

# Overview of Nonwovens in India- Understanding the opportunity

## *ANFA Conference*

Hong Kong  
30 – 31<sup>st</sup> October 2023

Presented by:

**KANAV GUPTA**

ASSOCIATE DIRECTOR

(BCH) BUSINESS COORDINATION HOUSE



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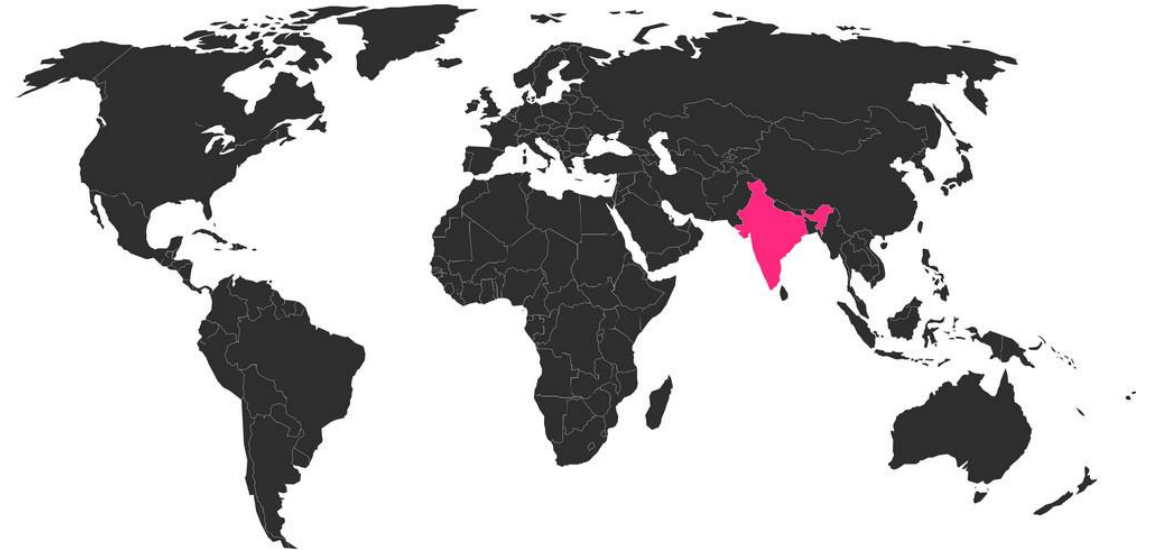
(BCH) BUSINESS COORDINATION HOUSE



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## *Overview of Nonwovens in India*

1. Introduction about BCH
2. Current scenario of India
3. Overview of Nonwovens
4. Nonwovens Market size and Growth Drivers
5. Trends, market size and growth drivers for Different Nonwoven application
6. Conclusion



# About BCH

## Overview of Nonwovens in India

- 100% Advisory and consulting company **Dedicated** to the **Nonwovens & Technical Textile Industry**
- Incorporated in **2005** (history dates back **over 100 years in the textile family business**) BCH and allied companies enjoy a strong goodwill
- Head office/ Showroom - **New Delhi, India**
- BCH is the liaison office for **ANFA (Asia Nonwovens Fabric Association)**
- Publisher of **TechTex India** – Global Industry magazine since 2005 with a reader base of **35,000+**
- Organised **30+** international level Symposiums, Trainings, conferences to facilitate and grow the industry in India
- BCH specialises in **Market research**, Entry Strategy, Sector Studies, **Turney project setups, Focussed industry events, Tie ups and alliances, HR Requisites,**



**Mr. Samir Gupta** - Managing Director  
(Over 30 Years experience in  
Textiles, Technical Textile  
and Nonwovens – Globally)



**Ms Ritika Gupta** - Executive Director  
(Over 20 Years experience in  
Textiles, Technical Textile  
and nonwovens – Globally)



**Mr Kanav Gupta** - Associate Director  
(4 years experience in Ernst and Young  
and 4 + years consulting experience in  
Technical Textiles and Nonwovens)



# Our Services

## About BCH

### BCH Services

#### Advisory & Consulting



Entry Strategy, Market Surveys,  
Jvs and M&As, Buying & Selling

#### Showcasing



A 365 Day Showroom in New Delhi  
to Display your Products

#### Magazine



TechTex India, Quarterly Magazine  
covering latest Industry News

#### Events/Trainings



Customized Events to Promote your  
company & Grow the Industry

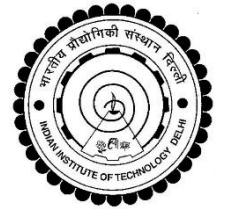
# BCH Clients across the nonwovens value chain

About BCH

## BCH Clients



SURYA TEXTTECH  
...standing apart in quality



# Past Events by BCH since 2006 - 2022

*About BCH*



5<sup>th</sup> edition of '**Right**' Hygiene 2022



India's 1<sup>st</sup> Medical Nonwovens Conference **Incontrol** 2023  
organized jointly by EDANA and BCH



# India Hosted ANFA 2019

*Changing Market Dynamics for Technical Textile in India*

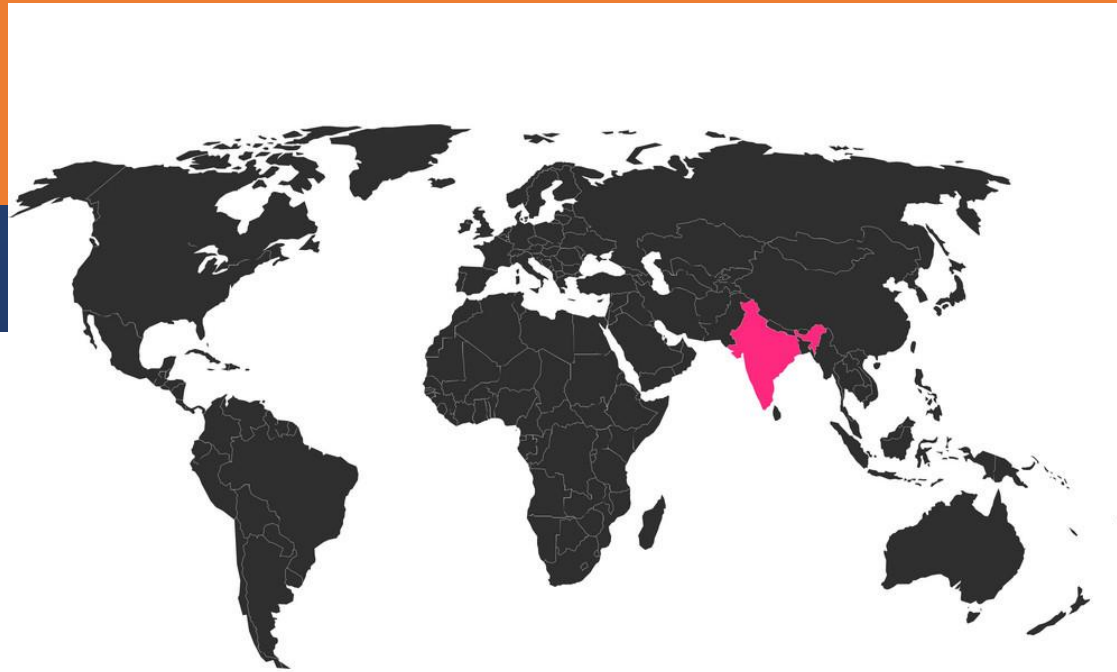


Under Kanai San's Leadership, India hosted the **1<sup>st</sup> ANFA conference** in New Delhi, organized by BCH





# Current scenario of India



# India – A Land of Contrasts

*Indian Nonwovens Sector - A market for everyone*



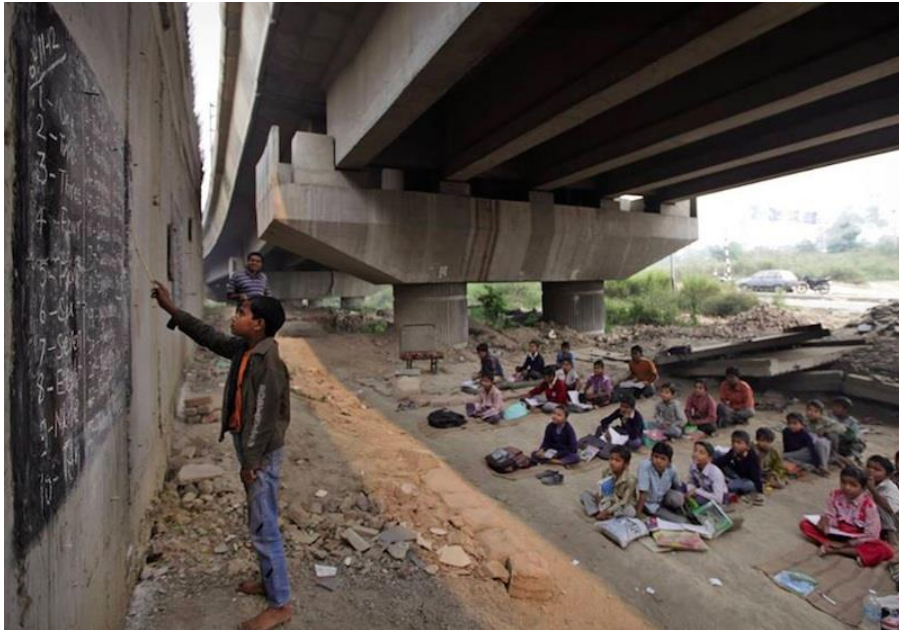
# India – A Land of Contrasts

*Indian Nonwovens Sector - A market for everyone*



# India – A Land of Contrasts

*Indian Nonwovens Sector - A market for everyone*



**Satya Nadella, CEO Microsoft**



**Shantanu Narayen, CEO Adobe**



**Indra Nooyi, CEO, PepsiCo**



**Sundar Pichai, CEO Google**

# India – A Land of Contrasts

*Indian Nonwovens Sector - A market for everyone*



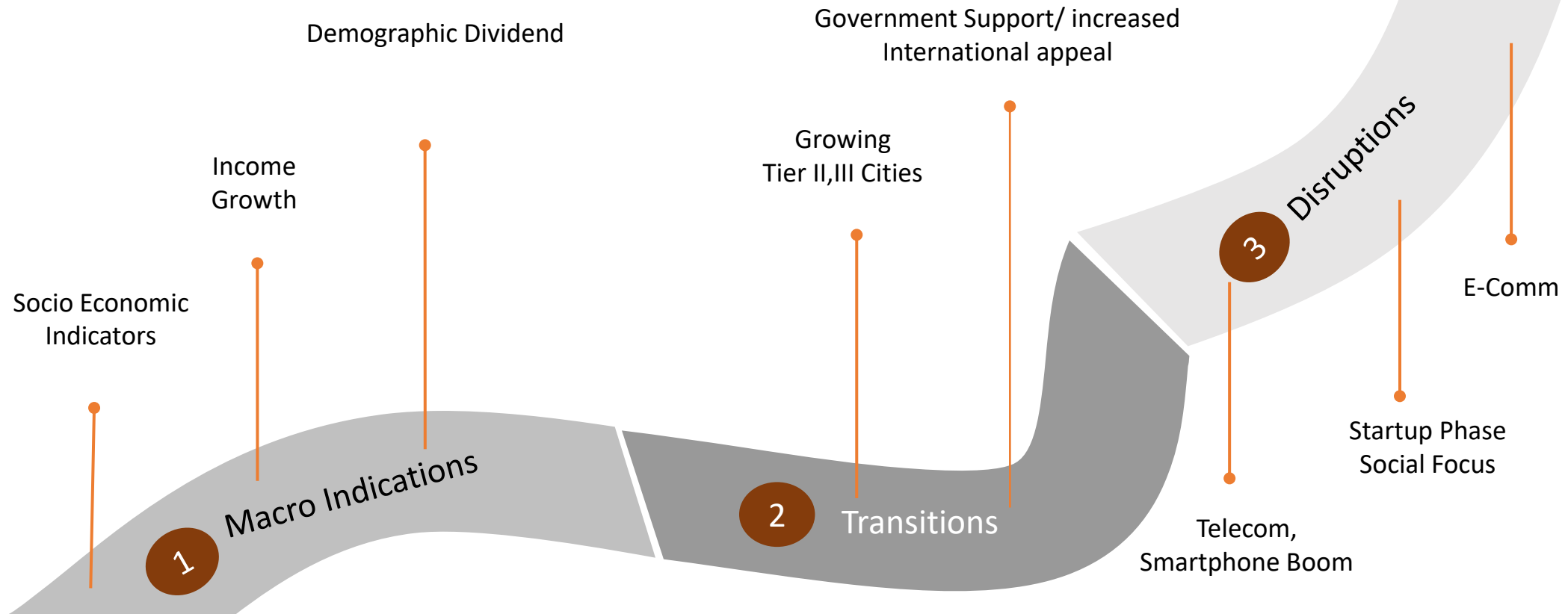
India is the Land of Diversity and contrasts. **The Deeper you Look the more complex it gets.**

...As soon as you **ACCEPT** the complexities – India simplifies herself for you

# Why is this the Golden decade for India ?

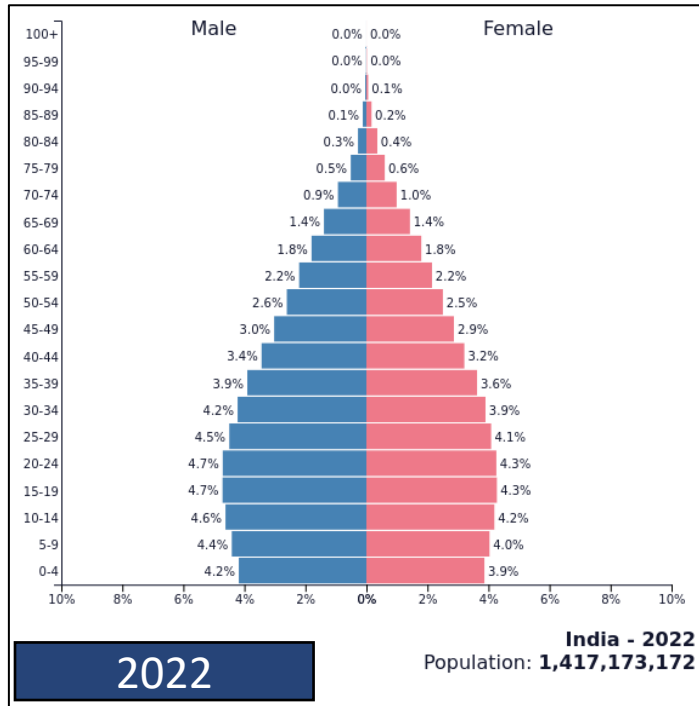
*What's driving India*

## India's Success Roadmap 2020 – 2030



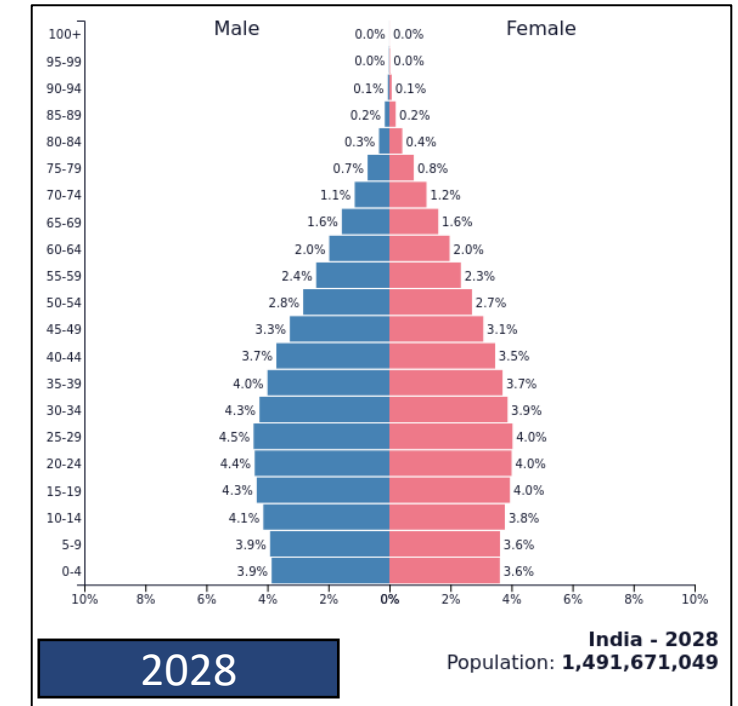
# Demographics of India

What's driving India



Segment	2022		2028	
	%	Population (Mn)	%	Population (Mn)
Children (0-4 years)	8.1	115	7.5	112
Women (15-49 years)	26.3	373	26.2	391
Elderly (60+ years)	10.5	149	12.3	183
Working Population (15-59 years)	64.2	910	64.9	968

Largest      Youngest      Working



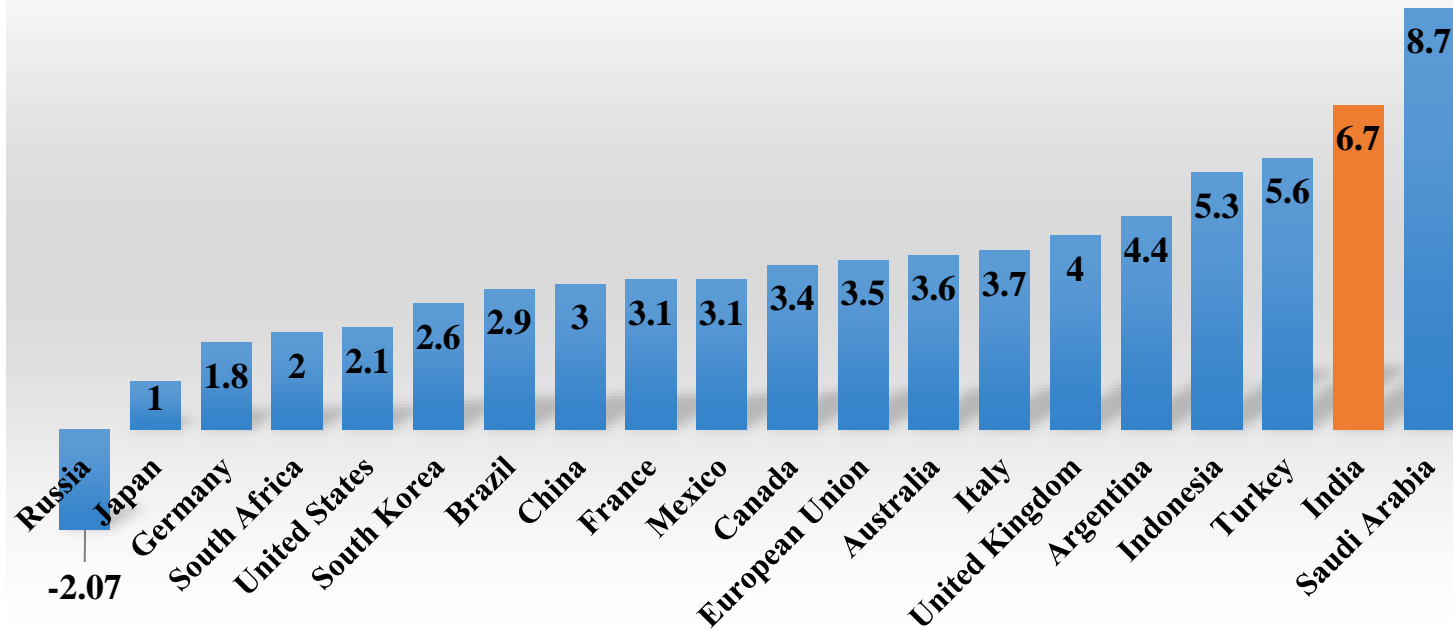
In next two decades, India will be having **high number of consumers** as well as **power to purchase** due to interplay of population momentum, demographic dividend, improving sex ratio and growing elderly population.



# Economic Snapshot of India

*What's driving India*

GDP Annual Growth Rate (%) for G20 countries in 2022



Times Now on MSN · 2d

EXCLUSIVE | 'India Witnessing 'Snowball Effect', Set To Become \$10 Trillion Economy In Coming Decade': WEF President

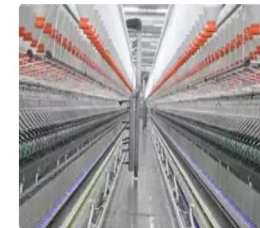
World Economic Forum President Borge ...

India's economy **continued to grow faster** even in post-pandemic period and IMF projected that India is **set to become world's third-largest economy** by FY 28.



# Government Initiatives in India

*What's driving India*



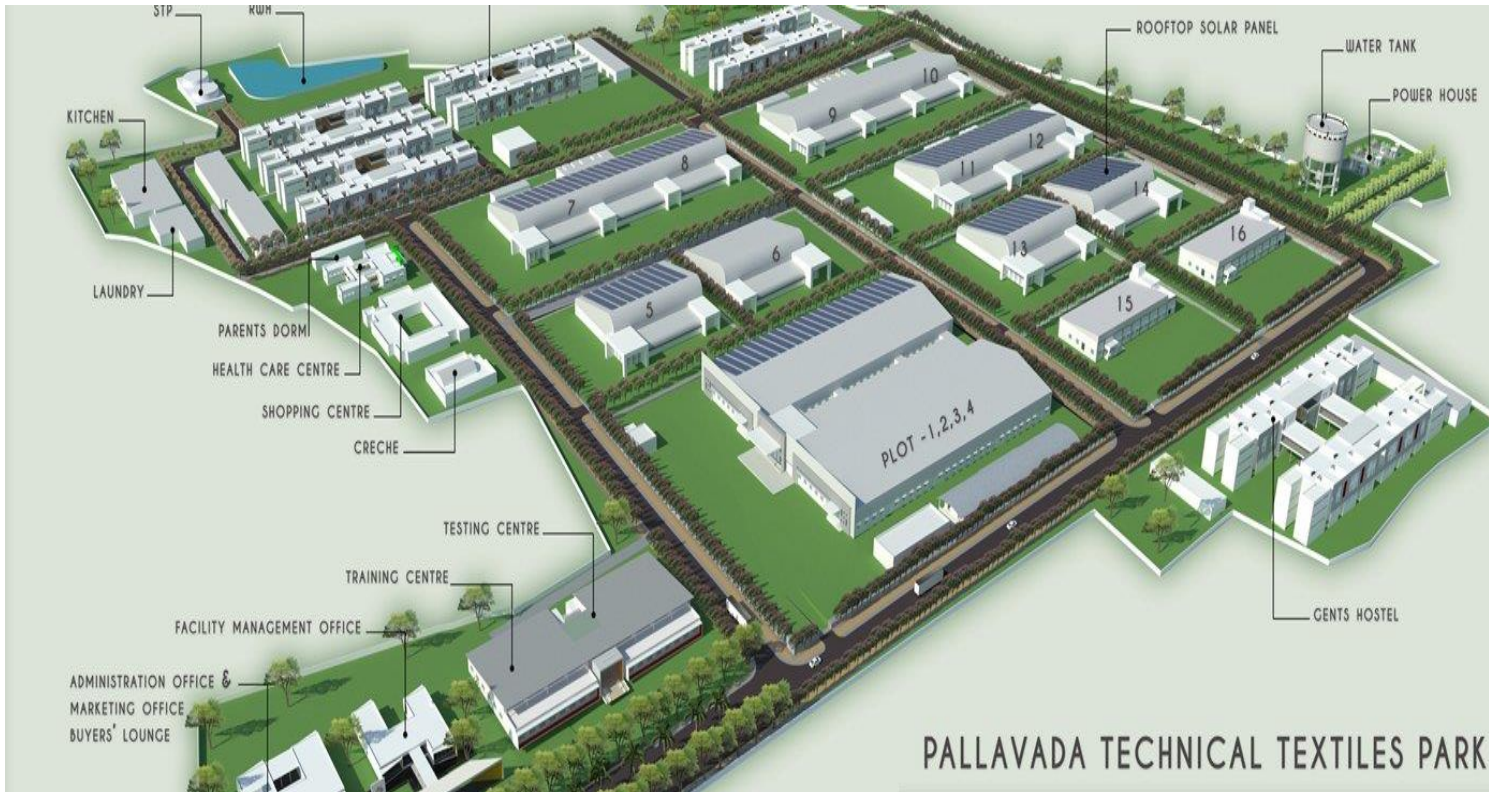
Centre to provide upto Rs 50 lakh to innovators in technical textiles

ANI / Aug 29, 2023, 22:48 (IST)

The Ministry of Textiles has decided to provide grant-in-aid of upto Rs 50 lakhs for up to a period of 18 months to aspiring innovators in technical textiles space. The Ministry of Textiles has approved the Startup Guidelines for Technical Textiles - Grant for Research and...

# Government Initiatives in India

*What's driving India*



## TECHNICAL TEXTILE

### Avgol Nonwoven inaugurates new Indian plant

August 1, 2022 / textilemagazine

There is a great response to the Production Linked Incentive (PLI) scheme and PM Mitra Parks in the country. Speaking after virtually inaugurating Avgol Nonwoven's New Manufacturing facility at Halol in Gujarat, Smt. Darshana Jardosh, Union Minister of State for Textiles and Railways, said that the Government's focus is on Five Fs-Fibre to Farm to Fabric to Fashion to Foreign. She said that the contribution of India towards man-made fibre in the global market is 25%. And in order to increase this share, PLI Scheme and PM Mitra Parks will support to achieve the desired scale and size while also emerging as a strong competitor in the global market. Indorama has invested in its plant in Halol under 100% FDI.



*Smt. Darshana Jardosh, Union Minister of State for Textiles and Railways*

**Strong Leadership**

**Strong Domestic Market**

**Government Schemes**

**Elections in 2024.....**



# Free trade Agreements of India

*What's driving India*

India's RTA Partner	Name of RTA
ASEAN	India-ASEAN FTA
	India –Singapore CECA
	India-Malaysia CECA
	India-Thailand FTA
Japan	India-Japan CECA
South Korea	India-South Korea CEPA
SAFTA	Agreement on SAFTA
	India-Srilanka FTA
	India-Nepal Treaty of Trade
	India-Bhutan Agreement on Trade, Commerce and Transit
Mauritius	India-Mauritius CECPA
United Arab Emirates	India-UAE CEPA
Australia	India-Australia ECTA

India has signed **13 Regional Trade Agreements (RTAs)/Free Trade Agreements (FTAs)** with various countries/regions and India's merchandise exports to all these countries/regions have **registered a growth in last ten years.**

In addition, India has also signed **6 Preferential Trade Agreements (PTAs)** including Asia Pacific Trade Agreement (APTA).




# Successful foreign collaborations in India

## Case Study - JICA

### Japan interested in partnering with India to build infra abroad: JICA India chief

4 min read • 11 Oct 2023, 11:21 PM IST

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[Shashank Mattoo](#)

*On the Indian side, JICA is financing road connectivity improvement projects in the Northeast region*



Saito Mitsunori, JICA India chief.

India - Japan expand collaboration to create Sustainable Global Business Breakthrough Ecosystem for societal-manufacturing

2023.09.26



All across India, JICA, the largest bilateral aid agency, has partnered with India for various **technical Cooperation Projects**, **Technical Cooperation for Development Planning** and provided **ODA loans and ODA grants**

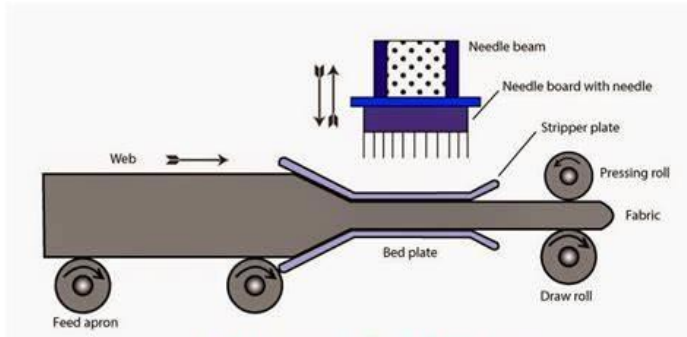


# Overview of Nonwovens

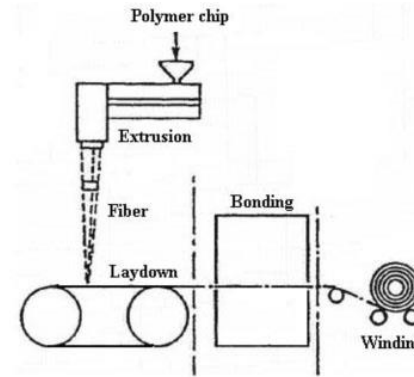


# Major Nonwoven Technologies in Indian Market

## Overview of Nonwovens in India



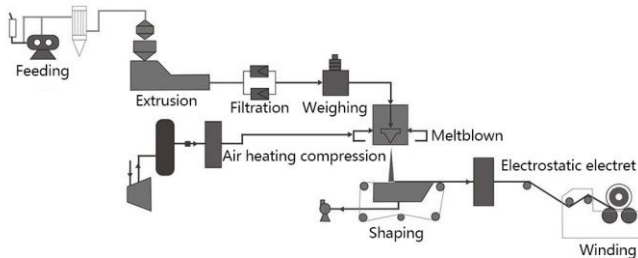
Needlepunch



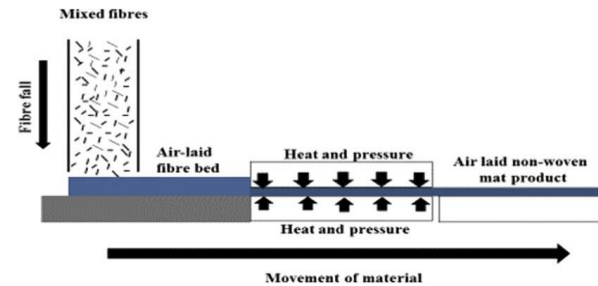
Spunbond



Spunlace



Meltblown



Airlaid

Wetlaid, Spunmelt, Airthrough, Chemical bonding, Thermal bonding and many more.....

# Major Applications in India

## *Overview of Nonwovens in India*



Medical



Hygiene



Geotech



Packtech



Automotive



Home tech



Agro tech



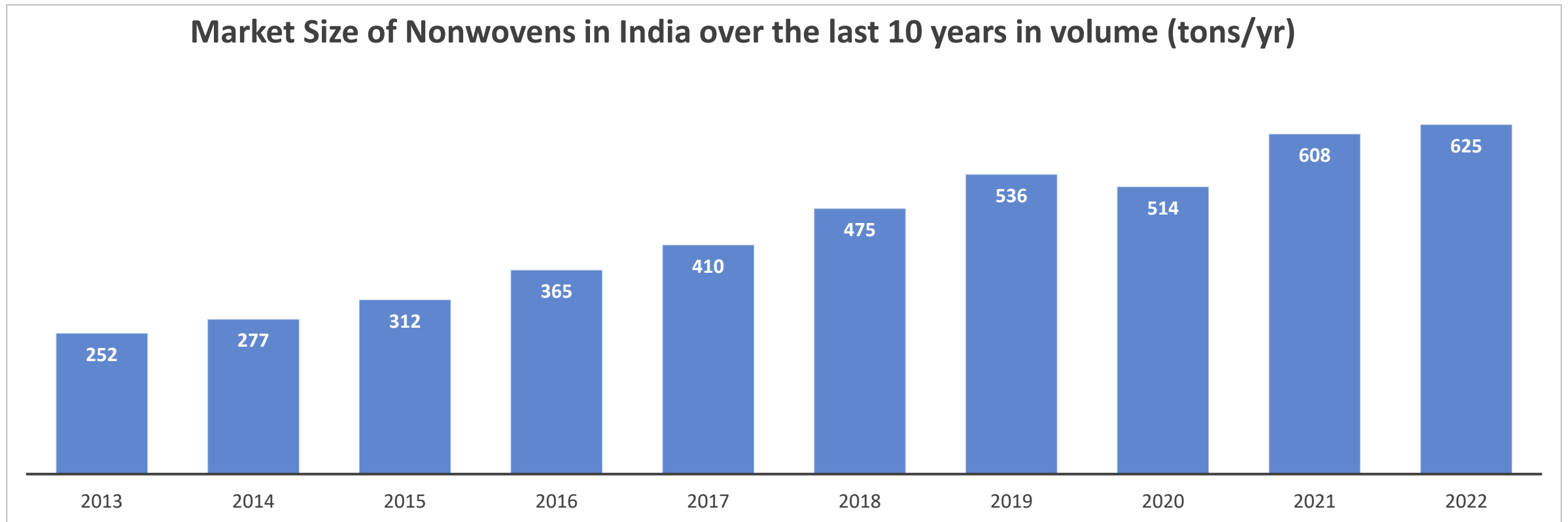
Filtech



Protech

# Nonwovens Market Scenario in India

*Growing over the years.....*



India's Nonwovens market **grew steeply over the years** with **slight fluctuation in 2020** due to pandemic but **bounced back** with higher speed in 2021.

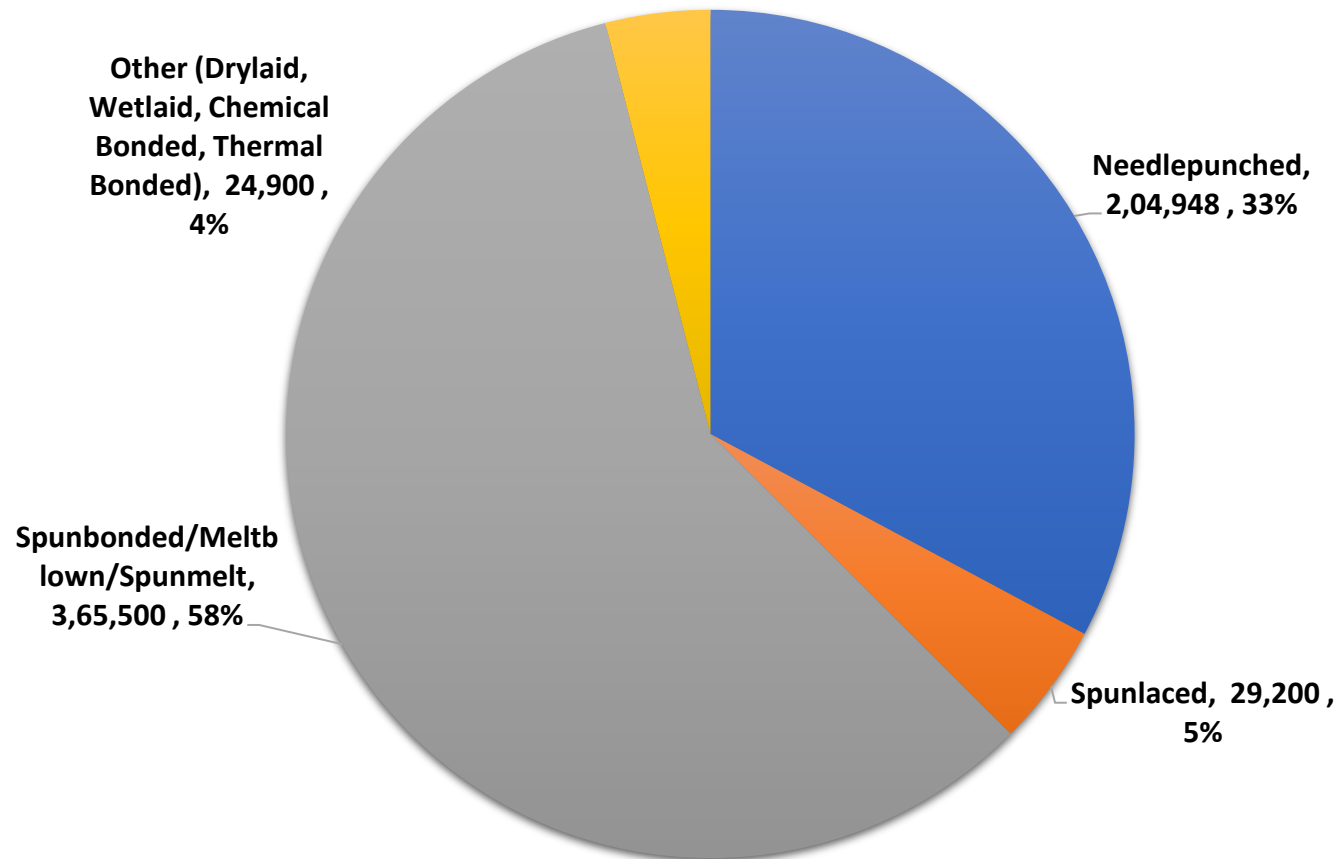




# Contribution of each Technology.....

## Nonwovens Market Scenario in India

Market Size by volume (tons/yr) for nonwoven technology in India, 2022

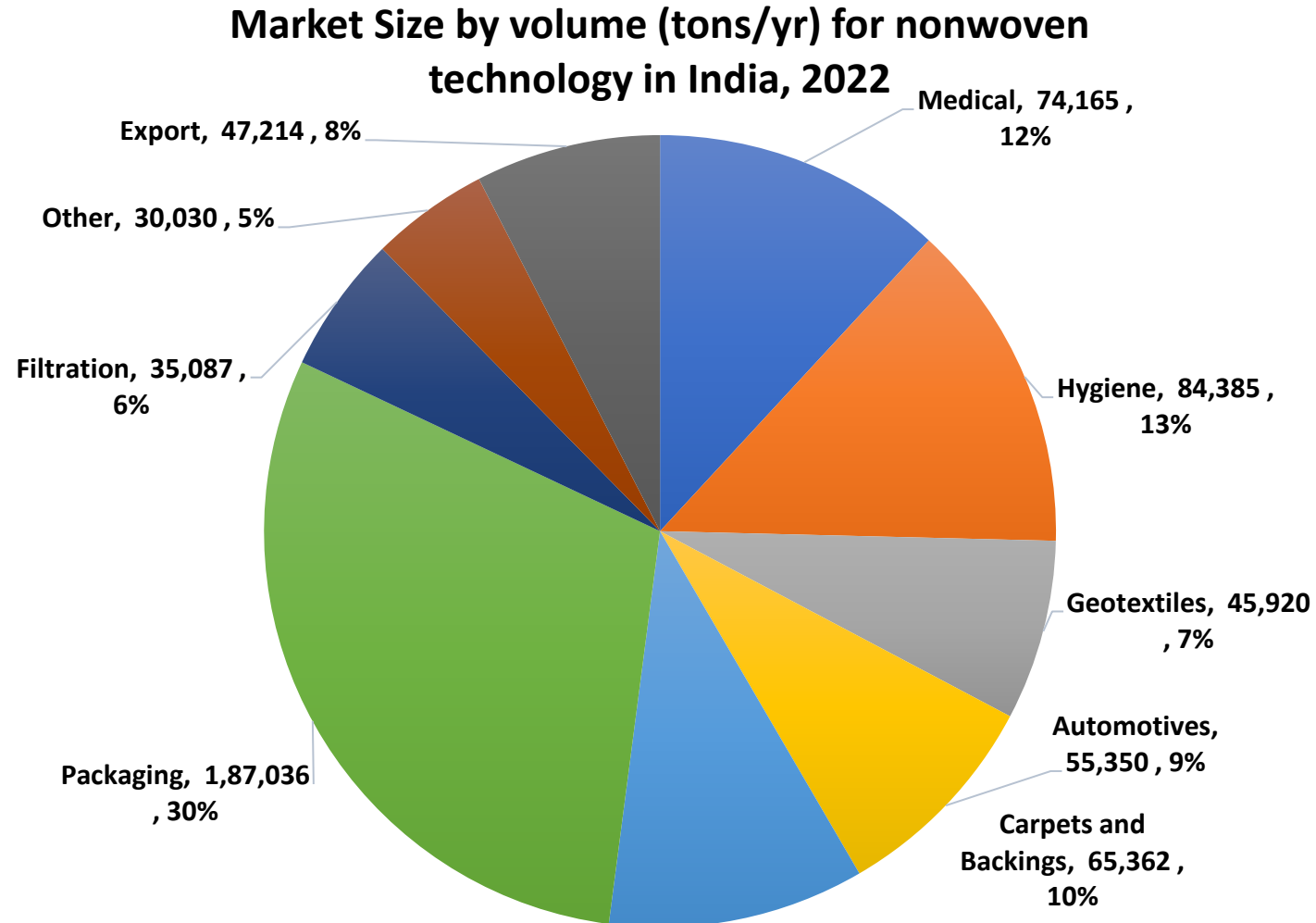


Overall, **more than half of Indian market** is dominated by spunbond, meltblown and spunmelt technology in 2022.

**Needle punch sector witnessed a 12% growth** due to all sectors doing well namely the automotive, geotextiles, filtration and carpets. Expansions are expected in 2023 and 2024.

# Nonwovens Market Scenario in India

*Contribution of each application.....*



**One-third** Indian Nonwovens market is dominated by Packaging sector in 2022.

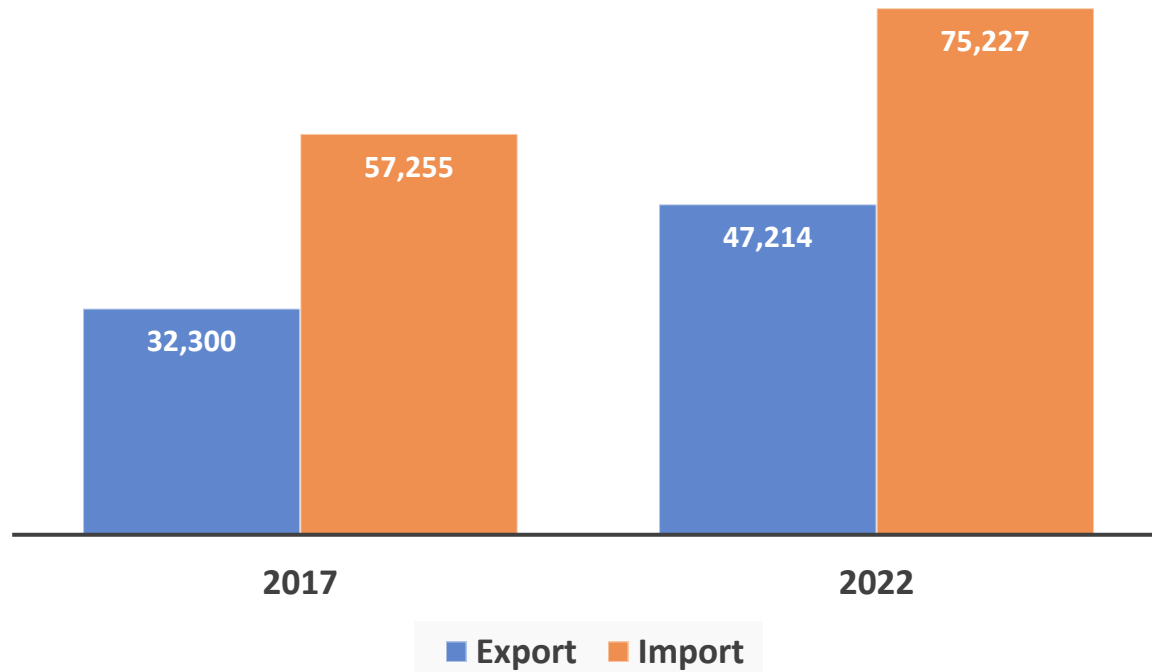
Medical and Hygiene sector together constitutes **more than one-third** of total Indian nonwovens market in 2022

Local demand in almost **all sectors is on the rise** in India.

# Export-Import Scenario.....

*Nonwovens Market Scenario in India*

**Export and import of nonwovens by volume (ton/yr) in last five years in India**



Both export and import have **grew tremendously** in last five years.

Nonwovens exported to.....	Nonwovens imported from.....
United States of America (USA)	China
United Arab Emirates (UAE)	Germany
Qatar	Thailand
Bangladesh	Malaysia
Nepal	United States of America (USA)

Largest export is to **USA** and import is from **China** by volume (tons/yr)

# Recent Expansions in Nonwovens in India.....

*Nonwovens Market Scenario in India*

Spunmelt



Spunlace



Airthru



Nanliu Enterprise



# Nonwovens by Applications

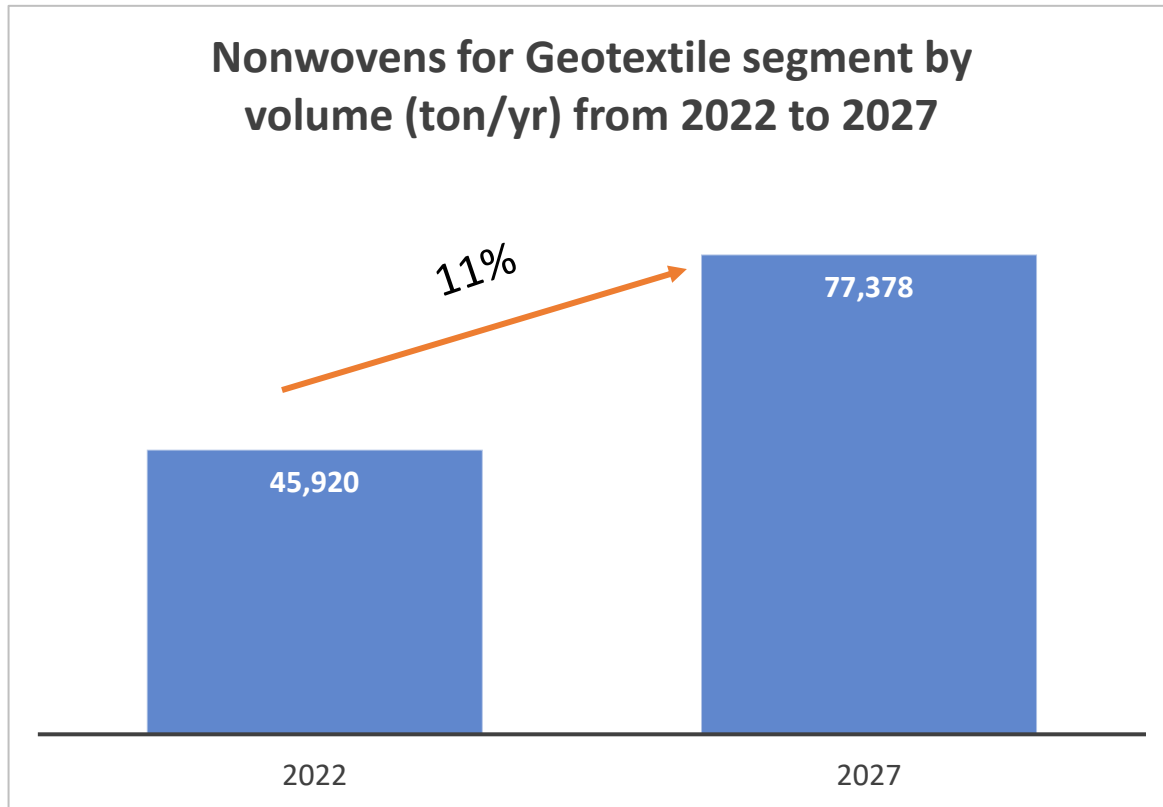


# Geotextile sector

## Applications of Nonwovens in India

### Market Size

Nonwovens for Geotextile segment by volume (ton/yr) from 2022 to 2027



### Trends

Tapping global market through environment friendly solutions

Smart Geotextile - Innovations

Smart cities and infrastructural development



NITK will get geotechnical textile testing lab soon

Sep 11, 2023, 08:26 (IST)

Geotextile is growing at **12% CAGR** and is expected to reach **77,378 tons volume** by 2027. Major growth driver is **infrastructural development**.

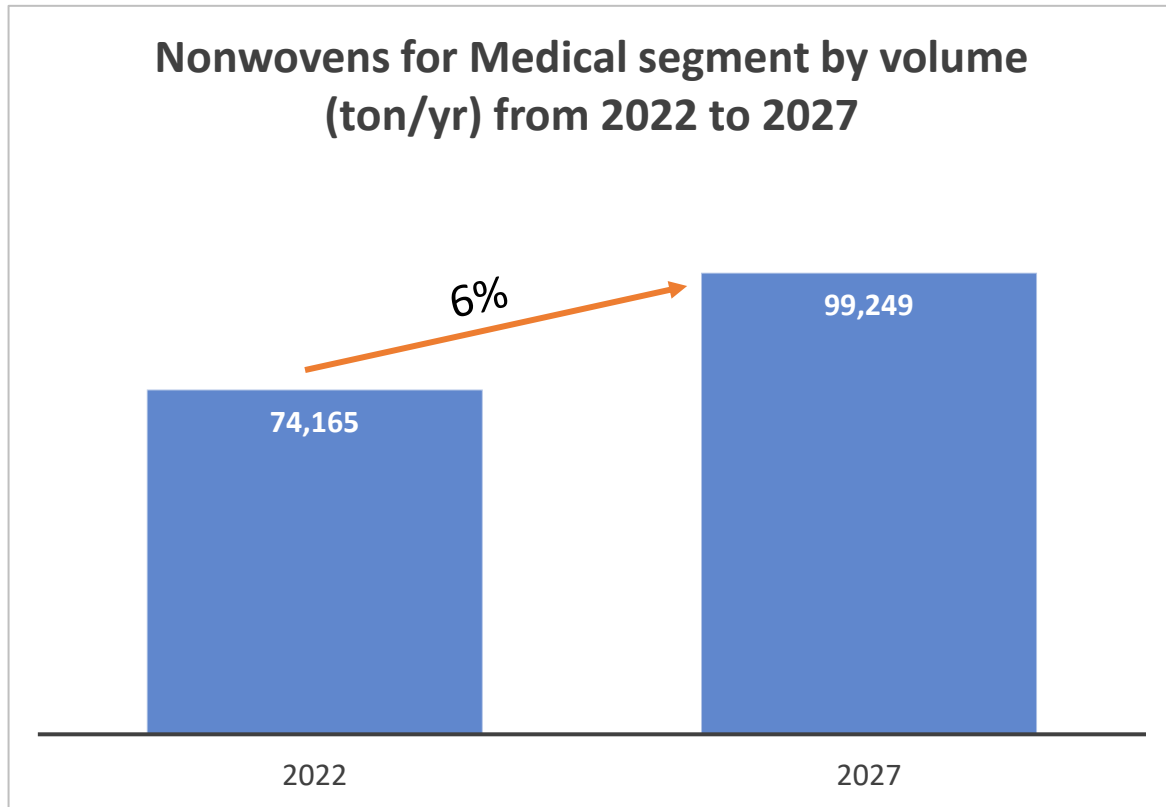


# Medical sector

## Applications of Nonwovens in India

### Market Size

Nonwovens for Medical segment by volume (ton/yr) from 2022 to 2027



### Trends

COVID-19 pandemic give a boost

Quality and Disposability – A major concern

Huge export potential and opportunity

### Welspun Inaugurates Spunlace Facility in India

With this investment, company becomes the largest producer of spunlace nonwovens in the country

03.07.23

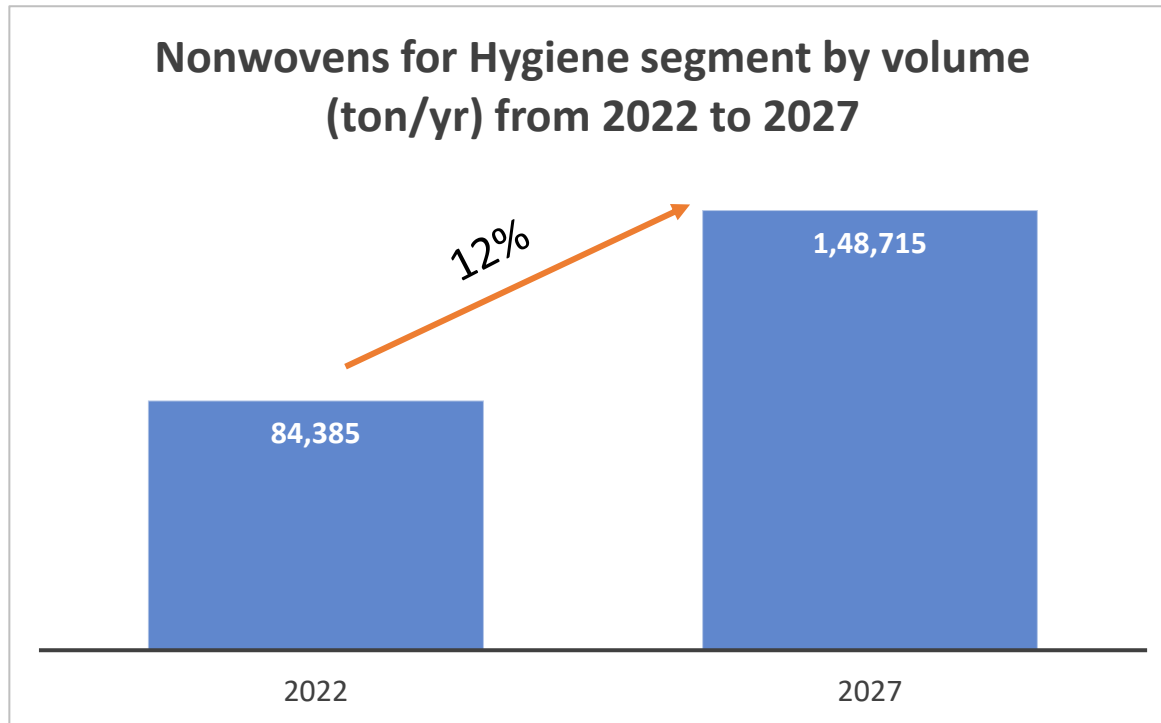


Medical nonwovens is growing at **6%** CAGR and is expected to reach **99,249 tons volume** by 2027. Major growth driver is **increasing diseases, hospitals and awareness about infection prevention**

# Hygiene sector

## Applications of Nonwovens in India

### Market Size



Hygiene nonwovens is growing at **12% CAGR** and is expected to reach **148,715 tons volume** by 2027. Major growth driver is **increasing women's participation in workforce, urbanisation and increased disposable income.**

### Trends

**Adult diaper witnessing major growth**

**Untapped rural market**

**Awareness about Sustainability**

Ginni Filaments Ltd., The Leader Sets A Milestone With The First-Ever 99.9% 'Paaniwipes' For Babies, Manufactured In India

June 12, 2023

Revolutionising Eco-Friendliness with Unparalleled End-to-End Impact: Niine launches India's first PLA-Based Sanitary Napkins

NEWS PROVIDED BY  
Niine Sanitary Napkins  
31 May, 2023, 10:00 IST

SHARE THIS ARTICLE



**Noble Hygiene Launches Slim Disposable Absorbent Underpants in India**

*Friends UltraThinz are designed specifically for younger consumers who suffer from light incontinence*

05.10.23



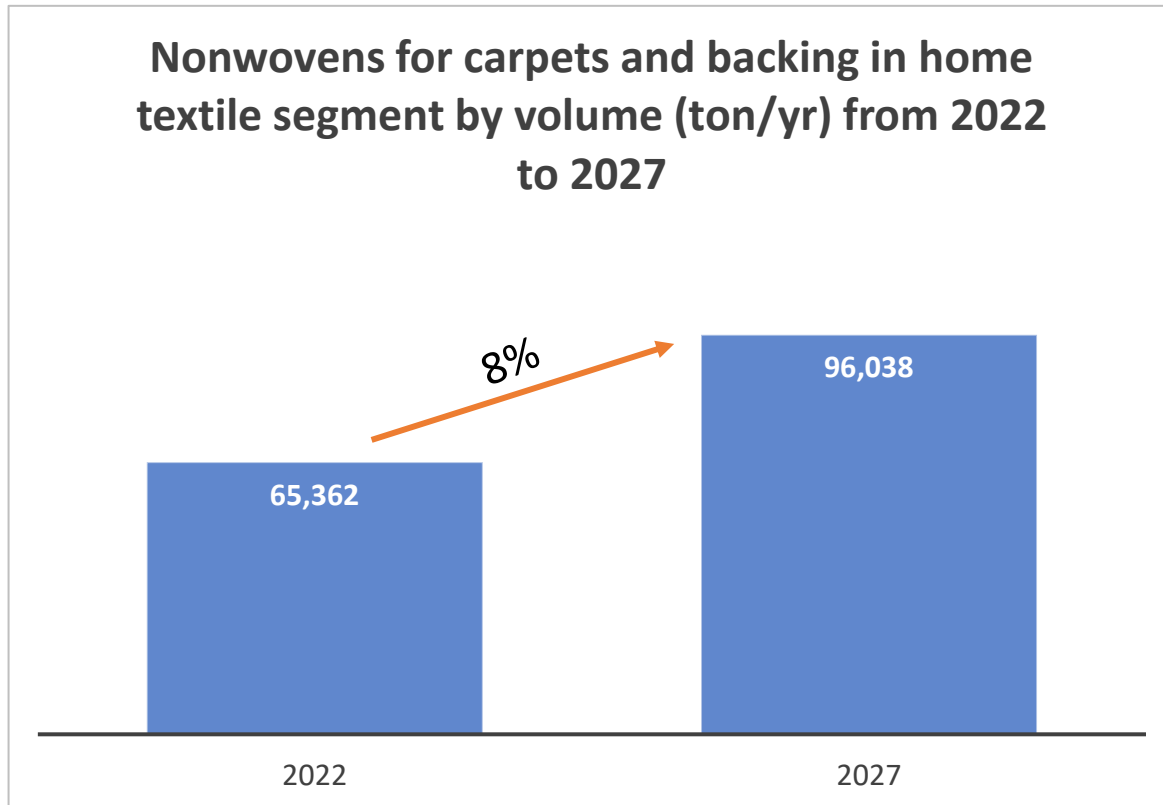


# Carpets and Backing sector

## Applications of Nonwovens in India

### Market Size

Nonwovens for carpets and backing in home textile segment by volume (ton/yr) from 2022 to 2027



### Trends

Lifestyle changes

Demand for customisation

Growth in online avenues



Home textile production will get special subsidy, Tamil Nadu CM Stalin says

TNN / Aug 25, 2022, 15:48 (IST)

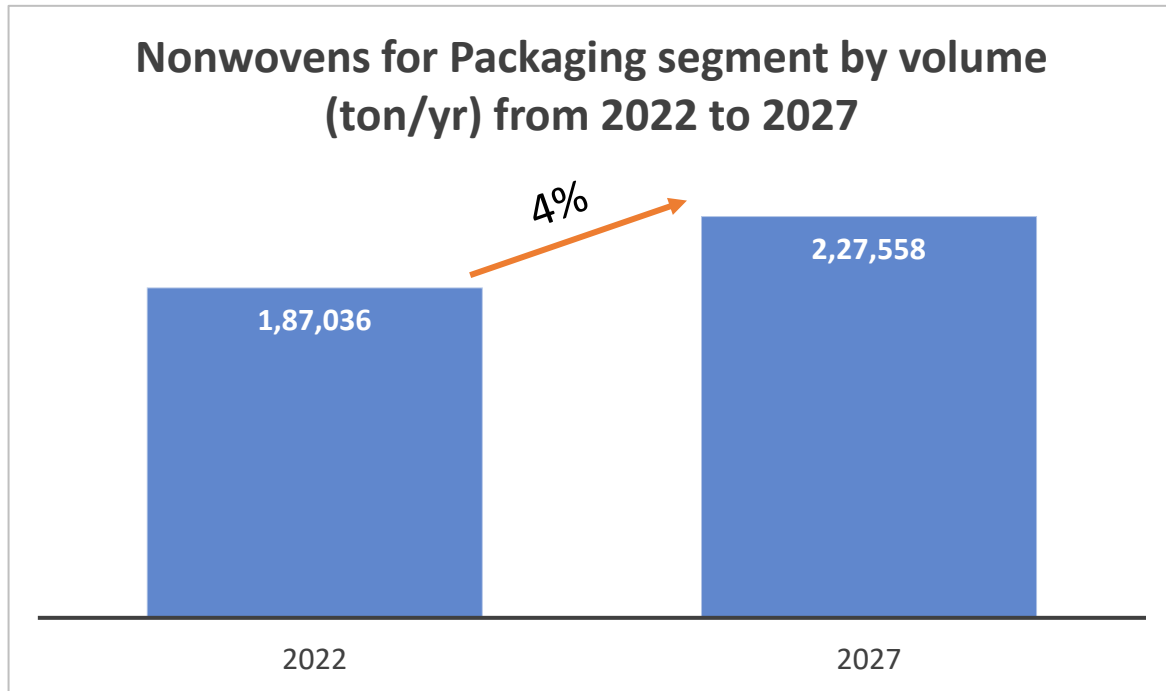
Home textile sector is growing at **8% CAGR** and is expected to reach **96,038 tons volume** by 2027. Major growth driver is **improving standard of living, speedy migration, urbanisation and modernisation.**

# Packaging Sector

## Applications of Nonwovens in India

### Market Size

Nonwovens for Packaging segment by volume (ton/yr) from 2022 to 2027



Packaging sector is growing at **4%** CAGR and is expected to reach **227,558 tons volume** by 2027. The major growth driver is **disposable income for purchasing goods at both online and offline avenue.**

### Trends

**Demand of Biodegradable and Compostable Materials**

**Ecommerce giving boost to packaging industry**

**Smart Packaging – QR Codes, Tracers**

### Gujarat: Production of non-woven fabric up 15% since SUP ban

TNN / Updated: Jul 22, 2022, 11:40 IST

161 PTS SHARE PRINT AA FOLLOW US



Textile units shifting to polyester, viscose

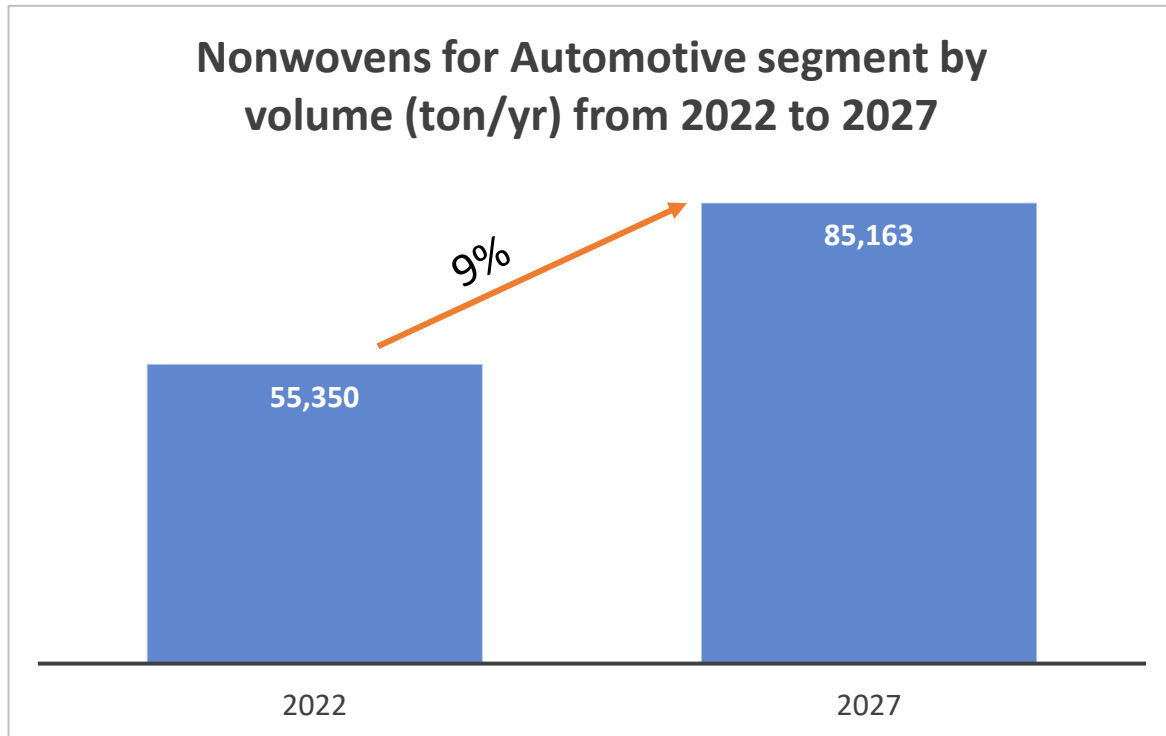
TNN / Apr 24, 2023, 08:22 (IST)

High cotton prices have hurt the textile industry so much that industrialists are looking to alternative avenues to make businesses viable.

# Automotive Sector

## Applications of Nonwovens in India

### Market Size



### Trends

Luxury becoming necessity

Comfort is priority – Quality not compromised

**ANDRITZ announces successful start-up of the needlepunch line supplied to AUTOTECH Nonwovens, India**

2017/03/20

ANDRITZ Nonwoven, part of international technology Group ANDRITZ, has successfully started up a complete needlepunch line – from webforming to needlepunching – supplied to AUTOTECH Nonwovens, India.

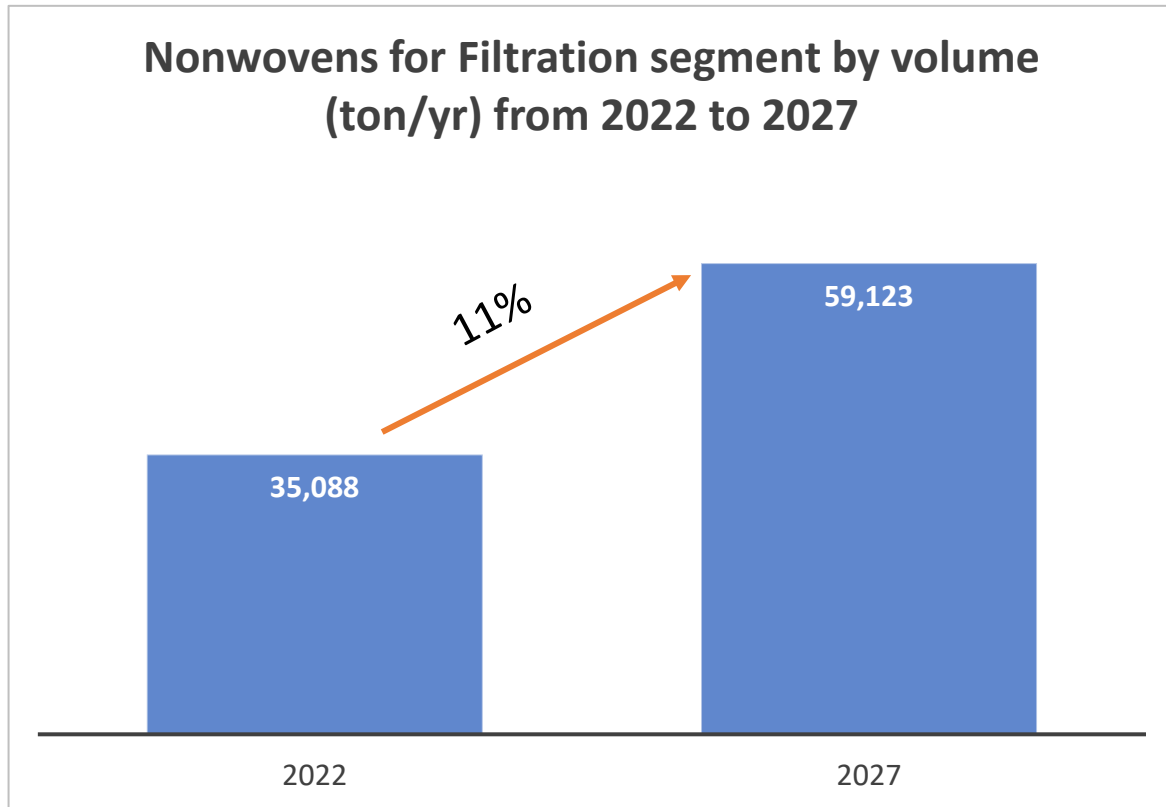
Automotive sector is growing at **9% CAGR** and is expected to reach **85,163 tons volume** by 2027. Major growth driver is **disposable income for buying vehicles**.



# Filtration Sector

## Applications of Nonwovens in India

### Market Size



### Trends

**Rising concerns about air and water pollution**

**National Clean Air Program (NCAP)**

**Growing industrial sector increases demand**

Air cleaner for polluted spot in Kolhapur

TNN / May 16, 2023, 13:02 (IST)

The Kolhapur Municipal Corporation has installed air filtering units at Dabolkar Corner, considered one of the most polluted places in the city.

Filtration Nonwovens sector is growing at **11%** CAGR and is expected to reach **59,123 tons volume** by 2027.

Major growth driver is **environmental changes and improving standard of living.**



# Final Remarks

*Opportunities & Prospects of Nonwovens in India*

Recession resistant economy

Growing Domestic market

Growth of International business



**SAVE THE DATE!!**

20<sup>th</sup> – 21<sup>st</sup> March, 2024, New Delhi, India  
Hygiene Conference & Exhibition

**RIGHT**  
HYGIENE

*Thank you for your interest and attention*

**For Hygiene & Nonwovens, BCH Specialises in...(Since 2008)**

- Detailed Market Research and Entry Strategy
- New Project Setup (Turnkey) / Merger / Acquisitions
- Organizing India's biggest hygiene Forums/ conferences



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