

INDA NEWS

PUBLISHED BY THE ASSOCIATION OF THE NONWOVEN FABRICS INDUSTRY

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INDA

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Message From The President

INDA's Long-Term Strategic Planning Process Takes Center Stage This Fall

The end of summer brings new beginnings for schools and universities ... and for INDA. For us, the changing of the leaves and the return of cooler temperatures this year herald the beginning of our Strategic Planning Process.

INDA may be unique as an association in that we invest quite a lot of time and effort in detailing our strategic plans, environmental assumptions and our goals/objectives. Our whole team will participate in the development of the final documents and we do use them as a guide to our annual and triennial activities.

This year's Strategic Plan will

INDA President Rory Holmes



include our most recent Member Survey data. The survey was completed at the end of 2003 and will help us define the important issues for our members. Conferences and trade shows continue to be a focus of INDA and our membership. Emerging issues around Global Capabilities and Regulatory/Governmental Affairs were highlighted. We will share the finished plan with our members and other interested people when it is completed by late September.

Our updated Analysis of the Nonwovens Industry in North America is available through the INDA e-Bookstore on our website – www.inda.org – or can be purchased by contacting Brooke Boyle at bboyle@inda.org.

In addition, the World Wide Analysis is being completed. Significant changes in the business climate since the last publication have required a considerable amount of effort and updating. The meteoric increase in output in China is having far-reaching impacts on supply and demand of products throughout the value chain. This World Wide Analysis will be available in December.

As the North American economy has improved, the demand on our member services and technical assistance has also increased. Committee activities are surging with conference details, test method harmonization,

(Continued on page 2)

Technical Update

Efforts On Standard Test Methods, Flushability Standards Dominate INDA's Technical Efforts in 2004

A few months ago I reported that INDA and EDANA have agreed to publish one common book of test standards and that this is one major step forward for the industry in general. We have received several positive notes from our membership about this decision and that's encouraging.

We now get down to the business of how to accomplish this. We have set up a task force made up of representatives of INDA's Standard Test Methods committee (STM) and EDANA's Task Force on Harmonization. This group is scheduled to meet in Brussels in early September to hammer out the layout and format of the new book. We hope to come away from this meeting with a clear sense of direction and then work toward completing the new book of standards by the end of April 2005.

In other standards news, ISO/TC 172/SC 9/WG 4, dealing with laser systems for medical applications, met in Pforzheim, Germany in June and continued its work regarding the resistance of operating room drapes to medical lasers. The group has been working on two proposed ISO standards.

- ISO/DIS 11810-1, Test method for the laser resistance of surgical drapes and/or patient covers – Part 1: Primary ignition and penetration, was voted on earlier in the year and there were neither negative votes nor comments. This means that Part 1 will now move to a Final Draft

The Fall 2004 issue of the INDA International Nonwovens Journal will be available online this month at www.inda.org. Just click on the link for the INJ.

International Standard (FDIS) and will be subject to a final Yes or No vote early in 2005. It will most likely be approved.

- ISO/CD 11810 – 2.2, Secondary ignition, was voted on in July 2003 and although it only received two negative votes, there were many critical comments on the procedure by the members. These comments must be resolved before the procedure can move on. This work group will formally meet again in June 2005, but work on the procedure will continue via email.

INDA's Flushability Committee conducted its third meeting on July 20. This is one of the best-attended committees within INDA, with 30 representatives in attendance.

This time, the committee reviewed test methods that are presently used by member compa-

nies to access flushability of their products. These methods were compared to those recommended by the WERF report and a compromise was reached on test methods for certain criteria dealing with household toilets and piping, and ejector pumps. Methods dealing with other aspects of onsite and municipal systems will be considered at the next meeting, which is scheduled for November 30 at INDA's offices.

Meanwhile EDANA's Task Force on Flushability will meet in Brussels this month. Thus far, both groups have agreed on similar actions on the items discussed.

If you have any questions about any of the topics discussed here, please contact Cos Camelio at 919-233-1210, x114; or at ccamelio@inda.org.

Message from The President *(Continued from page 1)*

regulatory issues and additional short courses. You can read about most of these in this issue of INDA News.

Committee participation continues to be the most popular way for members to contribute and network within the bounds of INDA. I thank all the committee members for their time and good ideas that they have offered.

I look forward to seeing everyone at INTC in Toronto, September 20-23; at the Needlepunch Conference in Savannah, October 25-27; and Filtration 2004 Conference and Exposition in Philadelphia, December 7-9 to close out our busy and successful 2004.

— Rory Holmes, INDA President

INDA Will Come To You For Inhouse Training Course

INDA is offering an in-house non-wovens training course based on the popular Nonwovens Training Course that is held three times a year at the INDA offices in Cary, North Carolina. The training course is designed for seasoned professionals as well as industry newcomers. This in-house training course can be customized to a company's needs and can be at any location. Confidentiality agreements are in effect with

the course instructor.

Ed Vaughn, Professor Clemson University, leads the training courses sponsored by INDA and will be leading the in-house training courses. Dr. Vaughn has more than 40 years of experience in the nonwovens industry.

The course can be tailored from the following original topics to suit individual company needs: Raw materials for nonwovens; web form-

ing technologies; web bonding technologies; web conversion and finishing technologies; INDA and EDANA test methods; nonwoven products and applications; environmental issues – waste management; and nonwoven markets and future directions.

If you would like more information, please contact Deanna Lovell: 919-233-1210, Ext. 119; Fax 919-233-1282; dlovell@inda.org.

INDA Meetings Calendar 2004-05

INTC 2004 • September 20-23
Westin Harbour Castle • Toronto, Canada
Needlepunch 2004 Conference • Oct. 25-27
Savannah Marriott • Savannah, GA
INDA/NCRC Manufacturing Process Fundamentals Course • November 1-5
INDA Headquarters • Cary, NC
Nonwovens Training Course • November 16-18
INDA Headquarters • Cary, NC
Filtration 2004 • December 7-9
Pennsylvania Convention Center • Philadelphia, PA

2005

Vision 2005 Consumer Products Conference • January 16-19, New Orleans, LA
Automotive Product Development Course • Jan. 31-Feb. 4 • INDA Headquarters • Cary, NC
Nonwovens Training Course • February 8-10
INDA Headquarters • Cary, NC
Annual Meeting 2005 • March 20-22
Hyatt Regency Grand Cypress Resort • Orlando, FL
Filtration 2005 • November 15-17
Navy Pier • Chicago, IL

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Nonwovens Handbook
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Needlepunch
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**Basic videos also available!

Questions? Contact: Brooke Boyle,
919-233-1210, Ext. 120; bboyle@inda.org

Worldwide Nonwoven Statistics 2004-2009

Coming in November!
(Pre-orders receive 10% Discount)
Produced in cooperation with EDANA

*If you commissioned this study, the cost would \$50,000+.
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www.inda.org and go to eBookstore in the upper right hand corner)

Contact: Brooke Boyle, 919-233-1210, Ext. 120; bboyle@inda.org

**Also Available: North America: 2003-2008;
Mexico: 2002; South America: 2002**

Government Relations/Global Activities Update

FDA Publishes Final Rule On Tampon Absorbency

In a notice published by the U.S. Food and Drug Administration (FDA) on August 25, the Agency issued a final rule that had originally been proposed on October 18, 2000, and changes the lowest level of tampon absorbency designation from "junior" to "light."

According to FDA, the change is necessary because the term "junior" can imply that the tampon is "only for young or teenage women when, in fact, [these tampons] may be appropriate for women of any age with light menstrual flow."

In the notice, FDA further notes that risk of Toxic Shock Syndrome is minimized when women use tampons that have the lowest needed level of absorbency and, accordingly, four absorbency standards have been developed – junior, regular, super and super plus – so women can "compare the absorbency of one brand and style of tampons with the absorbency of other brands and styles."

Based on the final rule, manufacturers will have until February 27, 2006 to change labeling for tampons that absorb less than six grams of fluid from "junior" to "light." FDA states that this rule should not present a hardship to manufacturers because it only requires them to change one word on their labeling, and they will have 18 months to do so.

But at least two tampon manufacturers have informed FDA that the rule will have a broader impact on companies that sell feminine hygiene products in the U.S. and Canada. Specifically, the final rule notes that FDA received comments from two manufacturers pointing out that the Canadian designation is "light absorbency" (not "light").

FDA was asked, therefore, to adopt the "light absorbency" designation so that the same terms would be acceptable in the U.S. and Canada.

In response to these concerns, FDA has indicated that it intends to work with Canadian authorities "to harmonize required absorbency terms for tampons."

For more information, call Colin Pollard with FDA's Center for Devices and Radiological Health at 301-594-1180.

OSHA Adds New Fit Testing Protocol To Respiratory Protection Standard

The Occupational Safety and Health Administration (OSHA) recently announced that employers will soon have an additional option for fit testing their employees for respirator use. On August 4, OSHA published a final rule in the Federal Register approving an additional quantitative fit testing protocol – the controlled negative pressure (CNP) REDON fit testing protocol – for inclusion in its Respiratory Protection Standard. While the previously approved CNP protocol specifies eight test exercises, including one re-donning of the respirator, the new protocol requires administering only three test exercises followed by two re-donnings of the respirator.

OSHA adopted the new CNP REDON under a provision within the Respiratory Protection Standard that allows individuals to submit evidence for including additional fit testing protocol. Any new protocol being considered by OSHA must either be found to be accurate and reliable by an independent government research laboratory (e.g. Los Alamos National Laboratory) or an

article must be published in a peer-reviewed industrial-hygiene journal describing the protocol and how test data support the accuracy and reliability of the new fit testing methods. The CNP REDON protocol was published in two peer-reviewed journals.

The final rule adding the new protocol was slated to go into effect on September 3. You may learn more about this and other OSHA standards by visiting www.osha.gov.

Two Trade Missions This Fall for the Far East

The U.S. Department of Commerce's International Trade Administration (ITA) will conduct two trade missions this fall, either or both of which may be of interest to INDA members.

From October 26-November 2, ITA will lead an "Environmental Technologies Trade Mission" to China and Hong Kong. China is expected to spend billions of dollars over the next several years to address industrial groundwater contamination, treat hazardous waste, and to implement air pollution control measures, and Hong Kong has earmarked approximately \$775 million for environmental infrastructure improvement. The mission will allow representatives from 8-12 U.S. firms to arrange one-on-one appointments with prospective clients, conduct site visits and convene high-level meetings with government officials.

ITA will also lead a "Consumer Goods Trade Policy Mission" to Beijing November 8-9 as an opportunity for U.S. industry representatives to meet with Chinese officials to discuss market access issues.

To learn more about these and other ITA trade missions, please visit: <http://www.ita.doc.gov/doctm/tmcal.html>.

New INDA Reports Cover The Americas

The three most important markets for nonwovens in the Western Hemisphere – North America, South America and Mexico – are analyzed in a series of recently released reports published by INDA.

These comprehensive reports – the result of hundreds of interviews combined with market and production information provided by suppliers and converters – cover all aspects of nonwovens production and consumption in these regions. They are designed as a forecasting tool for companies involved or considering entering these markets.

“Knowledge is power in the nonwovens industry and INDA is committed to its role as a key information provider in the world of engineered fabrics and nonwovens,” says INDA President Rory Holmes. “These reports not only define the markets in North America, South America and Mexico as they exist today, but provide projections of consumption and end usage in the future.”

The three reports are:

- **The Analysis of Nonwovens in North America: 2003-2008 ...** This report offers the latest statistics and analysis of the world’s most important market for nonwovens. It examines both Short- and Long-Life Applications, along with an in-depth look at the Top 10 Nonwoven Roll Goods Producers and U.S. Nonwovens Imports and Exports.

- **The Analysis of the Nonwoven Industry In South America: 2002-2007...** Covering the countries of Argentina, Brazil, Chile, Colombia and Venezuela, this report includes an analysis of Consumer Markets (absorbent hygiene, wipes and dryer/fabric softeners), Medical/Surgical, and Industrial/Institutional markets (including filtration). Long-Life applications include Interlinings, Home Furnishings, Automotives, Geotextiles and Agricultural/Landscape Fabrics.

- **The Analysis of the Nonwovens Industry in Mexico: 2002-2007 ...** This report analyzes the country’s Short- and Long-Life Markets for Nonwovens, along with a review of Production By Technology, and Raw Materials Consumption

All three reports provide an in-depth look at the major producers in each market as well as a summary of Nonwovens Production Volume By Technology, and Raw Materials Consumption in each local market.

According to Holmes, a company that is involved in any link in the nonwovens supply chain needs this information to accurately assess its potential and needs in terms of future investments in machinery and new product development. “Companies will find these reports an invaluable tool in their planning process,” he says.

For more information or to order these reports:

Free Trial Access To Online Nonwovens Directory Available Now To INDA Members

Already one of the most popular services offered to its members, the comprehensive International Nonwovens Online Directory is now made available for free to the nonwovens industry on a trial basis.

In effect through November 1, the industry can log into the Nonwovens Online Directory – which contains constantly updated listings of more than 12,500 buyers and sellers of nonwovens raw materials, machinery/equipment, roll goods, converted products and services worldwide – at no charge. The Directory, which is now only available online, contains more than 500 product category listings that

encompass the entire nonwovens production chain.

“Our customers have consistently told us that the Online Directory is a valuable tool for their businesses and we are looking to give even more companies an opportunity to take advantage of how it can help them,” explains INDA President Rory Holmes. “This is an incredible resource for our industry – from supplier to converter to end user – and our goal is to make it as widely available and widely used as possible.”

Holmes says that when an initial promotional mailing on the free trial was conducted earlier this summer,

more than 5000 people logged on the association’s server.

In addition to the company and product listings, the International Nonwovens Online Directory provides users with a number of other specific functions. Among them:

- The ability to search for and identify companies by geographic location, product category or product/contact name.
- The ability to develop industry- and product-specific mailing lists
- Daily updates of new information received from listed companies.

Companies can take advantage of this limited-time promotion immediately by contacting Brooke Boyle at INDA, bboyle@inda.org; 919-233-1210, Ext. 120, to receive a password.

INDA MEETINGS PROVIDE LEARNING, NETWORKING AND SALES OPPORTUNITIES

Would you like a chance to network with your colleagues, industry executives, and customers? Needlepunch 2004, Vision 2005 and INTC 2005 all offer the opportunity to purchase tabletop exhibits.

Needlepunch - October 25-27, 2004

Vision - January 16-19, 2005

INTC 2005 - September 19-22, 2005

**INTC also offers Showcase Presentations as well.

For more information on any of the above opportunities please call Tracey Barefoot at 919-233-1210, Ext. 129; tbarefoot@inda.org

Vision Conference Returning To New Orleans in 2005

Globalization and Consumer Opportunities, along with unparalleled networking opportunities, will attract hundreds of consumer products and nonwovens industry executives to the Vision 2005 Consumer Products Conference, January 16-19, 2005, as the annual event returns to its roots in New Orleans, LA.

Now in its fourth year, the Vision Conference annually attracts more than 500 participants for three days of presentations, discussions and the prestigious Visionary Awards.

Among the highlights of the Vision 2005 Consumer Products Conference:

- A "Globalization" session spearheaded by Dieter Brandes, previously an executive with Aldi, the German retailer that has "out Wal-marted Wal-mart" in its native country and is looking to expand its presence in the U.S.

- A "Lessons from the Leaders" panel discussion that will bring together the top executives from such influential suppliers as PGI, BBA Fiberweb, Freudenberg, Nordson and Tredegar Film Products to offer their perspectives on the business and to answer questions from attendees.

- Presentations from the consumer research firm A.C. Nielsen as part of

a "Profitable Consumer Trends" session. That session will also include a look at household cleaning products from the Soap and Detergent Association; a "Marketing To Women" discussion; and a Consumer Trends segment that will feature an informative Consumer Focus Group moderated by Martec.



Vision attendees are in for a treat on the final morning of the Conference when INDA will host a breakfast where Peter Richutti, noted Tulane University business professor, will give an entertaining and informative look at "Globalization - The Good, The Bad and The Ugly." Richutti has been described as a cross between Alan Greenspan and Robin Williams.

One of the certain highlights of the Vision 2005 Conference will be presentations from the finalists for the Visionary Award, given annually to the consumer product that exhibits the best use of a nonwoven fabric. Following the finalist presentations, Vision Conference attendees will vote on the recipient of the 2005 Visionary Award, which will be

Annual Meeting 2005 .. Network! Network!

INDA cordially invites you, your guest and senior level executives in your company to attend our Annual Meeting 2005, March 20-22, 2005, at the Hyatt Regency Grand Cypress Resort, Orlando, Florida.

The INDA Annual Meeting . . . an important business meeting of the INDA Membership. Here you will meet the Right People . . . at the Right Place. Back by popular demand . . . James F. Smith, Ph.D., Kenan-Flagler Business School, University of North Carolina at Chapel Hill.

Every year at the Annual Meeting, INDA elects new Board members to fill the shoes of Board members whose terms have ended. For the first time, INDA will be electing an entirely new Executive Committee as well as five new Board Members.

Another important feature at the Annual Meeting is the State of the Association address. Under consideration will be INDA's Financial Position, Membership, Publications, Seminars/Conferences & Expositions, Global Activities, Government/International Trade Activities, and Technical Activities.

For more information: Misty Ayers, 919-233-1210, Ext. 112; mayers@inda.org.

announced on the final morning of the Conference.

Registration for the Vision 2005 Consumer Products Conference begins this month. For more information, please log on to www.inda.org.



Time To Get Involved With Filtration 2004

Attend ... Filtration 2004 is the main event for the filtration industry this year, with more than 2000 professionals from around the world expected to attend. In addition, 200 or more exhibitors will be showing the latest in filter media, raw materials, machinery, supplies and services.

Filtration 2004 will be held December 7-9, 2004 at the Pennsylvania Convention Center, Philadelphia, Pennsylvania.

Building on the success of Filtration 2003, Filtration 2004 will again feature tutorials on Air Filtration and Liquid Filtration. The conference sessions scheduled are:

- Homeland Defense
- Automotive Filtration
- Emerging Markets
- Filtration Media

Ellen J. Kullman, Group Vice President-DuPont Safety & Protection, will provide the keynote speech. Under Kullman's direction, DuPont Safety & Protection is focused on becoming the global market leader in providing solutions for people, property and operations in the area of safety, security and protection.

If you would like information regarding attending or exhibiting, contact INDA: 919-233-1210 Fax: 919-233-1282; info@inda.org; or visit www.inda.org.

Exhibit ... Filtration 2004 exhibit sales are well under way. This year's show will take place December 7-9 at the Pennsylvania Convention Center in Philadelphia.

Exhibiting is the most cost-effective way to reach all of your customers

FILTRATION 2004 Conference discounts are available for members of:

- American Filtration & Separations Society
- American Institute of Chemical Engineers
- EDANA
- Filter Manufacturers' Council
- Filtration Society of Europe/Asia
- GEO-Institute of American Society of Civil Engineers
- INDA
- Institute of Environmental Sciences and Technology
- National Air Filtration Association
- Society of Automotive Engineers
- TAPPI

under one roof at one time. If you are looking to promote your products and develop new business relationships in the most economical way possible, then exhibiting at Filtration 2004 is your best choice. This is your chance to meet 2000 current and potential customers from all over the world so don't miss out on this great opportunity.

For more information on exhibiting contact Marilyn Bellinger at 919-233-1210, Ext. 118; mbellinger@inda.org; or Tracey Barefoot at 919-233-1210, Ext. 129; tbarefoot@inda.org.

Needlepunch 2004 Is Set For Savannah

Presentations by such important companies as Ford Motor Co., Honda R&D Americas USA, Reiter Automotive Systems, and the Environmental Health Center-Dallas will highlight INDA's NeedlePunch 2004, set for October 25-27 at the Savannah Marriott, Savannah, Georgia. This conference will allow leaders in the needlepunch industry to network and keep pace with the latest developments. The program is

designed for people in product development, technical, and sales/marketing from fabric producers/converters/suppliers.

Needlepunch 2004 Conference Sessions will focus on Market Trends; Fibers; Filtration; Geotextiles; Bedding; Government Needs; and Wipes.

Also, a new feature at NeedlePunch 2004 will be the Advanced Needling Tutorial. Presenters from N. Schlumberger USA Inc., Foster Needle Co., and Groz-Beckert USA Inc. will be discussing "The Advanced State of NeedlePunch Technologies," "NeedleFelted Principles," and the "Resistance Factor of Needles."

A Reception and Table-Top Event will provide a unique networking event on October 26. At the Table-Top Event, the latest developments in needlepunch raw materials, equipment, and services from more than 30 suppliers will be on hand.

If you would like more information about attending or acquiring a table-top, contact INDA, 919-233-1210, Ext. 126; Fax 919-233-1282; www.inda.org; info@inda.org

INDA EXECUTIVE COMMITTEE AND BOARD OF DIRECTORS

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Welcome To New INDA Members ...

INDA would like to welcome the following companies as new members:

Aeroglide
Fleetguard, Inc.
Catoosa Resources LLC
Josco Products
Purolator-Facet, Inc.

A few benefits of INDA membership include: discounts on INDA sponsored events, technical/research/statistical support/information at any time from INDA's on-staff Technical Director and Director of Market Research & Statistics; and, perhaps most important of all, countless opportunities for your company to network, make important business contacts and even gain valuable insight with current/potential suppliers and your competitors.

If your company is interested in becoming an INDA member please contact Marilyn Bellinger for more information: 919-233-1210, Ext. 118; mbellinger@inda.org.

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