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Non-Woven Fabrics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Fiber (Polyester, Cotton Rayon, Polypropylene, Others), By End User (Disposable Applications, Wipes, Geotextiles, Medical Products, Automotive, Others), By Region and Competition, 2019-2029F

https://marketpublishers.com/r/NF32A0201DDAEN.html
Date: June 2024
Pages: 185
Price: US$ 4,900.00 (Single User License)
ID: NF32A0201DDAEN

Abstracts

Global Non-Woven Fabrics Market was valued at USD 44.68 Billion in 2023 and is anticipated t%II%project steady growth in the forecast period with a CAGR of 4.86% through 2029. Nonwoven fabric refers t%II%a cohesive fabric-like textile manufactured by arranging fibers together using heat, chemicals, or pressure. These fibers can be entangled or bonded through chemical and thermal processes. Common materials used in nonwoven fabric production include olefin, polyester, and rayon. Compared t%II%traditional fabrics like cotton, linen, wool, and silk, nonwoven fabrics have several advantages. They are lighter in weight and d%II%not require weaving or knitting.

This makes them ideal for manufacturing interlinings, insulation and protection clothing, industrial workwear, chemical defense suits, and footwear. With their versatility, nonwoven fabrics find extensive applications in various industries such as personal care and hygiene, automotive, healthcare, building and construction, and filtration. The global nonwoven fabrics market is primarily driven by the development of the textile industry worldwide. Additionally, the COVID-19 pandemic has increased the demand for nonwoven hygiene products in healthcare centers. Nonwoven fabrics are widely used in the production of healthcare essentials like face masks, isolation gowns, drapes, single-use caps, and shoe and headcovers. This surge in demand is expected t%II%contribute significantly t%II%the growth of the global market. The adoption of nonwoven fabrics for lightweight automobile components further fosters market growth. These fabrics offer

advantages such as weight reduction and improved fuel efficiency.

There are ongoing product innovations in the industry, including the development of smart nonwoven fabrics and blast-resistant curtains. These textiles expand under tension, absorbing shockwaves and catching flying debris. As a result, they find applications in building and construction as well as the automotive industry. Technological advancements in manufacturing processes and increasing R&D activities for the production of environment-friendly fabrics are expected t%II%drive market growth globally. However, volatility in raw material prices may hamper the growth of the nonwoven fabrics market during the forecast period. On the contrary, the proliferation of new technologies presents growth opportunities for the industry.

Key Market Drivers

Growing Demand of Non-Woven Fabrics from Automotive Industry

Non-woven fabrics are versatile sheets or webs that are manufactured using bonding methods other than weaving or knitting. These fabrics are typically composed of fibers that are either stapled or bonded together through thermal, chemical, or mechanical processes. The non-woven structure of these fabrics grants them a wide range of applications, thanks t%II%their adaptability, cost-effectiveness, and versatility across different manufacturing processes.

One of the key industries that heavily relies on non-woven fabrics is the automotive industry. In the automotive sector, these materials find extensive use in various parts of vehicles, such as interior trim, trunk compartments, under shields, and engine insulation. The lightweight nature, flexibility, durability, and cost-effectiveness of non-woven fabrics make them an ideal choice for automotive applications.

The automotive industry's pursuit of lighter and more fuel-efficient vehicles has further propelled the use of non-woven fabrics. By incorporating these materials, manufacturers can effectively reduce the overall weight of the vehicles, thereby contributing t%II%improved fuel efficiency.

The increasing demand for non-woven fabrics in the automotive industry serves as a significant driver for the global non-woven fabrics market. This trend, coupled with the rising production of vehicles on a global scale, is expected t%II%further boost the demand for these materials.

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Growing Demand of Non-Woven Fabrics from Medical Industry

The medical industry has emerged as a significant end-user of non-woven fabrics, thanks t%ll%their exceptional properties and versatility. These materials find extensive application in the production of various medical products, including surgical gowns, face masks, drapes, caps, gloves, bandages, and more. Their superior qualities, such as high absorbency, liquid repellency, resilience, stretch, softness, strength, flame retardancy, washability, and sterility, make them indispensable in the healthcare sector.

The recent COVID-19 pandemic has further underscored the critical role of non-woven fabrics in the medical industry. The unprecedented demand for personal protective equipment (PPE), such as face masks, gowns, and coveralls, which are predominantly made from non-woven materials, has significantly bolstered the market for these fabrics. The need for reliable and effective PPE t%ll%protect healthcare workers and the general population has driven the surge in demand for non-woven fabrics.

The growing demand for non-woven fabrics in the medical industry serves as a major driver for the global non-woven fabrics market. This upward trend, coupled with the ongoing global health crisis, is projected t%ll%continue fueling the market's growth. As the world continues t%ll%grapple with public health challenges, the demand for non-woven fabrics in the medical industry is likely t%ll%remain robust. Ongoing research and development efforts aimed at developing more effective and sustainable non-woven fabrics will als%ll%contribute t%ll%the market's expansion and innovation.

Key Market Challenges

Volatility in Price of Raw Materials

Non-woven fabrics, with their unique and versatile properties, are produced by bonding fibers together through mechanical, thermal, or chemical methods, rather than traditional weaving or knitting processes. This innovative manufacturing approach allows for the creation of fabrics that exhibit exceptional strength, durability, and breathability.

The primary raw materials used in the production of non-woven fabrics are polyester, polypropylene, and viscose. These materials are carefully selected for their specific characteristics, such as their ability t%ll%resist moisture, withstand high temperatures, or provide optimal comfort. However, the cost and availability of these raw materials significantly impact the production process and ultimately affect the profitability of

manufacturers in the industry.

Fluctuations in the prices of these raw materials can have a direct impact on the overall cost of production, posing challenges for manufacturers. Factors such as changes in crude oil prices, trade policies, and geopolitical events can contribute t%ll%the volatility in raw material prices, making it difficult for manufacturers t%ll%predict and plan for future production costs. This unpredictability presents a significant challenge for the non-woven fabrics market, potentially hampering its growth.

The volatility in raw material prices not only affects manufacturers but als%ll%has implications for consumers. Manufacturers may need t%ll%pass on increased costs t%ll%consumers, which could impact demand for non-woven fabrics. On the other hand, manufacturers may choose t%ll%absorb these costs, potentially affecting their own profitability. Balancing these factors is crucial for the sustainable growth of the non-woven fabrics industry.

Key Market Trends

Growing Innovations in Fiber Technology

In recent years, there have been remarkable and groundbreaking innovations in fiber technology, leading t%ll%the development of highly advanced and sophisticated non-woven fabrics. These fabrics possess a wide range of enhanced performance attributes, making them more sustainable, versatile, and adaptable t%ll%various applications.

For instance, the advent of biodegradable and recyclable fiber technologies has perfectly aligned with the increasing global demand for sustainable products. These eco-friendly advancements not only contribute t%ll%environmental conservation but als%ll%meet the stringent quality expectations of diverse consumer segments. With the rise of conscious consumerism, sustainable non-woven fabrics are gaining significant traction in industries such as fashion, home goods, and personal care.

Furthermore, the emergence of smart fibers has revolutionized the possibilities for non-woven fabrics. These intelligent fibers are capable of dynamically changing their properties in response t%ll%environmental stimuli. This opens up a world of opportunities, particularly in sectors like healthcare, automotive, and protective clothing, where non-woven fabrics with adaptive functionalities can play a vital role. Imagine a protective garment that adjusts its insulation properties based on temperature changes or a wound dressing that responds t%ll%moisture levels for optimal healing conditions.

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The ability t%ll%tailor non-woven fabrics t%ll%specific applications has expanded their utilization across numerous industries. From filtration and packaging t%ll%geotextiles and construction materials, non-woven fabrics are now providing innovative solutions in diverse sectors. Moreover, these advancements have significantly boosted the competitiveness of non-woven fabrics against traditional materials, further augmenting their market demand and growth potential.

Segmental Insights

Fiber Insights

Based on Fiber, Polypropylene have emerged as the fastest growing segment in the Global Non-Woven Fabrics Market in 2023. Polypropylene is relatively inexpensive t%ll%produce compared t%ll%other polymers used in non-woven fabrics, making it an attractive option for manufacturers aiming t%ll%produce affordable products. It is versatile, with applications in hygiene products (such as diapers and sanitary napkins), medical textiles (such as surgical gowns and masks), automotive interiors, geotextiles, and agricultural fabrics. This adaptability drives its demand across multiple industries. Polypropylene's beneficial properties, including being lightweight, having high tensile strength, chemical resistance, and hydrophobicity, make it suitable for applications requiring durability, moisture resistance, and flexibility. The expanding non-woven fabrics market, driven by growth in key end-use industries like healthcare, automotive, construction, and agriculture, further contributes t%ll%the increasing use of polypropylene.

End User Insights

Based on End User, Geotextiles have emerged as the dominating segment in Global Non-Woven Fabrics Market during the forecast period. The increased emphasis on global infrastructure development, encompassing projects like road construction, erosion control, and environmental initiatives, has notably heightened the demand for geotextiles. These textiles play a vital role in civil engineering projects by providing solutions for soil stabilization, drainage, filtration, and reinforcement, making them indispensable. Geotextiles present cost-effective alternatives t%ll%traditional materials such as concrete and asphalt. Their lightweight composition reduces transportation and installation expenses, while their durability and extended lifespan contribute t%ll%overall cost-efficiency. Furthermore, amidst growing environmental concerns, there's a notable shift towards sustainable construction practices. Geotextiles serve as

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eco-friendly alternatives, minimizing soil erosion, fostering vegetation growth, and reducing reliance on chemical stabilizers, thereby aligning with sustainability objectives. Their customizable nature allows for tailoring t%ll%specific project requirements, offering a diverse array of characteristics such as strength, permeability, and filtration capabilities. This adaptability enables their utilization across various applications, ranging from road construction t%ll%shoreline protection.

Regional Insights

Based on Region, Asia Pacific have emerged as the dominant region in the Global Non-Woven Fabrics Market in 2023, holding the largest market share in terms of value. The region's remarkable growth can be attributed t%ll%several factors. A rising birth rate has led t%ll%a larger population, consequently increasing the demand for products and services. The aging population in the region necessitates heightened focus on hygiene, presenting opportunities for businesses in the healthcare sector. The government has implemented stringent laws and measures t%ll%combat female infanticide, aiming t%ll%improve the gender rati%ll%and promote gender equality. Moreover, the government's emphasis on providing quality education t%ll%the youth has the potential t%ll%empower and uplift the population, fostering socio-economic development. This is anticipated t%ll%further fuel the demand for various products and services, including female hygiene products.

Key Market Players

%ll%Ahlstrom Oyj

%ll%BERRY GLOBAL INC.

%ll%KIMBERLY-CLARK CORPORATION

%ll%Glatfelter Corporation

%ll%DuPont de Nemours, Inc.

%ll%TORAY INDUSTRIES INC.

%ll%Lydall Inc.

%ll%Fitesa S.A.

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%ll%SUOMINEN CORPORATION

%ll%Johns Manville Europe GmbH

Report Scope:

In this report, the Global Non-Woven Fabrics Market has been segmented int%ll%the following categories, in addition t%ll%the industry trends which have als%ll%been detailed below:

%ll%Non-Woven Fabrics Market, By Fiber:

%ll%Polyester

%ll%Cotton Rayon

%ll%Polypropylene

%ll%Others

%ll%Non-Woven Fabrics Market, By End User:

%ll%Disposable Applications

%ll%Wipes

%ll%Geotextiles

%ll%Medical Products

%ll%Automotive

%ll%Others

%ll%Non-Woven Fabrics Market, By Region:

%ll%North America

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%ll%United States

%ll%Canada

%ll%Mexico

%ll%Europe

%ll%France

%ll%United Kingdom

%ll%Italy

%ll%Germany

%ll%Spain

%ll%Asia Pacific

%ll%China

%ll%India

%ll%Japan

%ll%Australia

%ll%South Korea

%ll%South America

%ll%Brazil

%ll%Argentina

%ll%Colombia

%ll%Middle East & Africa

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%ll%South Africa

%ll%Saudi Arabia

%ll%UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Non-Woven Fabrics Market.

Available Customizations:

Global Non-Woven Fabrics Market report with the given market data, Tech Sci Research offers customizations according t%ll%a company's specific needs. The following customization options are available for the report:

Company Information

%ll% Detailed analysis and profiling of additional market players (up t%ll%five).

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