

Non-woven Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Non-woven Packaging Market size in terms of production volume is expected to grow from 1.61 Million tons in 2024 to 2.31 Million tons by 2029, at a CAGR of 7.47% during the forecast period (2024-2029).

Innovation and improvements in the non-woven fabric manufacturing processes have also contributed to market growth. Innovations in materials and production techniques have led to the development of non-woven fabrics with enhanced properties such as strength, flexibility, and barrier capabilities, creating opportunities for the products to substitute existing packaging products. The advancements mentioned have expanded the application scope of non-woven fabric packaging across various industries, further driving market growth.

The textile industry has become increasingly globalized, spreading production and consumption across various regions. As a result, countries with competitive advantages in textile production, such as low labor costs or access to raw materials, have been able to ramp up their yarn production for export purposes. This has led to a surge in the volume of textile yarn traded internationally.

Non-woven materials offer lightweight, durable, and cost-effective solutions for packaging in various industries such as agriculture, construction, and retail. The versatility of non-woven fabrics makes them suitable for different types of sacks and bags, driving their adoption in packaging applications.

Environmental awareness, such as eco-friendly fashion has evolved worldwide. Non-woven bags, created from sustainable resources, are at the forefront of this trend,

providing a chic and responsible substitute to conventional plastic bags.

The geopolitical situation often influences global energy markets, impacting the prices of crude oil and natural gas. Since these commodities are key feedstocks for petrochemical-based raw materials used in non-woven fabric production, such as polypropylene and polyester, fluctuations in energy prices can directly affect the cost of raw materials. Sharp increases in energy prices can drive up production costs for non-woven fabric manufacturers, leading to higher prices for non-woven packaging materials.

Non-woven Packaging Market Trends

Food Packaging to Hold Major Market Share

Producers and converters in the food packaging sector are actively innovating to create sustainable solutions, often incorporating natural fibers and optimizing raw material usage. In food pads, air-laid non-wovens take center stage, boasting a high proportion of natural fibers.

Additionally, spun bond/SAP/spun bond laminates are gaining traction in the market. These non-woven food pads effectively absorb liquids from perishable goods like meat and fruit, preserving freshness and extending shelf life, ultimately reducing food wastage. According to the OECD, the projected global consumption of poultry meat will amount to 156.24 metric kilotons by 2032.

According to INDA, the association representing the non-woven fabrics industry, air-laid is particularly well-suited for food pads due to its resemblance to hygiene absorbent cores. It exhibits rapid liquid acquisition, minimal rewetting, and high absorbency capacities. However, other types of non-woven fabrics, including spun bond, melt blown, and needle-punched varieties, also serve distinct roles in the food packaging industry.

One of the key advantages of non-woven materials in food packaging is their cost-effectiveness compared to traditional packaging materials such as plastics and paper. This affordability makes them an appealing choice for various food packaging applications, from fresh produce to processed foods.

Non-woven materials are crucial in crafting insulated bags and totes designed for transporting perishable food items like groceries, prepared meals, and frozen foods.

These bags are equipped with thermal insulation to maintain the desired temperature, ensuring the freshness and quality of the contents during transit. Additionally, non-woven fabrics are extensively utilized to create reusable shopping bags tailored for groceries, produce, and food items. These bags are prized for their durability, strength, and versatility, serving as an eco-friendly substitute for disposable plastic bags.

Asia Pacific Expected to Witness Significant Growth

The countries across the region have focused on supporting all aspects of the textile industry. In particular, attention was given to the numerous uses of non-wovens in different packaging applications. Non-woven bags are widely acceptable in the region due to their durability and tear-resistant, flexible features for advertisements, shipping, packing, and promotion.

As non-wovens and technical textiles are considered the most promising and dynamic segment of the textiles industry, the demand and consumption of Non-wovens and Technical Textiles will grow steadily throughout the forecasted period in India. Indian industry is beginning to follow international trends by calling on foreign players to collaborate with the entrepreneurs in India and pushing manufacturers to innovate non-woven packaging and increase the production line.

Packaging is one of the most traditional non-woven applications in China. Due to the ban on plastic bags, there is a considerable demand for non-woven reusable shopping bags. The Chinese non-woven industry will continue to focus more on industrial packaging, medical packaging, and food packaging applications in the future.

In China, the demand for non-wovens in the medical and surgical industry will change occasionally. The Healthy China Initiative and the development of products and applications will continue to boost non-woven medical and surgical packaging consumption.

China Non-wovens and Industrial Textiles Association, which represents the non-wovens, industrial textiles, and related industries in China, released data in May 2023 stating that in 2022, approximately 50 spun-bonded and melt-blown non-wovens production lines, 20 spun laced lines, 150 needle-punched line production lines have been added.

Non-woven Packaging Industry Overview

The Non-woven Packaging market is fragmented owing to global players and small and medium-sized enterprises. Some of the major players in the market are Novipax Buyer, LLC, EAM Corporation (Domtar Corporation), Glatfelter Corporation, Felix Non-wovens, and Dupont de Nemours, Inc. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

February 2024 - Berry Global Group, Inc. and Glatfelter Corporation declared their agreements to merge the majority of Berry Global Group's hygiene, health, and specialties segment to incorporate its global non-wovens and films business with Glatfelter. This merger is the first step for the company to become the market leader in non-woven and specialty materials in the global markets.

November 2023 - Novipax enhanced the benefits of its absorbents pad named Prep Pads in the food service industry for various purposes, including storage of food for storage and transportation, food packaging to absorb excess oil and moisture, and others.

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