

# 2014 INDA IMPACT

Insight and analysis of events  
that impact the nonwovens market.





# INDA Impact

## 2014

Insight and analysis into events impacting the nonwovens industry:

- ▶ The Wiper Rule: Impact on the Industrial Wipes Market
- ▶ Boomer Echo: Impact on the Absorbent Hygiene Market
- ▶ ACA and HAIs: Impact on the Disposable Nonwovens Markets
- ▶ Coal Ash Storage and Hydraulic Fracturing Regulation: Impact on the Geosynthetics Market



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# INDA Impact 2014

## Foreword

It is my pleasure to introduce the inaugural addition of the INDA Impact report. It is INDA's intent to provide industry thought leadership through the gathering, analysis and dissemination of relevant, reliable and insightful market information and industry reports to aid in decision making. The INDA Impact report is one of our new vehicles to communicate this information, one which will be published on an annual basis.

The objective of this report is to provide deeper insight and quantitative analysis of events – which we refer to as **Drivers of Change** – which could be game changers, tipping points, opportunities, disruptors, or threats to and for the nonwovens industry.

This year's issue of INDA Impact provides insight into four events – across a spectrum of nonwoven end uses – that could substantially impact the nonwovens industry.

They are:

- I. The Wiper Rule: Impact on the Industrial Wipes Market;
- II. Boomer Echo: Impact on the Absorbent Hygiene Market;
- III. ACA and HAIs: Impact on the Disposable Nonwovens Markets; and
- IV. Potential Coal Ash Storage and Hydraulic Fracturing Regulation: Impact on the Geosynthetics Market.

Each of these events includes a **conventional thinking** statement of what is generally known and believed in regards to the event, followed by an **assessment** section which takes a deeper examination of the event, the nonwoven market(s) impacted, and the issues that could drive additional nonwovens usage. Each of the events finishes with a **results** section which quantifies and presents the nonwoven potential.

Individually each of the events may appear to be insignificant in regards to the tonnage added to the nonwovens industry. These tonnes identified in the report are incremental tonnage, which are in addition to the tonnes from the previous forecasted growth.

In totality these four events could be quite significant to the nonwovens industry, summing to an additional 128,000 incremental tonnes over a three-year period. If these events were all to pan out as identified, that's nearly 43,000 tonnes a year. This is in addition to the 101,000-tonnes-a year growth based on INDA's annual forecasted growth rate of 4.9 percent from 2012 to 2017.

It is INDA's intention to continue to improve the quality of data and industry information each year. Your comments help to drive that continued improvement, and we would appreciate any feedback on this year's report and any suggestions you may have for future topics of the INDA Impact. Please feel free to contact myself or the author, Brad Kalil, on any aspect of this report.



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