Non-woven Fabric - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Non-woven Fabric Market Analysis

The Non-woven Fabric Market was valued at USD 60.93 billion in 2025 and estimated to grow from USD 64.61 billion in 2026 to reach USD 86.55 billion by 2031, at a CAGR of 6.03% during the forecast period (2026-2031). Sustained demand from healthcare, construction, and automotive applications continues to accelerate investment in spun-bond manufacturing lines, while electrospun nanofiber breakthroughs open premium niches in wound care, filtration, and solid-state battery separators. Polypropylene-based grades preserve a cost edge over woven fabrics even as propylene feedstock prices rise, helping converters defend margins. Regulatory momentum around microplastic leakage and recyclable packaging is reshaping product design toward biodegradable or circular solutions, pushing rayon, lyocell, and natural-fiber blends into mainstream specifications.

Global Non-woven Fabric Market Trends and Insights

Exploding Demand for Disposable Hygiene Products

Soaring birth rates in parts of Asia-Pacific and steadily aging populations in North America and Europe are lifting unit sales of diapers, adult incontinence pads, and feminine hygiene articles that rely on lightweight, absorbent non-wovens. Smart wound-care substrates incorporating controlled vapor transmission films and super-absorbent cores are moving from pilot to high-volume production, improving healing environments and reducing dressing changes. Producers are pairing spun-bond and melt-blown layers to optimize fluid handling while keeping basis weight low, a configuration that helps converters meet price points without

sacrificing performance. Brand owners also favor chlorine-free fluff pulps and bio-based binders to align with retailer sustainability scorecards. Together, these trends reinforce the non-woven fabric market trajectory in hygiene through mid-decade.

Rapid Adoption in Medical PPE and Wound-Care

Hospital supply chains that experienced shortages during the pandemic have expanded stocking requirements for masks, gowns, and drapes with certified barrier performance. NIOSH targets for 2020-2030 emphasize domestic surge capacity, prompting investment in high-output spun-melt composites equipped with real-time quality monitoring. Electrospun nanofibers based on polyimide or PEEK deliver elevated heat resistance, allowing their use in powered air-purifying respirators and implantable devices. Multifunctional wound dressings integrating silver nanoparticles or growth factors show more than 99.99% bacterial reduction and faster epithelialization in pre-clinical trials. Reimbursement reforms that reward shorter hospital stays further support demand for advanced non-wovens that cut infection risk and healing time.

PP and PET Price Volatility

Unplanned refinery outages and delayed new propylene capacities have tightened supply, lifting polypropylene contract prices in South Asia by USD 10-20 per ton in early 2025. At the same time, freight surcharges tied to Red Sea rerouting inflate delivered costs into key converting hubs. PET markets mirror the pattern as producers in China and Europe shut older polymer lines amid negative spreads. Such swings compress margins for converters locked into fixed-price supply contracts with hygiene brand owners, prompting them to explore resin hedging or material substitution strategies.

Other drivers and restraints analyzed in the detailed report include:

Infrastructure Boom Driving Geotextile UptakeCost Advantage Over Woven and Knitted FabricsMicroplastic and Landfill Regulations Tightening

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The spun-bond segment accounted for 52.88% of the non-woven fabric market in 2025, reflecting its high throughput and proven suitability for hygiene laminates, medical gowns, and geotextiles. Generational upgrades now integrate weight-control scanners and closed-loop air recirculation to curb energy use. Growth opportunities emerge in ultra-soft topsheets and 3-layer SMX-based composites that enhance cloth-like feel without sacrificing barrier integrity.

Other technologies are set to expand at an 8.74% CAGR to 2031, lifting their contribution to the non-woven fabric market size through electrospinning, centrifugal spinning, and intense needling platforms that deliver nanofiber webs, gradient density mats, and 3D lofted felts. Electrospun separators using PAN/PS/PMMA blends achieve 75.87% porosity and less than 3% shrinkage at 150 C, features valued in high-safety battery packs. Melt-blown producers combine electret charging with nanoparticle doping to maintain more than 97% capture of 0.3 □m aerosols, securing air-filtration and respirator contracts.

The Non-Woven Fabric Market Report is Segmented by Technology (Spun-Bond, Wet Laid, Dry Laid, and Other Technologies), Material (Polyester, Polypropylene, Polyethylene, Rayon (Viscose), and Others), End-User Industry (Construction, Textiles, Healthcare, and More), and Geography (Asia-Pacific, North America, Europe, South America, and Middle-East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific commanded 48.10% of non-woven fabric market share in 2025 and is on course for a 7.50% CAGR to 2031 as converters expand in China, India, and Indonesia to serve growing diaper and mask consumption. Regional supply chains integrate propylene crackers, fiber spinning, and end-product assembly within close proximity, minimizing logistics cost. Chinese lines add needlepunch capacity dedicated to acoustic and thermal insulation for domestic EV factories, while Indian producers scale spun-lace installations to supply wipes exporters.

North America benefits from reshoring of critical medical-PPE and battery-separator supply, supported by Kimberly-Clark's USD 2 billion expansion across Ohio and South Carolina facilities that feature AI-enabled logistics. Canada's forthcoming separator plant from Asahi Kasei will feed the U.S. EV ecosystem beginning in 2027. Tight labor markets push the adoption of high-automation spun-bond lines, creating opportunities for equipment vendors.

Europe's stringent regulations spur investment in biodegradable fibers and closed-loop recycling pilots. Freudenberg's acquisition of Heytex deepens exposure to coated technical textiles, while Lenzing's lyocell upgrades secure long-term supply of bio-based inputs. Middle East and Africa show emerging demand linked to coastal protection and sanitary product localization, whereas Latin America leverages nearshoring to supply North American hygiene brands with competitively priced composites.

List of Companies Covered in this Report:

Ahlstrom Amcor plc Asahi Kasei Advance Corporation Autotech Nonwovens Pvt Ltd Avgol Industries 1953 Ltd Cygnus Group DuPont Eximius Innovative Pvt. Ltd. Fibertex Nonwovens A/S Fitesa SA and Affiliates Freudenberg Performance Materials Hollingsworth & Vose Indorama Ventures Public Company Limited Johns Manville KCWW Lydall, Inc. Magnera Mitsui Chemicals, Inc. paramountnonwoven PFNonwovens Holding s.r.o. Toray Industries Inc. TWE GmbH & Co. KG

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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