

**150 End-Use Products
in Technical Textiles and Nonwovens
World Market Forecasts to 2010**

OEKOTECH

PRODUCED FOR:

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1. OVERVIEW

1.1 TECHNICAL TEXTILES DEFINED

In this report technical textiles are defined as comprising all those textile-based products (either finished products in their own right, such as ropes or tarpaulins, or components of other products, such as tyre cord for tyres or coverstock for diapers), which are used principally for their performance or functional characteristics, rather than for their aesthetics, or are used for non-consumer (i.e. industrial) applications. So nonwoven carpet backing (functional) is included as technical, but needlepunched carpets (largely aesthetic) are not, except for those used in automotive (i.e. high technical specification) applications. Similarly, shoe components (hidden, functional) are included as technical, whilst shoe uppers (visible, largely aesthetic) are treated as non-technical.

Hence the definition does not depend on the yarn or fibre used, but on the end-use of the product itself. A more detailed definition of technical textiles is provided in Appendix 1.

1.2 AIMS OF THE REPORT

The main aims of this report are as follows:

- i) to provide a comprehensive and detailed analysis of the current world market for technical textiles and nonwovens by individual end-use product.
- ii) to provide estimates of current end-use consumption levels for each separate, or small grouping of, end-use product by region and by physical make-up – polymer/fibre type, polymer/fibre form (yarn type) and fabric type.
- iii) to provide forecasts of consumption by product by region to 2010 at the same level of detail, based on a well defined and internally consistent set of assumptions, in order to provide a clear picture of future demand for technical textiles and nonwoven products.

This information on the most important features of the technical textiles market currently and up to 2010 is expected to be useful to the following types of organisation:

- Producers of fibres, yarns, fabrics and end-use products already operating in the sector or wishing to enter it
- Suppliers of chemicals to the fibre and textile industries: spin finishes, process chemicals, adhesives, coating, effect chemicals, etc
- Manufacturers of machinery for fibre extrusion and processing, textile production, coating and laminating, etc
- Converters and other downstream processors of technical textiles and nonwovens

1.3 THE SOURCE OF THE FORECASTS

The product detail and market forecasts in this report are based on DRA's proprietary system for describing and forecasting world end-use markets for textile products. Details of this Textile Products End-Use Consumption Forecasting System are given in Appendix 2.

The databases and the model included in this consumption forecasting system have been set up to handle a high level of product and market detail. In practice the physical make-up of some 150 individual end-use products included in the technical textiles partition of this consumption forecasting system is analysed across 210 individual country markets into:

- 19 individual polymer/fibre types (e.g. cotton, viscose, polyester, etc)
- 8 forms of polymer/fibre or yarn type used (e.g. unspun staple fibre, filament yarns, tape yarns)
- 19 different final textile product types (e.g. narrow woven fabrics, warp knits, dry-laid nonwovens)
- 4 coating types (plus uncoated).

Complete lists of the variables contained within the DRA consumption forecasting system are given in Exhibit A2.2 in Appendix 2.

1.4 PRODUCTS INCLUDED IN THIS REPORT

For the purposes of statistical analysis in this report, some of the smaller or overlapping individual end-use technical textile products have been combined, resulting in a list of 138 separate product headings. Each of the individual end-use technical textile products has been assigned to one of the relevant 12 application areas as defined by Messe Frankfurt, the organisers of the Techtextil Shows and described in Exhibit A1.1, Appendix 1. A list of the 150 products and the 138 product headings used in the statistical analysis, together with their application area and brief product description, is provided in Exhibit 1.1, overleaf.

Exhibit 1.1

List of End-Use Products Covered in this Report, with relevant Application Area

| Application Area and Product Name | Products included and Brief Description |
|---|--|
| Agrotech: Woven crop cover, protection | General agricultural, horticultural wovens for protection: wind-breaks, ground matting, tobacco cloth, etc (including tarpaulins) |
| Agrotech: Land netting | Nets for crop protection, fruit collection, etc. Includes balewrap nets |
| Agrotech: Nonwoven crop cover, protection | Fabrics for crop cover, protection, mulching, etc |
| Agrotech: Capillary matting | Capillary matting, ground cover and similar heavy-weight nonwovens for agriculture/horticulture |
| Agrotech: Fishing ropes | Ropes for fishing - towing nets, fish farms, etc (only) |
| Agrotech: Fishing line | Lines for fishing (long line, rod and line) |
| Agrotech: Fishing nets | Nets for all fishing purposes, including seine nets, fish farms etc |
| Agrotech: Baler twine | Twine used to tie bales of hay etc. (excludes balewrap nets) |
| Buildtech: Tarpaulins | Heavy woven fabrics for protection and storage applications |
| Buildtech: Textile structures | Heavy woven fabrics for marquees, tenting, roofs, etc - including architectural membranes |
| Buildtech: Awnings, canopies | Woven fabrics for commercial and industrial awnings and canopies |
| Buildtech: Roofing felts | a) Fabrics, impregnated with bitumen or similar, for use as roofing felts (flat roofs and underlay). b) Sewer linings. |
| Buildtech: Woven roofing | Fabrics for use as substrates in single ply roofing |
| Buildtech: Roof scrims | Support for nonwovens (e.g. felt) and for PVC coating, for use on roofs |
| Buildtech: Shingles | Nonwoven fabrics, primarily of glass, for roofing/shingles |
| Buildtech: Hoardings | Fabrics for billboards, hoardings, mostly for advertising. |
| Buildtech: Scaffold nets | Scaffolding nets to protect against falling debris; façade netting with or without printed advertising |
| Buildtech: Housewrap | Membranes for insulating houses, some breathable |
| Buildtech: Concrete reinforcement | Loose fibre used to reinforce concrete |
| Buildtech: Composites | a) Fibre reinforced plastic for building components, shower trays, swimming pools, wind blades, etc. b) Scrims for concrete reinforcement |
| Clothtech: Interlinings, woven & knit | Woven and knitted fabrics used to provide support and structure to garments |
| Clothtech: Interlinings, nonwoven | Nonwoven fabrics used to provide support and structure to garments |
| Clothtech: Waddings | Wadding/fibrefill used to provide insulation in garments |
| Clothtech: Shoe laces | Shoe and boot laces |
| Clothtech: Shoe components | Linings, components etc for most shoes and trainers, (excluding artificial suede, leather substrates and PVC substrates) |
| Clothtech: Sewing threads | Threads used in all garment applications |
| Clothtech: Fasteners | a) Zip teeth b) Velcro (hook and loop) fastenings |
| Clothtech: Labels | Printed and woven labels for all applications |
| Geotech: Ground stabilisation | Geotextile fabrics for stabilisation, separation, drainage |
| Geotech: Soil reinforcement | Geotextile fabrics for reinforcement of soil |
| Geotech: Pit linings | Geotextile fabrics for lining waste ponds, pits, landfill, etc |
| Geotech: Erosion control | Geotextile fabrics for erosion control |
| Homotech: Woven & knit wipes | Cleaning wipes for domestic applications in woven, or knit form |
| Homotech: Nonwoven wipes | Cleaning wipes for domestic applications in nonwoven form, including floor mops, etc |
| Homotech: Vacuum filters | Filter media for domestic and industrial vacuum cleaners |

Exhibit 1.1
(continued)

**List of End-Use
Products Covered
in this Report,
with relevant
Application Area**

| Application Area and Product Name | Products included and Brief Description |
|--------------------------------------|---|
| Homotech: HVAC filters | Heating, ventilation and air conditioning filters for domestic and industrial use |
| Homotech: Pillow tickings | Tickings for filled products (pillows, duvets, cushions) |
| Homotech: Mattress tickings | Outer fabrics for wrapping mattresses |
| Homotech: Mattress components | Flanging and quilt backing for mattresses |
| Homotech: Mattress spring wrap | Fabrics used to wrap springs in sprung beds |
| Homotech: Spring insulators | Flat fabrics (decking) used to cover springs in beds or upholstery |
| Homotech: Platform cloth | Fabrics used as a base for cushions on upholstered furniture |
| Homotech: Dust cloths | Fabrics attached to base of furniture |
| Homotech: Other furniture components | Skirt linings and other fabrics for use in upholstered furniture, bedding etc, not elsewhere specified |
| Homotech: Fibrefill & waddings | Pillow, cushion, duvet filling; wadding used in upholstered furniture and mattresses |
| Homotech: Furniture webbings | Strapping used to support seating in upholstered furniture, etc |
| Homotech: Curtain tapes | Header tapes for drapes and nets |
| Homotech: Woven carpet backings | a) Woven fabrics used as a primary backing for tufted carpets (excluding ground yarns for woven carpets) b) Woven fabrics used as a secondary backing for tufted carpets |
| Homotech: Nonwoven carpet backings | a) Nonwovens used as a primary backing for carpets b) Nonwovens used as a secondary backing for carpets, underlay and backing to carpet tiles |
| Homotech: Carpet ground yarns | Ground yarns for woven carpets |
| Homotech: Sewing threads | Threads used in all furnishing, household textile applications |
| Homotech: Composites | Fibre-reinforced plastic materials for household use (e.g. consumer appliances, white goods) |
| Indutech: Conveyor belting | Woven fabrics for conveying and speciality applications |
| Indutech: Hoses | Braids, woven and knitted fabrics used to reinforce rubber and polymer hoses for industrial applications |
| Indutech: Drive belting | Machine drive and power transmission belting including flat and coated products as well as V-type designs |
| Indutech: Brushes | Bristles for brushes of all types |
| Indutech: Abrasives | Fabrics for a variety of polishing and abrasion applications |
| Indutech: Woven & knit wipes | Cleaning wipes for industrial applications in knit/woven form |
| Indutech: Nonwoven wipes | Cleaning wipes for industrial applications in nonwoven form |
| Indutech: Woven filters | All woven filters for use in industrial applications |
| Indutech: Nonwoven air filters | High Efficiency Particulate (HEPA) and Ultra Low Penetration (ULPA) products and other non-HVAC air filters for industry. |
| Indutech: Nonwoven dust filters | Filter media for dust bag-houses |
| Indutech: Nonwoven liquid filters | Filter media for swimming pools, food, vessel bags, etc. |
| Indutech: Other nonwoven filters | All other nonwoven filters |
| Indutech: Cigarette filters | Tow for cigarette filters |
| Indutech: Papermaking felts | Batting and support elements of press, forming and drying fabrics (or felts) in papermaking |
| Indutech: Battery separators, etc | a) Fabrics for battery separators b) Fabrics for floppy disc liners, transformers, etc (excludes PCBs) |
| Indutech: Cable components | Central strength members and rip cord yarns for use in cables |
| Indutech: Electrical composites | a) PCBs b) Other GRP composites for electrical applications, including other producer durable equipment |
| Indutech: Seals gaskets | Materials used for industrial seals and gaskets |

Exhibit 1.1
(continued)

List of End-Use Products Covered in this Report, with relevant Application Area

| Application Area and Product Name | Products included and Brief Description |
|-------------------------------------|---|
| Indutech: Fibrefill | Fibrefill and waddings for miscellaneous industrial applications |
| Indutech: Anti-corrosion composites | GRP for anti-corrosion end-uses - storage pipes, tanks, etc |
| Indutech: Liftingwebs | Webs and roundslings for lifting purposes |
| Indutech: Ropes | Ropes and cords for use in industry |
| Indutech: Misc coated fabrics | a) Coated fabrics storage silos b) Coated fabrics for oil booms c) Heavy coating substrates for covers and miscellaneous applications |
| Medtech: Woven gowns, drapes | Patient and surgeon gowns, drapes and garments used in surgical and other medical situations (excluding nurse-type garments) |
| Medtech: Nonwoven gowns, drapes | Lightweight nonwoven garments used in protective and medical situations |
| Medtech: Woundcare woven, knit | All medical wovens and knits such as bandages and dressings, gauze, slings, etc |
| Medtech: Woundcare nonwoven | Nonwovens for bandages, dressings and other medical end-uses not elsewhere specified |
| Medtech: Sterile packaging | Sterile medical packaging |
| Medtech: Medical mattresses | Waterproof coated fabrics for mattresses |
| Medtech: Coverstock | Outer fabrics used in sanitary towels, diapers, incontinence pads |
| Medtech: Cotton wool | Loose fibre used for removing or applying powders or liquids |
| Medtech: Wipes | Wipes for cleansing skin, face, hands, etc |
| Mobiltech: Car tyre cord | Fabric for reinforcement of car tyres |
| Mobiltech: CV tyre cord | Fabric for reinforcement of tyres other than for cars |
| Mobiltech: Auto drive belt | Fabric for reinforcement of automotive drive belts, etc |
| Mobiltech: Auto hose | Fabric for reinforcement of automotive hoses |
| Mobiltech: Cabin filters | Filter media for automotive, mainly cabin filters, but also engine filters, air-intake filters, fuel filtration |
| Mobiltech: Seat belts | Narrow woven safety belt fabric for vehicles |
| Mobiltech: Air bags | Fabric for reinforcement of automotive safety air bags |
| Mobiltech: Tufted carpet | Tufted automotive floor-coverings - face fabric only |
| Mobiltech: Needled carpet | Needlepunched nonwoven automotive floor-coverings |
| Mobiltech: Auto carpet backing | Primary (for tufted) and secondary carpet backing for automotive end uses |
| Mobiltech: Woven & knit trim | Woven, knitted automotive trim : boot liners, head liners, shelving, door panels, etc |
| Mobiltech: Nonwoven trim | Nonwoven automotive trim : boot liners, head liners, shelving, door panels, etc |
| Mobiltech: Upholstery | Woven & knitted automotive seating face and backing fabric |
| Mobiltech: Insulation | Insulation for engine compartments, wheel arches, foot-wells, etc |
| Mobiltech: Truck covers | Heavy woven fabrics for truck covers, curtain-sides and other protection and storage applications (e.g. ships' hold covers) |
| Mobiltech: Tiedowns | Narrow woven belts for truck curtain-sides and cargo restraints |
| Mobiltech: Transport composites | FRP for use in cars, trains, buses (mostly components, aerofoils, spoilers, seats) etc |
| Mobiltech: Marine composites | Glass fibre for use in boat bodies GRP - hand lay-up, etc |
| Mobiltech: Ropes | Ropes used in transport, including marine, tethering, etc |
| Packtech: FIBC big bags | a) Flexible Intermediate Bulk Containers ("Big Bags") b) Laundry bags and other bulk packaging products |
| Packtech: Sacks | Sacks for storage, etc |
| Packtech: Twine | Twine and string for tying packages, etc (excludes agricultural applications) |
| Packtech: Teabags | Non-paper tea bags and coffee filters |
| Packtech: Misc. nonwoven packaging | a) Food soaker pads b) All other nonwoven packaging items except tea bags, e.g. envelopes, durable papers |

Exhibit 1.1
(continued)

**List of End-Use
Products Covered
in this Report,
with relevant
Application Area**

| Application Area and Product Name | Products included and Brief Description |
|--|---|
| Packtech: Netting | Net packaging for storing, packing, transporting, retailing foodstuffs, toys, and other |
| Packtech: Misc. woven packaging | a) Woven fibre strapping b) Other miscellaneous woven packaging items such as lightweight mail-bags |
| Protech: FR clothing | Fabrics for use in clothing worn to protect against flame and heat |
| Protech: NBC | Fabrics to protect against nuclear, biological and chemical exposure |
| Protech: Cut, slash protection | Fabrics for garments and gloves used to provide protection from knives, glass or other sharp implements; chain saw protection |
| Protech: Ballistic protection | Fabrics designed to deflect or absorb impact of bullets, etc |
| Protech: Face masks | Face masks for medical, industrial (clean room), and domestic applications |
| Protech: Dust protection | Lightweight barrier fabrics for garments worn to provide protection against dust or other particulate matter |
| Protech: Disposable chemical protection | Fabrics for disposable garments worn to provide protection against harmful chemicals and gases, pesticides, etc |
| Protech: Durable chemical protection | Fabrics for durable garments and gloves worn to provide protection against harmful chemicals and gases |
| Protech: FWC | Fabrics for foul weather clothing using coating or laminates, for all end uses |
| Protech: Hi-vis | Fluorescent and phosphorescent (not retro-reflective) fabrics for gilets, trousers, etc (excludes FWC) |
| Protech: Harnesses | Safety straps for workers, climbing, push chairs, child car seats, etc |
| Sporttech: Boat covers | Boat covers and other fabrics used to provide protection from adverse weather on pleasure craft |
| Sporttech: Bookcloth | Substrate for leather-type covering of hard backed books |
| Sporttech: Shopping bags | Outer fabrics plus substrates for soft sided shopping and other small bags, carriers, etc (excluding handbags, leathergoods) |
| Sporttech: Artificial leather substrates | Coating substrates for artificial leather handbags, luggage, small goods |
| Sporttech: Sports bags, luggage | Face fabrics and substrates for soft sided luggage, bags for carrying sports gear, rucksacks |
| Sporttech: Sailcloth | Fabrics used in mainsails, foresails and spinnakers |
| Sporttech: Artificial turf | Material used to provide surfaces for sporting activities |
| Sporttech: Climbing ropes | Ropes and cords used for climbing, yachting, etc |
| Sporttech: Sports nets | Nets for soccer, tennis, cricket, etc and for court protection |
| Sporttech: Footballs | Coating substrates for artificial leather used to cover footballs and similar |
| Sporttech: Equipment composites | Materials used in the production of skis, racket frames, canoes, jet-skis |
| Sporttech: Air sport fabrics | Fabrics for balloons, kites, para-gliders, parachutes |
| Sporttech: Tents | Fabrics for use in lightweight, portable tents for personal camping/sleeping purposes |
| Sporttech: Sleeping bag fabrics | Outer fabrics for sleeping bags |
| Sporttech: Sleeping bag filling | Fibrefill/wadding for sleeping bags |
| Sporttech: Animal webbing | Pet leads, collars, horse halters, etc |
| Sporttech: Flags | Fabrics for flags, pennants, bunting, for parades, shows, etc. |
| <i>Oekotech: Housewrap (Buildtech), Erosion control (Geotech), Pit linings (Geotech), Woven filters, (Indutech), Nonwoven dust filters (Indutech), Automotive insulation (Mobiltech)</i> | <i>Products extracted from the above list that are used for environmental control purposes</i> |

1.5 LEVELS OF DETAIL IN THIS REPORT

Not all variables included in the DRA consumption forecasting system are included in this report. The physical make-up of each of the 138 product headings listed in Exhibit 1.2 is described in terms of 4 polymer/fibre types, 6 polymer/fibre forms and 6 fabric/final textile product types as shown in Exhibit 1.3. Also, for the sake of conciseness, the 210 countries in the consumption forecasting system have been condensed into 8 regions.

Exhibit 1.2
Reporting Levels used in this Report

| Regions | Polymer/Fibre Group Types | Polymer/Fibre Forms (Yarn Types) | Fabric Types |
|--|---------------------------|----------------------------------|--------------------|
| N America | Natural | Polymer Chip | Unspun Fibre |
| S America | Regenerated | Staple Fibre | Woven |
| W Europe | Synthetic | Spun Staple | Knitted |
| E Europe | Inorganic | Multifilament | Nonwoven |
| S Asia | | Monofilament | Yarn Type Products |
| N E Asia | | Tape/Slit Film | Other Fabrics |
| S E Asia | | | |
| Rest of World (Central Asia, Middle East, Africa, Oceania) | | | |
| Total: 8 | Total: 4 | Total: 6 | Total: 6 |

Source: DRA

Further details of the variables used in this report are given in Exhibit A1.3, Appendix 1.

1.6 SCOPE AND STRUCTURE OF THE REPORT

Chapter 2: The Technical Textiles Market provides summary forecasts for the technical textiles market overall and then looks briefly at the 11 end-use application areas.

Chapters 3-14: End-Use Products by Individual Application Area analyses in detail the relevant end-use products by individual application area. Each Chapter provides a set of 20 Forecast Tables drawn from the DRA consumption forecasting system analysing the world market for technical textiles from 1995 to 2010. These Tables are split into 3 Parts:

Part A consists of 6 **Summary Tables**, which provide an overview of technical textile consumption worldwide in the **application area** over the period 1995-2010. These tables split total consumption by polymer/fibre type and by polymer/fibre form in volume terms, and by fabric type, coating level and region in volume and value terms.

Part B (2 Tables) provides world consumption forecasts to 2010 for the individual **end-use products** contained within the application area, in volume and value terms.

Part C (12 Tables) provides a detailed analysis of the relevant individual **end-use products split** by polymer/fibre type and polymer/fibre form in volume terms, and by fabric type, region and application area in volume and value terms, in 2000 and 2010.

Appendix 1: Definitions and Assumptions outlines the main assumptions and definitions underlying the projections in this report and provides a description of the main table formats used to present the forecasts.

Appendix 2: The DRA Textile Products End-Use Consumption Forecasting System describes the consumption forecasting system developed by David Rigby Associates which is the basis of the volume and value estimates presented in this report.