

GROWTH OPPORTUNITIES FOR MAN-MADE POLYMERS AND FIBRES IN TECHNICAL TEXTILES AND NONWOVENS

David Rigby Associates has published four reports ⁽¹⁾ focusing separately on polyester, polypropylene, nylon and viscose rayon which analyse in detail the consumption of these man-mades in both technical textile and nonwoven end-uses both overall and in their polymer, fibre, yarn and fabric forms and make forecasts to 2010 by volume and value.

The reports are based on DRA's Technical Textiles Consumption Forecasting System which contains descriptions of 150 individual end-use products and analyses their make-up in terms of 19 separate polymer/fibre types, 8 kinds of yarn and 19 different sorts of fabrics, braids, ropes etc.

DRA forecasts that the world market for technical textile products will grow at an average annual rate of 3.7% up to 2010 by when man-mades will account for 75.5% of total polymer/fibre consumption of 23.8m tonnes in these end-uses. Both viscose and polypropylene will gain market share, polyester's share will be stable and nylon's share will decline, although in all four cases overall volumes will increase.

The Polyester report describes and forecasts world and regional demand for 109 separate technical end-use products containing polyester and the consequent demand for polyester in each of its forms: polymer chip, fibre, yarn and fabric. Its growth rate will be below historical trends due mainly to increased competition from polypropylene in woven products and from both polypropylene and viscose in new and developing nonwoven applications. By 2010 it will have increased its share of all fibres used in the sector to 25%, with Europe, North America and North East Asia (including China) accounting for around 80% of this total. The bigger end-uses include fibrefill, luggage and shoe components; the fastest growing applications are all nonwovens: wipes, filters and insulation. By 2010 North East Asia will account for 34% of all polyester consumption in technical products.

The Polypropylene report describes and forecasts 66 different products. Currently over 50% of consumption is in packaging and medical applications. Its areas of highest growth include woven tape for packaging and agricultural applications and various melt-laid nonwoven products such as wipes and filters. North East Asia is forecast to grow at an above average rate of 5.1% per annum to 2010 and will take over from North America as the second largest polypropylene consuming region, behind Western Europe.

The Nylon report describes and forecasts 63 separate products. Its growth in nonwoven and unspun end-uses will offset to some extent its continuing substitution by polyester and polypropylene in many of its traditional end-uses, although the worst of its substitution by polyester is now past. Nylon consumption is forecast to reach 1.6 million tonnes per annum by 2010 with North East Asia retaining its dominant position and South Asia having the highest growth rate.

The Viscose report describes and forecast 30 different technical products. Viscose use is forecast to grow significantly faster than all the other man-mades, although from a much lower volume base, due largely to its suitability in rapidly growing markets for nonwoven wipes and other hydrophilic products. Nonwovens account for 9 out of the 10 fastest growing products containing viscose. In 2010 Western Europe will remain the largest consumer of viscose in technical textiles and nonwovens, whilst North East Asia is forecast to become the second largest consumer, overtaking North America. Market growth is expected to be the strongest in South Asia, albeit from a low initial volume.

David Rigby, Chairman of DRA, said: “We believe that these reports are the first attempt to quantify at a high level of detail the global market for man-mades consumed in technical textiles and nonwovens. The reports provide unique world and regional forecasts for the different types of man-made polymers, fibres, yarns and fabrics used in a comprehensive range of technical products and their end-use applications. This is vital information for producers of intermediates, polymers and fibres, for manufacturers of technical textile products and for those suppliers of speciality chemicals, machinery and other products and services which are targeting this important and growing branch of textiles”.

For more details on these four reports visit DRA's website:

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Or visit DRA on Stand 5.1 D42 at Techtextil, 8-10 April, in Frankfurt.

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The reports are entitled:

Polyester in Technical Textiles and Nonwovens: World Market Forecasts to 2010

Polypropylene in Technical Textiles and Nonwovens: World Market Forecasts to 2010

Nylon in Technical Textiles and Nonwovens: World Market Forecasts to 2010

Viscose Rayon in Technical Textiles and Nonwovens: World Market Forecasts to 2010

Word count: 769