List of Figures

| Figure 1 | North American Capacity Additions by Web-Forming Process | 2 |
|-----------|--|------|
| Figure 2 | Twin Beam Meltblown Production Line | 8 |
| Figure 3 | Reicofil® Five-Beam (SSMMS) Spunmelt Line | 9 |
| Figure 4 | Carding Production Line | 10 |
| Figure 5 | Dual Needle Loom | 11 |
| Figure 6 | Single Needle Loom | 11 |
| Figure 7 | Needle Loom Production Line | 11 |
| Figure 8 | Capacity by Process, 2024, Tonnes | 12 |
| Figure 9 | Capacity by Region, 2024, Tonnes | 12 |
| Figure 10 | North American Capacity by Process, 1990 to 2024, Tonnes | 14 |
| Figure 11 | North American Capacity by Process 2019 to 2024, Average Annual Growth Rates, Tonnes | 16 |
| Figure 12 | North American Capacity by Drylaid Bonding Process, 2019 to 2024, Average Annual Growth Rates, Tonnes | 17 |
| Figure 13 | North American Capacity by Spunlaid Process, 2019 to 2024, Average Annual Growth Rates, Tonnes | 18 |
| Figure 14 | North American Capacity Share by Detailed Process, 2024, Tonnes | 19 |
| Figure 15 | North American Capacity by Detailed Process, 2014 to 2024, 10-Year Compound Annual Growth Rates, Tonnes | 21 |
| Figure 16 | North American Capacity, Production, and Operating Rates: 2005, 2010, 2015 and 2024, Tonnes | 28 |
| Figure 17 | North American Capacity, Production, and Operating Rates by Process: 2005, 2010, 2015 and 2024, Tonnes | 30 |
| Figure 18 | North American Capacity, Production, and Operating Rates, 2019 to 2024, Tonnes . | 32 |
| Figure 19 | North American Capacity, Production, and Operating Rates by Process, 2022 to 2024, Tonnes | 34 |
| Figure 20 | North American Production Share by End-Use Market 2024, Tonnes | 35 |
| Figure 21 | Share of Resin and Staple Fiber Used in North American Production, 2024, Tonnes | . 36 |

May 2025 Page iii

| Figure 22 | Share of Synthetic Polymers Used in North American Production, 2024, Tonnes | 36 |
|-----------|---|----|
| Figure 23 | North American Spunlaid Resin Consumption, 2024, Tonnes | 38 |
| Figure 24 | North American Staple Fiber Consumption, 2024, Tonnes | 40 |
| Figure 25 | 2024 North American Nonwoven Material Intra-Region Trade Flow with Import, Export and Net Tonnage Difference, Tonnes | 46 |
| Figure 26 | 2024 North American Nonwoven Material Trade Flow by Region with Import, Export and Net Tonnage Difference, Tonnes | 47 |
| Figure 27 | U.S. Nonwoven Material Imports and Exports, 1989 to 2024, Tonnes | 50 |
| Figure 28 | U.S. Nonwoven Material Imports and Exports, 1996 to 2024, Dollars | 51 |
| Figure 29 | United States – Mexico Nonwoven Material Trade, 2013 to 2024, Tonnes | 54 |
| Figure 30 | United States – Mexico Nonwoven Material Trade, 2013 to 2024, Dollars | 55 |
| Figure 31 | U.S. Nonwoven Material Exports to Mexico by Weight, 2014 to 2024 with 2024 Tonnes, Tonnes | 56 |
| Figure 32 | U.S. Nonwoven Material Imports from Mexico by Weight, 2014 to 2024 with 2024 Tonnes, Tonnes | 56 |
| Figure 33 | United States – Canada Nonwoven Material Trade, 2014 to 2024, Tonnes | 57 |
| Figure 34 | United States – Canada Nonwoven Material Trade, 2014 to 2024, Dollars | 58 |
| Figure 35 | U.S. Nonwoven Material Exports to Canada by Weight, 2014 to 2024 with 2024 Tonnes, | 59 |
| Figure 36 | U.S. Nonwoven Material Imports from Canada by Weight, 2014 to 2024 with 2024 Tonnes, Tonnes | 59 |
| Figure 37 | North American Nonwoven Material Exports by Region Destination, 2014 to 2024 with 2014 and 2024 Tonnes | 61 |
| Figure 38 | North American Nonwoven Material Exports by Detailed Region Destination, 2014 to 2024, 10-Year Compound Annual Growth Rates, Tonnes | 62 |
| Figure 39 | Top 10 Export Countries for North American Nonwoven Material, 2014 to 2024 by 2024 Order, Tonnes | 64 |
| Figure 40 | North American Nonwoven Material Imports by Region of Origin, 2014 to 2024 with 2024, Tonnes | 65 |

Page iv May 2025

| Figure 41 | North American Nonwoven Material Imports by Detailed Region of Origin, | |
|-----------|---|------|
| | 2014 to 2024, 10-Year Compound Annual Growth Rates, Tonnes | . 60 |
| Figure 42 | Top 10 Import Countries to North America of Nonwoven Material, 2014 to 2024 by 2024 Order, Tonnes | . 68 |
| Figure 43 | North American Nonwoven Material Imports from China by Weight, 2014 to 2024 | |
| | with 2024 Share, 10-Year Compound Annual Growth Rates with 2024 Tonnes | . 69 |

May 2025 Page v

List of Tables

| Table 1 | North American Capacity Compound Annual Growth Rates by Process, 1990 to 2024, 5-Year Periods, Tonnes |
|----------|--|
| Table 2 | North American Capacity Average Annual Growth Rates by Process, 2015 to 2024, Tonnes |
| Table 3 | North American Drylaid Capacity Average Annual Growth Rates by Process, 2015 to 2024, Tonnes |
| Table 4 | North American Spunlaid Capacity Average Annual Growth Rates by Process, 2015 to 2024, Tonnes |
| Table 5 | North American Annual Additions by Line Type, 2019 to 2024 |
| Table 6 | North American Capacity, Production, and U.S. GDP Compound Annual Growth Rates: 2005 to 2010, 2010 to 2015, 2015 to 2024 and 2005 to 2024 |
| Table 7 | North American Production Compound Annual Growth Rates by Process: 2005 to 2010, 2010 to 2015, 2015 to 2024 and 2005 to 2024, Tonnes |
| Table 8 | North American Capacity, Production, and U.S. GDP Average Annual Growth Rates, 2019 to 2024 |
| Table 9 | North American Capacity and Production Average Annual Growth Rates by Process, 2024, Tonnes |
| Table 10 | HTS Nonwovens and Other Codes Tariff |
| Table 11 | Top 10 Countries for North American Nonwoven Material Exports Yearly Comparison 2014, 2023 and 2024 with Percentage Share of Exports, Tonnes |
| Table 12 | Top 10 Countries Importing Nonwoven Material to North America Yearly Comparison 2014, 2023 and 2024 with Percentage Share of Imports, Tonnes |

Page vi May 2025