

Polypropylene Fibers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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Report description:

Polypropylene Fibers Market Analysis

The Polypropylene Fibers market is expected to grow from 3.33 million tons in 2025 to 3.42 million tons in 2026 and is forecast to reach 3.9 million tons by 2031 at 2.68% CAGR over 2026-2031. Growth reflects the polypropylene fiber market's ability to meet steady demand from hygiene, construction, and automotive applications while navigating tighter microplastics regulations and price competition from recycled polyester. China's addition of 18.7 million tons per year of polypropylene resin capacity between 2024 and 2026 keeps raw-material costs low and sustains the polypropylene fiber market's cost advantage. End-use expansion within the Asia-Pacific, particularly in disposable hygiene and infrastructure, offsets slower gains in North America and Europe, where recycling mandates temper demand for virgin fiber.

Global Polypropylene Fibers Market Trends and Insights

Rising Usage in Hygiene and Medical Disposables

In 2024, spunbond polypropylene nonwovens dominated the global hygiene nonwoven market, driven by demand for diapers, feminine care products, and surgical drapes. Hospitals, now adopting single-use protocols, continue to utilize the meltblown capacity that surged during the COVID-19 pandemic, solidifying polypropylene fiber's presence in medical disposables. India's hygiene sector, buoyed by the broader distribution of sanitary napkins and a growing female workforce, is poised for significant growth, thereby bolstering regional consumption of polypropylene fibers. A similar trend is observed in Indonesia, Vietnam, and

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Thailand, where increasing urban incomes are driving the adoption of diapers. While polypropylene's hydrophobicity, breathability, and compatibility with sterilization make it the preferred choice under EU MDR 2017/745, there's a notable shift in premium adult incontinence products. These are increasingly favoring bicomponent polyethylene-polypropylene blends for their softness, leading fiber producers to diversify their offerings.

Construction-Sector Shift to Macro-Synthetic Concrete Reinforcement

Macro-synthetic polypropylene fibers, dosed at 3-5 kg/m², curtail plastic-shrinkage cracking, reduce installed costs relative to steel, and cut rust-related maintenance, supporting sustained inclusion in large flooring and tunnel projects. The Bharatmala highway and Sagarmala port programs have incorporated fiber-reinforced concrete clauses into Indian tenders. Contractors value the elimination of steel-mesh placement, while the polypropylene fiber market benefits from higher residual-strength specifications in ASTM C1399 and EN 14889-2. Residential uptake remains limited by code gaps; however, new guidelines from the Indian Concrete Institute aim to accelerate adoption in tropical climates.

Availability of Lower-Cost PET and Recycled-PET Fibers

As recycled PET capacity rapidly expands-bolstered by bottle collection networks and advancements in chemical recycling-the premium for rPET has decreased, heightening the risk of substitution in areas such as carpet backing, apparel linings, and upholstery. Major global brands in footwear and apparel, now committing to higher recycled-polyester content, are reallocating procurement budgets away from their traditional preference for polypropylene. This shift puts pressure on the polypropylene fiber market, particularly in the fashion segment. While recycling yields for polypropylene trail those of PET due to challenges such as lower melt strength and pigment contamination, these limitations hinder circularity claims and bolster cost comparisons in favor of rPET. In the hygiene sector, commodity spunbond boasts a speed edge compared to PET. However, the textile industry is increasingly leaning towards rPET, unless polypropylene offers a substantial price discount.

Other drivers and restraints analyzed in the detailed report include:

Geotextile Penetration in Road and Coastal Engineering Demand for Low-Density Lightweight Automotive Interiors Low Melting Point Restricts High-Temperature Applications

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

Segment Analysis

Yarn generated 84.46% of 2025 volume and is forecast to increase at a 2.72% CAGR to 2031, outpacing the broader polypropylene fiber market by 4 basis points and reinforcing its foundational role in woven geotextiles and carpet backing. Woven-geotextile looms require continuous filament, and any splice halts production, ensuring demand continuity. Bulk continuous filament grades, texturized for loft, supply half of the carpet yarn demand, while high-tenacity flat yarn supports tufting and sewing thread. Carpet backing, capitalizing on yarn's stain resistance and a cost advantage over nylon, absorbs a significant amount annually.

Staple fiber captures the remaining share and underpins needle-punched automotive liners, crimped hygiene acquisition layers, and composite filtration webs. Staple products deliver loft and softness by cutting filament into lengths of 38-102 mm, then carding it into webs that bond thermally or mechanically. Automotive trunk liners achieve noise-reduction coefficients greater than 0.6 using 15-25 denier staple blends with recycled content, illustrating value retention even as yarn volume dominates. However, staple's share is capped by the throughput gap with spunbond, which integrates filament formation and web bonding at 800 m/min. Unless carding speeds rise or recyclability rules favor discontinuous fibers, yarn will retain leadership through 2031.

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The Polypropylene Fiber Market Report is Segmented by Type (Staple and Yarn), End-User Industry (Textile, Construction, Healthcare and Hygiene, and Other End-User Industries), and Geography (Asia-Pacific, North America, Europe, South America, and Middle-East and Africa). The Market Forecasts are Provided in Terms of Volume (Tons).

Geography Analysis

The Asia-Pacific region accounted for 51.05% of the 2025 volume and is projected to grow at a rate of 3.33% annually through 2031. The region is set to maintain its lead, with steady growth projected through 2031. China's robust propylene base dedicates a significant portion to polypropylene, resulting in a surplus resin supply that bolsters domestic fiber producers. Notably, these producers have expanded their spinning capacity in recent years. With an oversupply in hand, PP fiber exports surged, primarily targeting Southeast Asian markets. India's nonwoven industry, driven by hygiene demands and highway geotextile specifications under the Bharatmala program, is poised for significant growth. Meanwhile, ASEAN economies, accounting for a notable portion of the region's demand, are witnessing a rise in urban incomes. This uptick has led to increased consumption of diapers and sanitary napkins. Concurrently, local converters are expanding their spunbond lines in both Indonesia and Vietnam.

North America, holding a considerable share in the global market, is experiencing a tempered growth rate. This muted pace can be attributed to a balance between mature automotive outputs and geotextile recycling mandates, which counterbalance the growth seen in EV-related composites. While new polypropylene plants in Texas have bolstered resin supplies, the market saw limited new fiber spinning capacity come online in 2024. This limited expansion highlights a market preference for injection-molding and film grades. Europe, commanding a significant portion of the market volume, is charting a steady growth trajectory. The region is also at the forefront of pioneering circular initiatives. Notable projects include geotextile recycling and reclamation efforts. While these initiatives are testing economic viability, they face a challenge: costs remain higher than virgin PP unless subsidized. Additionally, the EU's microplastics regulation, effective from 2023, mandates filtration retrofits. This move not only increases compliance costs but also appears to favor larger, vertically integrated players in the market.

The South America and Middle East-Africa regions, each accounting for a notable portion of the global demand, are witnessing steady growth. This growth is largely driven by advancements in infrastructure megaprojects and a rising adoption of hygiene standards. In Brazil, nonwoven volumes are climbing at a strong rate, spurred by increased diaper penetration in certain regions. Meanwhile, in Saudi Arabia, venues under the Vision 2030 initiative are mandating the use of polypropylene geotextiles and macro-synthetic fibers. This specification translates to an anticipated annual demand pull through 2028, although the execution timelines remain somewhat fluid. However, both regions face import dependencies, making them vulnerable to fluctuations in freight costs. For instance, shipping costs from Asia can inflate landed costs. This dynamic offers a competitive edge to domestic PET producers, especially when currencies decline, as highlighted by recent devaluations.

List of Companies Covered in this Report:

ABC Polymer Industries LLC Beaulieu Fibres International (BFI) Belgian Fibers Chemosvit Fibrochem SRO China National Petroleum Corporation DuPont Fiberpartner Aps Freudenberg Group Huimin Taili Chemical Fiber Products Co. Ltd Indorama Ventures International Fibres Group Kolon Fiber Inc. Mitsubishi Chemical Corporation Radici Partecipazioni SpA Sika AG Tri Ocean Textile Co. Ltd W. Barnet GmbH & Co. KG Zenith Fibres Ltd

Additional Benefits:

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

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