

# **PET & Polypropylene Based Geotextiles Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Woven, Non-Woven), By Technology (Needle Punch, Thermal, Chemical Bonding, Others), By Application (Roads & Highways, Railways, Dams & Canals, Drainage System, Others), By Region and Competition**

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## **Abstracts**

The Global PET & Polypropylene Based Geotextiles Market, with a valuation of USD 2.95 billion in 2022, is poised for substantial growth in the forecast period, expected to achieve a robust CAGR of 4.56% through 2028. These geotextiles, constructed from PET and polypropylene, are known for their versatility as polymers and find applications in a range of uses, particularly in the field of geotextiles, where their attributes of strength, remarkable tensile strength, and resilience to environmental elements are highly regarded.

### **Key Market Drivers**

#### **Rising Demand of PET & Polypropylene Based Geotextiles in Road & Highway Sector**

The global demand for sustainable and resilient infrastructure has never been more pressing. As countries grapple with the challenges of climate change, population growth, and urbanization, the road and highways sector stand at the forefront of this transformation. The concept of using geotextiles in civil engineering and construction projects isn't new, but their importance has grown exponentially in recent years, especially in the road and highways sector. Geotextiles, engineered materials made from synthetic polymers like PET and polypropylene, have gained prominence for their

multifaceted roles in enhancing the performance and sustainability of road infrastructure. Traditionally, road construction relied heavily on natural resources like gravel and soil. However, these conventional practices posed several challenges, including soil erosion, subgrade stabilization, and the need for frequent maintenance. This is where geotextiles come into play. Geotextiles are engineered to exhibit specific characteristics, such as high tensile strength, puncture resistance, and filtration properties, making them invaluable in road and highway construction.

Moreover, the primary functions of geotextiles in road construction is soil stabilization. Geotextiles are placed between different layers of soil to distribute loads, reduce soil erosion, and improve load-bearing capacity. This not only extends the lifespan of the road but also reduces maintenance costs. Proper drainage is critical in road construction to prevent waterlogging and maintain subgrade integrity. Geotextiles act as filters, allowing water to pass through while preventing the mixing of different soil layers. This ensures consistent soil properties and enhances the road's longevity. Roads and highways are susceptible to erosion, especially in areas with heavy rainfall or steep terrain. Geotextiles can be used to reinforce embankments and slopes, reducing erosion, and maintaining the structural integrity of the road.

Furthermore, in asphalt pavements, geotextiles serve as a stress-absorbing interlayer (SAMI) to retard the propagation of cracks from the existing pavement into the new overlay. This significantly enhances the life expectancy of road surfaces, reducing the frequency of resurfacing. By reducing maintenance requirements and extending the lifespan of roads and highways, geotextiles offer substantial cost savings over the long term. This cost-effectiveness is a compelling reason for their growing adoption. Environmental considerations are driving the adoption of sustainable construction practices. Geotextiles align perfectly with these concerns as they reduce the need for resource-intensive construction methods and minimize the environmental impact of roads and highways. Environmental considerations are driving the adoption of sustainable construction practices. Geotextiles align perfectly with these concerns as they reduce the need for resource-intensive construction methods and minimize the environmental impact of roads and highways, leading to the demand of market in the forecast period.

### Increasing Demand of PET & Polypropylene Based Geotextiles in Dams & Canals Sector

Dams and canals, the silent giants of civil engineering, play a crucial role in managing water resources, providing hydroelectric power, and facilitating transportation and

agriculture. These massive structures are subject to enormous stresses from water pressure, erosion, and sedimentation. To ensure their longevity and reliability, the construction and maintenance of dams and canals require advanced engineering solutions. In recent years, PET (Polyethylene Terephthalate) and Polypropylene Based Geotextiles have emerged as indispensable materials in the dams and canals sector, offering a range of benefits that enhance the performance, durability, and sustainability of these critical infrastructure projects. The incorporation of geotextiles in dam and canal construction represents a paradigm shift in the field of civil engineering. Geotextiles are engineered materials made from synthetic polymers like PET and polypropylene, which exhibit specific properties that make them invaluable in these projects. One of the primary functions of geotextiles in dams and canals is erosion control. Water flow, especially during heavy rains or floods, can erode the banks of canals and the surfaces of dams. Geotextiles, when strategically placed, act as a protective barrier, preventing soil erosion and maintaining the structural integrity of these critical infrastructure elements.

Moreover, proper filtration and drainage systems are essential components of effective dams and canals. Geotextiles serve as filtration layers, allowing water to pass through while retaining soil particles. This not only prevents clogging but also ensures the efficient flow of water. In dams, geotextile drainage layers help control seepage, reducing the risk of structural damage.

Additionally, dams and canals rely heavily on the stability of the underlying soil. Geotextiles enhance the load-bearing capacity of soil, reducing the risk of soil displacement and subsidence. This reinforcement is crucial for the long-term performance of these structures.

Moreover, silt and sediment buildup in canals can reduce water flow and capacity. Geotextile silt curtains are employed to trap sediment while allowing water to pass through. This prevents the accumulation of silt, maintains the efficiency of canals, and reduces the need for costly dredging.

### Rising Demand of PET & Polypropylene Based Geotextiles in Railway Sector

The global railway sector is in the midst of an exciting transformation. With the demand for efficient, sustainable, and cost-effective transportation solutions on the rise, railway infrastructure development and maintenance have taken center stage. Among the many innovations driving progress in this sector, PET (Polyethylene Terephthalate) and Polypropylene Based Geotextiles have emerged as indispensable materials, offering a

wide array of benefits that enhance the construction, operation, and longevity of railways.

Railway tracks are subjected to extreme dynamic loads, which can lead to track deformation and settlement over time. Geotextiles are used to stabilize the track substructure, prevent ballast contamination, and enhance load distribution. These applications result in safer and more durable railway lines.

Moreover, the quality and stability of the subgrade are paramount to a railway's long-term performance. Geotextiles act as a separation layer between the subgrade and ballast, preventing soil intrusion and promoting effective water drainage. This reduces the risk of subgrade failure and track degradation. Railway embankments and cut slopes are susceptible to erosion, particularly in regions with heavy rainfall or steep terrain. Geotextiles serve as erosion control measures, stabilizing slopes and preventing soil loss. This ensures the integrity of the railway's alignment.

Furthermore, geotextiles serve as filtration layers in track beds, allowing water to drain freely while retaining the ballast. This prevents clogging and maintains optimal drainage, crucial for track longevity. The global push for high-speed rail networks is a significant driver of geotextile adoption. High-speed trains exert greater dynamic loads on tracks, demanding enhanced track stability and longevity. Geotextiles are instrumental in achieving these objectives.

## Key Market Challenges

### Competitive Material Alternatives and Environmental Concerns Poses a Significant Obstacle to Market Expansion

While PET and Polypropylene Based Geotextiles offer a wide range of benefits, including durability and sustainability, they are not the only geotextile materials available. The market faces competition from natural alternatives such as coir, jute, and hemp. These materials are biodegradable and can appeal to environmentally conscious consumers. To maintain market share, PET & Polypropylene Based Geotextiles must continue to demonstrate their superior performance and sustainability.

Moreover, despite being synthetic materials, PET & Polypropylene Based Geotextiles are often perceived as contributors to plastic pollution. Concerns about microplastics and the long-term environmental impact of these materials are real. Manufacturers and industry must address these concerns through responsible production, recycling

initiatives, and transparent communication about the sustainability of their products.

### Cost Competitiveness and Regulatory Compliance

While PET & Polypropylene Based Geotextiles offer long-term cost savings through durability and reduced maintenance, the initial cost can be a barrier to adoption. Competing with traditional construction materials can be challenging. Industry stakeholders need to educate decision-makers about the long-term benefits of geotextiles to justify their upfront cost.

Moreover, the geotextile industry is subject to various regulations and standards, which can vary by region and application. Meeting these standards can be complex and costly. Staying updated with changing regulations and ensuring compliance across diverse markets is an ongoing challenge for manufacturers and suppliers.

In addition, many construction professionals and project managers are not fully aware of the benefits and applications of PET & Polypropylene Based Geotextiles. There is a need for educational efforts to inform stakeholders about the advantages of geotextiles in terms of sustainability, durability, and cost-effectiveness.

### Key Market Trends

#### Sustainability Takes Center Stage

In an era where sustainability is a top priority, PET & Polypropylene Based Geotextiles have emerged as key players. These materials are celebrated for their durability and resistance to environmental factors, making them ideal for long-term use. Their ability to improve soil stability, prevent erosion, and manage water resources aligns perfectly with the sustainability goals of modern infrastructure projects. As governments, environmental agencies, and construction companies seek eco-friendly solutions, PET and Polypropylene Based Geotextiles are increasingly in demand.

Furthermore, climate change poses unprecedented challenges to infrastructure worldwide. Rising sea levels, erratic weather patterns, and increased precipitation are threatening the integrity of structures and the environment. PET & Polypropylene Based Geotextiles are emerging as saviors in this context. These materials are used to reinforce coastal defenses, manage stormwater runoff, and prevent soil erosion caused by heavy rains. Their resilience in harsh environmental conditions makes them invaluable in safeguarding infrastructure against the impacts of climate change. These

factors are anticipated to drive the growth of the global PET & Polypropylene Based Geotextiles market during the forecast period.

### Road Construction Reinvented

Traditional road construction methods are resource-intensive, often requiring substantial amounts of aggregates. This not only drives up costs but also takes a toll on the environment. PET & Polypropylene Based Geotextiles are revolutionizing road construction by reducing the need for excessive aggregates. These materials reinforce road foundations, enhance structural integrity, and minimize the formation of potholes and cracks. The result is longer-lasting, more cost-effective, and eco-friendly roads.

Moreover, efficient water management is crucial in a world grappling with water scarcity and flooding. PET & Polypropylene Based Geotextiles are becoming pivotal in this regard. They are used in the construction of reservoirs, ponds, and dams, enabling effective water storage and flow control. These materials also facilitate advanced filtration, ensuring that water entering treatment facilities is free from sediment and pollutants. As water resources become scarcer, geotextiles are becoming indispensable tools for resilient water infrastructure.

### Soil Stabilization and Erosion Control

Preventing soil erosion and stabilizing soil in challenging terrains are vital functions of geotextiles. In regions prone to erosion, PET & Polypropylene Based Geotextiles are employed to reinforce slopes, embankments, and riverbanks. Their remarkable tensile strength and resistance to degradation make them effective in preventing soil erosion, thereby protecting both infrastructure and natural landscapes.

Moreover, geo-environmental engineering focuses on mitigating the environmental impact of infrastructure projects. PET & Polypropylene Based Geotextiles are invaluable in this regard. They are used in landfill liners to prevent the leaching of harmful chemicals into the soil and groundwater. Additionally, geotextile tubes are employed in dewatering sludge from wastewater treatment plants, reducing waste volume. These applications underscore the versatility of geotextiles in addressing environmental challenges associated with infrastructure development.

### Segmental Insights

### Type Insights



Based on the category of type insights, woven emerged as the dominant player in the global market for PET & Polypropylene based geotextiles in 2022. The woven geotextile products offer exceptional tensile strength, long-lasting durability, enhanced performance, lowered maintenance expenses over time, and an extended project lifespan. As a result, they contribute significantly to reducing the environmental footprint. These geotextiles exhibit resistance to UV degradation, making them well-suited for extended use in various applications. Consequently, they find extensive use in activities related to drainage, soil reinforcement, separation, filtration, embankment, and construction projects.

Moreover, the non-woven segment is poised to capture the largest share of the geotextiles market throughout the forecast period. This dominance is primarily attributed to the extensive infrastructural development, driving increased demand for non-woven geotextile products in diverse applications such as road construction, railway projects, highway development, airport construction, soil separation, drainage systems, soil reinforcement, and filtration processes. According to data from the European Disposables and Nonwovens Association (EDANA), approximately 750 square kilometers of nonwoven geotextiles are both manufactured and utilized annually, with a significant 60% being applied in road construction projects. Transitioning from traditional gravel to nonwoven materials in the construction of new roads within the EU could potentially lead to a reduction of approximately 6.8 million tons of carbon dioxide equivalents, highlighting both the environmental benefits and cost-effectiveness of nonwoven geotextiles. Furthermore, these materials offer advantages to users due to their lightweight nature, resilience to temperature fluctuations, and impressive resistance to punctures and tears.

### Technology Insights

Based on the category of technology insights, needle punch emerged as the dominant player in the global market for PET & Polypropylene based geotextiles in 2022. Needle punch segment is anticipated to hold the largest revenue share of the market and dominate the market segment in the upcoming years on the ground of advantages of the technology along with the high process efficiency associated with it. The eco-friendliness associated with the technology and recyclability of the products materialized by the needle punch technology also aids the growth of the segment as well as the growth of the global polypropylene based non-woven geotextile market in the forecast years.

## Application Insights

Based on the category of application, road & highway emerged as the dominant player in the global market for PET & Polypropylene based geotextiles in 2022. Roads & highways are anticipated to hold the largest revenue share of the market and dominate the market segment in the upcoming years on the grounds of increasing roads & highways construction, worldwide. Government aided plans and schemes to promote and expand the construction of such infrastructure further supports the growth of the global polypropylene based non-woven geotextile market in the next five years. Based on GSM, the market is bifurcated into Up to 100 GSM, 101-500 GSM, 501-1000 GSM, Above 1000 GSM, and others.

Within road construction applications, these geotextiles find primary utilization in filling gaps between roads, significantly enhancing the structural integrity of the soil and effectively preventing road degradation. This not only augments road stability but also reduces the likelihood of water erosion, thus extending the lifespan of road infrastructure.

Furthermore, in agriculture, these geotextile products serve as protective shields against elements such as wind and sun, while also offering control against pests, weeds, birds, and insects. Furthermore, farmers have increasingly adopted geotextiles to optimize crop yields. The breathable, organic covering provided by these products is expected to play a crucial role in mitigating soil erosion, ensuring effective weed control, and facilitating proper irrigation. This multifaceted approach is poised to stimulate growth within this segment.

## Regional Insights

Asia Pacific emerged as the dominant player in the global PET & Polypropylene based geotextiles market in 2022. This can be attributed to the burgeoning construction industry and the continuous rollout of infrastructure projects in emerging economies like India and China. Additionally, factors such as rapid urbanization, the presence of a skilled labor force, and increased government initiatives aimed at infrastructure development and enhancement will significantly contribute to regional expansion. For instance, in August 2020, the China State Railway Group unveiled plans to expand its railway network, with projections to reach 200,000 kilometers of railway tracks and approximately 70,000 kilometers of high-speed railway networks by 2035. In May 2020, coir manufacturers and exporters in Tamil Nadu, India, expressed optimism for the improvement of rural roads following the National Rural Infrastructure Development



Agency's mandate, which stipulated that over 5% of roads sanctioned under PMGSY-III should be constructed using coir geotextiles sourced from coir-producing states. Such developments are expected to bolster regional growth in the coming years. In major European countries, mounting environmental and health concerns have driven a surge in demand for green infrastructure solutions, primarily due to their cost-effectiveness, sustainability, and eco-friendly attributes. Stringent EU policies mandate manufacturers to create green infrastructures that not only combat environmental pollution but also safeguard ecosystems. Furthermore, governments are channeling increased investments into road infrastructure projects, driven by rising automotive sales and ongoing developments in road infrastructure, all of which are set to propel regional growth.

Moreover, the North American market is poised for substantial growth in the foreseeable future. In the United States, the drainage systems are well-established and expansive, with a consistent and effective maintenance regimen in place. Furthermore, ongoing research and development initiatives, coupled with technological innovations, have led to the introduction of both natural and synthetic materials that demand minimal maintenance. This development is expected to exert a favorable influence on market expansion in the region.

### Key Market Players

Geosys Group

Fibertex Nonwovens A/S

Asahi Kasei Corporation

HUESKER Synthetic GmbH

Tencate Geosynthetics Americas

Hangzhou Nbond Nonwovens Co., Ltd

TYPAR Geosynthetics

RadiciGroup

Ginni Filament Ltd

Flexituff Ventures International Ltd.

Report Scope:

In this report, the Global PET & Polypropylene Based Geotextiles Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

PET & Polypropylene Based Geotextiles Market, By Type:

Woven

Non-Woven

PET & Polypropylene Based Geotextiles Market, By Technology:

Needle Punch

Thermal

Chemical Bonding

Others

PET & Polypropylene Based Geotextiles Market, By Application:

Roads & Highways

Railways

Dams & Canals

Drainage System

Others

PET & Polypropylene Based Geotextiles Market, By Region:

Asia-Pacific

China

India

Australia

Japan

South Korea

Europe

France

Germany

Spain

Italy

United Kingdom

North America

United States

Mexico

Canada

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global PET & Polypropylene Based Geotextiles Market.

### Available Customizations:

Global PET & Polypropylene Based Geotextiles 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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- 17.5.10. Flexituff Ventures International Ltd.

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