

VISCOSE in Technical Textiles and Nonwovens World Market Forecasts To 2010

PRODUCED FOR:
DRA Limited

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1. OVERVIEW

1.1 VISCOSE: INCREASINGLY RELIANT UPON TECHNICAL TEXTILES

(THIS SECTION PROVIDES AN OVERVIEW OF THE MAIN FINDINGS OF THE REPORT.)

1.2 VISCOSE TECHNICAL TEXTILES DEFINED

This report considers all technical textiles that use viscose rayon in fibre, yarn or fabric form. In this report technical textiles are defined as comprising all those textile-based products 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. 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.

1.3 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 viscose in nonwovens and other technical textiles by individual end-use product
- ii) to provide estimates of current end-use consumption levels for 30 separate end-use products containing viscose by region and by physical make-up (fibre form/yarn type, 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 viscose fibre in technical applications.

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

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

- Fibre trade associations
- Ultimate commercial end-users of technical products.

1.4 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 (including 30 products which use viscose) 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 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 150 technical textile products and the other variables contained within the DRA consumption forecasting system are given in Exhibits A2.1 and A2.2 in Appendix 2.

1.5 PRODUCTS USING VISCOSE INCLUDED IN THIS REPORT

Each of the 30 individual end-use technical textile products in which viscose is used 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 products which use viscose, together with their application area and brief product description, is provided in Exhibit 1.2, overleaf.

Exhibit 1.2

**List of the 30
Viscose End-
Use Products
Covered in this
Report, with
Relevant
Application
Area**

Application Area and Product	Product Description and Function
Clothtech: Interlinings, woven & knitted	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
Homotech: Wipes, woven & knitted	Cleaning wipes for domestic applications in woven or knit form
Homotech: Wipes, nonwoven	Cleaning wipes for domestic applications in nonwoven form - including floor mops, etc
Homotech: Mattress tickings	Outer fabrics for wrapping mattresses
Homotech: Platform cloth	Fabrics used as a base for cushions on upholstered furniture
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: Abrasives	Fabrics for a variety of polishing and abrasion applications
Indutech: Wipes, woven & knitted	Cleaning wipes for industrial applications in knit/woven form
Indutech: Wipes, nonwoven	Cleaning wipes for industrial applications in nonwoven form
Indutech: Liquid filters, nonwoven	Filter media for swimming pools, food, vessel bags, etc.
Indutech: Battery separators, etc	Fabrics for battery separators, floppy disc liners, transformers, etc - excludes PCBs
Indutech: Fibrefill	Fibrefill and waddings for miscellaneous industrial applications
Medtech: Gowns and drapes, nonwoven	Lightweight nonwoven garments used in protective and medical situations
Medtech: Woundcare, woven & knitted	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: 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 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
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
Sporttech: Bookcloth	Substrate for leather-type covering of hard backed books
Sporttech: Artificial leather substrates	Substrates for artificial leather handbags, luggage, small goods

Source: DRA

1.6 LEVELS OF DETAIL IN THIS REPORT

Not all variables included in the DRA consumption forecasting system are relevant to viscose. Hence, in this report, the physical make-up of each of the 30 viscose products listed in Exhibit 1.2 is analysed in terms of 4 fibre forms and 5 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 1.3

Reporting Levels used in this Report

Regions	Fibre Forms (Yarn Types)	Fabric and Other End-Use Product Types
N America	Staple Fibre	Unspun Fibre
S America	Spun Staple	Woven
W Europe	Textile Multifilament (regular tenacity)	Knitted
E Europe	Industrial Multifilament (high tenacity)	Nonwoven
S Asia		Yarn Type Products
N E Asia		
S E Asia		
Rest of World (Central Asia, Middle East, Africa, Oceania)		
Total: 8	Total: 4	Total: 5

Source: DRA

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

1.7 SCOPE AND STRUCTURE OF THE REPORT

Chapter 2: The Relative Importance of Viscose in the Technical Textiles Market provides summary forecasts for the technical textiles market in total and then compares the current size and prospects for man-made fibres/polymers in technical textile markets with the other broad fibre groups: natural and inorganic. It then looks briefly at inter-fibre competition between viscose and other individual fibre types (e.g. polyester).

Chapter 3: Viscose End-Use Products and Markets draws on the detailed Tables in Chapter 4 to highlight some of the important trends in the use of viscose in technical textiles and nonwovens.

Chapter 4: Viscose End-Use Products: Detailed Forecast Tables provides a set of 46 Forecast Tables drawn from the DRA consumption forecasting system analysing the world market for viscose from 1995 to 2010. These tables are split into 7 Parts:

Part A consists of **5 Summary Tables**, which provide an overview of viscose consumption worldwide over the period 1995-2010. These tables split viscose consumption by polymer/fibre form, fabric type, region, application area and end-use product.

Parts B-D provide a detailed analysis of **30 individual viscose end-use products** with consumption forecasts to 2010:

- Part B (6 tables) shows the relative importance of each of the **4 fibre forms** in the production of each viscose product over the period 1995-2010 (e.g. staple fibre)
- Part C (9 tables) provides estimates and forecasts of consumption for each product across **8 regions** of the world over the period 1995-2010 (e.g. North America)
- Part D (7 tables) shows the relative importance of each of the **6 fabric and other end-use product types** in the production of each viscose product over the period 1995-2010 (e.g. knitted fabric).

Parts E-F provide an analysis of **overall end-use viscose consumption by the 8 main polymer/fibre forms** with forecasts to 2010:

- Part E (6 Tables) provides estimates and forecasts for the use of each polymer/fibre form in each of the **6 fabric and other end-use product types** over the period 1995-2010 (e.g. unspun fibre in nonwovens)
- Part F (6 Tables) provides estimates and forecasts for the use of each polymer/fibre form in each of **8 regions** of the world over the period 1995-2010 (e.g. spun staple yarns in Eastern Europe).

Part G (7 Tables) provides an analysis of **overall end-use viscose consumption** by the **6 fabric types** in each of **8 regions** of the world over the period 1995-2010 (e.g. nonwoven fabrics in Western Europe).

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.