextiles market to expand.

Key Players Landscape and Outlook

The geotextiles market has encouraged prominent companies to develop innovative solutions for long-range road networks and build sustainable management systems. The leading global companies in the global geotextile market are Tencate Geosynthetics Americas, Fibertex Nonwoven A/S, HUESKER International, Belton Industries., and Agru America Inc. The market players develop registered nonwoven geotextile fabric specifically designed for civil, mining, and environmental applications.

Agru integrated drainage system (IDS) covers over 250 million square feet where the installation is successively used for closure and containment applications.

In September 2020, Rocscience, a leading manufacturer of woven geotextiles collaborated with Wavin to integrate specific Wavin geosynthetics to provide solutions for sanitation, climate-resilient cities, and water management.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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