

Nonwovens Markets

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Wuhan hygiene event draws 50,000 attendees and 1,100 exhibitors to share market issues

The 32nd China International Disposable Paper Expo (CIDPEX2025) and the Tissue & Hygiene Conference program were held in Wuhan, the capital city of Hubei province in central China in the third week of April, in what some were informally dubbing the Wuhan hygiene week.

According to the organizer China National Household Paper Industry Association (CNHPA), over 700 delegates participated in the 2-day conference on Apr. 14-15. This was followed by the 3-day CIDPEX2025 trade fair, which attracted about 1,100 exhibitors from throughout the supply chain and over 50,000 visitors.

Conference. The 2-day tissue & hygiene conference included four sessions: Marketing and Wipes on day 1; Hygiene and *>>> continued on page 5*

Israel-based Shalag Group invests in new hygiene location site in state of Virginia

Shalag Group has recently opened a new state-of-the-art manufacturing plant in South Hill, VA, in an investment that will create 52 new jobs. It will significantly enhance the company's production capacity and reinforces its commitment to serving a customer base with high-quality nonwoven fabrics.

Virginia Governor Glenn Youngkin in September 2024 had announced that Shalag U.S. Inc. would invest \$16.6 million to open the new facility located in Mecklenburg County.

"I am gratified to see another international company select Virginia for a new U.S. facility, reinforcing the strategic advantages a Virginia location offers," said Gov. Youngkin at the time. *>>> continued on page 9*

APR advances in Vietnam with sustainable textiles as viscose and lyocell take centre stage

Asia Pacific Rayon (APR), a leading global manufacturer of viscose staple fibre products, rolled out its viscose and lyocell products to potential buyers at the SaigonTex 2025 trade show the week of April 10 as part of a wider effort to support the creation of a more sustainable textiles sector in Vietnam.

The event, in Ho Chi Minh City, represents APR's largest presence in the country to date, reinforcing its commitment to the country's growing textile industry.

At SaigonTex, APR has shared its global expertise with the growing local market to demonstrate how the use and adoption of sustainable textile fibres, such as viscose and lyocell, can *>>> continued on page 9*

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EU Raw Materials

Polypropylene demand steady, polyester Q2 prices rises, Chinese viscose dropping

Despite continued poor demand and the prospect of lower priced imports polypropylene (PP) chip producers held contracted prices steady in March into April while spot prices continued to fall over the same period.

Buyers had no rush to replenish stocks thought chip producers would immediately drop prices by at least the monomer reduction. By the middle of April contract prices remained stubbornly at their March levels.

A further effect of tariffs is that although Europe is not a big buyer of PP from the U.S. it does purchase substantial amounts of polyethylene.

A tightness of supply caused by reduced volumes of PTA has led to European polyester (PET) prices rising significantly as the second quarter begins, while demand picks up.

Plants through western and northern Europe increased or planning to increase their output within the restraints of reduced availability of raw material. What little spot is available is commanding a premium price, and the increase in virgin chip prices came as a welcome relief for the recycled PET market.

Imported viscose pulp prices in China dropped for the first time in nine months and fell back from previous stability. Domestically produced pulp also slid but by a smaller amount.

Operating rates recovered after the Chinese New Year shutdown and climbed back to decent capacity. Inventory levels however rose during the holiday period and are steady. European viscose fibre producers are monitoring imported volumes closely.

Whilst it is too early to judge what effect the ever-growing tariffs imposed on China by the U.S. will have on viscose produced in China,

It seems obvious that considerable volumes intended for export to the U.S. will need to find an

alternative market, with the most obvious market likely to be Europe.

Polypropylene. Despite continued poor demand and the prospect of lower priced imports polypropylene (PP) chip producers held contracted prices steady through the second part of March and into April. However, spot prices continued to fall over the same period. The April monomer contract price was settled early down 55 Euros per tonne at 1,080 Euros per tonne. With buyers in no rush to replenish stocks it was generally thought that chip producers would immediately drop prices by at least the monomer reduction. However, by the middle of April contract prices remained stubbornly at their March levels of between 1:46 to 1:53 Euro per kg. With spot prices dropping a further 20 to 50 Euros per tonne it seems inevitable that producers will have to reduce prices before the month end. The continued uncertainty generated by events in the U.S. has seen crude oil prices collapse by 19% which is certain to feed into lower naphtha prices. Also imported volumes have started to increase. Whilst Europe is not a large buyer of U.S. PP the tariffs

US producer price index: nw roll goods, products, raw materials

	Mar 2025	Feb 2025	Mar 2024	Monthly % Chg	Annual % Chg
Nonwoven fabric mills (12/1985)	177.2	177.0	176.3	0.1%	0.5%
Primary products (12/1985)	182.5	182.3	181.5	0.1%	0.5%
Nonwoven fabrics (12/1985)	184.8	184.7	184.0	0.1%	0.4%
Pressed, punched, needled felts (except hats) (12/1985)	168.1	168.0	164.7	0.1%	2.1%
Nonwovens and felt goods (1982)*	200.4	200.2	199.3	0.1%	0.5%
Disposable diapers and similar products (12/2003)	106.1	104.9	103.7	1.1%	2.4%
Sanitary paper prods from purchased materials (12/2003)	173.1	168.3	161.0	2.8%	7.5%
Primary prod. (from artificial fib. & fila. man. ind.) (6/1981)	157.4	160.8	170.8	-2.1%	-7.9%
Polyester fibers (12/1989)	156.9	156.9	151.6	3.5%	3.5%
Other noncellulosic organic fibers (6/2011)	119.7	123.4	137.1	-3.0%	-12.7%

The Producer Price Index measures the average change over time in the selling prices received by domestic producers. Data is relative to the base date, which equals 100. The base date is reported in parentheses. Source: US Department of Labor, Bureau of Labor Statistics. * Commodity data, rather than industry data. n.a. = not available; n.m. = not meaningful.

placed on other countries have seen a significant shift in their trade flows. For example, Canada has shifted the sales of a major percentage of its production away from America into Europe and other markets. Large amounts of imported PP are expected in Europe during quarter two from countries such as Vietnam, Korea, China and the Middle East, all countries hit by American tariffs.

A further effect of tariffs is that although Europe is not a big buyer of PP from the U.S. it does purchase large amounts of polyethylene. If European polyethylene production is ramped up to replace these volumes it will inadvertently lead to higher propylene production which will further put downward pressure on PP chip prices. However, decisions of such magnitude are not undertaken lightly, and the entire market is waiting to see just what will happen in the next few weeks and months. In the short term with spot prices crumbling, it seems inevitable the European PP chip prices will have to fall before the month end.

Fibre producers find it difficult to adjust to chip price movements late in the month. At the moment they are leaving prices unchanged at between 2:04 and 2:09 Euro per kg for thermal and hygienic grades and between 1:63 and 1:73 Euro per kg for commodity grade fibres. These prices seem certain to fall in May.

Polyester. A tightness of supply caused by reduced volumes of PTA has led to European polyester (PET) prices rising significantly as the second quarter begins. Demand is beginning to pick up after months of slow activity and the market is in a state of

high alert. Plants in Belgium, Germany and Lithuania have increased or are planning to increase their output as much as they can within the restraints caused by the reduced availability of raw material. At the moment there are no actual shortages, but most of the European production is committed to contract volumes leaving very little domestic product available for the spot market. What little spot is available is commanding a premium price. Imported product is scheduled to arrive before the end of the month and throughout the second quarter which should ease the situation going forward. As with so many other sectors there is considerable confusion around just how the American tariffs will affect the polyester market. If the high tariffs are implemented against Chinese and other producers exporting to the U.S. then Europe will become a more attractive market for these manufacturers. As a consequence of these factors PET contract prices have risen by up to 12 Euro cents to between 1:10 and 1:18 Euro per kg. Spot where available has risen by more and is now at a premium over contract at between 1:12 and 1:20 Euro per kg. Many European buyers who had been happy to rely on spot purchases throughout 2025 were reluctant to commit too great a percentage of their requirements to contract for 2025 and are now struggling to get the volumes they require. If demand does pick up significantly and imports do not increase the situation may become more difficult.

Fibre producers have been able to keep prices relatively stable recently but in the current uncertainty have had little option other than to increase prices

with fibres produced from 100% virgin chips rising significantly to between 2:01 and 2:10 Euro per kg.

The increase in virgin chip prices has come as a welcome relief for the recycled polyester market. Prices for post-consumer bottles have risen in Italy, Poland and the Czech Republic and this coupled with the higher prices for virgin chips has meant that polyester flake prices have risen slightly with hot washed colourless flakes up to between 1:00 and 1:10 Euro per kg. Fibre producers have seen their margins eroded significantly over recent months and with virgin fibres rising have been able to increase their prices by similar amounts. Fine denier non-woven fibres produced from flake have risen to between 1:76 and 1:90 Euro per kg. Non-woven fibres 6 denier and above have risen by a similar amount to between 1:51 and 1:71 Euro per kg.

Viscose. Chinese imported viscose pulp prices dropped for the first time in nine months, falling back \$40 per tonne to \$930 per tonne. Domestically produced pulp also fell back but by a smaller amount and is now slightly more expensive than imported product at \$942 per tonne. Commodity grade viscose staple fibre prices however rose slightly, and this coupled with the lower pulp prices allowed viscose fibre producers to increase their margins by up to \$70 per tonne to around \$732 per tonne.

Operating rates have recovered after the Chinese New Year shutdown and climbed back to around 84% of capacity. However, inventory levels rose during the holiday period and are still at more than eleven days of supply and may put some downward pressure on fibre prices.

Chinese cotton prices have risen by about \$35 per tonne to around \$2,050 per tonne. During the same period the global A-Index price slipped marginally, dropping \$4 per tonne to \$1,720 per tonne. The differential between Cotton and Viscose in China has dropped to \$155 per tonne it's lowest differential since April 2021.

European viscose fibre producers are monitoring imported volumes closely. Whilst it is too early to judge what effect the ever - growing tariffs imposed on China by the U.S. will have on viscose produced in China, it is obvious that considerable volumes intended for export to the U.S. will now have to find an alternative market. The most obvious market is likely to be Europe. Falling shipping costs from the Far East will also help and European producers are expecting an increased volume of imported product at attractive prices to start arriving in the second quarter. As a consequence, there is some reluctance by buyers to commit to fixed prices for the whole of the second quarter and so far European producers are only offering modest price reductions in the order of two, or three, Euro cents but higher reductions may be negotiated later in the month for more long term contract commitments. By mid-April European prices for standard grade viscose were down slightly at between 2:28 and 2:37 Euro per kg with speciality grades down by the same amount to between 2:38 and 2:47 Euro per kg. With the situation regarding tariffs changing day by day the market is very unsettled and further movements and volatility are almost certain throughout the second quarter and beyond.

Dissolving pulp

Yibin Grace opens its first recycled viscose textile facility in China

Producers of man-made cellulosic fiber (MMCF) products, Yibin Grace, in early April opened its first main recycled textile facility for dissolving pulp in China.

With an initial capacity of 1,500 tonnes/yr, the facility is located in Yibin, Sichuan Province, China, and built to address the growing need for circular materials to replace the use of high-carbon forest fiber in the textiles sector. Yibin intends to expand its Next Gen production to 60,000 tonnes/yr by 2027 with market support.

The company also has a 30% ownership interest in a fourth facility in Xinjiang Province, China.

Adding to the circular viscose supply chain, the new pilot facility uses post-industrial and post-consumer textile waste from supply chain partners to produce high quality, low-carbon dissolving pulp, which can be used in a variety of MMCF products.

"Canopy is thrilled with Yibin Grace's leadership with the launch of China's first Next Gen textile dissolving pulp mill," said *Canopy Planet* founder and executive director Nicole Rycroft. "Expanding circular production positions the sector to withstand supply volatility associated with increased forest fires and to capture markets looking for low-impact materials. We look forward to Yibin scaling this technology to commercial levels and being an early-solution provider to the textile sector."

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Canopy says its mission is to protect the world's forests, species, and climate, and to help advance frontline communities' rights. The news also is from staff of *Home Textiles Today*.

Yibin Grace is one of China's leading producers of MMCF and has a combined production capacity of 450,000 tonnes/yr of viscose staple fiber, viscose filament yarn, and lyocell products. It was also one of the first MMCF producers to use Circulose recycled pulp in its viscose staple fiber and viscose filament lines, under the brand name ReGracell.

It operates its single facility dedicated to producing viscose, which has attained the aspirational level across three critical areas of chemical management: the recovery of chemicals, the discharge of wastewater, and the emission of air pollutants.

Acquisition

US materials group Airtech acquires UK-based Cosmotec Nonwovens in strategic deal

Blackburn, UK-based nonwoven textile manufacturer Cosmotec Nonwovens on April 16 joined global industrial leader Airtech Advanced Materials Group, expanding capabilities and reach across Europe.

Headquartered in Huntington Beach, CA, Airtech, a global supplier of high-performance materials acquired Cosmotec Nonwovens in a strategic move to expand its European footprint and broaden its product offering across multiple industrial sectors.

The cross-border transaction was advised by corporate finance specialists Headpoint Advisors, acting on behalf of Cosmotec's parent company, Cha Technologies Group – a Switzerland-headquartered conglomerate with interests in textiles, property, technology, healthcare, and financial services.

Founded in Blackburn, Cosmotec manufactures crafted needle-punch and air-bonded nonwoven textiles from its eight-acre site in the heart of the UK's historic textile manufacturing region. Its products serve the geotextile, filtration, construction, and automotive markets, with a reputation for specialist engineering, agile lead times, and high-quality technical output.

The acquisition represents a major milestone for Cosmotec, which will become an integral part of Airtech's global operations. With a presence already spanning the US, Europe, and Asia, Airtech supplies advanced materials to the aerospace, composites, defence, and automotive industries. By integrating Cosmotec's capabilities, Airtech will strengthen its European manufacturing base and enhance its ability to serve global customers with an expanded range of nonwoven solutions.

"Headpoint assisted us in this process with great professionalism and delivered a successful sale of Cosmotec to an ideal international strategic buyer in Airtech," commented Group CEO of Cha Technologies Group Jacques Boubal. "Communication with Headpoint was always constructive, and the team was readily available and responsive to our needs, driving the deal to completion."

The deal underlines growing international interest in UK-based industrial innovation and reflects a broader trend of global players seeking high-value, specialist manufacturing capabilities in Europe.

"This is a great example of a strategic cross-border deal where both parties bring complementary strengths," added Managing Partner at Headpoint Advisors Mark Wilson. "Cosmotec's niche product knowledge and short lead times perfectly match Airtech's ambition to scale in Europe. We're delighted to have supported Cha Technologies and wish all teams continued success."

This deal reinforces Headpoint's track record in advising on international transactions involving specialist manufacturing businesses and delivering results that align with shareholder objectives and long-term strategic growth.

Separately, Airtech Advanced Materials Group announced on April 8 the integration of French company Kimya Chemical Technologie's high-performance filament portfolio into its established range of pellets and filaments for Additive Manufacturing applications. Founded in 2017, Kimya is a subsidiary of Armor Group and in late 2024 announced the closure of its production site based in Les Sorinières, France.

Production of these high-quality filaments would begin at Airtech Europe headquarters in Luxembourg, EU, and will be offered alongside Airtech's trusted Dahltram® pellet and filament resins.

Wuhan hygiene events

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Tissue on day 2. In the hygiene session, Ms. Zhang Yulan, secretary-general of CNHPA, delivered a presentation on overview and prospects of the Chinese disposable hygiene products industry.

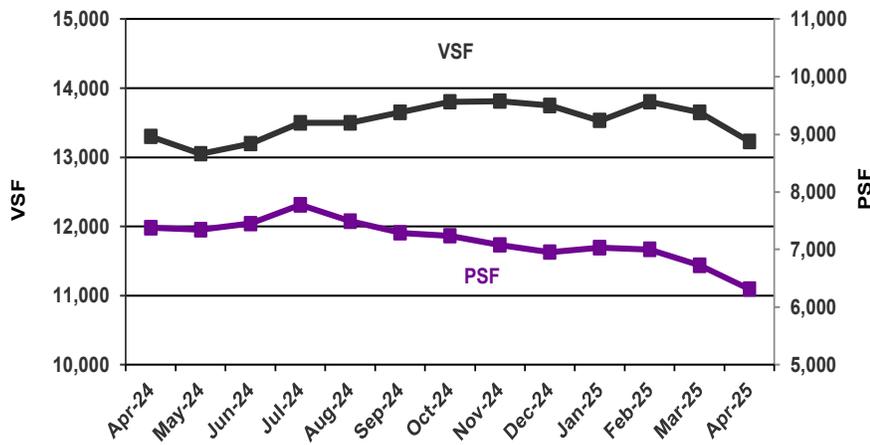
Market statistics. According to her, the sales (market size) of China's absorbent hygiene products (AHPs) – including feminine sanitary products (feminine napkins, pants and pantyliners), baby diapers, and adult incontinence products – reached 132.13 billion yuan (\$18.13 billion) in 2024, achieving a year-on-year increase of 13.87%. Sales of wipes – including wet wipes and dry wipes – was 23.61 billion yuan in 2024, an increase of 10.07% compared with 2023.

The 2024 compound annual growth rate (CAGR) of the AHPs sales was 2.1%, and the CAGR of the wipes sales was 1.3%, according to CNHPA.

Feminine sanitary products. Sales of China's feminine sanitary products were 86.71 billion yuan (2023: 70.34 billion yuan), which accounted for 65.6% of the overall sales of China's AHPs in 2024. The market consumption of feminine sanitary products was 120.34 billion pieces in 2024 (2023: 117.61 billion pieces). China's net export value of feminine sanitary products was 3.91 billion yuan in 2024 (2023: 3.68 billion yuan).

In 2024, output of feminine napkins was 101.79 billion pieces. Output of pant-type napkins was 6.97 billion pieces. Output of pantyliners was 28.81 billion pieces.

Chinese staple fiber prices (yuan/tonne)



Source: China Textile City Group

Chinese Staple Fiber Prices (yuan/tonne)

	PSF	VSF
Apr-24	7,380	13,300
May-24	7,345	13,050
Jun-24	7,450	13,200
Jul-24	7,775	13,500
Aug-24	7,490	13,500
Sep-24	7,293	13,650
Oct-24	7,240	13,800
Nov-24	7,080	13,810
Dec-24	6,955	13,750
Jan-25	7,030	13,530
Feb-25	7,000	13,800
Mar-25	6,725	13,650
Apr-25	6,310	13,230

Source: China Textile City Group. Prices shown are for ninth trading day of the month. The PSF is 1.4 denier and the VSF is 1.5 denier.

According to Zhang Yulan, more brands have entered into the pant-type napkin market in 2024, which caused the average price of pant-type napkins dropped. In addition, the market size of pantyliners continued shrinking.

Baby diapers. Sales of baby diapers were 31.71 billion yuan (2023: 32.26 billion yuan), accounting for 24% of the overall sales of China's AHPs in 2024. Output of Chinese baby diapers and pads was 42.72 billion pieces (2023: 39.39 billion pieces). The net export value of baby diapers 13.16 billion yuan (2023: 11.16 billion yuan).

Output of baby diapers was 41.27 billion pieces (2023: 37.93 billion pieces), and output of baby pads was 1.45 billion pieces (2023: 1.46 billion pieces). The 2024 consumption of Chinese baby diapers (including pads) was 25.86 billion pieces (2023: 25.78 billion pieces).

Zhang Yulan pointed out that over supply, fierce market competition and declining average price have caused the market size to shrink continuously.

Adult incontinence products. In 2024, sales of the adult

incontinence products were 13.71 billion yuan (2023: 13.44 billion yuan), accounting for 10.4% of the overall sales of AHPs. The net export value was 5.79 billion yuan (2023: 4.94 billion yuan).

Output of adult diapers was 7.07 billion pieces (2023: 6.53 billion pieces). Output of adult pads was 1.64 billion pieces (2023: 1.62 billion pieces). Output of light incontinence products was 860 million pieces. Output of bed pads was 5.7 billion pieces (2023: 5.27 billion pieces).

Consumption of adult diapers was 4.09 billion pieces (2023: 3.94 billion pieces). Consumption of adult pads was 541 million pieces (2023: 540 million pieces). Consumption of bed pads was 4.59 billion pieces (2023: 4.48 billion pieces).

According to her, 80% of China's output of adult incontinence products was for export. The domestic market is still in the embryonic stage, which needs to be cultivated.

Wipes. Sales of the Chinese wipes market were 23.61 billion yuan (2023: 21.45 billion yuan). The net export value was 7.71 billion yuan (2023: 6.75 billion yuan). The net export value was 7.71 billion yuan (2023: 6.75 billion yuan). In 2024, a total 752 thousand tonnes of nonwovens were consumed by the Chinese wipes industry (2023: 627 thousand tonnes).

Manufacturers. In 2024, 611 feminine hygiene product manufacturers were registered (2022: 619) according to CNHPIA. The number of baby diaper manufacturers in the country was 564 (2023: 571). In addition, 368 adult incontinence product manufacturers

were registered (2023: 401). Registered wipes manufacturers totalled 922 (2023: 927).

Japanese market. Mr. Shinya Takahashi with Japan Hygiene Products Industry Association (JHPIA) presented on the 2024 Japanese disposable hygiene product industry. The 2024 new-born population of Japan dropped by 4.9%. The aging population accounted for 29.3% of the whole population of Japan.

The 2024 sales of baby diapers and adult diapers of Japan were 130 billion yen (\$913 million) and 229 billion yen respectively. Sales volumes of baby diapers and adult diapers were 7.9 billion pieces and 9.59 billion pieces respectively.

Japan's production volume of baby diapers was 7.99 billion pieces in 2024 (2023: 8.87 billion pieces). According to him, high value-added and highly functional products will increase. Lineup for pants made from natural materials will expand. Production volume of adult diapers and light incontinence products was 9.6 billion pieces in 2024. The market will continue to expand.

African market. Mr. Raymond Chimhandamba with Handas Consulting introduced the African hygiene market to the audience. According to him, key drivers of African's baby diaper market include an increasing birth rate, urbanization and growth of the retail sector, growing income, health awareness and hygiene concerns, and etc. In terms of the feminine napkin market, key drivers include an increasing awareness, government initiatives and support, removal of VAT on sanitary pads, and some economic factors. In addition, key drivers of the adult incontinence products market

including the aging population, an increasing awareness, healthcare infrastructure development, and availability in normal retail.

According to him, the African wipes market is characterized by a rise in private label products alongside established brands, particularly in baby wipes and all-purpose cleaning wipes. Additionally, there is a growing interest in eco-friendly options as consumers become more environmentally conscious. Innovations in formulations, packaging, and marketing strategies are also shaping the competitive landscape of the wet wipes market in Africa.

Flushable nonwoven. Zhang Jianxin, founder of Zhejiang Dekang Environmental Protection Technology Co. presented on flushable nonwoven and moist toilet tissue. According to him, China's sales of moist toilet tissue was less than 1 billion yuan in 2020. But the sales reached about 4 billion yuan in 2024. China's sales volume of flushable nonwoven was 120 thousand tonnes in 2024.

According to him, over supply will sustain in the Chinese moist toilet tissue industry in 2025. The overall capacity of flushable nonwoven has been 350 thousand tonnes in 2024. Market price of flushable nonwoven started to drop remarkably since June 2024. The domestic flushable nonwoven industry will face destocking pressure and severe price competition in the coming 4-5 years, according to him.

China's moist toilet tissue industry has maintained rapid in recent years, although the growth rate has slowed down. The market size is continuing to expand. The penetration ratio in the domestic

market has exceeded 5%, with about 30 million long-term users.

Going overseas. The topic 'going overseas' has been discussed in panel discussion section of the conference for three continuous years since 2023. With competition in the Chinese domestic market intensifying, going overseas to explore new opportunities has been regarded as a good choice among the domestic hygiene companies.

This time, under the backdrop of the recent tariff war between China and the US, the panel discussion on day 1 afternoon attracted a lot of attention. The six panellists agreed on the point that going overseas is an inevitable choice for the domestic hygiene companies, no matter what kind of situation is in front. The current uncertainties will not be permanent, and the companies should have confidence. If America were not a good investment destination presently, they could consider going to the regions such as ASEAN.

A panellist pointed out that before going overseas, the companies should fully understand their advantages and choose proper strategies. Meanwhile, preparing a Plan-B investment strategy is important. When some emergency or challenge hit the destination of Plan-A, the company could transfer to the destination of Plan-B as soon as possible.

CIDPEX2025. According to the event organizer, the 3-day CIDPEX2025 fair attracted more than 50,000 visitors including 4,000 overseas visitors.

New NW lines. Several Chinese nonwovens companies announced startup of new nonwoven lines or

signed contracts with machinery suppliers in the trade fair.

On Apr. 16, Alear Silk Road New Materials and Andritz signed a long-term cooperation contract in the booth of Andritz. Three Andritz neXline aXcess crosslapped spunlace lines will be supplied to the company. Products of the lines will be applied in medical and hygiene fields.

Alear Silk Road New Materials, a state-owned enterprise, was founded in March 2025 in Alear of Xinjiang, which focuses on spunlace nonwoven manufacturing and plans to become the biggest spunlace production base in the country. On Apr. 10, the company signed a cooperation contract with another machine supplier ZFJ Textile machinery Co.

On the morning of Apr. 17, Trützschler and Zhejiang Uniway New Materials Co. held a ceremony in the exhibition center to celebrate startup of two new Trützschler crosslapped spunlace lines in Uniway. The lines manufacture spunlace nonwoven for medical care, personal care and industrial fields.

On the afternoon of Apr. 17, Trützschler and Hebei Hongrun celebrated startup of a Trützschler half crosslapped spunlace line with annual capacity of about 7,500 tonnes (depending on fiber type, weight and width) in Hebei Hongrun, for manufacturing dry wipe and wet wipe. This has been the second Trützschler spunlace line of Hongrun.

Also on Apr. 17, Trützschler and Kingsafe Group held a signing ceremony in the trade fair that Kingsafe will introduce two new Trützschler 3.8-meter airtrough-

bond nonwoven lines. Products will be applied in the baby and feminine care fields. According to Kingsafe, it has operated five Trützschler spunlace lines until now.

Xiaoshan Phoenix Nonwoven introduced its DualNet Spun spunlace nonwoven to visitors in its booth. According to Jack Shi, CEO of the company, the 8th spunlace line of the company has been started up at the end of March, supplied by Andritz. With annual capacity of over 10,000 tonnes, the new line could manufacture wood pulp plus viscose dry wipe and bio-degradable wipe.

New products. In such a market with fierce competition, a lot of Chinese hygiene companies are trying their best to launch new product series of new selling points. Some brands applied concepts such as 'cranberry' and 'probiotics' into their products.

Coco exhibited its light incontinence pad with cranberry essence, which claims to have good anti-bacteria function. Hengan exhibited its cranberry feminine napkin. In addition, Hengan, Sanxiao, and some other exhibitors brought their feminine napkins added probiotics, claiming to be good for health.

Some companies exhibited their composite cores with special network structures for diapers and napkins.

SAP and fluff pulp. Compared with the previous editions, this time, more super absorbent polymer (SAP) companies joined the trade fair. A contact working in a Chinese SAP manufacturer told *Nonwovens Markets* that use of fluff pulp will reduce in diaper manufacturing, especially under the background of the tariff war between China and

the US, and when the fluff pulp price increases inevitably. According to him, some manufacturers such as P&G and Drylock have developed pure SAP cores for diapers.

Another contact working in an American fluff pulp company has a different idea on this topic. According to him, the functions of fluff pulp and SAP are different in the hygiene field such as in the composite core. Fluff pulp could not be replaced by SAP, and fluff pulp will not lose the market either, he said. In addition, compared with hardwood pulp, softwood pulp has more advantages in hygiene applications. So, he is confident on the future of fluff pulp and softwood pulp in the Chinese market.

Lyocell and viscose. Lenzing and Sateri exhibited their spunlace nonwoven and viscose wipes in their booths. Lenzing created the household environment in the booth and introduced various types of wipes for different usages to the visitors.

When talking on the topic of lyocell, a contact with Lenzing told *Nonwovens Markets* that lyocell fiber will replace viscose in the wipes industry in the coming future, because lyocell fiber performs better in environmental protection, cost saving and some other aspects. However, a lot of consumers have gotten used to the softness offered by viscose wipes. Therefore, 5 to 10 years need to be spent on consumer education and products publicity, so as to let more consumers accept lyocell wipes which are more friendly to the earth, he said.

Presently, the application amount of lyocell fiber is about 10% of the

application amount of viscose in the wipes industry of the country. Also, this month in the Shanghai AWipes conference organized by China Nonwovens & Industrial Textiles Association, lyocell fiber was a hot concept among delegates. A market observer told *Nonwovens Markets* that lyocell fiber should be combined with other green fibers such as wood pulp fiber, etc. in the manufacturing process, to achieve the degradable function, better absorbency and better cost advantage.

Magnera. Magnera made its debut in CIDPEX2025 and exhibited its hygiene material solutions based on its global technology platform and local R&D capabilities.

In summer of 2024, Berry Global Group and Glatfelter announced the merger of Berry's Health, Hygiene and Specialties Global Nonwovens and Films business with Glatfelter, resulting in the creation of Magnera, the largest nonwovens company in the world, with a broad platform of solutions for the specialty materials industry.

In its booth, Mr. Yan Cui, General Manager, APAC, talked with *Nonwovens Markets*. He said that although the company uses a new name 'Magnera', the management team is the same as the past, and the products and services offered to the clients are as good as the past, too. He never worries about the challenge of client losing or misunderstanding after the company name and logo being changed.

In addition, he regards the management structure of Magnera as of high efficiency, which could respond to the market and market change in a quicker manner than in the past.

According to CNHPIA, the next edition CIDPEX2026 is scheduled for April 15-17 in Nanjing of Jiangsu province.

Shalag Group

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"The creation of 52 new jobs will help this region continue its economic comeback while also demonstrating the resurgence of manufacturing that is happening across Virginia."

Shalag's cutting-edge 3D Hybrid technology combines aperturing and embossing to achieve the ultimate haptic experience, delivering unparalleled softness, strength, and absorbency. This technology is ideal for a wide range of applications including topsheets and backsheets for hygiene items and filter media HVAC systems.

The company's nonwovens and materials are the product of 40 years of experience and a team of dedicated and passionate people, with company sites in Upper Galilee, Israel; Oxford, North Carolina, and Via Livornese di Sopra, Italy. Shalag acquired Texus S.P.A. in 2019. The headquarters are in Kibbutz Shamir, Israel.

Founded in Israel in 1983, Shalag is leading producer of wide range of non-woven fabrics for use in products including diapers, feminine hygiene, air filtration, and cleaning wipes. The company in the US is taking over an empty industrial building that was previously occupied by Global Safety Textiles, which ceased operations in South Hill in 2024.

Vietnam emerges as textile hub

>>> continued from page 1

contribute to the long-term growth of the textile sector in the country.

Vietnam has emerged as a major regional textile hub in recent years, with growing levels of production and a skilled workforce. The country is a significant market for both viscose and lyocell products. According to industry research, the global market for both products is expected to grow by 6-10% annually till 2030.

The growing demand for sustainable textiles in the global market presents a key opportunity for APR to expand the reach of its viscose and lyocell products and to consolidate its presence in Vietnam, which is a key market for the company in the region.

"We have seen a strong interest in APR's viscose and Lyocell by Sateri," said APR's head of commerce Sachin Malik. "We believe that increased awareness and adaptation of these fibres hold promising opportunities to establish Vietnam as a hub for sustainable textiles, and we're excited to be a part of that journey."

"Vietnam is an important market for us, not just in South East Asia, but also in the global map," added APR International Sales head Amit Baid. "The connections and insights we gained for the Vietnam market at SaigonTex 2025 are very valuable. We are committed to providing ongoing support to local businesses and to developing applications as per the market dynamics."

The company Sateri is a global leader in the man-made cellulosic fiber (MMCF) industry, specializing in viscose and Lyocell fibers. It is known for its large production capacity and commitment to sustainability, with multiple fiber factories and a focus on biodegradable and high-quality cellulose fibers, according to Sateri's website.

Headquartered in Shanghai, Sateri has sales, marketing and customer service networking covering Asia, Europe, and the Americas and is part of the Royal Golden Eagle (RGE) Group.

Associations

Advocates EDANA, INDA for global collaboration on trade policies affecting nonwovens

EDANA and INDA on April 4 jointly expressed their concerns regarding escalating trade tensions especially in the U.S. and EU. Both associations have recognized the potential for countermeasures and reciprocal tariffs to negatively impact the nonwovens industry globally.

The nonwovens industry is a global sector with many companies having significant operations worldwide. It is crucial to avoid a harmful cycle of retaliatory tariffs that could have a net negative effect on economies worldwide, says the associations.

Both EDANA and INDA urge policymakers to prioritize negotiations and seek mutually beneficial resolutions.

"While we understand the need to address unfair trade

practices, we urge regions to prioritize negotiations and seek mutually beneficial resolutions," stated EDANA GM Murat Dogru. "Escalating tariffs create uncertainty and can disrupt supply chains, ultimately harming industries and consumers."

INDA Pres/CEO Tony Fragnito added, "The nonwovens industry supports fair trade and a level playing field. We encourage policymakers to consider the broader impact of trade measures and to pursue policies that foster collaboration and free trade."

Both associations highlight the significant role of the nonwovens industry in providing essential materials for various sectors, including hygiene, healthcare, and manufacturing in many regions. EDANA and INDA urge the U.S. and EU to recognize the interconnectedness of the industry and the importance of maintaining open trade between the regions. Choosing collaboration over conflict, and commitment to open markets and productive engagement, will pave the way for a future where trade acts as a catalyst for shared prosperity and innovation, to the advantage of industries and consumers alike.

Deforestation

EUDR boosts demand for sustainable goods, jumbo tissue in Europe

The advancement of the European Union Deforestation Regulation (EUDR) is driving European tissue buyers - including both converted goods and jumbo rolls - to become more focused on environmental

certifications, with the the Forest Stewardship Council (FSC) certificate the most requested, Fastmarkets learned during the Tissue World conference that concluded April 10.

The EUDR requires European importers to prove that their supply chains are not linked to deforestation, under penalty of fines. The regulation's enforcement was postponed by the European Parliament in December 2024. The current timeline stipulates that the rules will come into effect on Dec. 30, 2025, for medium and large companies, and on June 30, 2026, for small businesses.

At the conference, it was common for buyers to ask producers showcasing their products about certification status even before asking about product specifications, Fastmarkets noted.

Several tissue vendors displayed FSC certification visuals at their booths - on counters, walls, or next to their company logos - as a way to signal their certification. Others opted to include the FSC logo in their product catalogs.

"Communication is easier when the customer already sees the FSC logo displayed, because we don't have to explain that our company is certified. Still, in some cases, they ask for formal proof of our certification," a tissue exporter from Turkey said.

According to a US-based tissue trader, the demand for environmental certifications is expected to strengthen once the EUDR is fully enforced.

"We've seen a growing concern among buyers worldwide. Europe

is where the demand is strongest, but there's also significant concern about certifications in the US," the trader said.

The trader added that in regions like Latin America and Asia, the focus on certifications is not as strong as in Europe and North America. Still, it's only a matter of time before environmental certification becomes standard practice globally.

"Some major tissue producers in Brazil, Indonesia, and China do not yet hold FSC certification, but they are expected to continue exporting to Europe because the new regulation will allow a certain volume of tissue to be purchased without certification," the trader said, adding: "Companies without certification risk having to sell their products at lower prices, even if they maintain high quality."

PPI Latin America, April 15, 2025, by jorge.barbosa@fastmarkets.com

Polypropylene

Polyvel produces extra soft, nonwoven polypropylene products

Polyvel Inc., a masterbatch specialist, now produces nonwoven polypropylene (PP) products with extra soft surfaces efficiently and cost-effectively with the help of newly developed softening agents. The company helps to support fibre manufacturers and users to produce everyday products from PP nonwovens that are soft to the touch.

Suitable for all products with surfaces that are soft to touch, these process aids boast a high-quality appearance and are ideal for manufacturers of hygiene textiles. Additionally, potential users in the automotive, furniture, medical technology, processing industry, and construction sectors may also find Polyvel's solutions helpful.

Following extensive tests by neutral certification and testing laboratories, the additives were deemed to be completely harmless when in contact with human skin. It is particularly reassuring in use cases like baby's diapers and additionally is deemed food safe and PFAS-free.

Users recently have been focusing on additives for processing bioplastics like polylactide (PLA) that are in demand as they add specific technical and functional properties to applications.

Reported on April 15, Polyvel Inc. is based in Hammonton, NJ.

Cotton

RAAN launches as first 100% cotton wipe brand, using TruCotton process

RAAN, said to be the first-ever unbleached 100% cotton wet wipe brand, officially launches April 8, offering consumers a truly clean alternative in personal care. Designed with just five simple ingredients—including organic aloe—and 99% purified water, RAAN is setting a new standard in purity, sustainability, and performance. The brand's ecommerce shop went live, with major retail launches at

Walmart.com and Amazon to be announced later this year.

The TruCotton™ Innovation brand is the first wet wipe to earn the Natural Cotton Seal, a designation reserved for products made entirely of cotton. Unlike traditional wipes that contain plastic fibers or synthetic blends, RAAN's cotton fabric is minimally processed, unbleached, and retains the natural softness, strength, and hypoallergenic properties of cotton.

"We founded RAAN to challenge the status quo in personal and baby care," said CEO of RAAN Vanessa Menache. "Consumers deserve a wipe that's not only safe for their families but also genuinely sustainable. RAAN is about transparency—no plastic, no harsh chemicals, no greenwashing—just clean, effective care."

RAAN stands apart from the leading wipe brands by prioritizing ingredient integrity, sustainability, and efficacy. The brand's vertically integrated, domestic supply chain ensures complete transparency—from sourcing to production—and champions regenerative farming practices. All of RAAN's materials and packaging are sourced in the USA.

Key differentiators include a 100% Cotton & Natural Cotton Seal – The first wipe to bear this industry-recognized hallmark, ensuring unmatched purity and quality, and with just five ingredients featuring organic aloe, 99% purified water, and no unnecessary additives with Environmental Working Group (EWG) certified for safety and transparency.

The RAAN product's meanings includes Recent Advances in Animal Nutrition, Red and Anarchist Action Network, Reformed African American Network, and more.

Menstrual products

Maryland introduces bill for menstrual products in bathrooms

City council members in Maryland introduced a bill to expand access to menstrual products in all city-run bathrooms, including ones designated for men, as reported by *Fox News Digital*, based from New York City.

Councilman Paris Gray of Baltimore, the lead sponsor of the bill, introduced the legislation during the city council's bi-monthly meeting April 7. Gray said the bill is not just a proposal and reflects the city's commitment to menstrual equity.

"Access to menstrual products should be as fundamental as access to soap or toilet paper," the Councilman said. "It is an essential part of personal hygiene, and yet, for far too many people, these products remain out of reach. Menstrual products are not a luxury. They are a necessity, and the absence of access can create undue stress and hardship."

The bill is seen as nothing new, and Gray said the bill, if approved, will require all city-owned and leased buildings with public restrooms to provide menstrual products, free of charge.

Gray also said Baltimore is not joining a national movement for

menstrual equality but instead is leading a charge across the US.

In February, California's Long Beach Unified School District took similar measures when it notified parents in an email that all schools containing grades 3 through 12 would have menstrual products in girls bathrooms, all-gender bathrooms, and in at least one boys bathroom.

The availability of period products in girls bathrooms and at least one boy's ensure that any student who menstruates - including transgender boys and nonbinary students - can access the necessary products, per that email.

Specialty paper

Pixelle Specialty Solutions pauses planned shutdown of Ohio specialty paper mill

Pixelle Specialty Solutions on April 18 announced it, H.I.G. Capital and Ohio officials based on an agreed framework that the company would delay the closure of the Chillicothe paper mill until the end of 2025.

The decision follows discussions with state and local leaders to explore long-term solutions for the mill and workforce.

News earlier of a shut was said an effort to align its operational footprint with long-term business objectives.

"This was an extremely difficult decision. We value our Chillicothe team and the contributions they have made to Pixelle," said company Pres/CEO Ross Bushnell. "While this step is necessary for

our long-term strategic goals, our priority at the moment is to support our employees with care and transparency throughout this transition."

The Chillicothe mill closure would allow Pixelle to strengthen its remaining operations in Spring Grove, PA, and Fremont, OH, and maintain its competitive position in the specialty paper market, according to a press release April 15.

About 800 employees were expected be affected by the shutdown, a company representative told NBC4 according to Ohio's WCMH. At the time, Pixelle indicated that some manufacturing from Chillicothe would be moved to the Fremont facility.

In Brief

On Apr. 15, Chinese machinery supplier **Sincilon** announced the successful installation and startup of a SSMMS nonwoven production line at Gesalife, Germany.

Supplied by Sincilon, this high-performance line will be used for the production of hygiene and medical materials, supporting Gesalife's mission to deliver safety, comfort, and innovation to the European market.

With headquarters located in Changzhou, Jiangsu province of China, Sincilon focus on the PP, PET, RPET, PLA, BICO spunbond, meltblown, and composite nonwoven lines R&D and manufacturing. All the fabric are widely used in hygiene, medicine, consumable, industry, agriculture, and filtration.

The **Lenzing Group** and **Speyer & Grund** announce the completion of a new acetic acid storage tank. This successful strategic project is not only a strong signal for the long-term partnership but also marks a new level of supply chain excellence.

The new storage tank, built at Speyer & Grund's site in Meerane (Germany), contains a tank for the exclusive filling with LENZING™ Acetic Acid Biobased. This is produced as a by-product in pulp production. The now increased tank capacity also enhances flexibility in the supply chain. The ceremonial commissioning of the acetic acid storage tank took place on April 10, 2025.

The biorefinery process in Lenzing optimally utilizes the renewable raw material wood, the starting material for pulp and fiber production, and converts it into valuable products such as biobased acetic acid. LENZING™ Acetic Acid Biobased, which has a carbon footprint over 85 percent lower than fossil-based acetic acid, is used in the food, pharmaceutical, cosmetic, cleaning, chemical, and textile industries and in textile sector processes such as washing, dyeing, and finishing.

The **Tamilnadu Spinning Mills Association** (TASMA) has sought the intervention of the Textile and Commerce Ministries to prevent the flooding of cheaper viscose staple yarn (VSY) imports from China into the country and save the country's spinning sector.

TASMA has urged the ministries to impose anti-dumping duties against the deluge of VSY imports from

China, said K Venkatachalam, Chief Advisor, TASMA.

Textile mills in the South have been badly affected by the imports of cheaper Chinese VSY in the domestic market because of the US-China trade dispute. This has begun to affect textile units around Karur, Dindigul and Pallipalayam regions in Tamil Nadu, he said.

"Due to the US-China tariff war going on strongly, China has started dumping its viscose staple yarn (VSY) in India at a low price of ₹175 per kg. While the cost of production of domestic VSY is being maintained at ₹198, due to the uncompetitive fibre price, maintained by the monopoly manufacturer and supplier of viscose staple fibre (VSF) - the raw material for manufacturing VSY," said the TASMA Chief Advisor.

Domestic VSY manufacturers cannot reduce the price of VSY below ₹198 even keeping it as their cost price. Cheap import of viscose fibre is not possible into the country in view of the quality control order. All domestic spinning mills manufacturing VSY depend on the monopoly manufacturer, which has priced VSF higher than the global market, he said.

People

Hengan International Group announced April 18 that the founder of Hengan Mr. Xu Lianjie passed away on Apr. 17, 2025, at the age of 73.

He was the founder and vice chairman of the board of

Hengan Group International Group, a member of the 9th, 10th, 11th National Committee of the Chinese People's Political Consultative Conference and the 10th All-China Federation of Industry and Commerce. He also served as the vice chairman of the Fujian Provincial Federation of Industry and Commerce, honorary president of the 5th Council of the Fujian Provincial Bright Charity, and president of the Jinjiang Charity Federation.

Founded in 1985, Hengan is the largest manufacturer of tissue and hygiene products for women and babies.

INDA, the Association of the Nonwoven Fabrics Industry, based in Cary, NC, proudly announced April 8 the election of four industry leaders to its 2025 Board of Directors. The Board plays a vital role in guiding INDA's strategic vision, ensuring responsiveness to evolving industry and member needs, and shaping policies and programs.

The newly appointed Board Members are: Ginny Casstevens, Director of Sales & Marketing, Fibertex Nonwovens, Inc.; Aleksandra Kruszewska, Director R&D Business Development; Mark Tumelty, Senior Vice President and General Manager, Nice-Pak Products, Inc.; and Mariagiovanna Ramini Vetere, Vice President Sustainability and Public Affairs, NatureWorks.

"We are excited to welcome these exceptional professionals whose insights, extensive experience, and leadership will significantly enhance INDA's initiatives," said Tony Fragnito, President of INDA.

“Their collective expertise will further strengthen our role as the leading resource for industry knowledge, technical innovation, workforce development, market intelligence, and sustainability within the nonwovens sector.”

The Executive Committee includes these officers and appointees: include Chair: Mark Thornton, VP President, Procter & Gamble; VP Chair: Barbara Lawless, VP of Sales and Marketing – Medical Products, Precision Fabrics Group; Past Chair: Bryan Haynes, Senior Technical Director for Global Nonwovens, Kimberly-Clark; Appointee: Mike Clark, President, Filtration Solutions, Hollingsworth & Vose Company; Appointee: Jodi Russell, VP R&D, Cleaning Innovation, Packaging & Sustainability, The Clorox Company; Appointee: Jeff Stafford, VP of Nonwovens, Milliken & Company; and Appointee: Robert Weilminster, EVP & General Manager, US & Canada – Health, Hygiene and Specialties Division, Magnera.

INDA also on April 17 announced Carl Cucuzza and Lynda Kelly as the recipients of the 2025 INDA Lifetime Service Awards. Carl and Lynda were recognized for their key contributions to the advancement of the nonwovens industry and INDA.

“I am thrilled to recognize Carl and Lynda for their exceptional dedication and impactful contributions,” said Matt O’Sickey, PhD, Director of Education & Technical Affairs at INDA. Carl Cucuzza will receive his award during the Hygienix Conference on November 18th, and Lynda

Kelly will receive her award during IDEA25 on April 29th.

Jones Family of Companies on April 7 announced Andrew Dailey as General Manager of Jones Sustainable Packaging based in Charlotte, NC.

In his role, Dailey brings invaluable leadership experience and industry knowledge to support Jones’ expansion targeting sustainable solutions and innovation in cold chain packaging.

He initially joined in 1991 as VP of Sales and Marketing and led sales at Jones Yarn for 25 years before transitioning to Nonwovens; he was officially named VP of Sales for mattress solutions in 2018. Under Dailey’s direction, both the Yarn and Nonwovens divisions were able to expand into new markets and improve their product offerings all while fostering new and existing customer relationships in alignment with Jones’ customer-focused approach to manufacturing.

Jones Family of Companies also on April 14 announced the promotion of Dennis St. Louis to chief sales officer of Jones Nonwovens. In this role, he will lead the company’s continuing efforts to improve upon its sales approach and customer engagement model, focusing on expanding market presence and strengthening industry partnerships in bedding, furniture, automotive and specialty products.

Wacker Chemical Corp. on April 1 named Dave Bloom as the VP of North and Central America polymer business activities, **including Calvert City.**

The company operates five polymer powder production sites, one of which is based in Calvert City, KY. That is included in the region Bloom now oversees in his new role.

Wacker said Bloom assumed the VP position effective March 1. He succeeds Mathias Wiedemann, who took over as Wacker Biosolutions president on Jan. 1.

Nonwovens Markets

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Staff

James McLaren, Senior News Editor jmclaren@fastmarkets.com; 929.988.7274
 Yan Kong, News Editor ykong@fastmarkets.com; 86.21.60396986
 Paul Blackwood, Digital Publishing Specialist pblackwood@fastmarkets.com; 781.298.8535

Contributors

Jim Loftus, Patents Contributing Editor JimLoftusLTC@gmail.com; 740.644.1532

Editorial office

1 Van de Graaff Drive, 6th Floor, Burlington, MA, 01803-5176 USA., Tel: 866.271.8525.

Subscriptions and customer service

Call +1 (708) 329-2641 (Americas), +44 (0) 203 855 5581 (Europe) or +65 3163 3458 (Asia); visit risi.com/catalog (new subscriptions); email info.risi@fastmarkets.com; fax 781.734.8998, or mail to Nonwovens Markets, 1 Van de Graaff Drive, 6th Floor, Burlington, Massachusetts, 01803-5176 USA

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Executives

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