

Global Meltblown Nonwoven Fabric Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 3.4 bn
Forecast (2031)	USD 5.2 bn
CAGR (2021-2031)	7.2%
Study period	2021-2031
Largest region	Asia-Pacific · 45.8%
Fastest-growing region	Asia-Pacific · 8.4%
Market concentration	Moderate
Licence	Individual / Company

The global meltblown nonwoven fabric market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Filtration is the largest application, supported by tighter indoor-air-quality requirements, electrified vehicle platforms, semiconductor cleanrooms and expanding liquid-filtration infrastructure. Polypropylene retains a XX% share because its processability, electret performance and cost position remain difficult to displace in high-volume applications. Asia-Pacific leads with XX% of market value and is also the fastest-growing region at an XX% CAGR.

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Executive summary

The global meltblown nonwoven fabric market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Filtration is the largest application, supported by tighter indoor-air-quality requirements, electrified vehicle platforms, semiconductor cleanrooms and expanding liquid-filtration infrastructure. Polypropylene retains a XX% share because its processability, electret performance and cost position remain difficult to displace in high-volume applications. Asia-Pacific leads with XX% of market value and is also the fastest-growing region at an XX% CAGR.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global market value advances at a XX% CAGR between 2025 and 2031.
- Asia-Pacific accounted for XX% of 2025 revenue and will grow at an XX% CAGR.
- Filtration represented XX% of 2025 market value, ahead of hygiene at XX% and medical applications at XX%.
- Polypropylene held XX% of material revenue in 2025, reflecting its high melt-flow processability and strong electret response.
- Fine and ultrafine fabrics below 25 grams per square metre represented XX% of market value in 2025.
- EDANA reported that Greater European nonwovens production reached XXX tonnes in 2025.
- INDA reported that North American nonwovens capacity reached XXX tonnes in 2024.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Meltblown Nonwoven Fabric Market Trends and Growth Drivers

Meltblown economics have separated into two distinct markets. Commodity polypropylene mask media remain exposed to excess capacity and price competition, while technically qualified filtration, medical-barrier and specialty-polymer fabrics earn premiums for uniformity, charge retention, pore control and documented consistency.

Demand growth increasingly follows the installed base of filters and controlled environments rather than episodic personal-protective-equipment purchasing. HVAC upgrades, semiconductor and battery investment, vehicle cabin-air systems, process-water treatment and stricter contamination control create recurring replacement demand across multiple end markets.

Sustainability changes both resin selection and product architecture. Producers are reducing basis weights, eliminating fluorinated treatments, adopting bio-attributed feedstocks and designing mono-material composites, but commercial success still depends on preserving filtration efficiency, pressure drop, hydrohead and high-speed convertibility.

Growth drivers

Indoor air quality upgrades accelerate filter replacement

Commercial buildings, healthcare facilities, schools and industrial sites are increasing the efficiency and replacement frequency of air-filtration systems. Meltblown media benefit because electrostatic charging delivers high particle capture at comparatively low pressure drop, supporting energy-efficient HVAC operation.

Liquid filtration broadens the addressable market

Water treatment, food and beverage processing, lubricants and process-fluid purification are adopting finer and more uniform media. PBT, PET, polyamide and engineered polypropylene meltblowns gain where pore consistency, chemical resistance and thermal stability determine filter life.

Vehicle electrification raises filtration value per platform

EVs require advanced cabin-air control, battery manufacturing cleanliness and thermal-management fluid filtration. Premium multilayer and functionalized meltblown media capture more value per vehicle as manufacturers target lower particulate loading and improved passenger air quality.

Healthcare consumption establishes a higher baseline

Hospitals and medical-product manufacturers maintain larger strategic inventories and more diversified sourcing than before 2020. Surgical barriers, sterilization protection and respiratory products sustain demand for validated fabrics with consistent bacterial-filtration efficiency and breathability.

Clean manufacturing expands ultrafine-media demand

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Semiconductor fabs, battery plants and pharmaceutical facilities require controlled environments throughout production and material handling. New capacity in East Asia, the United States and Europe supports HEPA and process-filter demand with stringent uniformity and contamination-control specifications.

Hygiene lightweighting increases square-metre consumption

Diaper, feminine-care and adult-incontinence producers are reducing basis weights while preserving barrier performance through improved web formation and multilayer structures. The shift expands square-metre output per tonne and favors modern composite lines capable of stable, low-grammage meltblown layers.

Restraints

Commodity mask-media overcapacity compresses utilization

Rapid capacity additions during the pandemic created excess supply in standard polypropylene mask grades, particularly in China and parts of Southeast Asia. Lower utilization and aggressive export pricing constrain margins for producers without differentiated charging, certification or composite capabilities.

Polymer and energy volatility pressure conversion spreads

Polypropylene resin, electricity and natural-gas costs represent major components of meltblown economics. Contract repricing often lags feedstock movements, exposing converters to temporary margin compression and discouraging speculative capacity investment.

Multilayer structures complicate circularity

Electret additives, mixed polymers, laminates and contamination after use limit mechanical recycling routes for many applications. Brand-owner sustainability requirements therefore increase development and documentation costs, especially in hygiene, medical and disposable filtration products.

Qualification cycles slow supplier switching

Medical, automotive, food-contact and high-efficiency filtration customers require extensive validation of pressure drop, efficiency, shedding and durability. These processes protect incumbent suppliers but delay revenue realization for new lines and specialty grades.

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Meltblown Nonwoven Fabric Market Driver and Restraint Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Indoor air quality upgrades accelerate filter replacement	XXX	XXX	XXX
Liquid filtration broadens the addressable market	XXX	XXX	XXX
Vehicle electrification raises filtration value per platform	XXX	XXX	XXX
Healthcare consumption establishes a higher baseline	XXX	XXX	XXX
Clean manufacturing expands ultrafine-media demand	XXX	XXX	XXX
Hygiene lightweighting increases square-metre consumption	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Commodity mask-media overcapacity compresses utilization	XXX	XXX	XXX
Polymer and energy volatility pressure conversion spreads	XXX	XXX	XXX
Multilayer structures complicate circularity	XXX	XXX	XXX
Qualification cycles slow supplier switching	XXX	XXX	XXX

Source: XXX

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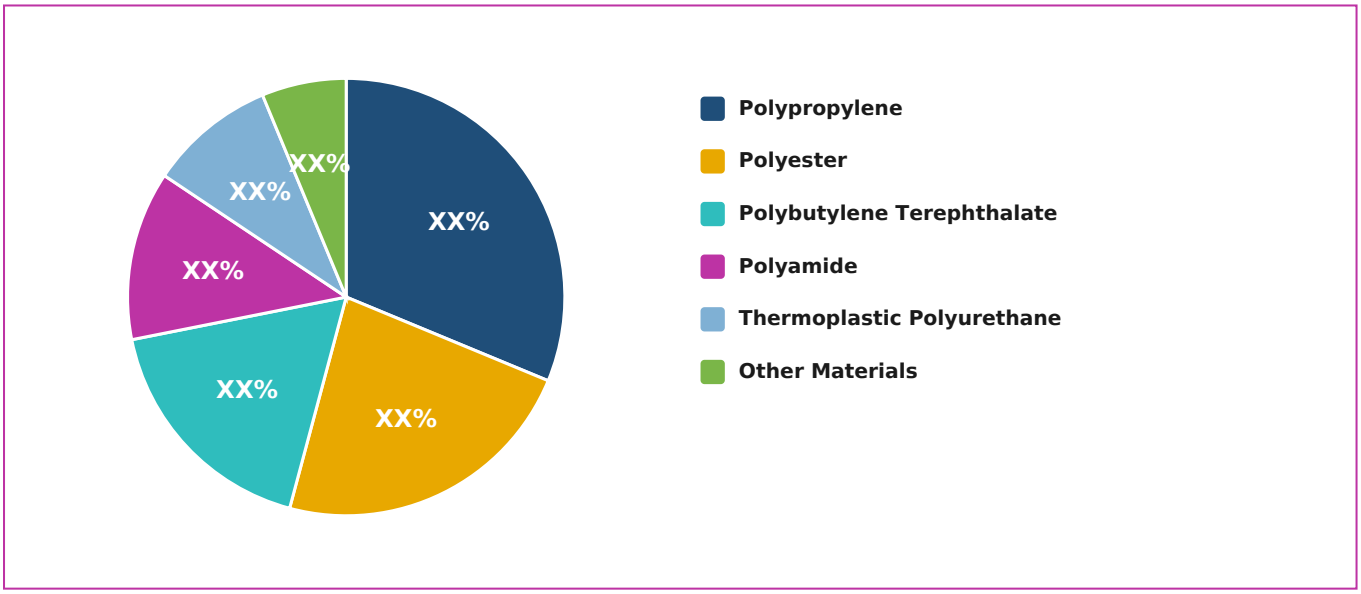
Meltblown Nonwoven Fabric Market Segmentation Analysis

By Material

Polypropylene dominates because high-melt-flow grades run efficiently, accept electrostatic charging and deliver favorable cost-to-performance in filtration, hygiene and medical products. Polyester and PBT gain in applications requiring thermal stability, chemical resistance or dimensional strength. Polyamide and thermoplastic polyurethane remain smaller, higher-value niches for liquid filtration, apparel, acoustic and elastic structures.

Value share by material, 2025



Source: XXX

Value by material, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Polypropylene	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Polyester	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Polybutylene Terephthalate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Polyamide	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Thermoplastic Polyurethane	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Materials	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

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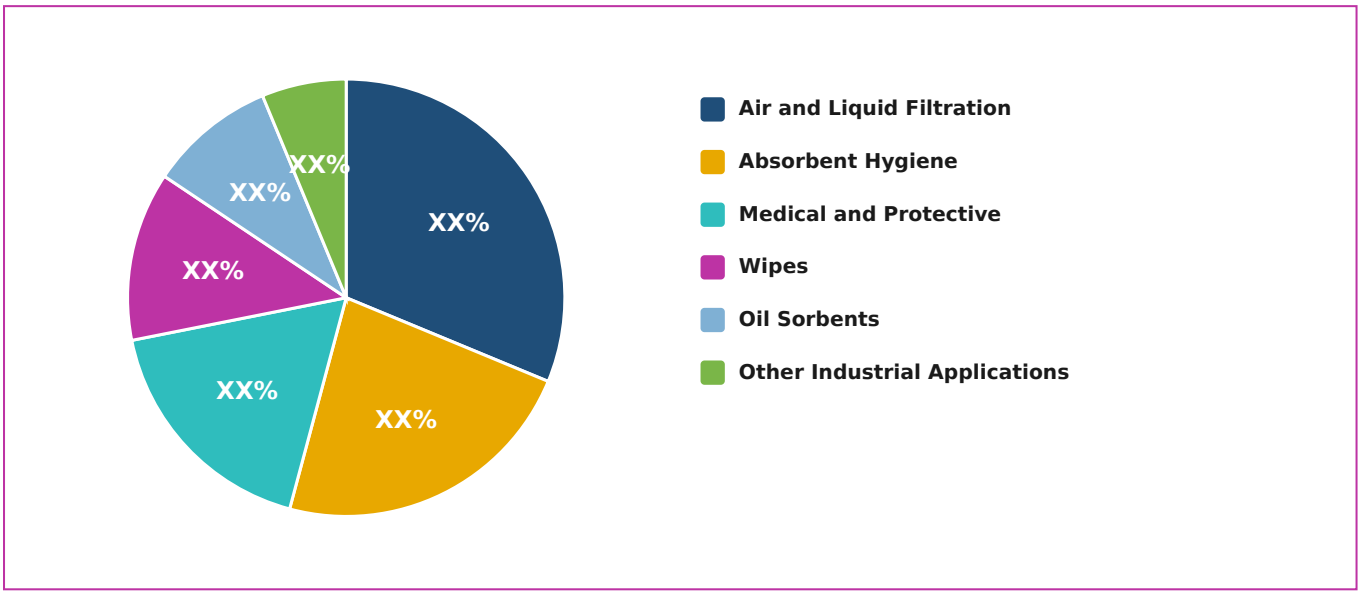
Air and liquid filtration lead because meltblown microfibers combine controlled pore structure with low pressure drop and can be functionalized through charging, additives and lamination. Hygiene is the second-largest application through barrier layers in composite fabrics, while medical demand has normalized above its pre-pandemic baseline. Automotive, cleanroom and process-liquid filtration are the fastest-expanding technical niches.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Air and Liquid Filtration	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Absorbent Hygiene	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Medical and Protective	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wipes	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Oil Sorbents	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Industrial Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Basis Weight

Low-basis-weight webs dominate high-volume masks, respirators and composite hygiene barriers, where line uniformity determines yield. The 25–50 gsm range serves a broad mix of filtration and medical uses. Heavier media secure higher unit prices in sorbents, liquid filtration and engineered industrial products but grow more slowly in volume.

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Value by basis Weight, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Below 25 gsm	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
25–50 gsm	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
51–100 gsm	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 100 gsm	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct contracts dominate medical, hygiene, automotive and high-efficiency filtration accounts, where customers approve specific lines, formulations and test profiles. Distributors remain important for fragmented industrial users, replacement filtration and smaller roll orders. Digital and specialist channels grow fastest by improving access to development quantities and standardized grades.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Manufacturer Contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Converters	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Digital and Specialist Channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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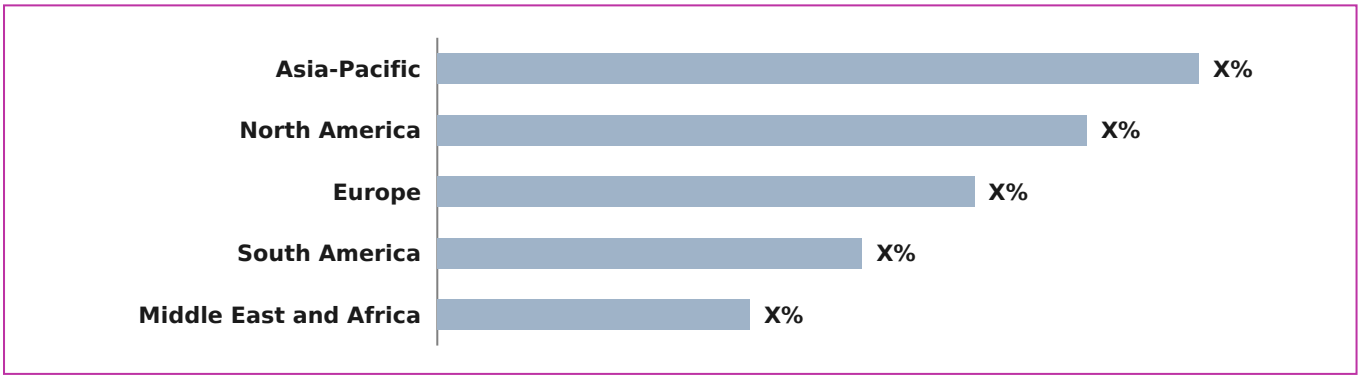
Meltblown Nonwoven Fabric Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global market value in 2025 and will advance at an XX% CAGR through 2031. China supplies the region's largest installed meltblown and converting base, while Japan and South Korea concentrate higher-value electret, automotive and electronics-filtration grades. India and Southeast Asia provide the strongest incremental consumption from hygiene penetration, hospital capacity, air pollution control and localized filter production.

North America accounted for XX% of 2025 revenue, supported by sophisticated HVAC, healthcare, transportation and industrial-filtration markets. INDA reported XXX tonnes of total North American nonwovens capacity in 2024, demonstrating the depth of the wider production ecosystem. U.S. buyers continue to prioritize domestic security of supply for respiratory, medical and critical-filtration media, while Mexico gains from automotive and hygiene nearshoring.

Europe represented XX% of market value in 2025. EDANA reported XXX tonnes of Greater European nonwovens production that year, while regulatory pressure is accelerating lightweight, PFAS-free and lower-carbon product development. Germany leads in technical filtration and automotive demand; Italy, France, the United Kingdom and Central Europe remain important medical, hygiene and converting centres. The Middle East, Africa and South America collectively offer smaller but faster-developing opportunities around water filtration, hygiene conversion and local healthcare supply.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
South America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Meltblown Nonwoven Fabric Market Competitive Landscape and Company Share

The market is moderately concentrated: large multinational producers lead qualified medical, hygiene-composite and high-performance filtration contracts, while numerous Chinese and regional suppliers compete in standard polypropylene grades. Magnera combines the former Berry Health, Hygiene and Specialties platform with Glatfelter and operates the Meltex meltblown technology portfolio. Fitesa, PFNonwovens, Freudenberg Performance Materials, Toray Industries, Mogul and JOFO-Medlong form the next group of scaled or technically differentiated competitors.

Competition centres on fiber diameter control, web uniformity, electret durability, hydrohead, pressure drop, pore-size distribution and consistency at low basis weights. Producers with integrated spunmelt platforms can place meltblown layers inside SMS and SMMS structures, while filtration specialists compete through polymer flexibility, functional additives, lamination and application engineering.

Portfolio restructuring and scale consolidation are reshaping customer negotiations. The November 2024 creation of Magnera established a global specialty-materials platform with 46 manufacturing facilities, while continued investments in modern Reicofil composite lines improve throughput and lightweighting. Strategic spending is shifting away from undifferentiated mask capacity toward cleanroom, automotive, industrial air, liquid-filtration and sustainable-composite applications.

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Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Magnera Corporation	XXX	XXX	XXX	XXX
Fitesa	XXX	XXX	XXX	XXX
PFNonwovens	XXX	XXX	XXX	XXX
Freudenberg Performance Materials	XXX	XXX	XXX	XXX
Toray Industries	XXX	XXX	XXX	XXX
Mogul Nonwovens	XXX	XXX	XXX	XXX
Medlong Holdings	XXX	XXX	XXX	XXX
Ahlstrom	XXX	XXX	XXX	XXX
Mitsui Chemicals Asahi Life Materials	XXX	XXX	XXX	XXX
Don & Low	XXX	XXX	XXX	XXX
Hollingsworth & Vose	XXX	XXX	XXX	XXX
Johns Manville	XXX	XXX	XXX	XXX

Source: XXX

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Meltblown Nonwoven Fabric Market Forecast and Opportunities to 2031

The market will move from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will remain strongest in Asia-Pacific, but value creation will be led by electret stability, fine-particle capture, high-temperature resistance and customized multilayer construction rather than by commodity tonnage alone.

The base case assumes continuing filtration upgrades, normal healthcare replenishment and measured hygiene expansion. An accelerated clean-air and industrial-investment scenario would lift demand for HVAC, semiconductor and battery-production media, whereas prolonged commodity overcapacity would place the greatest pressure on standard mask-grade polypropylene.

Winning suppliers will combine low-basis-weight process control with regional technical service, documented product footprints and resilient polymer sourcing. Specialty PBT, PET, polyamide and functional polypropylene grades will outgrow the broader market, while bio-attributed feedstocks and recycled-content solutions will progress first in applications where filtration efficiency and electret retention remain uncompromised.

Opportunities

- Long-life electret media with lower pressure drop
- PBT and specialty-polymer fabrics for demanding liquid filtration
- PFAS-free and fluoro-free hydrophobic filtration media
- Bio-attributed and recycled-content meltblown products
- Localized critical-filtration supply chains
- Composite media for EV cabin air, battery safety and industrial emissions control

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