

Global demand for Spunlace Nonwovens is projected to reach 2.0 million tonnes by 2024

Spunlace nonwovens is the third-largest nonwoven (in volume) in 2019, behind only spunlaid and needle punch. Spunlace accounts for 12.1% of all nonwovens consumed and is projected as the fastest growing nonwoven for 2019–24.

In 2019, spunlace nonwovens accounted for 1.4 million tonnes or 31.1 billion square metres, valued at \$6.2 billion. Smithers latest market report *The Future of Spunlace Nonwovens to 2024* forecasts spunlace to account for 2.0 million tonnes or 45.9 billion square metres, valued at \$9.2 billion. There are over 180 spunlace producers globally in 2019, accounting for 2,147,500 tonnes of installed capacity and 1,376,500 tonnes of consumption. This sector of the nonwovens market has seen high growth and high margins in response to new demands for wipe products and technical innovation.

The Future of Spunlace Nonwovens to 2024 provides in-depth analysis on the key trends affecting the market which is briefly highlighted below:

Spunlace supply and demand issues - Spunlace is in a severe oversupply situation globally and in many individual regions. Some of this is due to economic and political issues, while some is due to overexpansion. It is expected that less expansion, closure of older lines and stabilising economies globally will reduce this oversupply to minor proportions by 2024.

Raw material supply and pricing- The major change in raw material supply and pricing over the last five years has been due to petroleum price and supply. Producers have managed this capacity expansion carefully, slowing start-ups and ‘swinging’ to other grades of pulp to keep prices at an all-time high in 2019.

Sustainability - The five years to 2024 are expected to show an accelerated demand for sustainability. Despite continued global economic issues, there seems to be increasing demand for sustainable products, which will accelerate through to 2024.

A good example is the European Union’s Single-use Plastics Directive, approved in committee in 2018. This directive orders specific actions for ten single-use plastic products, most required to take effect no later than 2024. Two products on this list, sanitary napkins and wipes,

Resource Conservation - A major driver for the growth of nonwovens is the lower cost of such products compared to alternative materials. This cost is measured not only in dollars or euros, but also in consumption of scarce resources.

Performance requirements and developments In some cases, spunlace nonwoven materials deliver performance properties unattainable (economically) by other materials, such as clean room wipes and electrostatic dusters.

These are just a few of the many other spunlace nonwovens with similar performance advantages over competitive materials.

Regulations - Regulations under consideration or in place globally affect groups of nonwovens:

- Regulations on flushable wipes
- Regulations on industrial wipes
- Regulations on flammability of bedding
- Regulations on emissions from diesel engines.

Although there are specific regional regulations for each of these groups, their effects on spunlace nonwovens are similar.

[This new indepth study into the Future of Spunlaid Nonwovens to 2024 provides authoritative market sizings and forecasts for future consumption of spunlace nonwovens in all major end-uses for 2014-2024. https://www.smithers.com/services/market-reports/materials/the-future-of-spunlace-nonwovens-to-2024](https://www.smithers.com/services/market-reports/materials/the-future-of-spunlace-nonwovens-to-2024)