

# **South American Nonwovens Industry Outlook 2015 – 2020**

**A Review and Forecast of the South American Nonwovens  
Supply and Demand for 2010, 2015 and 2020**



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## Foreword

A.D. Jezzi & Associates and INDA are pleased to publish INDA's fourth nonwovens market outlook in regards to the South American nonwovens industry. The updated version of the South American Nonwovens Industry Outlook report covers the nonwoven industry in the South American region, defined here to include South America, Central America and the Caribbean. It is amazing how quickly the South American nonwovens industry has grown. INDA's first look into the region, the 11-page Analysis of the Nonwovens Industry in Brazil published in 1998, involved a market of 65,000 tonnes in 1997. The South American region has rapidly grown to a region producing 582,000 tonnes, importing a net of 132,000 tonnes in 2015 to meet the region's growing nonwoven demand, based upon this 180-page report.

This study is built up from the region's macro-drivers — economic and demographic trends — as those are the significant drivers of demand within the nonwovens industry. The study is further framed within the regional and local economic environments and the nonwoven industry's technological and market environments, primarily focusing on those of the largest end use, with slightly more than a third of production directed towards the disposable absorbent hygiene products category.

This report presents detailed supply and demand data for the region's nonwoven industry for 2010 and 2015, and a forecast to 2020. Specifically, the goals of the report were to:

- provide economic and demographic trends, as they are significant drivers of demand within the nonwovens industry
- present industry production data by process and end-use markets
- explain industry trends within regions, processes, end uses, and trade flows
- provide an overall picture of regional's nonwoven roll goods trade
- define and clarify production processes and end-use market segmentation to provide greater clarity in the industry.

It is also one of the elements of INDA's mission to provide credible statistics to its members and the overall industry. To that end, this report was published to provide a benchmark of the industry's progress through the years in the region. This information is intended to assist those in the nonwovens industry in making better business decisions.

While no study is perfect, both A.D. Jezzi & Associates and INDA have taken the time and applied their knowledge to make this the most accurate and comprehensive analysis of the South American region nonwovens industry. The reader should keep in mind that the data provided in this publication are estimates, based upon the methodology outlined in the appendix. It should be viewed as directional and intended to provide a broad overall view of the region and the market volumes and growth potential.

It is our intention to continue to improve the quality of data and industry information. Your comments are what drive change, and we would appreciate your suggestions for information you would like included in future reports of the nonwoven industry. Please feel free to contact either of the report authors (Rick Jezzi, A.D. Jezzi & Associates and Brad Kalil, INDA) regarding any aspect of this report.



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