



ABOUT THE COMPANY

Business Overview:

Fiberweb India Ltd. was established in 1985 and was engaged in manufacturing and exporting of injection Moulded, Blow Moulded and Roto Moulded products on German machinery along with the Garbage bags and Carrier bags. With the growing global demand for non-woven fabrics and to de-risk the existing business model, Fiberweb decided to diversify into the non-woven business in early 90's. The Company established its flagship unit for Spun Bond Nonwoven Fabrics, being the first of its kind in India. Since the commissioning of the plant in the year 1996, the Company with its excellence in manufacturing, has attained glorious heights in producing and supplying high quality roll goods to various users all over the world including few of the fortune 500 clients.

The company manufactures innovative, quality spun-bond polypropylene nonwoven roll goods and products used globally in various industries, such as hygiene, agriculture crop cover and medical & industrial clothing.

FWB is an 100% export oriented unit (EOU) with 75% of its products exported to countries like U.S.A., U.K., Europe, Australia, New Zealand, South Africa and Gulf countries. Due to its focus on quality and consistency, the company's products command a premium in the market. In India, the company supplies to Multinational companies like Johnson & Johnson India Ltd. and Unicharm India Ltd.

The Company has implemented comprehensive quality management systems in all functional areas like marketing, material management, production, maintenance, quality assurance and customer services, to fully satisfy the customer under ISO 9001:2015 , ISO 14001:2015 & ISO 45001:2018 certified by quality Registrar Intertek and UKAS. The Company also holds authorization/accreditation conforming to Oeko-Tex standards from Hohenstein Textile Institute, Germany. The main Raw Material Polypropylene is imported from world class renowned producer Exxonmobil Co. U.S.A.

Product Portfolio & It's Usage



- **Industrial applications** - Hospital masks & Industrial garments
- **Automotive** - Bumper covers ,Interior carpets, Trunk carpets, Underbody panels
- **Agricultural Applications** - Crop cover, Soil cover , Weed protection
- **Personal hygiene applications** - Baby diapers, Female hygiene & Adult diapers
- **Textile Applications** – Curtains, lining/Backing/Interlining in upholstery, luggage & garments, Bedsheets / pillow covers
- **Technical Application** - Geotextiles & Structural Engineering



Melt Blown Fabric



- **Medical Fabrics** – Face masks, disposable gowns, drapes & sterilization wraps.
- **Oil Adsorbents** – For oil spills in water & mats in machine shops /industrial plants.
- **Wipes** - face wipes, hand wipes, surface cleaning (wood, leather, floors, tiles etc).
- **Filtration** - surgical face masks, liquid filtration, gas filtration, cartridge filters, clean room filters etc
- **Sanitary Products** - feminine sanitary napkins, diaper & disposable adult incontinence products
- **Apparel** - Disposable industrial apparel, thermal insulation and substrates for synthetic leather

Competitive Strengths:

Pioneer and amongst leading players in manufacturing of Spun bond nonwoven fabric in India

Well set supply chain, with most of the raw material sourced from the world's largest O&G company, Exxon Mobil

State-of-art manufacturing facility at Daman, with machines procured from Reifenhauer GMBH of Germany

Best in class product quality with International accreditations and certifications - ISO 9001-2015, 14001-2015, ISO 45001:2018, Intertek and UKAS

Product innovation & cost competitiveness.

Key Milestones

1986 – Established as a plastic moulding company

1995 – Forayed into manufacturing spun bond nonwoven fabrics, 5000 MTPA spun bond capacity installed

1996 – 2009 - Started exports to North America, Subsequently started exporting to UAE, Europe, UK, South Africa, New Zealand & Australia

2016 – Came out of BIFR 2500 MTPA of leased spun bond capacity signed up

2017 – Set up a 100% sub in Dubai, to trade in lower value spun bond fabrics. Started exporting value added products (converted products) in spun bond & Became Zero Debt company with positive net worth



2019 – Successfully commissioned Melt blown line with a 1500 MTPA capacity

Manufacturing Facility



The Company has its manufacturing plant situated in Daman. Spread across an area of 85,000sq.ft.

With one of the most modernised plant & Equipment.

Capacity:-

Spun Bond – 5000 MTPA

Melt blown – 1500MTPA



Industry Overview:

The Global consumption of non-wovens in 2019 is 11.2 million tones or 307.0 billion square meters (m²), valued at \$ 46.8 billion.

The non-woven fabric market is expected to witness a healthy growth, at an estimated CAGR of 7.25%, over the forecast period (2019-2024). Growing application base in the healthcare and personal care industry, along with increasing demand from the automotive industry, is expected to drive the market studied. However, lack of awareness among consumers, wherein they consider nonwoven fabric products to be harmful to the environment (and not taking into consideration the positive quality attributes of polypropylene, which is used in making nonwoven fabrics), is expected to hinder the growth of the market studied.

In 2018, the spun bound segment dominated the market, by technology, and it is also likely to witness the highest CAGR during the forecast period.

The nonwoven fabric market is witnessing considerable growth due to the growth in modern healthcare in developing market and positive awareness about environmentally friendly fabrics. This market has immense potential of new technologies. The regulatory frameworks are also promoting the usage of Non-woven fabrics. In 2018, the healthcare segment dominated the market, by end-user application. The Hygiene sector is projected to dominate the non-woven fabrics market in coming years.

Market Snapshot



*source- www.smithers.com



Key Market Trend

Increasing Demand from the Healthcare Industry

- Non-woven fabric is used to make various products in the healthcare industry, such as surgical gowns, aprons, drapes, face mask components, and wound dressings, among others. They are also used in hygiene products, such as sanitary towels, sanitary napkins, tampons, baby diapers, and napkin liners.
- The demand for new and better-performing products is propelling the non-woven industry. There is a significant demand for non-woven fabric from the healthcare industry. Increasing surgeries and construction of new medical facilities are the primary driving forces for this market.
- In Europe, cataract surgery, the extraction of the lens from an eye, was conducted 4.2 million times across the EU Member States, making it one of the most common surgical operations. In Germany, Sweden, Finland, Malta, the Czech Republic, Luxembourg, Estonia, France, Austria, and Portugal, cataract surgery was performed 1.0 thousand times or more, per 100 000 inhabitants, in 2015.
- Moreover, recently, there has been an increase in medical facilities across the United States, especially in the Texas state. The government activities on improving the health of the population in rural areas are driving the market. For instance, in 2017, the US Department of Agriculture provided more than USD 1 billion, to help improve access to healthcare services for 2.5 million people in rural communities in 41 states.
- Asia-Pacific is expected to witness a significant increase, over the forecast period, for hygiene products, due to the increasing adoption of female hygiene products in countries, like India, China, etc.
- In India, according to the BCH (Indian Non Wovens Industry Association), the market penetration rate of sanitary napkin increased by 18%, from 2014.
- Other factors, like population growth, increasing aged population, and better awareness about hygiene among women in developing countries, are the other factors driving the demand for non-woven fabrics in healthcare.

Nonwoven Fabric Market: Revenue(%), by End-user Application, Global, 2019 and 2024





Asia-Pacific Region is the Largest Consumer

- Asia-Pacific is expected to be the largest consumer, globally, owing to the commissioning of additional capacities, as well as an increase in the production of non-woven fabric in the region.
- In terms of consumption and production of non-woven fabric, in 2018, China held the largest share, globally.
- The textile industry in China is booming, with increasing investments and government support from the 13th Five Year Plan. Textile and apparel makers in the country are going through painful industrial restructuring. While the country, with enormous production capacity, is still the world's largest clothing exporter, oversupply at home, high labor costs, and rising global protectionism have all eroded its competitiveness.
- The Chinese government is planning Xinjiang as the hotbed for the textile and apparel manufacturing, and has invested USD 8 billion. China's northwest region is expected to become the country's largest textile production base by 2030.
- The year 2016 was the first year of China's 13th Five Year Plan. It was an important year for the country's engineering, procurement, and construction (EPC) industry, as it ventured into new business models, domestically and internationally. In 2017, China's construction industry developed rapidly due to the central government's push for infrastructure investment, as a means to sustain economic growth.
- All the aforementioned factors, in turn, projected to increase the market at high rates, owing to the rapid growth of end-user industries in the region.

Nonwoven Fabric Market - Growth Rate by Region, 2019-2024



Competitive Landscape

The market is highly fragmented, with the top eight players accounting for almost 20% of the global market, in 2018. The market is extremely competitive, with various major manufacturers engaging in



strategic mergers and acquisitions to expand their market share. Major players in the market include Berry Global Inc., Freudenberg Performance Materials (Freudenberg Group), Kimberly-Clark Corporation, and DowDuPont, among others.

Key Domestic Markets Trends

- India's nonwoven market is growing at a rate of 8-10% & the market is expected to grow at a rate of 12-15 % in future.
- Production of non-woven in India is estimated at ~3.65 lakh MT for 2016, a growth of 17% YoY
- Most of the tonnage today is going into low end, cost competitive products constituting of shopping bags, carpets and backings.
- However the consistent growth showing up usage in automotives, filtration, geotextiles and the medical and hygiene sector, the growth will escalate in value terms too.
- The personal hygiene market is expected to grow @ CAGR of 20% till 2020, led by rising disposable income and increasing awareness
- The Geotextile market is expected to reach ~USD 9.3bn by 2022 @ CAGR of 10.2% from 2017
- India is expected to emerge as the world's 3rd largest passenger vehicle market by 2021 with annual production to ~5mn vehicles. This will increase the demand for non-woven
- The Indian packaging industry is likely to witness CAGR growth of 18% with the increase in share of non-woven