

Global Nylon Filament Yarn Market Assessment, By Application [Sports Apparels, Ethnic Wear, Industrial, Fishing Nets, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global nylon filament yarn market is expected to grow at a CAGR of 5.07% during the forecast period 2025-2032. The market size will grow from USD 35.67 billion in 2024 to USD 52.99 billion in 2032. The global nylon filament yarn market is growing with increased demand from a variety of industries, such as textiles, apparel, and home furnishings, etc., owing to its strength, elasticity, and durability. Furthermore, growing consumer demand for the superior quality of the yarn, partnerships between manufacturers and consumers, and the growing demand for high-performance products in hosiery, swimwear, upholstery, parachute cloth, umbrella cloth, etc. are propelling the market growth. Industrialization in emerging economies and the growing demand for sportswear and activewear are also propelling this market growth. Further, the rising focus on sustainable and green materials is offering opportunities for recycled nylon filament yarn.

Additionally, the global nylon filament yarn market is witnessing enormous growth, led by rising end-user sectors such as the textile industry and rapid growth in the demand for ethnic apparel. Moreover, the popularization of the athleisure and sports industry is driving demand for nylon filament yarn in different countries. The government initiatives for the growth of the textile industry are also contributing to the nylon filament yarn market. For instance, in India, the Make in India program of the Indian government, as well as the production-linked incentive program for local production, are expected to contribute to textile industry growth. Textiles companies will receive incentive payments from the production-linked incentive scheme, which commenced in 2021, to encourage local production of man-made yarn, garments, and technical textiles. As of September 2024, around 40 companies have grounded investment, and the scheme aims to provide 10-12 companies with an incentive payout under the textile sector production linked incentive scheme.

Growing Demand for Ethnic Wear and Sportswear Drives Market Growth

The fashion and sportswear industry is the major end-user industry for driving the demand for nylon filament yarn. The strength, durability, and flexibility of nylon filament yarn make it special for use in end-use industries. Besides this, the growth in sports and

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physical fitness activities drives demand for active wear and performance wear, and the higher abrasion resistance and flexibility of nylon filament yarn drive this. Likewise, the growing ethnic wear demand for nylon filament yarn is driven by attributes like softness, wear and tear resistance, and colorfastness, which collectively help offer durable and fashion-based garments. Additionally, favorable government policies and regulations for sustainability, safety, and quality are driving demand for nylon filament yarn in industries. Growing interest in interior decorating and home furnishing, rising disposable income, and changing consumer behavior are all driving demand for quality, pleasing, and aesthetic home furnishing. This trend will further propel the growth of the nylon filament yarn market.

For instance, in 2023, Century Enka Limited increased its nylon filament yarn capacity to 86,000 metric tons from 78,000 metric tons, to cater to the growing demand from ethnic wear and sportswear. Further, the company aims to cater to the export market for nylon filament yarn produced from green polymer.

Rising Demand for Sustainable Yarn Propels the Growth of Nylon Filament Yarn Market

The growing focus on environmental sustainability and sustainable production procedures is a dominant growth driver for the nylon filament yarn market. Customers are progressively becoming environmentally friendly and actively looking for green products. This change in consumer trends is propelling the use of green nylon filament yarn, which is produced using environmentally friendly methods, with recycled raw materials and novel finishing and dyeing techniques. The firms are capitalizing on the demand by investing in research and development to produce bio-based and recycled nylon 6 filament yarn. These environmentally friendly products reduce the use of fossil fuels

and lower the ecological cost of nylon production. Recycled nylon filament yarn reflects the international movement toward sustainable textile and clothing production, accomplishing the circular economy. The increased application of sustainable nylon filament yarn production processes is a leading trend in the sector, transforming companies that practice these processes into dynamic players in the international marketplace. The trend is a major driver of nylon filament yarn market growth and reinforces its position in the textile and garment industries. The greater focus on sustainability and green products is destined to continue influencing the demand for the recycled nylon filament yarns.

For instance, Aquafil S.p.A., the producer of ECONYL regenerated nylon, introduced a new collection of sustainable yarns in natural materials in November 2024. The ECONYL Bespoke Collection offers various textures and finishes inspired by natural materials, available in solution-dyed and dyed regenerated nylon yarns. The collection is designed for use in contract, hospitality, and residential spaces, including handmade and machine-made rugs, tufted and woven rugs, and residential and commercial wall-to-wall carpets.

Sports Apparel Dominates Nylon Filament Yarn Market

The demand for nylon filament yarn is rising significantly in sports apparel products. The material has exceptional performance, durability, and versatility, which align perfectly with the needs of activewear and sportswear products in the market. Nylon filament yarn has abrasion resistance and lightweight properties, which make the material ideal for men's and women's garments, such as shorts, jerseys, yoga pants, and gloves. Nylon filament yarn's moisture-wicking and quick-drying characteristics enhance wearer comfort, while its ability to retain color and shape after repeated use ensures long-lasting, vibrant sportswear. Additionally, advancements in recycled and eco-friendly nylon filament yarns are attracting environmentally conscious consumers and brands, further driving demand for the material in sports apparel.

Moreover, rising awareness related to health consciousness and fitness-oriented lifestyles has fueled the popularity of activewear, thereby boosting the need for high-performance sports apparel in the market.

Furthermore, consumers seek clothing that transitions seamlessly from exercise to everyday wear, which drives the demand for high-quality nylon filament material in the market for manufacturing sports apparel. In conclusion, the combination of superior material properties, evolving consumer preferences, and sustainability trends is propelling the increased demand for nylon filament in the sports apparel industry.

Asia-Pacific Dominates the Nylon Filament Yarn Market

Asia-Pacific dominates the global market for nylon filament yarn in terms of the highest market share for various reasons. Development in the industrial sector in nations such as China and India has been a key reason for the growth in demand for nylon filament yarn. The region's textile sector is well-developed, with considerable focus being given to producing high-quality fabric for apparel, particularly in the sports apparel sector, where the performance traits of nylon are in high demand. Growing

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disposable incomes among individuals in these nations have generated huge demand for apparel, particularly performance apparel. Growth in the auto sector in Asia-Pacific is a positive for the market for nylon filament yarn as nylon is among the key materials used to produce such parts as tire cords and interior parts.

Furthermore, urbanization and middle-class population growth are also contributing to the demand for quality and durable fabric in several applications. Favorable government policies in the region, with initiatives to boost textile exports, further enhanced the region's ability to produce. Thus, the Asia-Pacific region not only continues to dominate but also provides opportunities for steady growth, led by industrial uses as well as consumer demand for nylon filament yarn.

For instance, in April 2024, Nilit Ltd, a textile producer, announced plans to expand capacity in China. The factory, which produces textiles for the automotive industry, will complement another factory in Shanghai, producing sportswear yarns for brands like Lulu Lemon, American Eagle, Patagonia, and Chinese brands. Nilit Ltd. has four factories in Israel, Brazil, the United States, and China.

Impact of U.S. Tariffs on Global Nylon Filament Yarn Market

□□ Tariff hikes disrupt established supply chains, forcing the United States' apparel and textile manufacturers to seek alternative suppliers, potentially leading to delays and production slowdowns.

□□ Increased input costs for nylon filament yarn are expected to be passed down in the value chain, resulting in higher prices for finished goods such as sportswear, hosiery, and technical textiles.

□□ Brands and manufacturers may shift sourcing from high-tariff countries like China, Taiwan, and Germany to regions with lower or zero tariffs.

□□ New rules of origin, documentation requirements, and varying tariff rates by country and product type may add complexity to import compliance, increasing administrative burdens and risk of shipment delays, which impact the industry growth.

Key Players Landscape and Outlook

Global nylon filament yarn has a large and geographically diverse set of manufacturers, where Asia-Pacific is a strong base for production and consumption. The nylon filament yarn industry also comprises multi-product firms, which manufacture other types of yarn such as polyester filament yarn and nylon tyre cord. The nylon filament yarn market is confronted with challenges from polyester filament yarn and the high price of imported caprolactam in the case of import-dependent countries. In addition to large companies, there are a number of manufacturers with small capacity plants. The increasing demand for performance and value-added nylon filament yarn in apparel, industrial textiles, technical applications, and evolving consumer preferences and global supply chains shapes a complex and dynamic competitive landscape. Further, companies are advancing the technologies to be competitive in the market.

For instance, in October 2021, Aquafil S.p.A., a yarn producer, developed the ECONYL regeneration system, which allows nylon 6 waste to be regenerated into new nylon 6 without compromising quality.

The reclaiming program is crucial for a reverse supply chain and reliable materials inputs. Aquafil S.p.A., known for its expertise in nylon yarn production, has developed advanced environmental technologies for over 50 years. The company is now focusing on depolymerization through the ECONYL process, but the company is also realizing the benefits of a closed-loop model without relying on radical technological advancements.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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