

Breathable Films Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Raw Material (Polyethylene, Polypropylene, Polyurethane, Polyester, PTFE, Others), By Technology (Microporous, Monolithic), By End User (Hygiene, Medical, Food Packaging, Construction, Fabric), By Region and Competition

<https://marketpublishers.com/r/BF171A6FD5B4EN.html>

Date: October 2023

Pages: 174

Price: US\$ 4,900.00 (Single User License)

ID: BF171A6FD5B4EN

Abstracts

Global Breathable Films Market has valued at USD3.04 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.15% through 2028. Breathable film, a type of polymer-based film, is widely utilized in moisture control applications for diapers and feminine hygiene products. Among the raw materials used in the manufacturing process of these breathable (micro porous) films in the hygiene industry, polyethylene stands out. It serves as a barrier film for a range of products including baby diapers, adult incontinence items, and surgical drapes.

The distinct properties exhibited by polyethylene-based breathable films are worth highlighting. These films possess high permeability, allowing for enhanced vapor transmission. Moreover, they demonstrate remarkable absorbency and pH stability. The utilization of polyethylene-based breathable films extends across various sectors such as personal care & hygiene, medical, and construction, contributing significantly to the global market's growth. Furthermore, the rise in awareness of hygiene-related activities has led to an increased demand for diapers, sanitary pads, and other hygiene products. These products rely on polyethylene-based breathable films as a barrier to reduce moisture and the risk of skin infections. The combination of these factors drives the demand for breathable films, thereby fostering the growth of the global breathable films market.

However, it is worth mentioning that there are alternatives available in the market that serve as substitutes for breathable films. These substitutes, such as diffuser films, moisture barrier films, and waterproof films, possess similar characteristics and are often available at more affordable rates. Consequently, buyers are drawn towards these substitutes, which could potentially restrain the growth of the breathable films market during the forecast period.

On the contrary, the increasing purchasing power of consumers and the fast-paced lifestyle have resulted in a surge in sales of packaged food items in both developed and developing economies. According to an article published by the Business Standard, the packed food market in India is expected to witness substantial growth in the upcoming 5-10 years. This growth can be attributed to factors such as strong economic growth, an increase in the penetration of e-commerce platforms, and the demographic dividend. In addition, breathable films play a vital role as an excellent barrier for moisture control in packaged food items. They enhance the shelf life of these products by keeping them fresh for a longer duration. This serves as a significant driving force for the global breathable films market.

Key Market Drivers

Growing Demand of Breathable Films in Food and Beverage Industry

Breathable films, made from highly filled polyethylene, are specifically engineered to allow the passage of water vapor while effectively preventing the passage of liquids or contaminants that could compromise product quality. These films play a critical role in the food and beverage industry, where they are widely utilized in packaging applications to extend the shelf life of perishable goods. By maintaining an optimal balance of oxygen and moisture, breathable films ensure that food and beverages stay fresher for longer, reducing the risk of spoilage and minimizing food waste.

In response to the increasing consumer demand for fresh and high-quality food products, breathable films have emerged as a key solution. These films offer a reliable means of preserving the freshness and taste of packaged foods, meeting the growing expectations of consumers who seek uncompromised quality. Whether it's preserving the crispness of fruits and vegetables or maintaining the flavors of ready-to-eat meals, breathable films provide an effective barrier that safeguards product integrity throughout its shelf life.

One of the driving factors behind the rising demand for breathable films is the growing popularity of ready-to-eat meals and convenient food options. As more consumers opt for these on-the-go food choices, the need for packaging solutions that preserve taste and freshness becomes paramount. Breathable films excel in this regard, ensuring that consumers can enjoy their meals as intended, with all the flavors and textures intact.

Technological advancements in the development of breathable films have led to the creation of films with superior properties. These innovative films exhibit exceptional breathability, excellent barrier properties, and improved mechanical strength, making them even more efficient in preserving the quality of food and beverages. With enhanced performance characteristics, these films provide extended protection against external factors, such as oxygen and moisture, which can degrade product quality over time. As a result, the demand for these improved breathable films continues to grow in the food and beverage industry.

Furthermore, the push for sustainability in the food and beverage industry has also contributed to the increasing demand for breathable films. To address environmental concerns, manufacturers are increasingly focusing on developing breathable films using biodegradable materials. These sustainable films not only offer effective packaging solutions but also align with the industry's commitment to reducing environmental impact. By opting for eco-friendly breathable films, businesses can meet the evolving consumer demand for sustainable packaging choices while ensuring the optimal preservation and protection of food and beverage products.

Growing Demand of Breathable Films in Medical Industry

Breathable films, typically made from highly filled polyethylene, are designed to allow the passage of water vapor while preventing the passage of liquids or other contaminants. In the medical industry, these films find extensive applications in areas such as surgical drapes, wound dressings, and medical packaging, owing to their excellent barrier properties against bacteria and other contaminants.

In the field of surgical drapes, breathable films provide a protective barrier that helps prevent the transfer of microbes during surgical procedures. This helps reduce the risk of surgical site infections and ensures a safer environment for both patients and medical professionals. Moreover, the breathable nature of these films allows excess moisture to escape, reducing the chances of discomfort and complications.

When it comes to wound dressings, breathable films play a crucial role in maintaining

an optimal healing environment. By allowing water vapor to pass through, these films help regulate moisture levels, which is essential for promoting wound healing. The barrier properties of breathable films also protect the wound from external contaminants, reducing the risk of infection and facilitating faster recovery.

In addition to their applications in surgical drapes and wound dressings, breathable films are extensively used in medical packaging. These films provide a reliable barrier against bacteria and other pathogens, ensuring the sterility and integrity of medical devices and pharmaceutical products. The breathability of these films also helps prevent the buildup of moisture, which can compromise the quality and efficacy of the packaged items.

The COVID-19 pandemic has further highlighted the importance of breathable films in the production of personal protective equipment (PPE). These films are used in the manufacturing of gloves, gowns, and masks to enhance comfort and safety. By allowing perspiration to escape while keeping harmful biological agents out, breathable films make PPE more comfortable to wear for extended periods, reducing the risk of heat stress and promoting compliance with the recommended safety measures.

Recent technological advancements have led to the development of breathable films with superior properties, such as high breathability, excellent barrier properties, and improved mechanical strength. These improved films offer enhanced performance in medical applications, further driving their demand in the industry. For instance, advancements in nanotechnology have enabled the production of breathable films with nanopores, allowing for precise control over breathability and barrier properties.

In conclusion, the growing demand for breathable films in the medical industry is driven by various factors, including the rising need for advanced wound care products, the use of breathable films in PPE, technological advancements in film manufacturing, and increasing sustainability concerns. As these trends continue to evolve, the global breathable films market is poised to experience significant growth in the coming years.

Key Market Challenges

Rise in Environmental Regulations

Breathable films, primarily made from highly filled polyethylene, are known for their exceptional ability to allow the passage of water vapor while effectively blocking liquids or other contaminants. Their unique properties make them indispensable in various industries, including food and beverage, medical, and personal care. However,

concerns about the environmental impact of these films have been raised due to their non-biodegradable nature, which can contribute to pollution if not disposed of correctly.

Recognizing the urgent need to address environmental pollution, governments worldwide are implementing stringent regulations on plastic use. These regulations often encompass restrictions on the production, use, and disposal of plastic products, including breathable films. For example, the European Union has introduced the Single-Use Plastics Directive, a comprehensive initiative aimed at minimizing the environmental impact of specific plastic items. As a result, manufacturers of breathable films face significant challenges as they endeavor to adapt their production processes to comply with these evolving rules and regulations.

By staying abreast of the ever-changing environmental landscape and embracing sustainable practices, manufacturers can navigate these challenges and contribute to a greener and more environmentally conscious future.

Key Market Trends

Growing Focus on Antimicrobial and Anti-Odor Properties

Antimicrobial properties are increasingly being incorporated into breathable films. These properties help kill or inhibit the growth of microorganisms, enhancing the hygiene quotient of the products made with these films. This is particularly important in industries such as medical and personal care, where maintaining hygiene is of utmost importance.

Antimicrobial breathable films can be used in a wide range of applications, including wound dressings, surgical drapes, and personal care products. By incorporating antimicrobial properties into these films, they not only provide a protective barrier but also help prevent infections and promote faster healing in medical applications. Moreover, these films ensure freshness and cleanliness in personal care products, elevating the overall user experience.

Furthermore, the inclusion of anti-odor properties in breathable films is an emerging trend that addresses the need for odor control in various industries. Breathable films with anti-odor properties effectively inhibit the growth of bacteria and fungi on fabrics, ensuring that apparel remains odor-free for extended periods. This has significant implications for the textile industry, where these films can be utilized in the production of sportswear, footwear, and other clothing items that require effective odor management.

With the continuous advancements in technology and innovative use of breathable films, the possibilities for enhancing product performance and improving user satisfaction are expanding. The integration of antimicrobial and anti-odor properties into breathable films is revolutionizing the hygiene and odor control capabilities of various products, making them more effective, reliable, and appealing to consumers.

Segmental Insights

Raw Material Insights

Based on the category of raw material, the Polyethylene segment emerged as the dominant player in the global market for Breathable Films in 2022. Polyethylene films are widely adopted in manufacturing facilities due to their low cost and impressive properties. These films exhibit high absorbency, permeability, and strength, making them an excellent choice for producing breathable films. The utilization of polyethylene films in various industries, such as packaging, agriculture, and healthcare, has contributed significantly to the growth of this market segment. With their versatility and cost-effectiveness, polyethylene films continue to play a pivotal role in meeting the demands of diverse applications and driving innovation in the industry.

End User Insights

The food packaging segment is projected to experience rapid growth during the forecast period. Breathable films are versatile materials that find extensive usage in various industries. They are commonly employed in food packaging, ensuring the freshness and quality of perishable goods. In the medical field, breathable films are utilized in the production of medical instruments, masks, gloves, and other essential protective gear. These films also play a crucial role in maintaining hygiene standards in medical and healthcare environments, contributing to the overall well-being of patients and healthcare professionals.

Moreover, breathable films have found applications in consumer goods, such as apparel and electronic components, where moisture control is paramount. Their ability to regulate moisture levels makes them an ideal choice for packaging beverage bottles, food preparations, and other moisture-sensitive products.

The demand for breathable films witnessed a significant surge during the COVID-19 pandemic, as their usage in masks, gloves, and general medical textiles became crucial in ensuring the safety and protection of individuals. As the medical and healthcare

industry continues to grow steadily, the demand for breathable films is expected to remain robust in the coming years.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Breathable Films Market in 2022, holding the largest market share in terms of value. The regional market growth is being driven by the increasing demand for premium hygiene products in emerging economies such as India and China. This is primarily due to the rising awareness and importance of maintaining good hygiene practices among the growing population in these countries. Additionally, the growing construction industry is also playing a significant role in the high demand for breathable films in the construction sector. With the rapid urbanization and infrastructure development taking place in these regions, there is a need for durable and high-performance materials that can enhance the sustainability and energy efficiency of buildings.

According to the International Trade Administration (ITA), China stands as the world's largest construction market, and it has been heavily impacted by recent changes in government regulations and policies. In response to these changes, China's 14th Five-Year Plan has been formulated, which focuses on the development of new infrastructure projects in transportation, energy, water systems, and new urbanization. The estimated investment in new infrastructure during the 14th Five-Year Plan period (2021-2025) is projected to be around 27 trillion yuan (\$4.2 trillion). This ambitious plan also emphasizes the importance of energy efficiency and green building development, including the retrofitting of over 350 million square meters of existing buildings and the construction of over 50 million square meters of net-zero energy consumption buildings.

With the growth and development of various industries in the Asia-Pacific region, the demand for breathable films is expected to witness a significant increase in the upcoming years. These films offer numerous advantages such as moisture management, breathability, and protection against external elements, making them an ideal choice for a wide range of applications across industries like healthcare, packaging, and construction. As more countries in the region prioritize sustainability and environmental consciousness, the demand for breathable films that align with these principles is expected to further drive the market growth.

Key Market Players

Schweitzer-Mauduit International, Inc.

Arkema SA

Berry Global, Inc

Fatra, a.s.

Nitto Denko Corporation

Rahil Foam Pvt. Ltd.

RKW North America, Inc.

SILON s.r.o

Mitsui Chemicals, Inc.

Omya AG

Report Scope:

In this report, the Global Breathable Films Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Breathable Films Market, By Raw Material:

Polyethylene

Polypropylene

Polyurethane

Polyester

PTFE

Others

Breathable Films Market, By Technology:

Microporous

Monolithic

Breathable Films Market, By End User:

Hygiene

Medical

Food Packaging

Construction

Fabric

Breathable Films Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

Breathable Films Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented...

Breathable Films Market.

Available Customizations:

Global Breathable Films Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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