



Recent Trends of the Asian Nonwovens Market



November 7th, 2019, Shangri-Las Eros Hotel

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ANFA Chairman & President , *KANAI JYUYO KOGYO CO,*

Agenda:

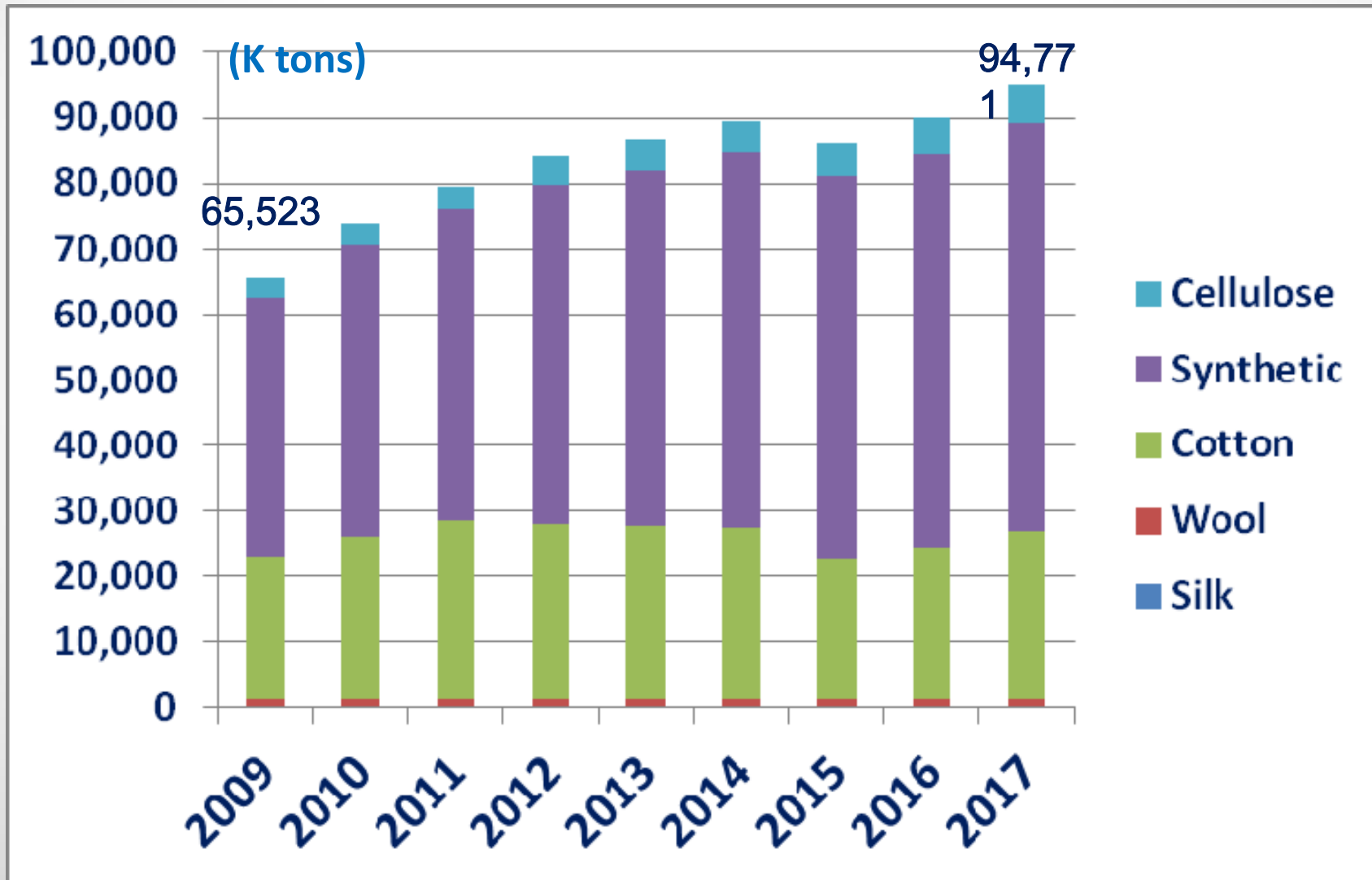
- 1. The Asian Nonwovens in Worldwide
Nonwovens and Fibers Industries**
- 2. The Asian Nonwovens
Production and Trading**

1. The Asian Nonwovens in Worldwide Nonwovens and Fibers Industries



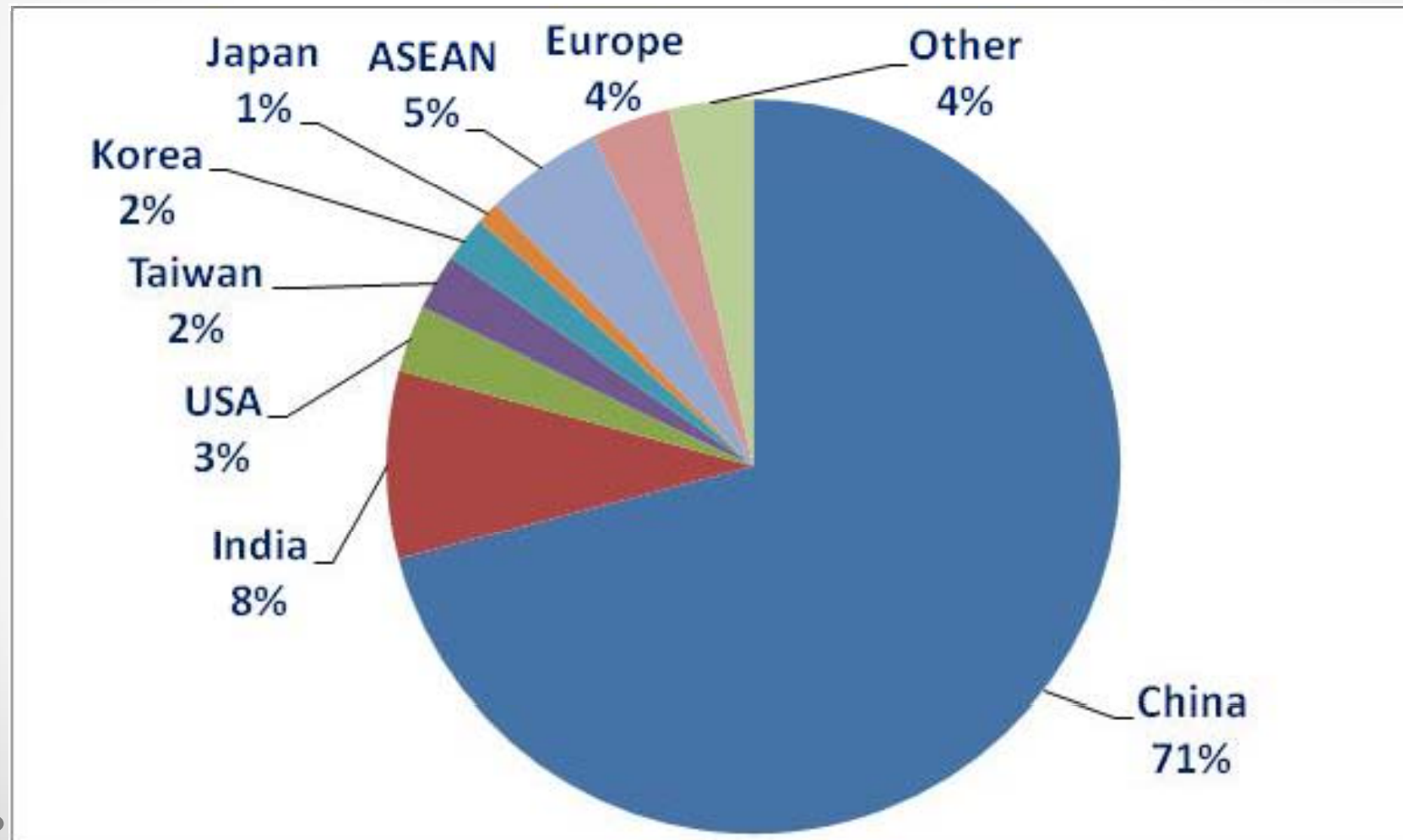
Fibers Production & Consumption in the World

Source : JCFA



Regional Shares of Chemical Fiber Production in the World (2017) (68.0 M tons)

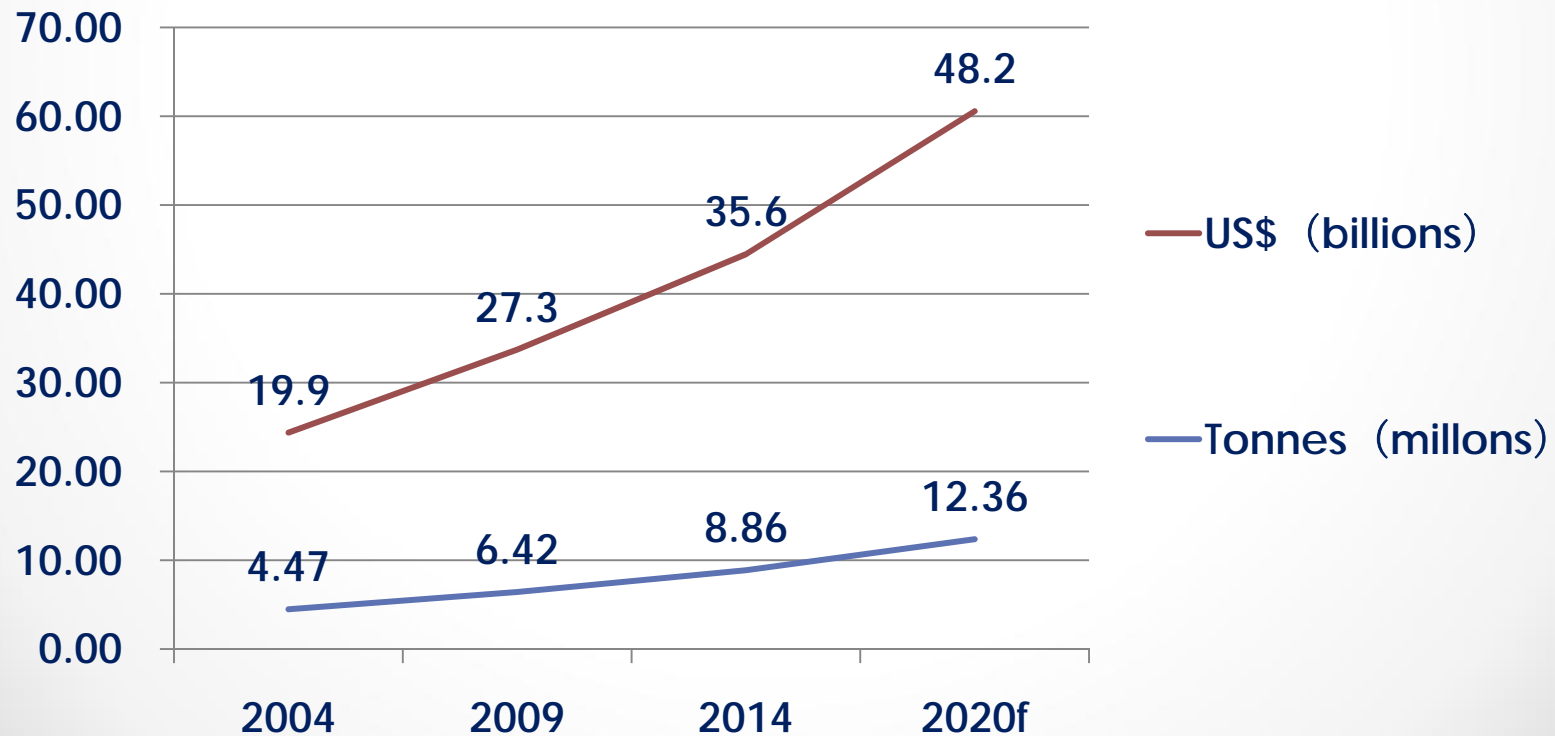
Source : JCFA



Outlook of Worldwide Nonwovens Production

Source : INDA,EDANA Estimate

	2004	2009	2014	2020f	Growth(AAGR)%	
					2004-2014	2014-2020f
Tons (millions)	4.47	6.42	8.86	12.36	7.1	5.7
US\$ (billions)	19.9	27.3	35.6	48.2	6.0	5.2
Unit Price (US\$/kg)	4.45	4.25	4.02	3.90		



Nonwovens Share in Total Fibers Production & Consumption in the World

Source: EDANA, INDA, ANFA, JCFA

	2001	2006	2011	2014	2016	2017
Nonwovens Production & Consumption (M tons)	3.7	5.4	7.3	8.9	9.9	10.6
Fiber Production & Consumption (M tons)	59.5	74.0	82.0	92.9	98.1	97.8
Nonwovens Share (%)	6.3	7.3	8.9	9.6	10.1	10.9

Outlook for Nonwovens Production by Region

(K tons)

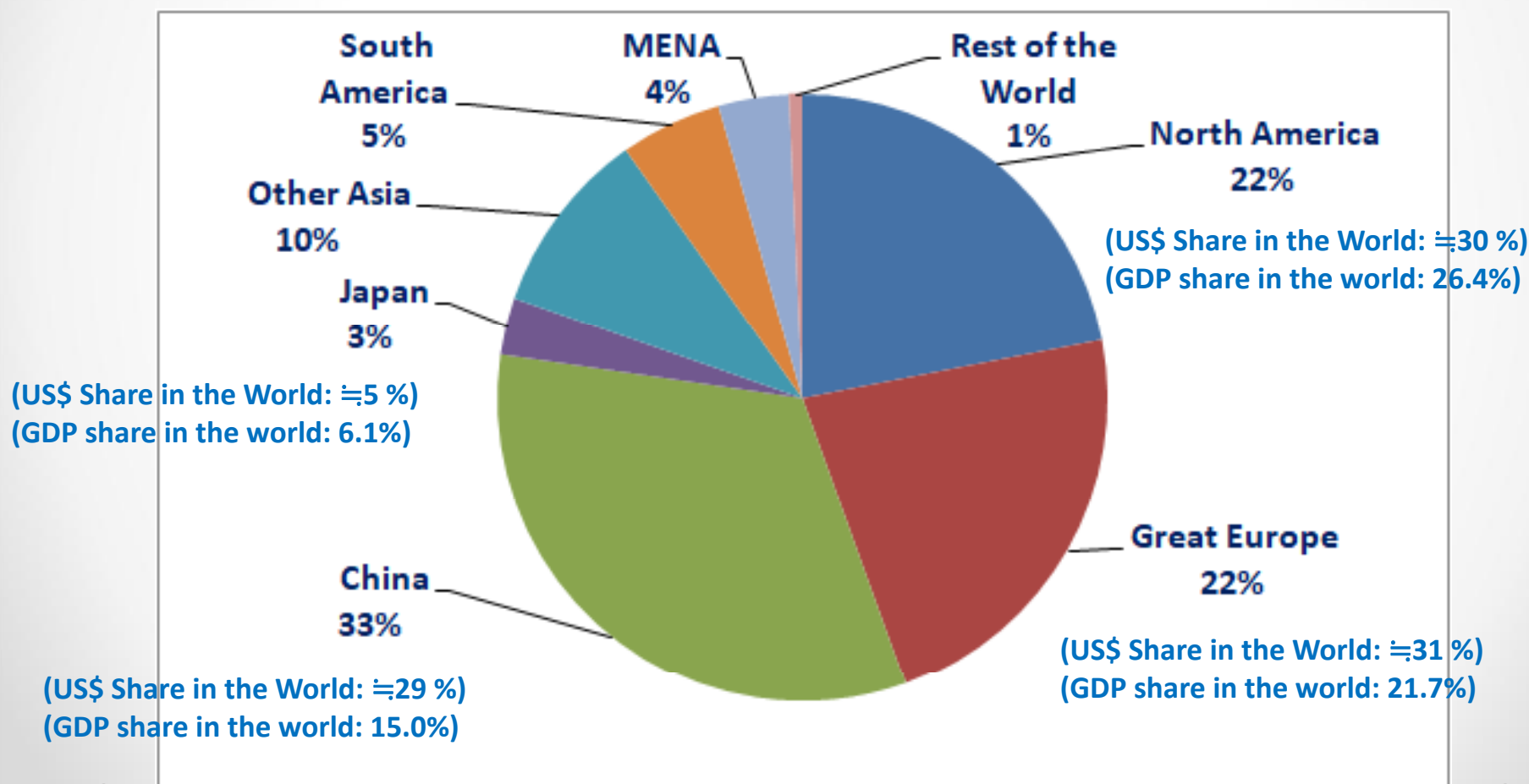
Source : INDA,EDANA Estimate

Region					Groth(AAGR)%	
	2004	2009	2014	2020f	2004-2014	2014-2020f
North America	1,193	1,729	2,095	2,857	5.8	5.3
Great Europe	1,336	1,673	2,167	2,876	5.0	4.8
Asia	1,415	2,428	3,707	5,300	10.1	6.1
China	755	1,505	2,432	3,653	12.4	7
Japan	297	283	336	372	1.2	1.7
Other Asia	363	640	939	1,276	10.0	5.2
South America	313	304	494	725	4.7	6.6
MENA	178	237	336	509	6.6	7.1
Other	37	50	62	97	5.4	7.6
Total	4,472	6,420	8,862	12,364	7.1	5.7

Regional Shares of Worldwide Nonwovens Production (2017)

10,635 K tons (41,900 B US\$)

Source : INDA,EDANA, ANFA Estimate



Nonwovens Production per Capita

Source: ANNA

(kg / Capita)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
World	0.9	0.9	1.0	1.0	1.1	1.1	1.1	1.2	1.4	1.4	1.5
North America	3.3	3.2	3.5	3.3	3.9	3.7	3.8	4.4	4.9	4.8	5.0
South America								0.8	0.9	0.9	1.0
Europe EU28	3.6	3.6	3.3	3.7	3.9	4.0	4.0	4.3	4.6	4.7	5.0
MENA								1.1	1.1	1.2	1.2
Japan	2.6	2.6	2.2	2.5	2.5	2.5	2.6	2.6	2.7	2.7	2.7
China	0.9	1.0	1.3	1.4	1.5	1.6	1.8	1.9	2.1	2.4	2.7
Korea	4.4	4.5	4.6	4.6	4.9	4.5	4.3	4.4	4.2	4.4	4.4
Taiwan	7.0	6.5	6.1	6.5	7.2	5.7	6.7	7.9	8.0	8.0	8.5
Indonesia									0.3	0.3	0.3
India	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.3	0.3
Other Asia								0.1	0.3	0.3	0.3

2. The Asian Nonwovens

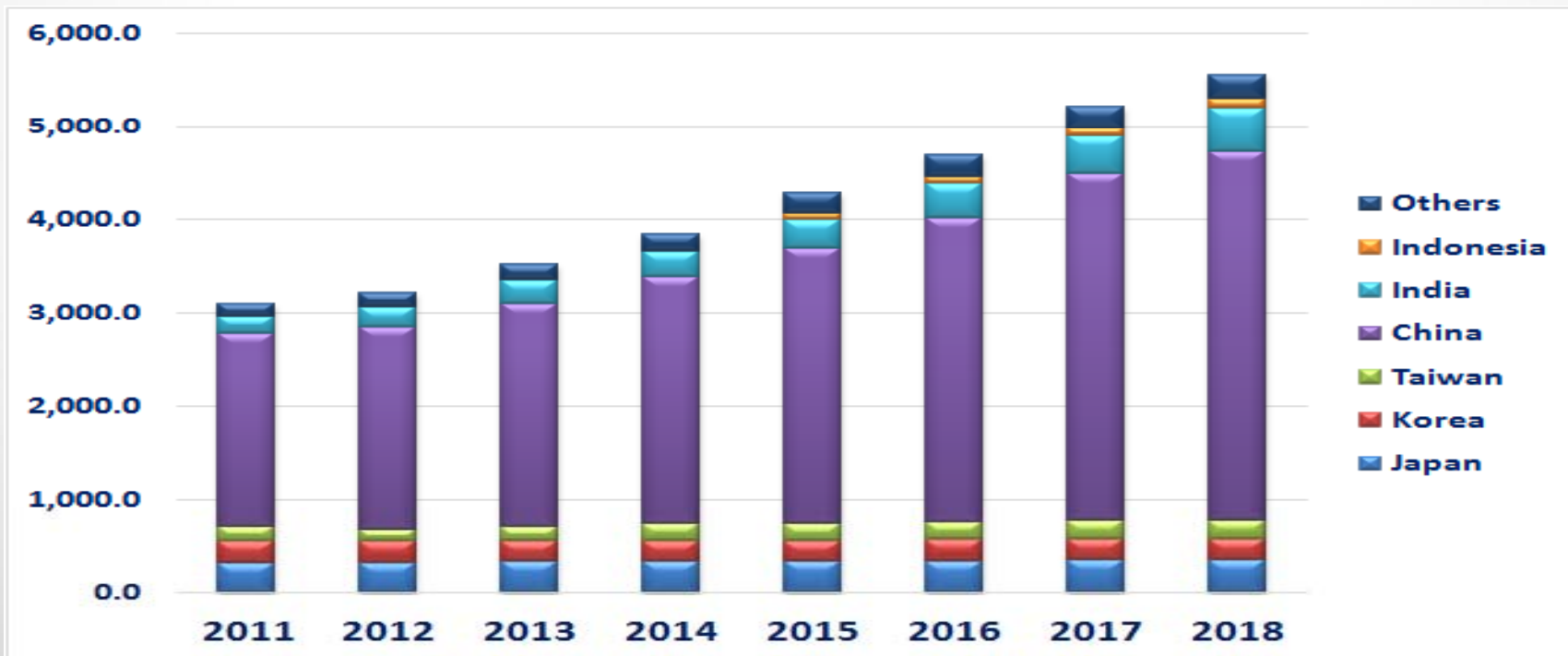
Production and Trading

Asia Nonwovens Production (2011-2018)

(K tons)

Source : ANFA

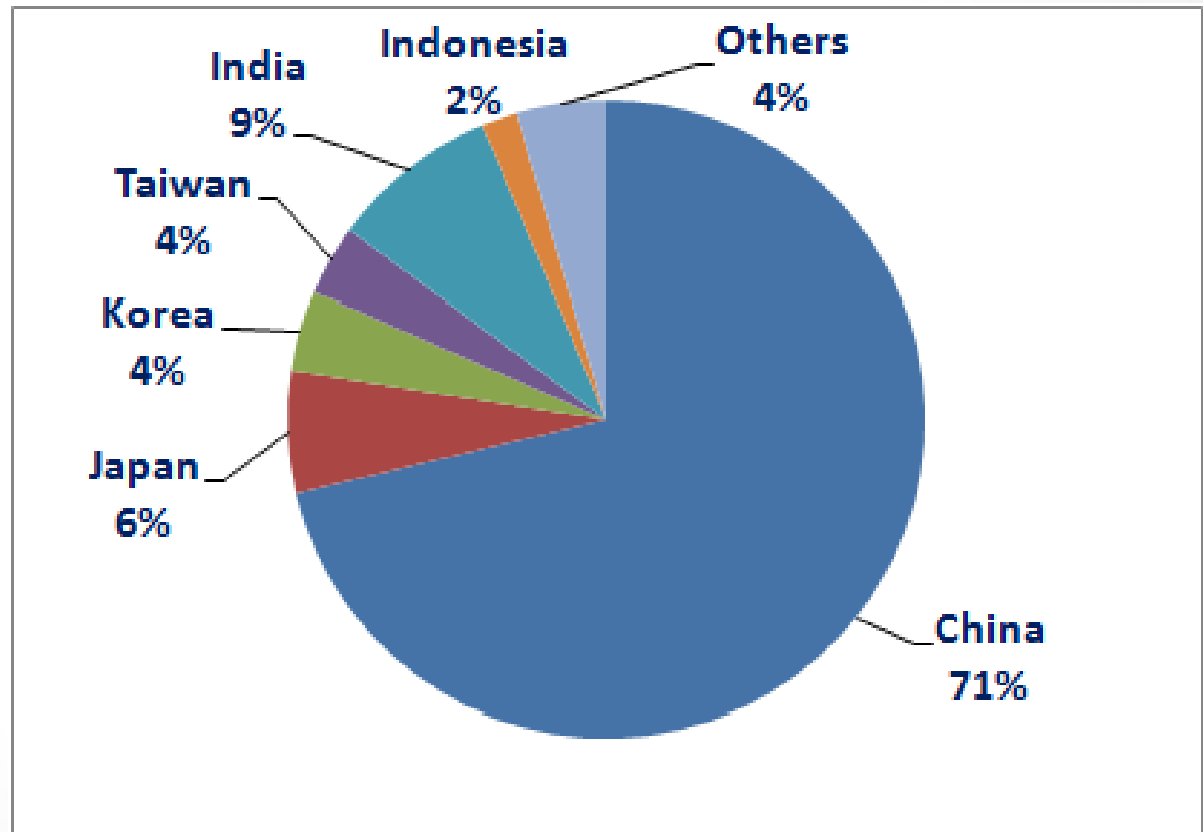
	2011	2012	2013	2014	2015	2016	2017	2018	'18/'17%
Japan	313.0	320.9	331.5	336.3	342.0	339.6	342.1	342.8	100.2
Korea	233.2	226.2	217.2	221.3	216.2	225.5	227.8	227.2	99.7
Taiwan	164.8	130.5	153.1	181.5	183.7	188.0	200.4	197.3	98.4
China	2,054.7	2,163.0	2,387.0	2,635.0	2,941.0	3,260.0	3,705.0	3,960.0	106.9
India	186.3	222.6	252.5	277.1	312.0	365.0	410.0	475.0	115.9
Indonesia	-	-	-	-	68.7	77.9	91.1	100.1	109.9
Others	145.0	152.3	168.0	182.8	214.4	228	240.0	252.6	105.3
Total	3,097.0	3,215.5	3,509.3	3,834.0	4,278.0	4,684.0	5,216.4	5,555	106.5



Asia Nonwovens Production by Region (2018)

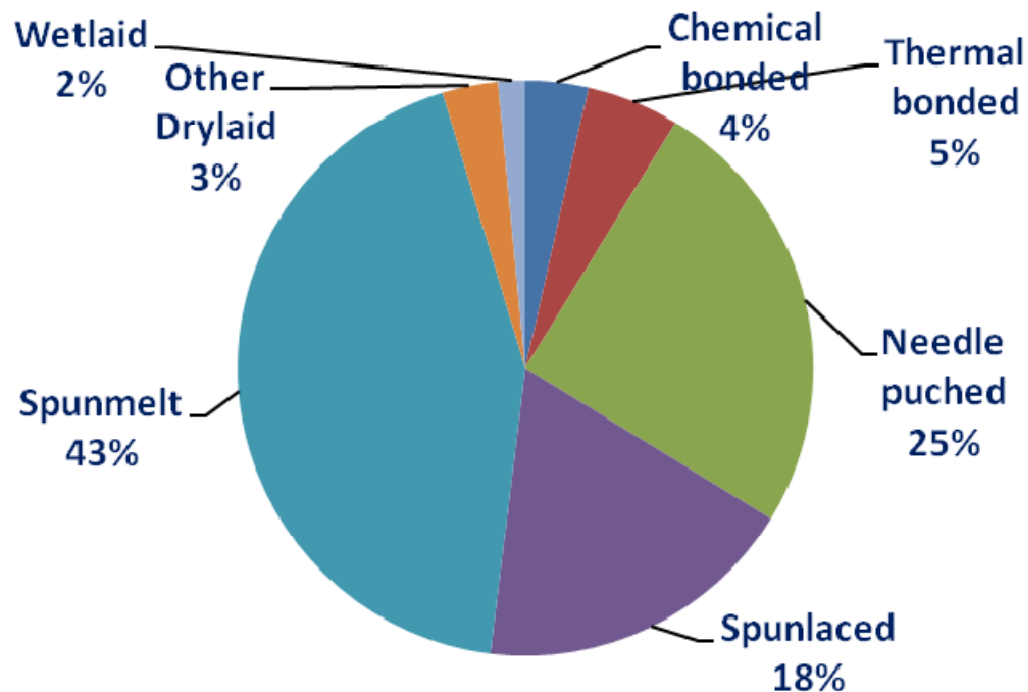
(K tons)

	2018
Japan	342.8
Korea	227.2
Taiwan	197.3
China	3,960.0
India	475.0
Indonesia	100.1
Others	252.6
Total	5,555



Asia Nonwovens Production by Technology in Major 6 regions (2018) (K tons)

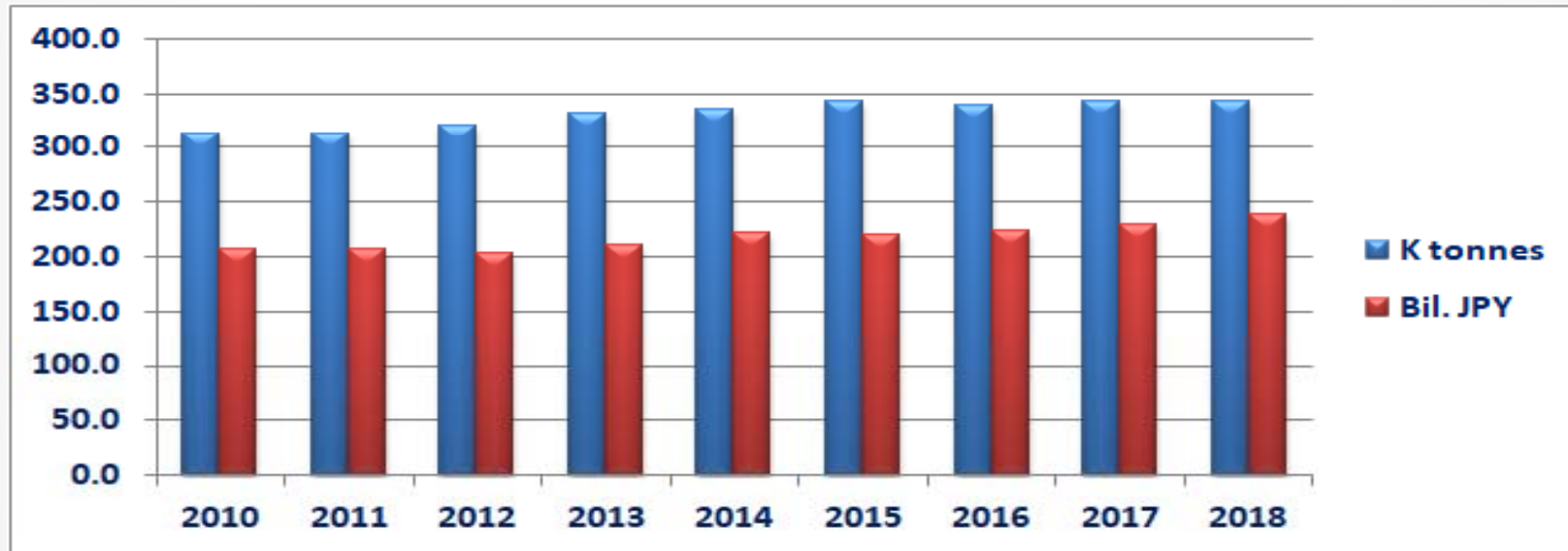
	Japan	Korea	Taiwan	China	India	Indonesia	Total
Chemicalbonded	20	19	4	135	-	-	178.8
Thermalbonded	39	21	13	200	-	10	265.0
Neddlepunched	75	85	38	848	164	56	1,266.0
Spulaced	51	9	80	850	33	6	924.0
Spunbonded/MB	99	90	55	1,779	257	28	2,200.0
Other Drylaid	23	3	4	107	21	0	158.5
Wetlaid	35	0	1	41	-	-	77.4
Total	343	227	197	3,960	475	100	5,070



Japan Nonwovens Production (2010~2018)

Source : METI

	2010	2011	2012	2013	2014	2015	2016	2017	2018
K tons	313.4	313.0	320.9	331.5	336.3	342.0	339.6	342.1	342.8
B JPY	206.9	205.7	203.5	210.2	221.3	220.6	223.5	229.2	237.6
JPY/kg	660	657	634	634	658	645	658	670	693



[Ref.] Nonwovens production in foreign countries by Japanese companies
(capitalization ratio: 49% or more)

2012: 165.1 K tons, 62.3 B yen, 2013: 196.3 K tons, 84.1 B yen

2014: 227.5 K tons, 103.2 B yen, 2015: 259.1 K tons, 120.1 B yen

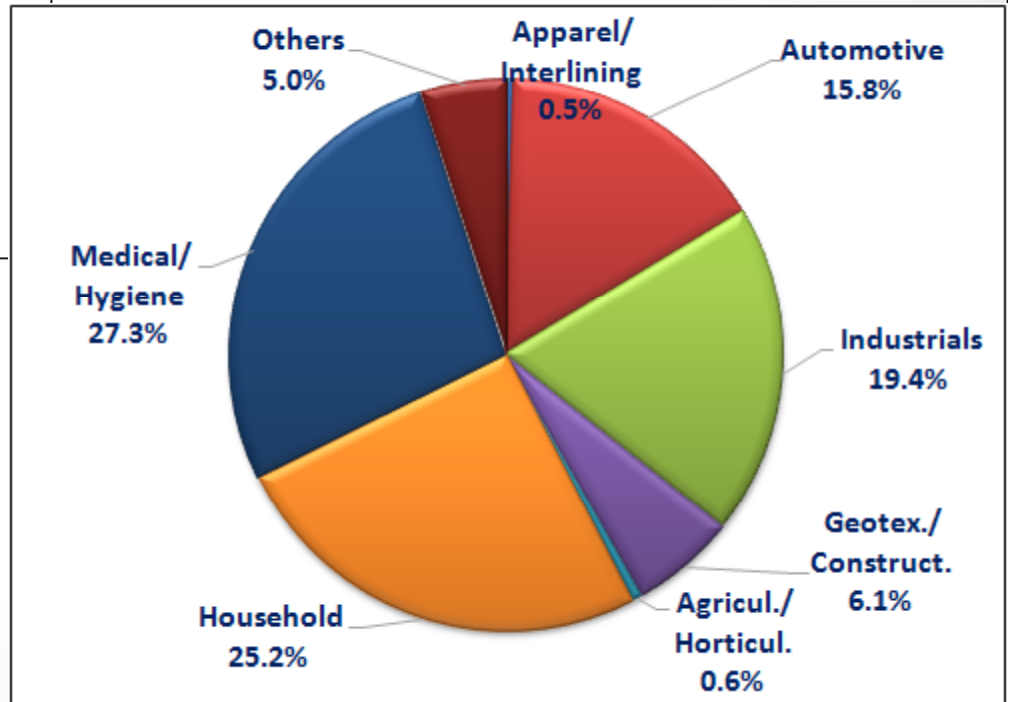
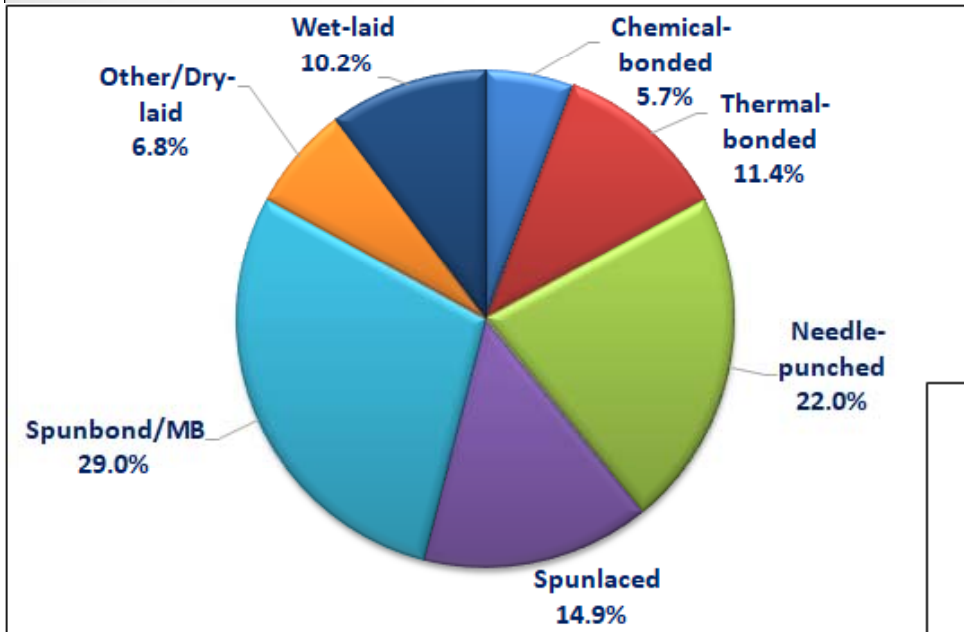
2016: 266.4 K tons, 107.5 B yen, 2017: 294.3 K tons, 125.5 B yen

2018: 314.5 K tons, 172.9 B yen

Source: ANNA

Japan Nonwovens Production by Technology & Application (2018) (342.8 K tons)

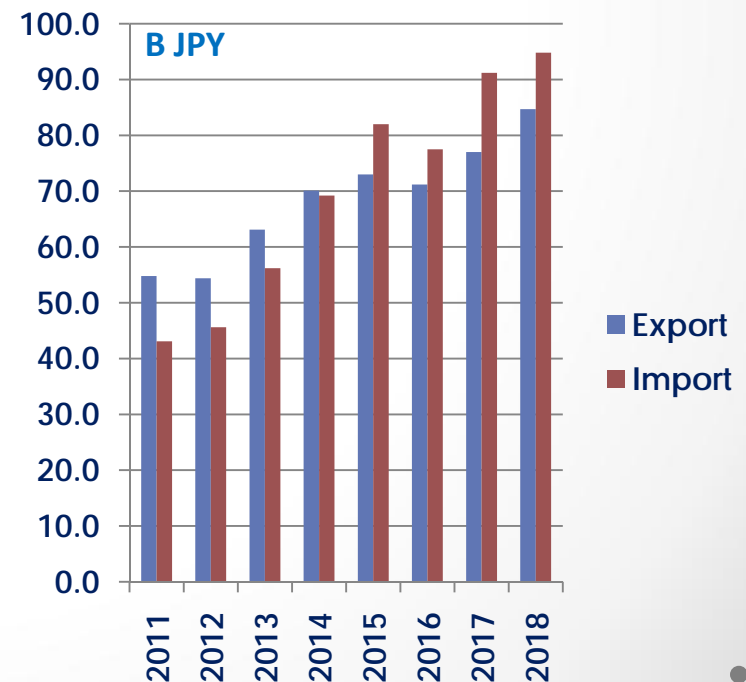
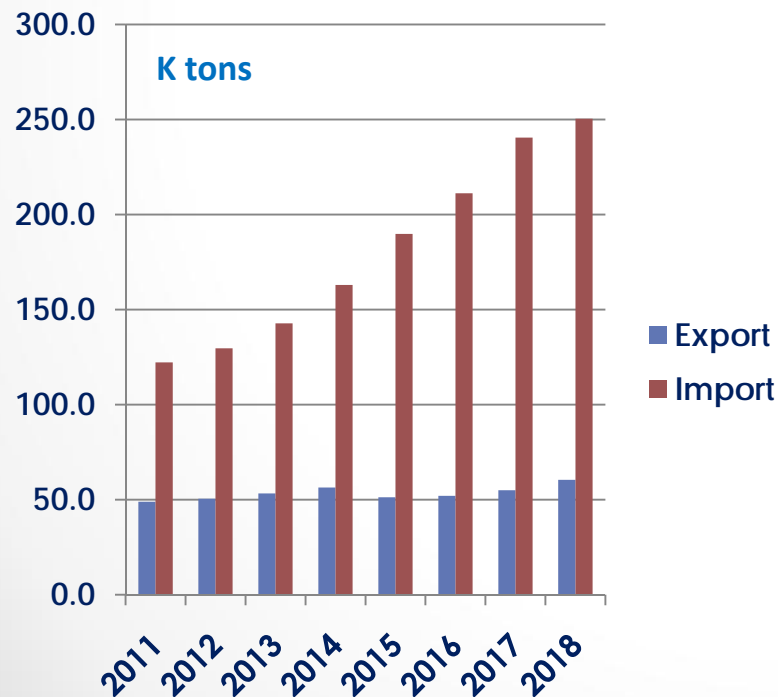
Source : METI



Japan Trend in Export & Import (2011-2018)

Source : Ministry of Finance

		2011	2012	2013	2014	2015	2016	2017	2018
K tons	Export	48.9	50.5	53.3	56.4	51.3	52.0	55.0	60.4
	Import	122.2	129.6	142.8	163.0	189.8	211.2	240.5	250.4
B JPY	Export	54.8	54.4	63.1	70.1	73.0	71.2	77.0	84.7
	Import	43.1	45.6	56.2	69.2	82.0	77.5	91.2	94.8
JYP/kg	Export	1,121	1,077	1,184	1,243	1,423	1,369	1,400	1402
	Import	353	352	394	425	432	367	379	379

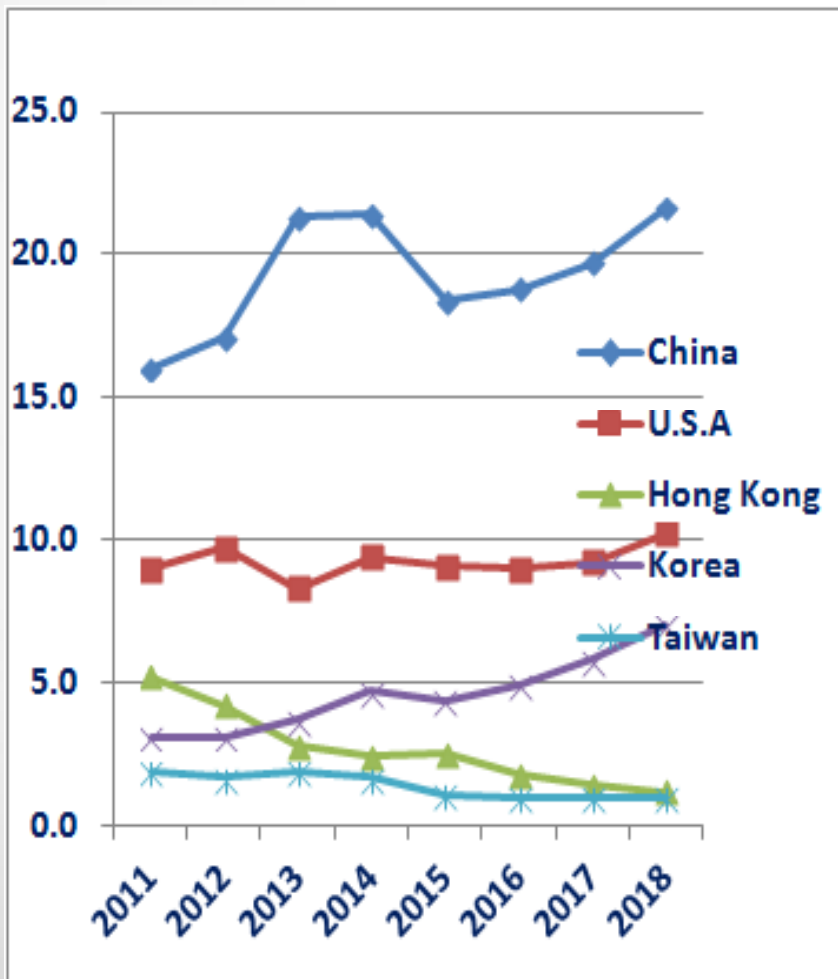


Top 5 Countries in Export & Import of Japan

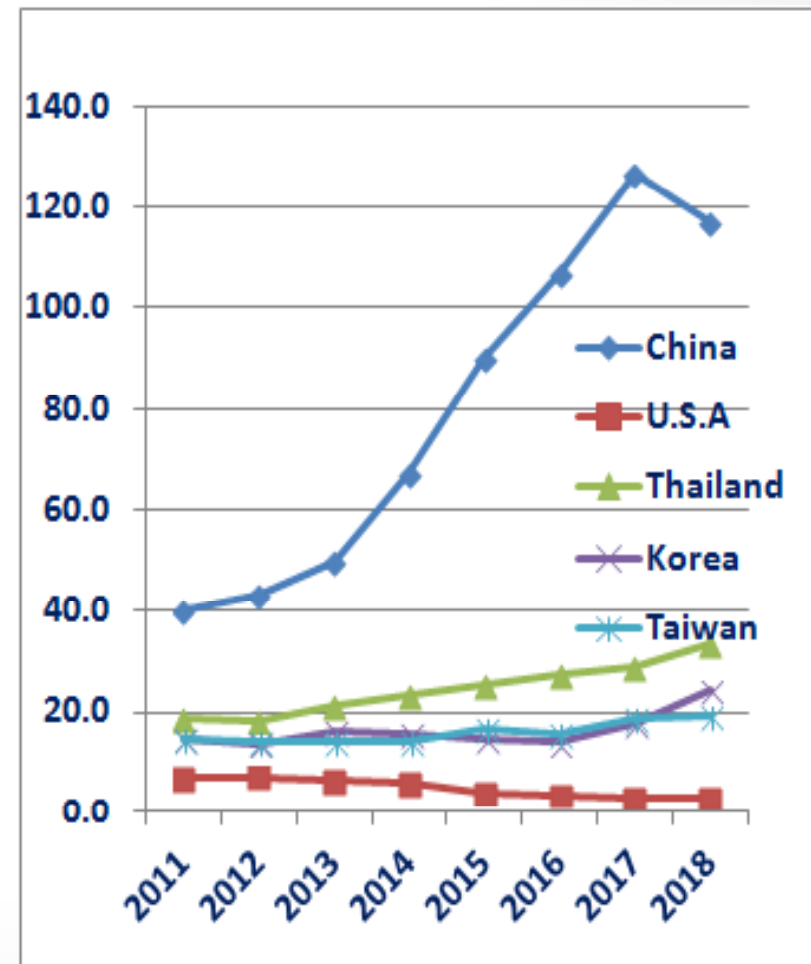
(K tons)

Source : Ministry of Finance

Export



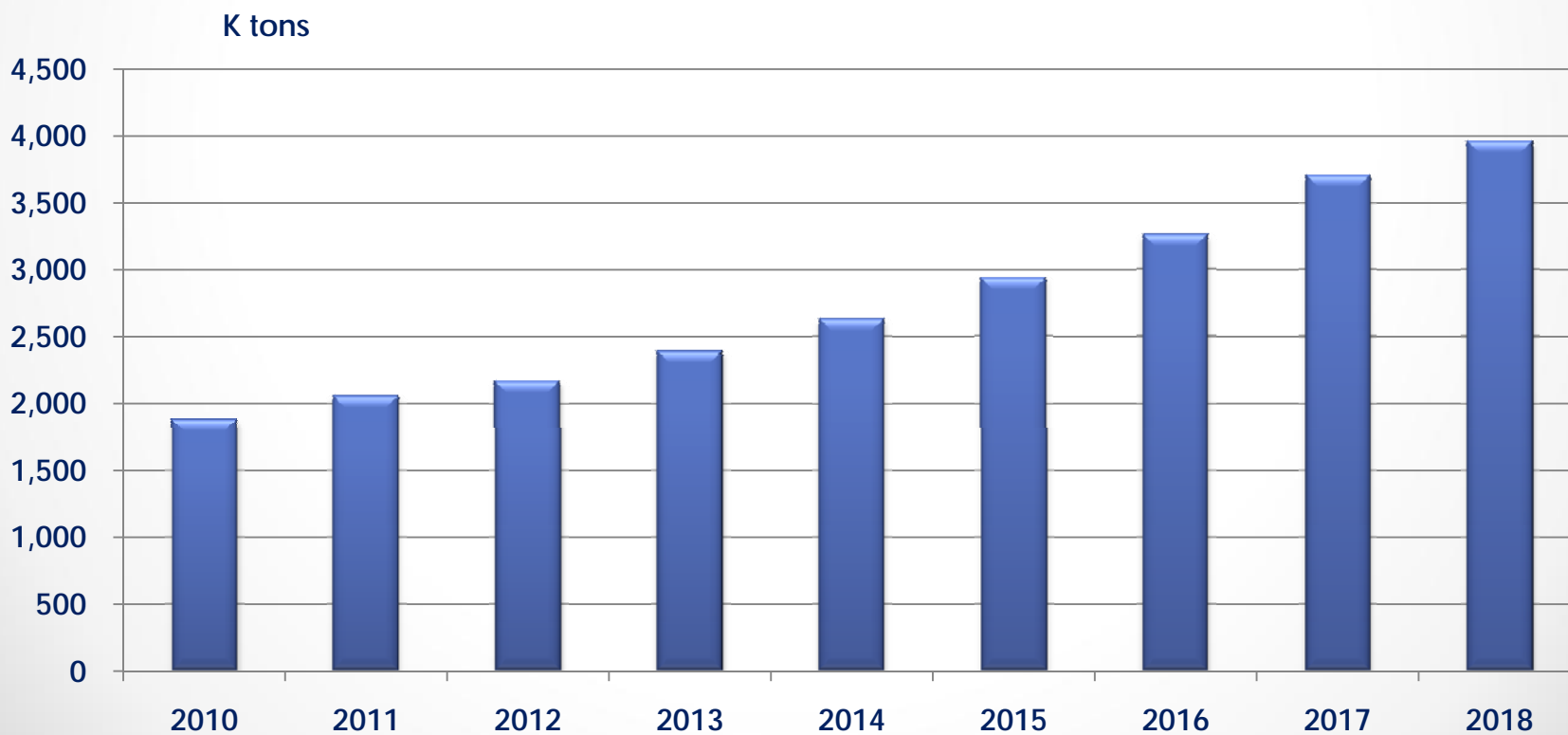
Import



China Nonwovens Production (2010~2018)

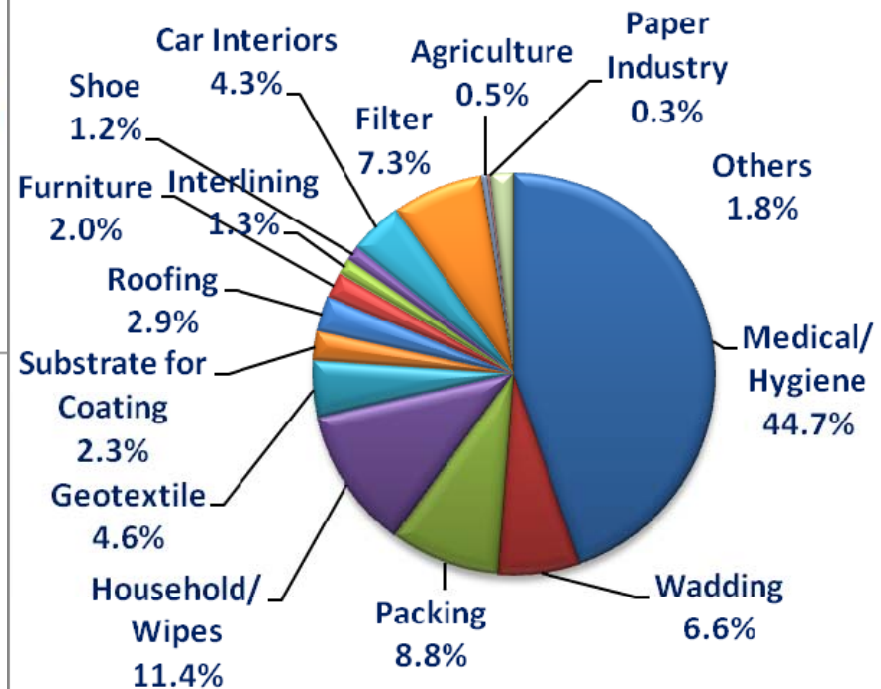
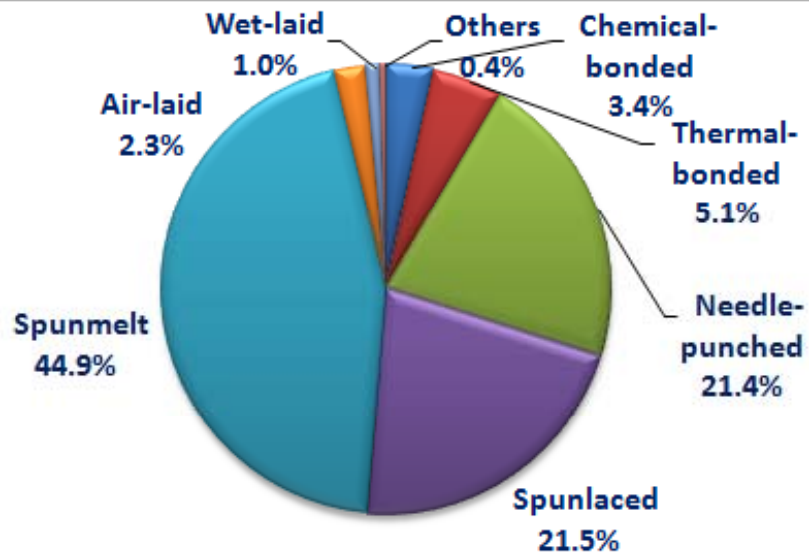
Source : CNTA

	2010	2011	2012	2013	2014	2015	2016	2017	2018
K tons	1,879	2,055	2,163	2,387	2,635	2,941	3,260	3,705	3,960
Annual Growth %	11.5	9.4	5.3	10.4	10.4	11.6	10.8	13.7	6.9



China Nonwovens Production by Technology & Application (2018) (3,960 K tons)

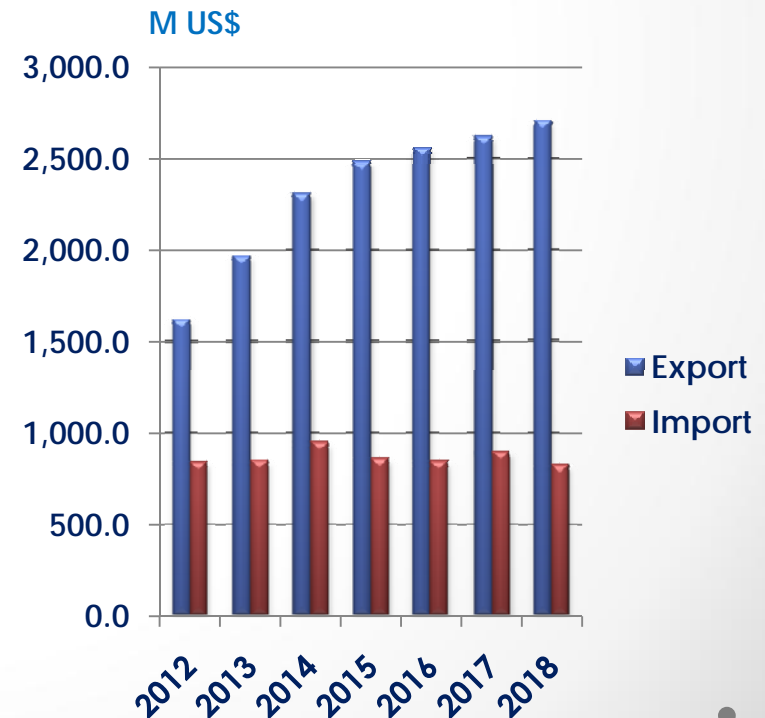
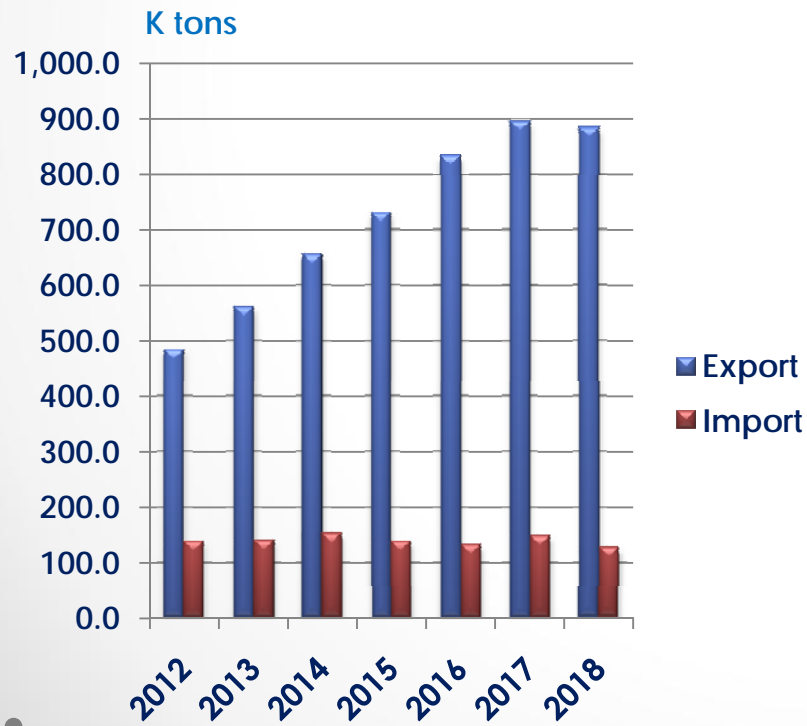
Source : CNTA



China Trend in Export & Import (2012-2018)

Source :
CNTA

		2012	2013	2014	2015	2016	2017	2018
K tons	Export	484.8	559.3	656.2	730.9	832.5	894.2	881.5
	Import	138.3	139.7	152.0	138.0	132.7	147.3	127
M US\$	Export	1,624.4	1,971.9	2,311.6	2,482.1	2,556.3	2,614.4	2,705.8
	Import	839.0	849.8	947.8	859.4	842.6	896.5	827.4
US\$/kg	Export	3.35	3.53	3.52	3.40	3.07	2.92	3.07
	Import	6.07	6.08	6.24	6.23	6.35	6.09	6.54

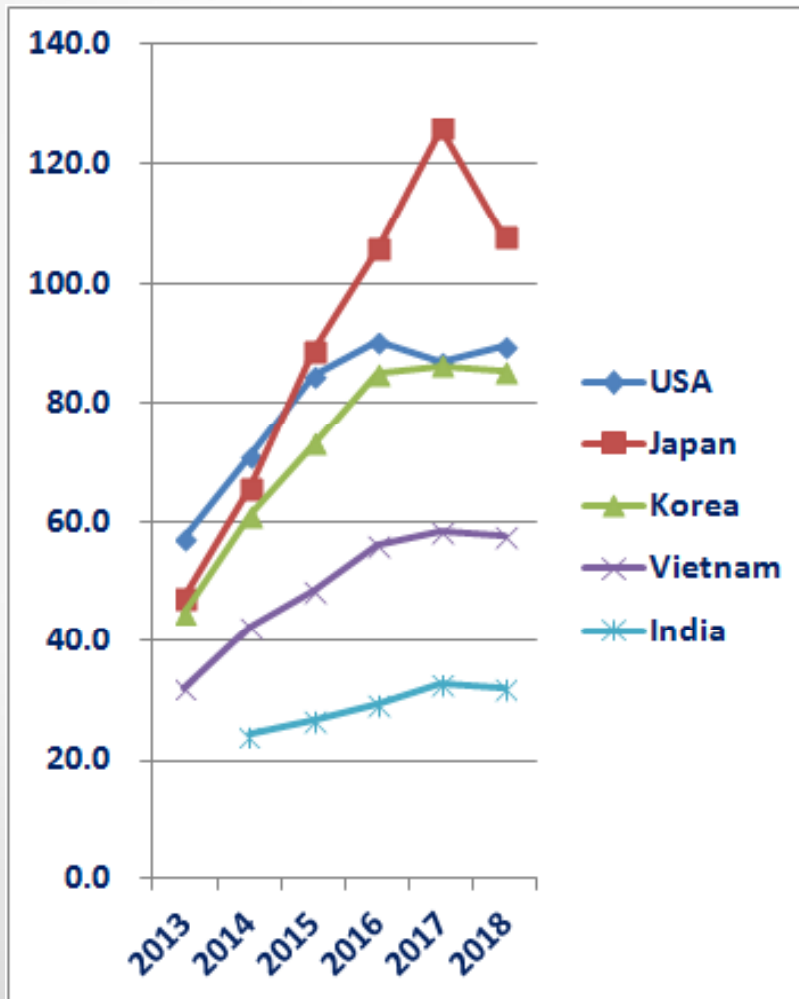


Top 5 Countries in Export & Import of China

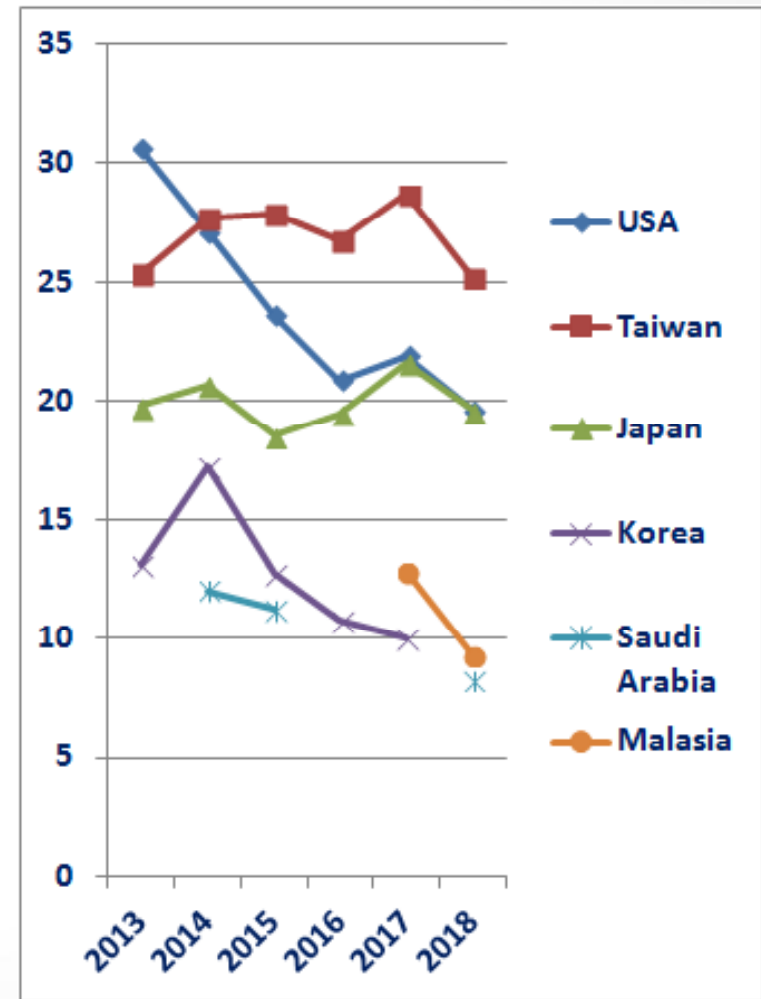
(K tons)

Source : CNTA

Export



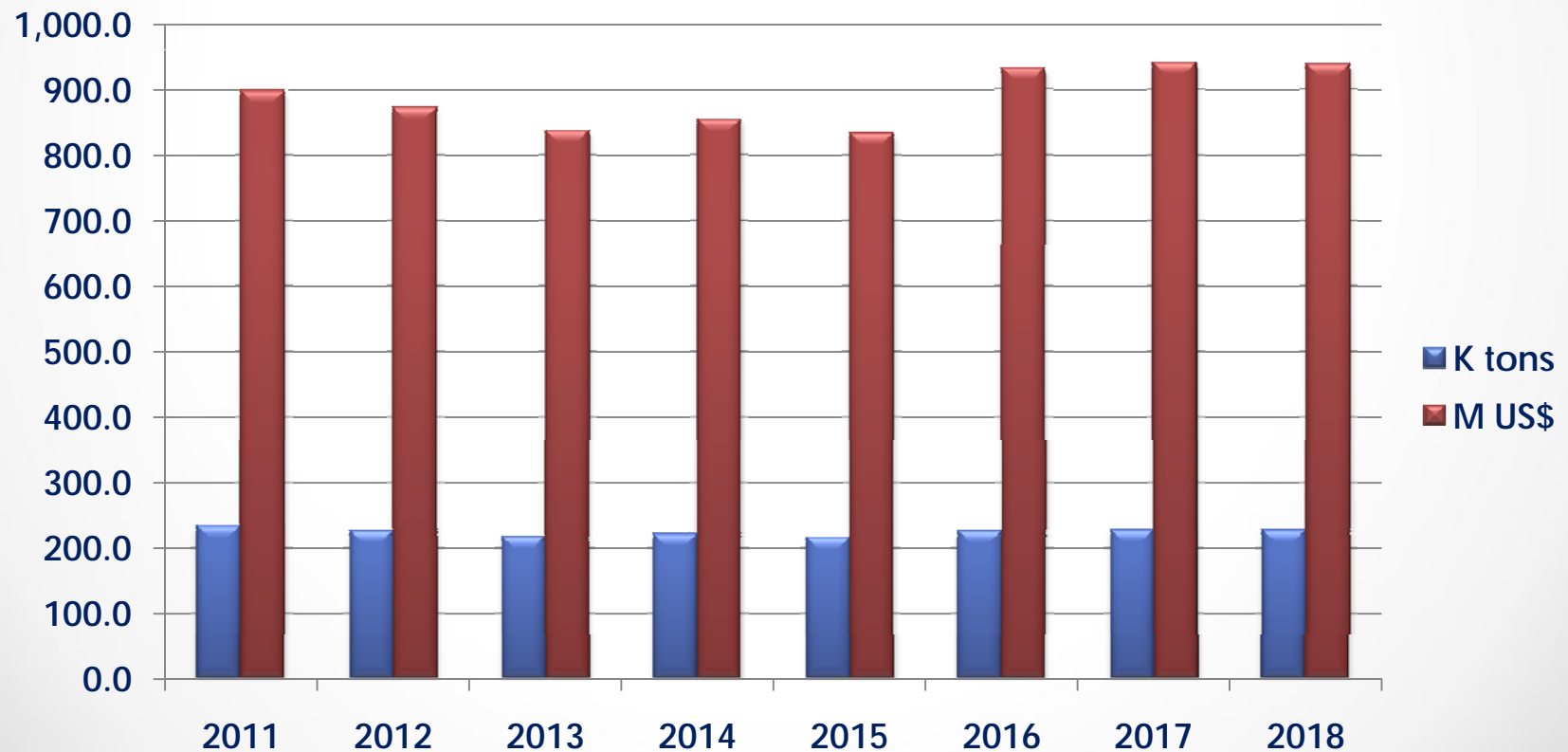
Import



Korea Nonwovens Production (2011~2018)

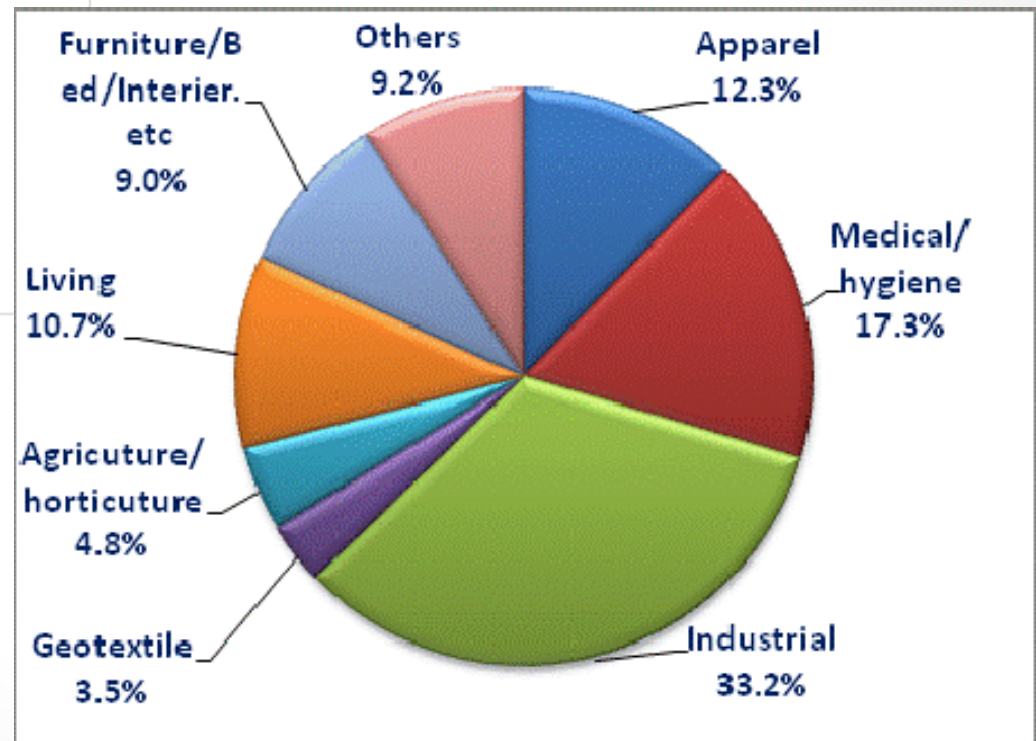
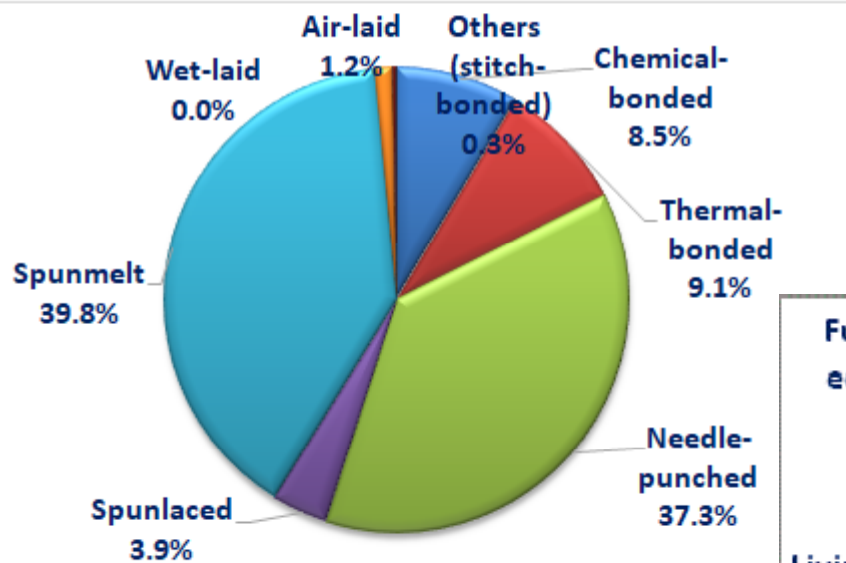
Source : KNIC

	2011	2012	2013	2014	2015	2016	2017	2018
K tons	233.2	226.2	217.1	221.3	216.2	225.5	227.8	227.2
M US\$	897.8	872.0	837.1	853.1	833.2	932.3	941.9	939.7
US\$/kg	3.85	3.85	3.86	3.85	3.85	4.13	4.13	4.14



Korea Nonwovens Production by Technology & Application (2018) (227.2 K tons)

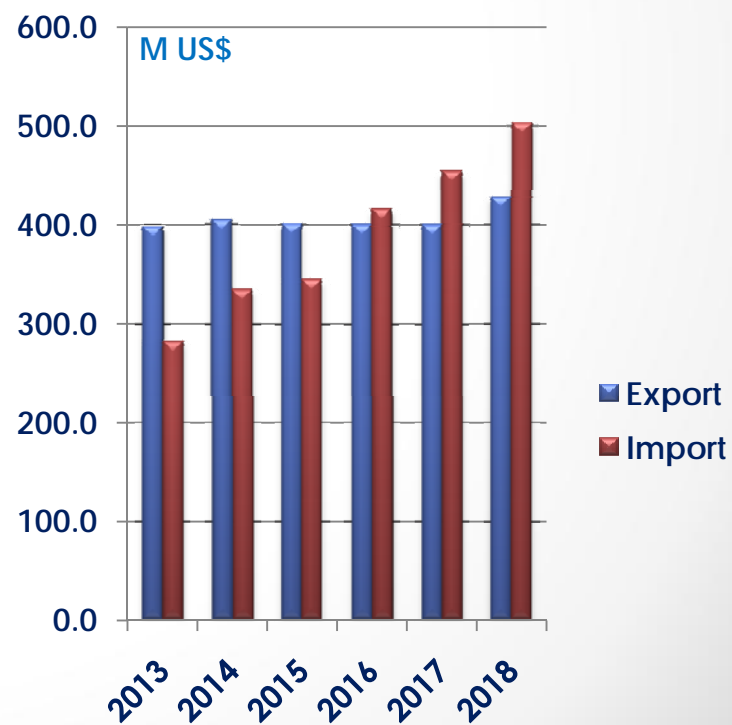
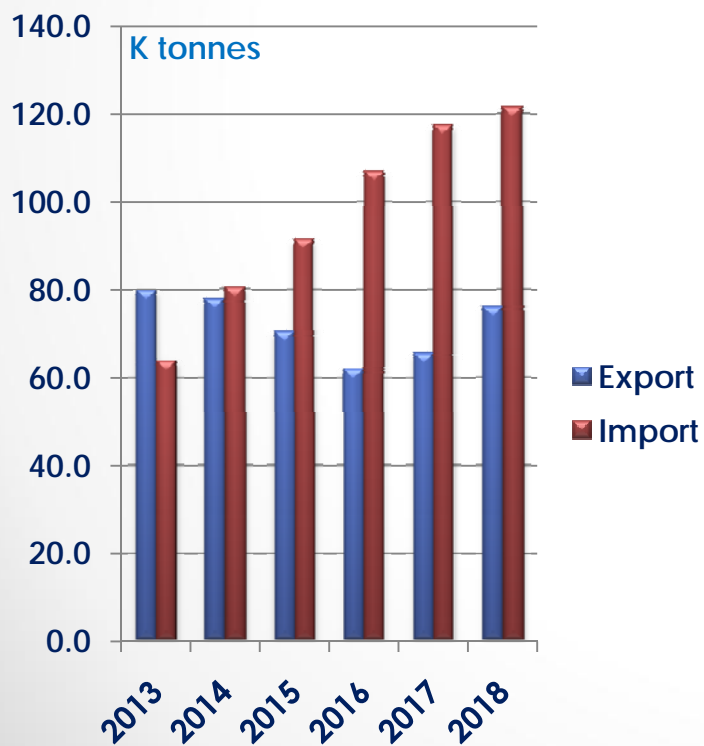
Source : KNIC



Korea Trend in Export & Import (2013-2018)

Source : KNIC

		2013	2014	2015	2016	2017	2018
K tons	Export	79.8	77.8	70.4	62.0	65.5	76.1
	Import	63.8	80.5	91.5	106.9	117.4	121.3
M US\$	Export	397.5	404.4	400.4	400.0	400.0	428.3
	Import	281.6	334.0	344.0	415.7	453.5	502.1
US\$/kg	Export	4.98	5.20	5.69	6.45	6.11	5.63
	Import	4.41	4.15	3.76	3.89	3.86	4.14

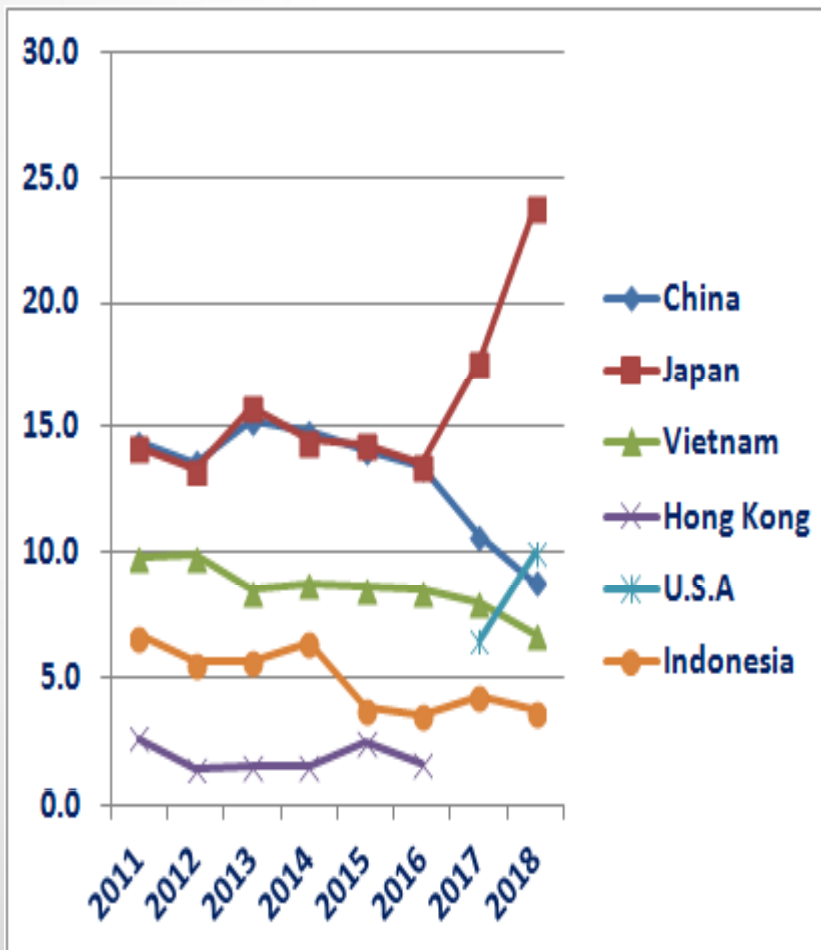


Top 5 Countries in Export & Import of Korea

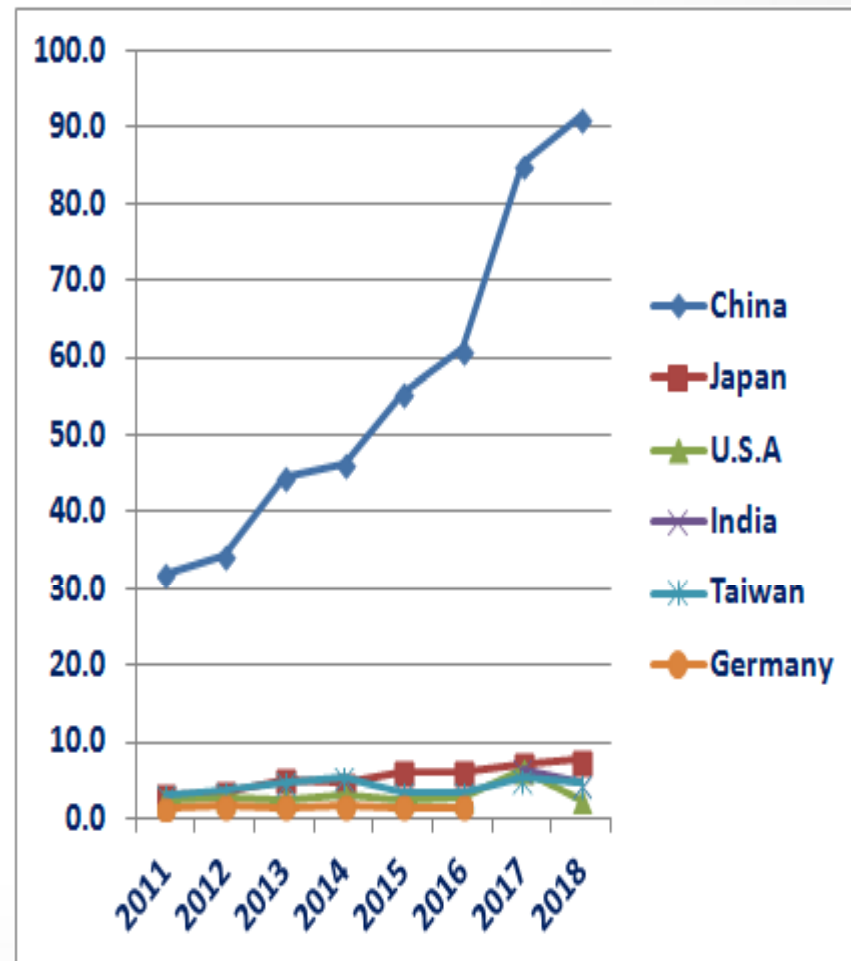
(K tons)

Source : KNIC

Export



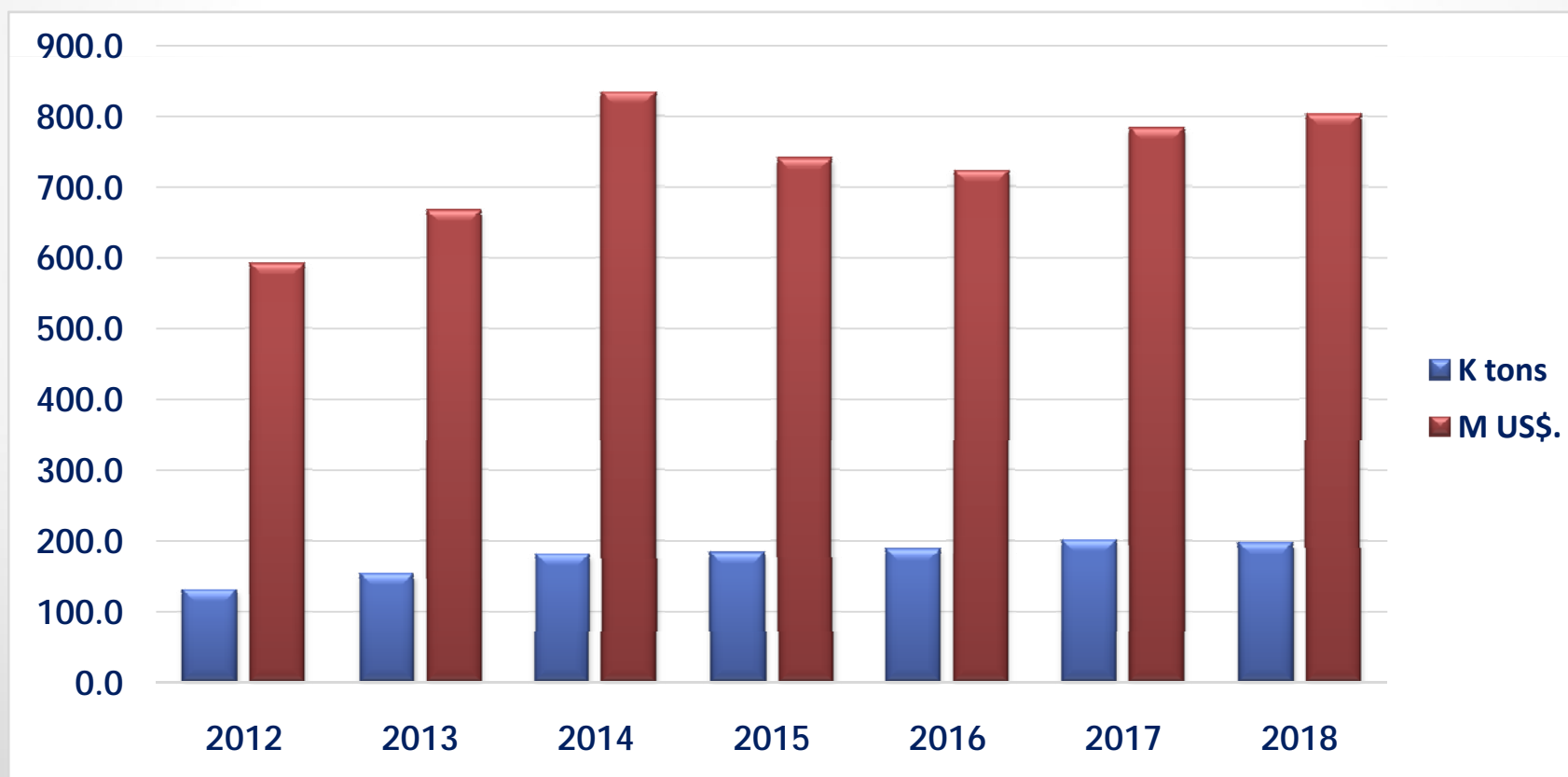
Import



Taiwan Nonwovens Production (2012~2018)

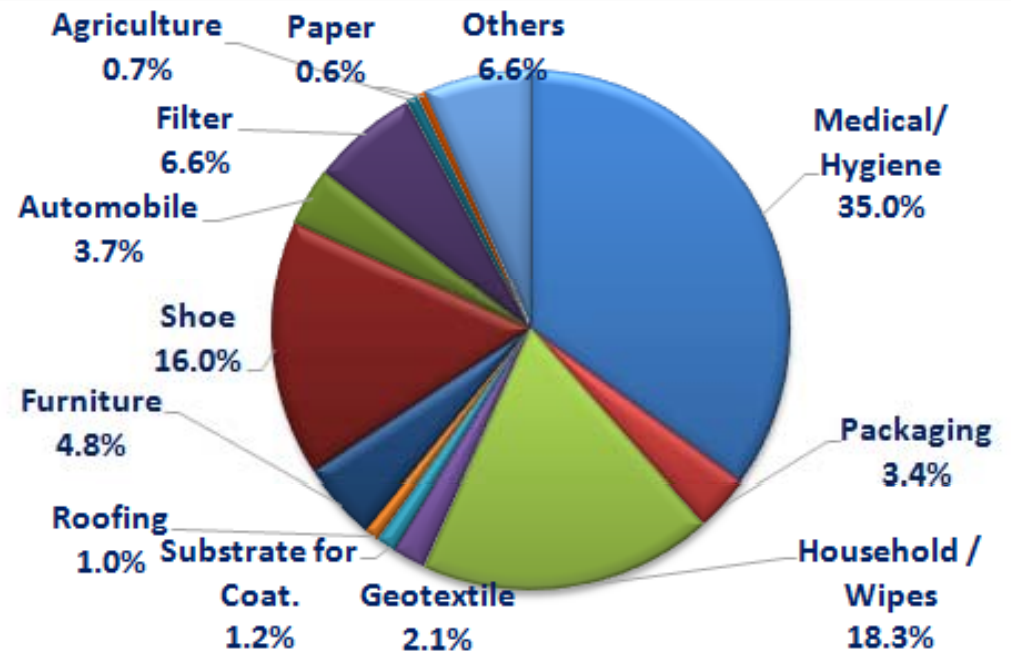
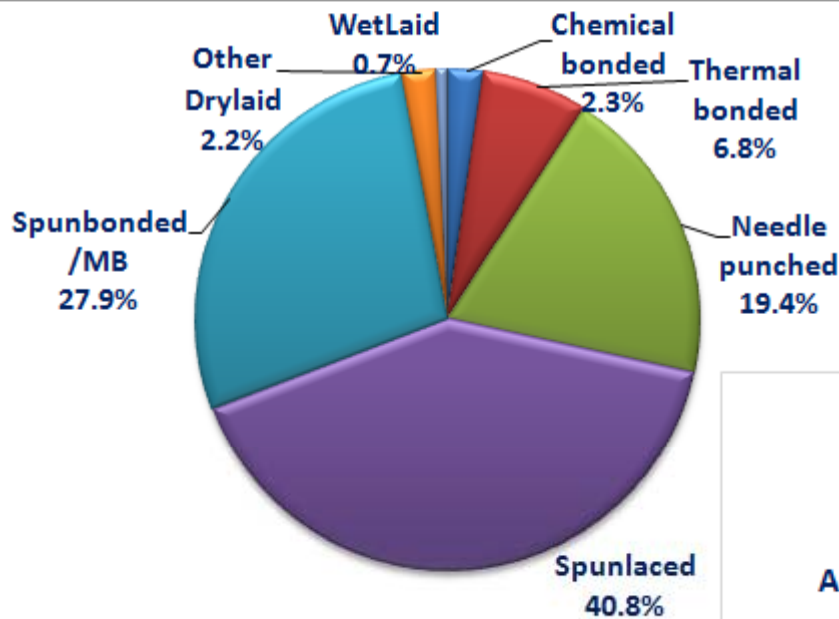
Source : TNFIA

	2012	2013	2014	2015	2016	2017	2018
K tons	130.5	153.1	181.5	183.7	188.0	200.4	197.3
M US\$.	591.8	667.2	833.4	739.3	721.8	781.7	802.4
US\$/kg	4.53	4.36	4.59	4.02	3.84	3.90	4.07



Taiwan Nonwovens Production by Technology & Application (2018) (197.3 K tons)

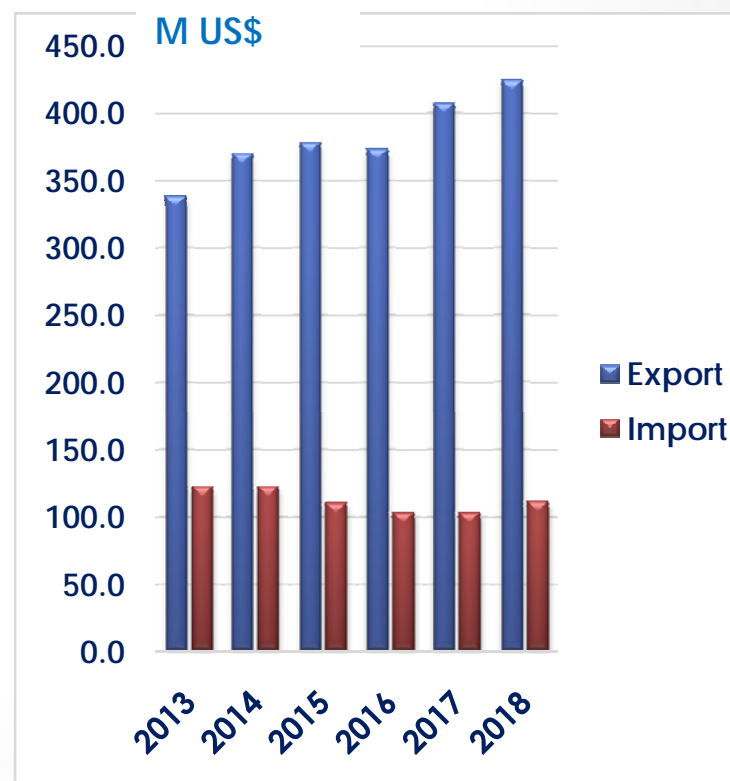
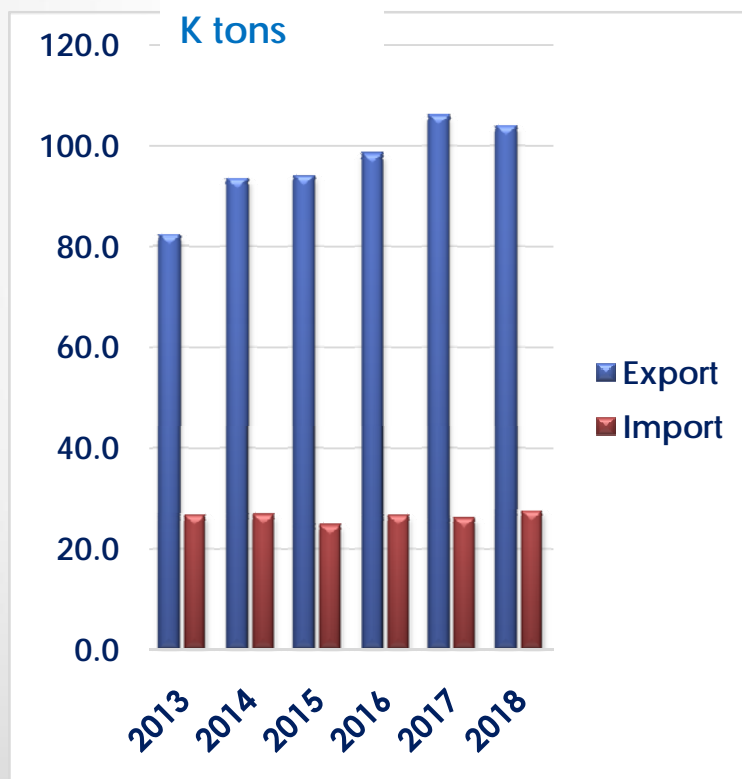
Source : TNFIA



Taiwan Trend in Export & Import (2013-2018)

Source : TNFIA

		2013	2014	2015	2016	2017	2018
K tons	Export	82.3	93.4	94.0	98.2	106.0	103.8
	Import	26.6	26.7	24.7	26.6	26.1	27.5
M US\$	Export	338.5	369.5	378.1	372.5	407.3	423.9
	Import	122.2	122.6	110.4	103.2	103.3	111.4
US\$/kg	Export	4.11	3.96	4.02	3.79	3.84	4.08
	Import	4.59	4.59	4.47	3.88	3.96	4.05

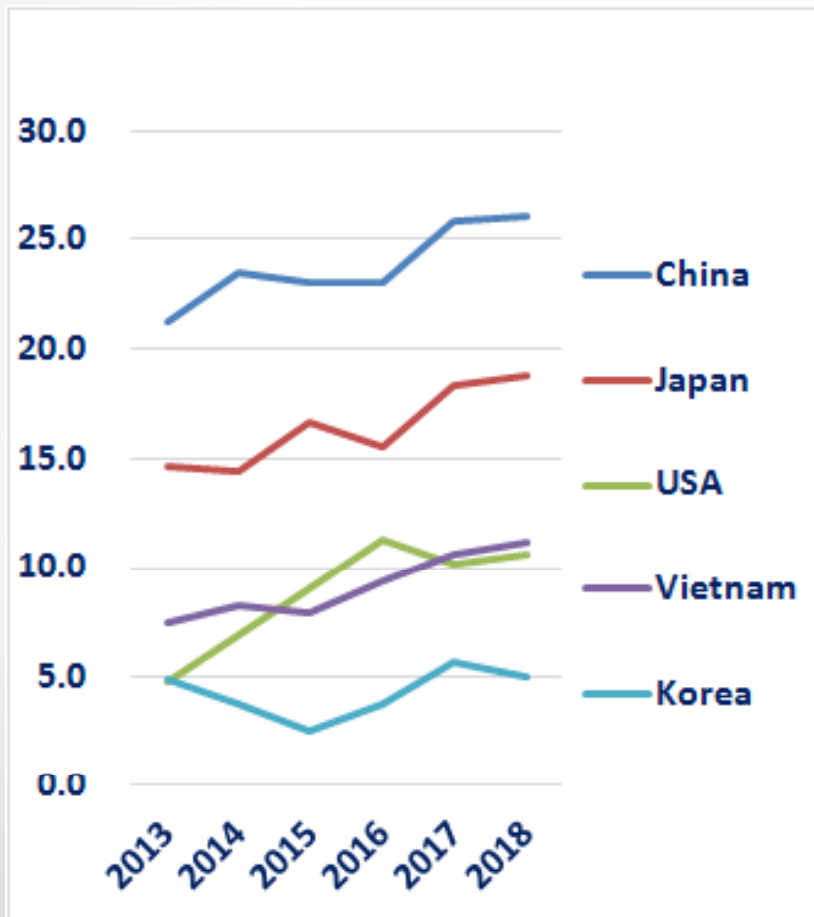


Top 5 Countries in Export & Import of Taiwan

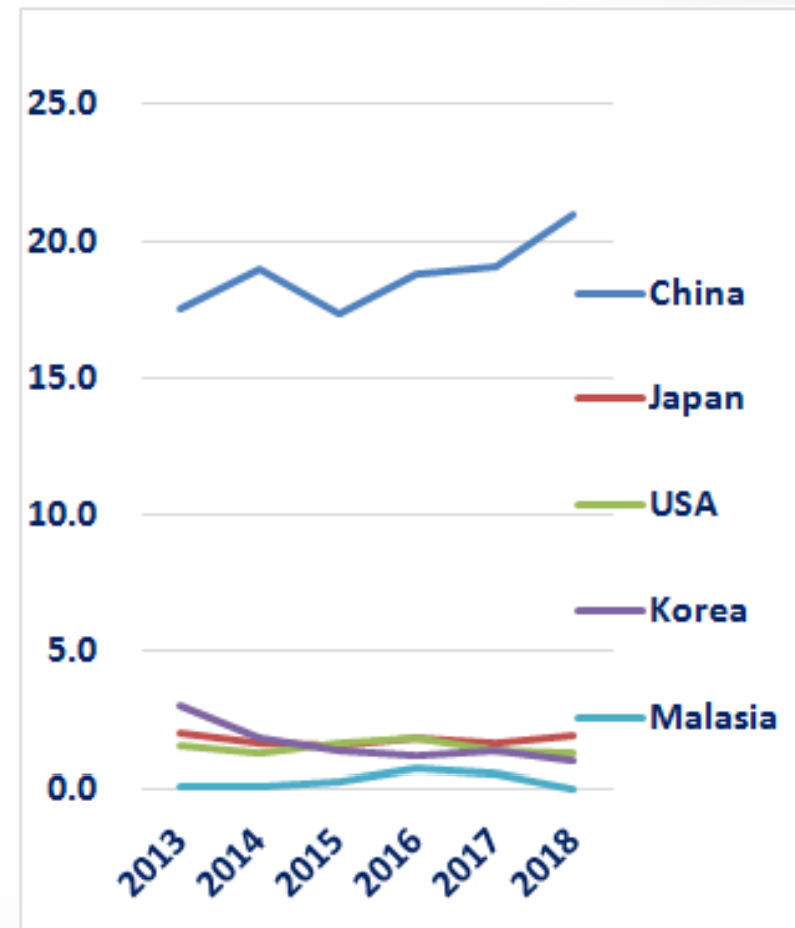
(K tons)

Source :TNFIA

Export



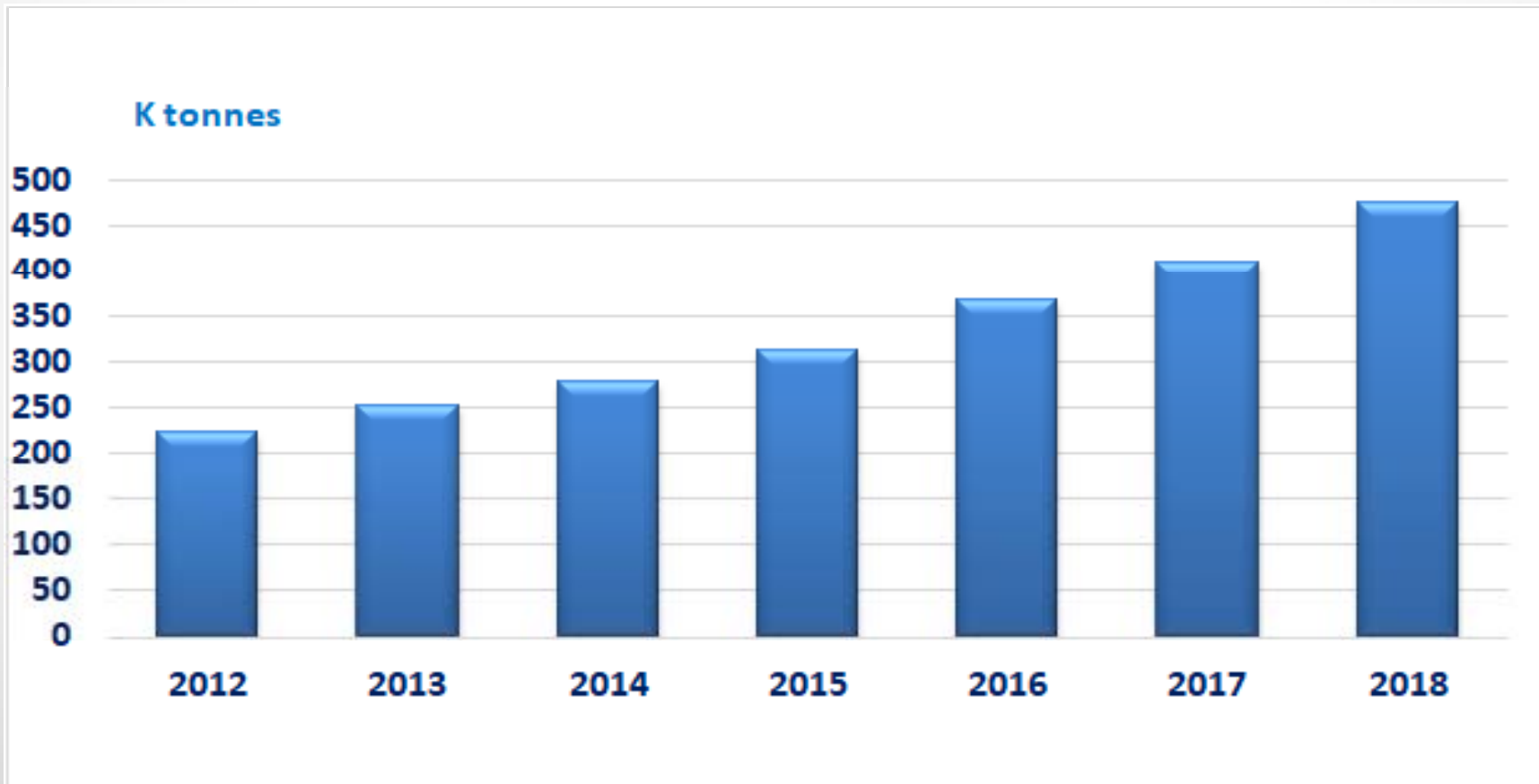
Import



India Nonwovens Production (2012~2018)

Source : BCH

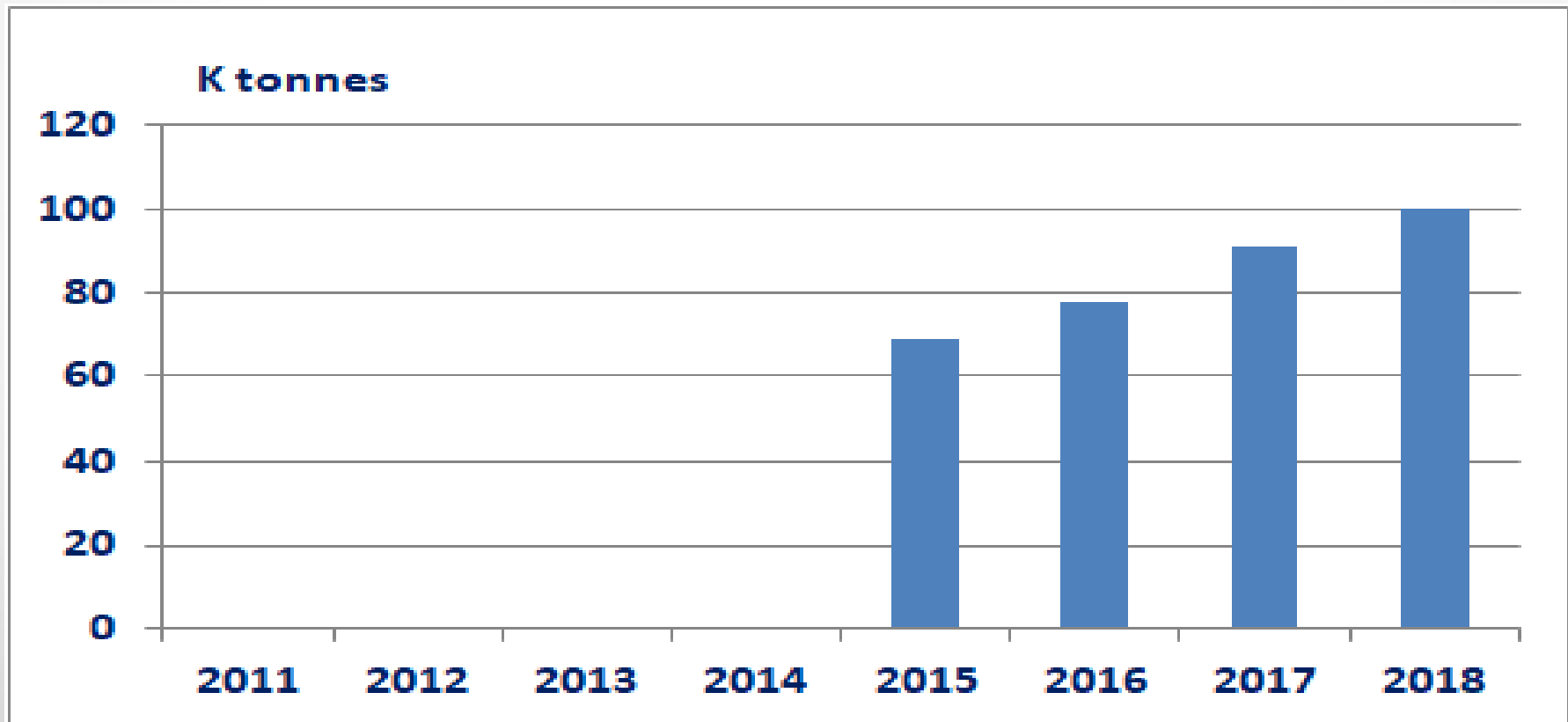
	2012	2013	2014	2015	2016	2017	2018
K tons	222	252	277	312	365	410	475
Annual Growth %		13.5	9.9	12.6	17.0	12.3	15.9



Indonesia Nonwovens Production (2011~2018)

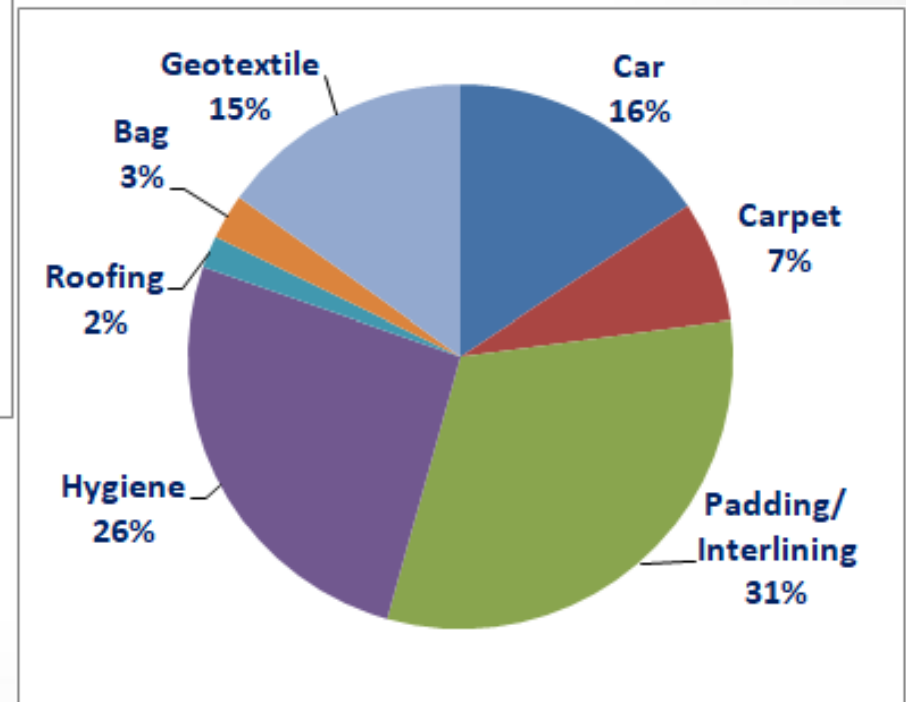
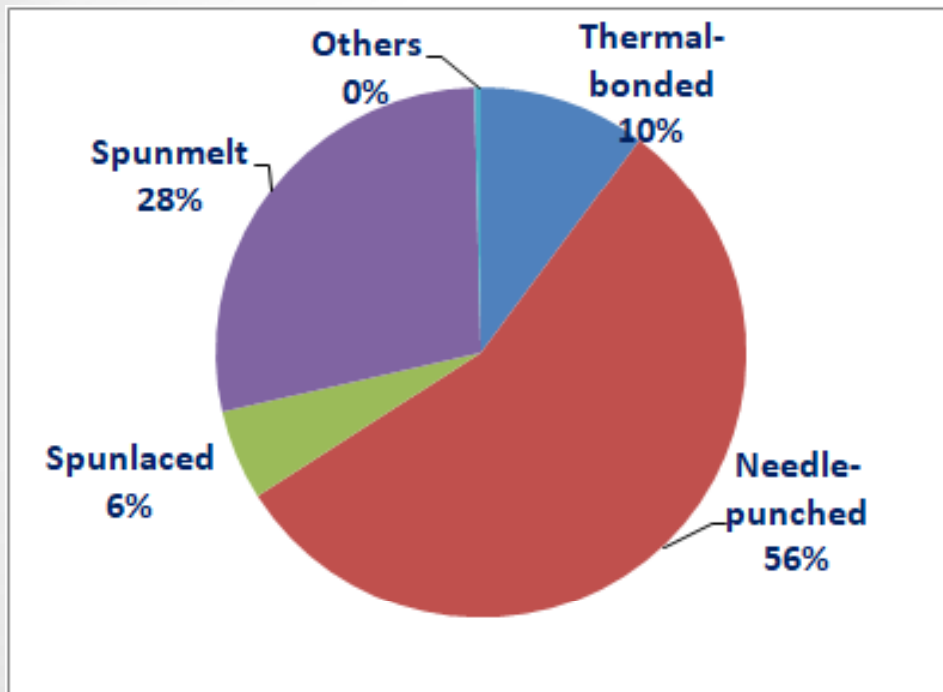
Source : INWA

	2011	2012	2013	2014	2015	2016	2017	2018
K tons	-	-	-	-	68.7	77.9	91.1	100.1
Annual growth %						13.4	16.9	9.9



Indonesia Nonwovens Production by Technology & Application (2018)

(100.1 K tons)

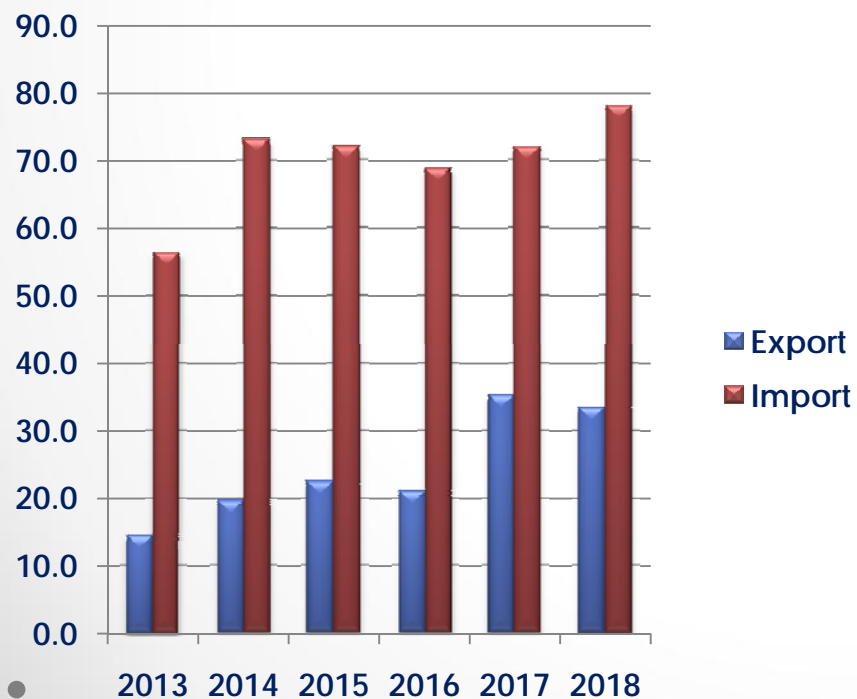


Indonesia Trend in Export & Import (2013-2018)

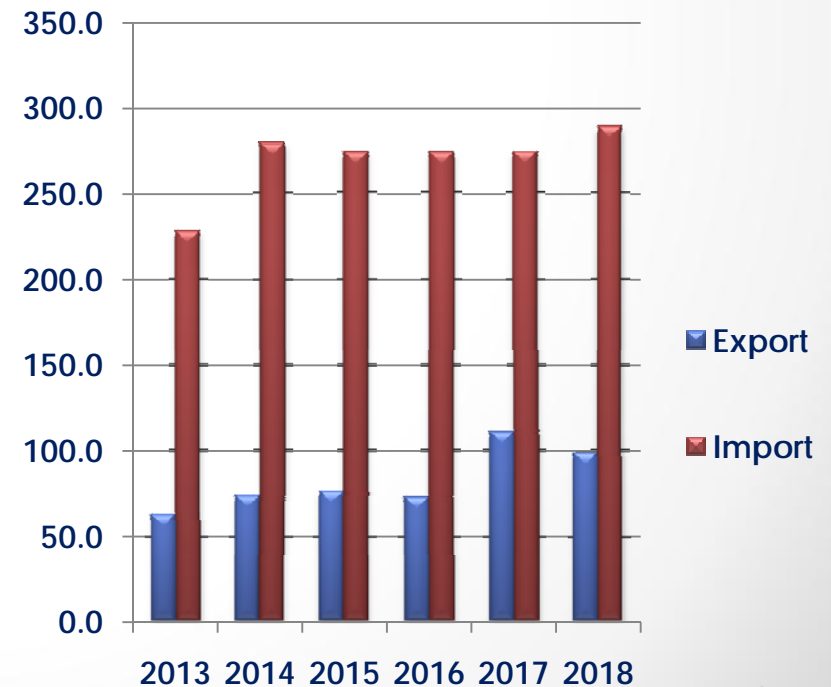
Source : INWA

		2013	2014	2015	2016	2017	2018
K tonnes	Export	14.5	19.6	22.5	21.0	35.2	33.5
	Import	56.4	73.2	72.1	68.9	72.0	78.2
M US\$	Export	62.8	73.6	76.2	72.9	111.0	99.0
	Import	227.7	279.9	274.1	274.2	274.7	289.2
US\$/kg	Export	4.33	3.76	3.39	3.47	3.15	2.96
	Import	4.04	3.82	3.80	3.98	3.82	3.70

K tonnes

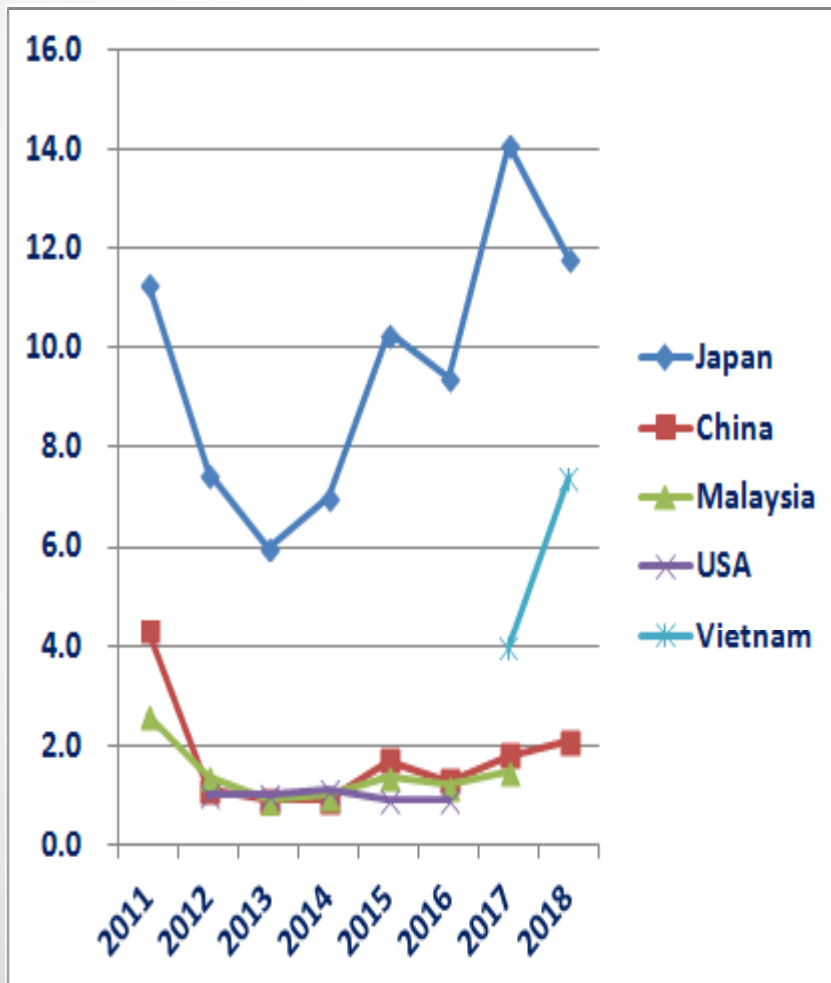


M US\$

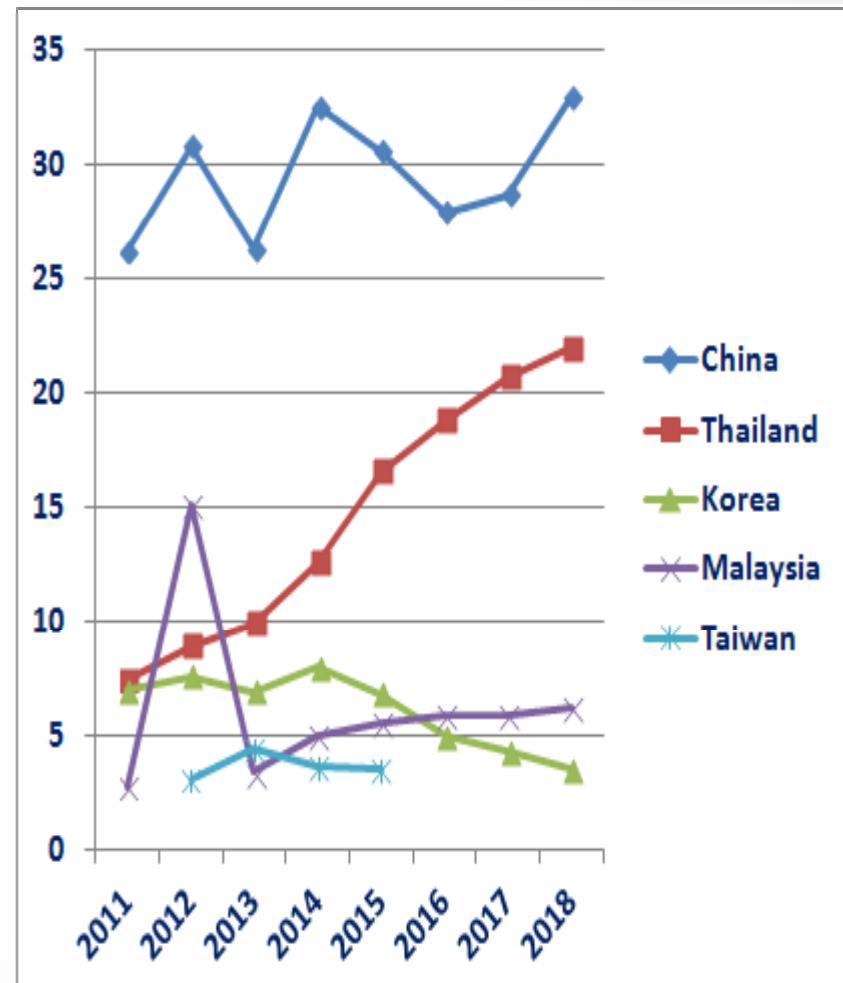


Top 5 Countries in Export & Import of Indonesia (K tons)

Export



Import



Thank you for your attention

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FAX : +81-6-6233-0843

E-mail: info@asianonwovens.org

URL: [URL:http://www.asianonwovens.org](http://www.asianonwovens.org)