

Engineered Coated Fabrics Market by End-Use Industry Type (Automotive, Aerospace & Defense, Oil & Gas, Marine, and Others), by Coating Type (Polyurethane, Rubber, Silicon, and Others), by Substrate Type (Polyester, Fiberglass, Aramid, Polyamide, and Others), by Coating Process Type (Calendaring, Hot-Melt, Knife, and Others), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023

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Abstracts

This report, from Stratview Research, studies the engineered coated fabrics market over the trend period of 2012 to 2017 and forecast period of 2018 to 2023. The report provides detailed insights into the market dynamics to enable informed business decision making and growth strategy formulation based on the opportunities present in the market.

The Global Engineered Coated Fabrics Market: Highlights

Engineered coated fabrics refer to the highly technically coated fabrics, which include combination of technical fibers and specific polymers to coat the fabric as per the diverse requirements of applications. The engineered coated fabrics are marking their presence in various high-end technically advanced applications for various end-use industries. Some of the keys engineered coated fabric applications are airbags, aerostats, evacuation slides, train bellows, gaskets and seals, fuel storage, as well as

health and medical accessories, such as wound retractors and cuffs mattresses.

The engineered coated fabrics market is characterized by a wide array of factors which are directly or indirectly engendering the growth of the market. Among all, the biggest factor is the continuous gain in the market traction of engineered coated fabrics in various end-use industries including aerospace & defense and automotive, owing to their superior performance. Another factor pushing the demand for engineered coated fabrics market is growing penetration of polymers and textiles in various industries, such as aerospace & defense, automotive, marine, and oil & gas. Increasing aircraft deliveries, increasing defense budget of developing economies, especially China and India, and rising passenger safety concerns are further proliferating the growth of the engineered coated fabrics market.

The global engineered coated fabrics market is projected to grow at a healthy growth rate over the next five years to reach US\$ 891.5 million in 2023. Organic growth of the automotive and aircraft industry coupled with an increasing demand for lightweight products, development of new high-performance applications using engineered coated fabrics, advancement in the technology, and introduction of stringent government standards regarding the safety are some of the major factors that are bolstering the demand for engineered coated fabrics in various end-use industries.

Engineered coated fabric manufacturers have to rely rigorously on the quality check and legal documentation of parts and processes prior to their usage in different end-use industries, which can be a time-consuming process. Growing safety concern and stringent government regulations, such as FAA's Technical Standard Order (TSO) C69, and FAR 121, and National Transport Safety Board (NTSB), for aircraft evacuation slide and safety provision for workers, are the key factors, which may adversely impact the demand for engineered coated fabrics.

There are series of directions where the engineered coated fabric manufacturers are moving today with the purpose to improve the overall customer experience, as these fabrics are mostly customized to meet the specific requirements of the customer. Engineered coated fabrics are an indispensable focus area for all the major tier-players, who are engaged in developing products and fabricating parts, such as airbags, evacuation slides, gaskets, seals, fuel tanks, upholstery, and hospital seats, without sacrificing performance.

Based on the end-use industry type, the engineered coated fabrics market is

segmented into Automotive, Aerospace & Defense, Oil & Gas, Marine, and Others. Automotive is likely to remain the most dominant segment of the global engineered coated fabrics market over the next five years. Growing demand for lightweight yet durable parts for achieving higher fuel efficiency and increasing passenger safety concerns are the major factors bolstering the demand for engineered coated fabrics in the automotive industry.

Aerospace & defense segment is likely to grow at the highest rate during the forecast period, driven by increasing aircraft deliveries, growing safety concerns, stringent government regulations, and an increased usage of engineered coated fabrics in ballistic jackets, safety floats, and other defense applications.

Based on the process type, the market is bifurcated into Calendaring, Hot-Melt, Knife, and Others. Calendaring is the most widely preferred coating process in the global engineered coated fabrics market. It is considered as an ideal process for rubber-based fabrics processing and is very good at handling heat-sensitive polymers. Hot-melt coating process is projected to grow at the highest rate, owing to its low-processing time. In the hot-melt coating process, the coating material can be applied without any organic solvents at a high application rate, which leads to its low-processing time.

Based on the substrate type, the market is segmented into Polyester, Fiberglass, Aramid, Polyamide, and Others. Fiberglass substrate is expected to remain the most dominant segment of the global engineered coated fabrics market during the forecast period (2018-2023), whereas polyester, aramid, polyamide, and other major substrate types, are likely to witness healthy growth rates over the next five years. Fiberglass substrates offer high-tensile strength and possess excellent resistance to heat and flame, making them the most preferred substrates for engineered coated fabrics.

Based on regions, North America is projected to remain the largest market for engineered coated fabrics during the forecast period, driven by both OE as well as aftermarket segments. The USA is the growth engine of the region's market and has presence of almost all major engineered coated fabric manufacturers including Omnova Solutions and Uniroyal Global Engineered Products. Consistent growth in the automotive and aerospace & defense industries is likely to boost the overall demand for engineered coated fabrics in the North American market.

Asia-Pacific is likely to witness the highest growth during the forecast period, driven by a host of factors, such as increasing automobile production, propelled by beefing up the production of existing plants as well as roll out of new plants; growing aerospace &

defense industry, supported by increasing defense budget and rising passenger traffic; growing textile industry and gradual shift of manufacturing base from the developed economies to the developing Asian economies. China and Japan are likely to remain the major growth engines of the market, whereas India is likely to be the new growth engine of the region's market in the coming years.

The supply chain of this market comprises raw material suppliers, engineered coated fabric manufacturers, distributors, and end-users. The key engineered coated fabrics manufacturers are Graniteville Specialty Fabrics Inc., Lamcotec Inc., Omnova Solutions Inc., Orca – by Pennel & Flipo, Trelleborg AB, Uniroyal Global Engineered Products Inc., and Vintex Inc. Some of the key end-users in the industry are Boeing, Airbus, Spradling International Inc., and Modern Inc.

RESEARCH METHODOLOGY

This report offers high-quality insights and is the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research's internal database and statistical tools. More than 700 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles have been leveraged to gather the data. We conducted more than 15 detailed primary interviews with the market players across the value chain in all four regions and industry experts to obtain both qualitative and quantitative insights.

REPORT FEATURES

This report provides market intelligence in the most comprehensive way. The report structure has been kept such that it offers maximum business value. It provides critical insights into the market dynamics and will enable strategic decision making for the existing market players as well as those willing to enter the market. The following are the key features of the report:

Market structure: Overview, industry life cycle analysis, supply chain analysis

Market environment analysis: Growth drivers and constraints, Porter's five forces analysis, SWOT analysis

Market trend and forecast analysis

Market segment trend and forecast

Competitive landscape and dynamics: Market share, Product portfolio, New product launches, etc.

Attractive market segments and associated growth opportunities

Emerging trends

Strategic growth opportunities for the existing and new players

Key success factors

The global engineered coated fabrics market is segmented into the following categories.

Engineered Coated Fabrics Market, By End-Use Industry Type

Automotive (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Aerospace & Defense (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Oil & Gas (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Marine (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Engineered Coated Fabrics Market, By Coating Type

Polyurethane Coating (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Rubber Coatings (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Silicon Coatings (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Other Coatings (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Engineered Coated Fabrics Market, By Substrate Type

Polyester Substrates (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Fiberglass Substrates (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Aramid Substrates (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Polyamide Substrates (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Other Substrates (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Engineered Coated Fabrics Market, By Coating Process Type

Calendaring Process (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Hot-Melt Process (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Knife Process (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Other Processes (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Engineered Coated Fabrics Market, By Region

North America (Country Analysis: The USA, Canada, and Mexico)

Europe (Country Analysis: France, Germany, the UK, Spain, Russia, and Rest of Europe)

Asia-Pacific (Country Analysis: China, Japan, India, and Rest of Asia-Pacific)

Rest of the World (Country Analysis: Latin America, the Middle East, and Others)

REPORT CUSTOMIZATION OPTIONS

With this detailed report, Stratview Research offers one of the following free customization options to our respectable clients:

COMPANY PROFILING

Detailed profiling of additional market players (up to 3 players)

SWOT analysis of key players (up to 3 players)

MARKET SEGMENTATION

Current market segmentation of any one of the application by coating type

COMPETITIVE BENCHMARKING

Benchmarking of key players on the following parameters: Product portfolio, geographical reach, regional presence, and strategic alliances

Custom Research: Stratview Research offers custom research services across sectors. In case of any custom research requirement related to market assessment, competitive benchmarking, sourcing and procurement, target screening, and others, please send your inquiry at sales@stratviewresearch.com

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