



Land of opportunity or land of turbulence?

The recent history and trends that are shaping the South American nonwovens market

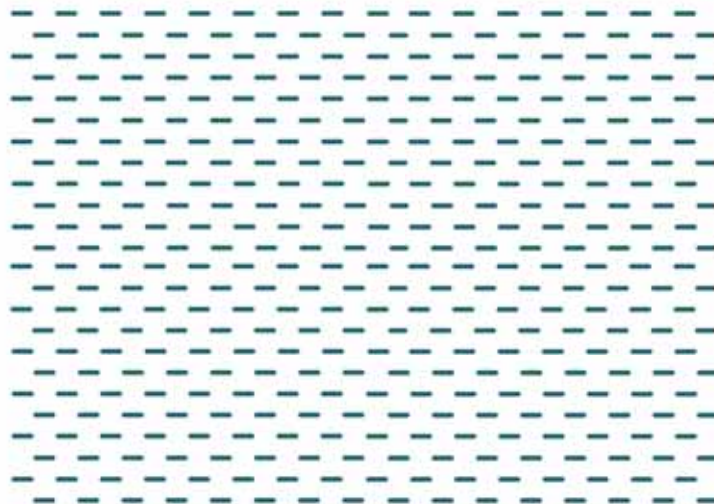
fitesa



Agenda

- Fitesa
- South American Markets and Trends
- South America in Numbers

Fitesa





#leader

**One of the world's largest
nonwovens manufacturer**
(Nonwovens Industry)

**Brazilian company with the largest
international footprint** (Fundação Dom Cabral)



#global

23 plants in 13 countries

Brazil (4), China, Germany, Hungary, India, Italy (3), Mexico,
Netherlands, Peru, Sweden, Thailand (2), UAE, USA (5)
Sales office in Japan
Corporate Office in Brazil



#innovative

5 Innovation Centers

4 of which equipped with pilot lines

China, Germany, Italy and United States



#green

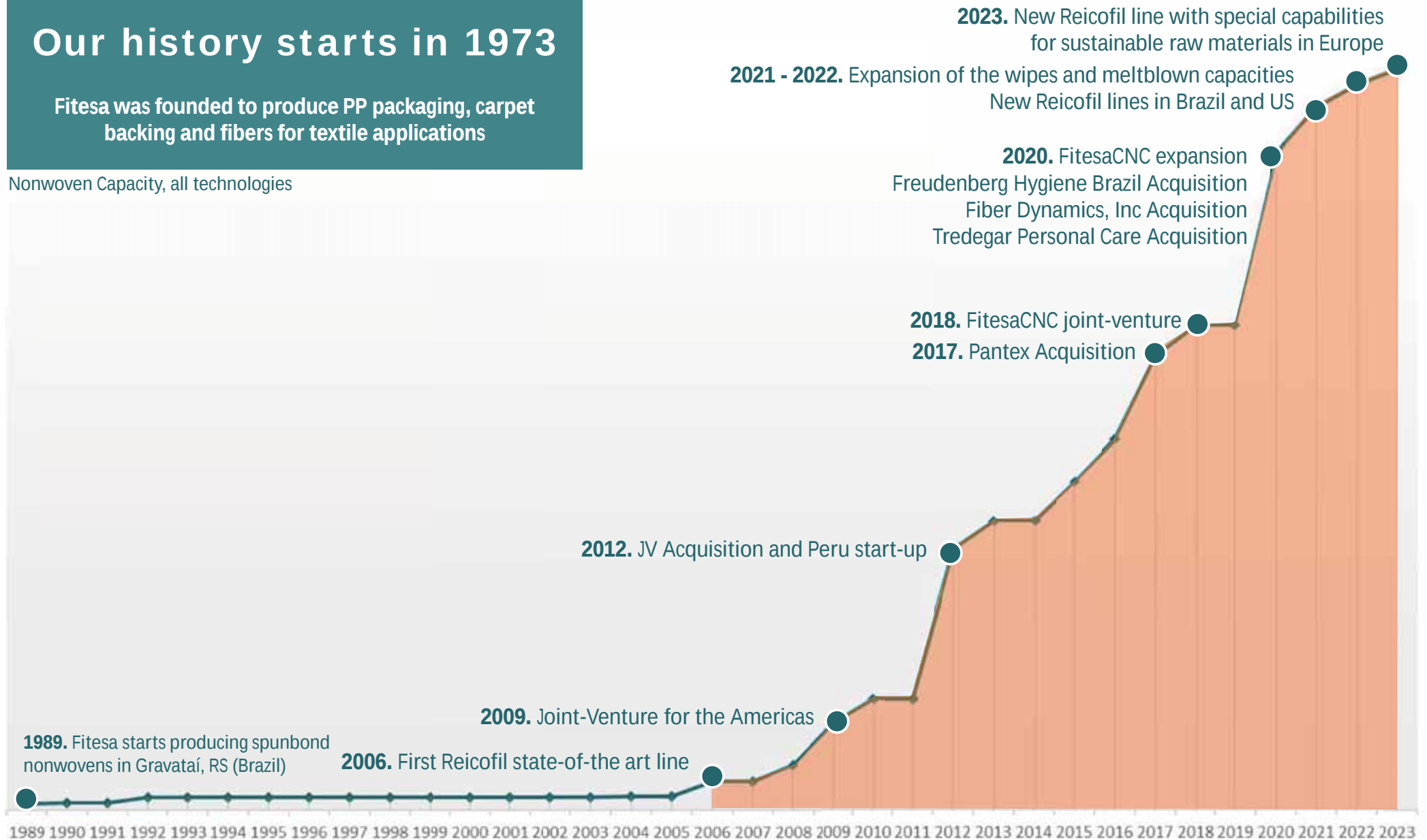
**One of the largest sustainable portfolios
in the nonwovens industry**

Winners of the IDEA 2019 Roll Goods Achievement Award
for our 100% BioBase PLA Soft
IDEA 2022 Sustainability Advancement Award Nominee for
our 100% Biobase PE/PLA Bico

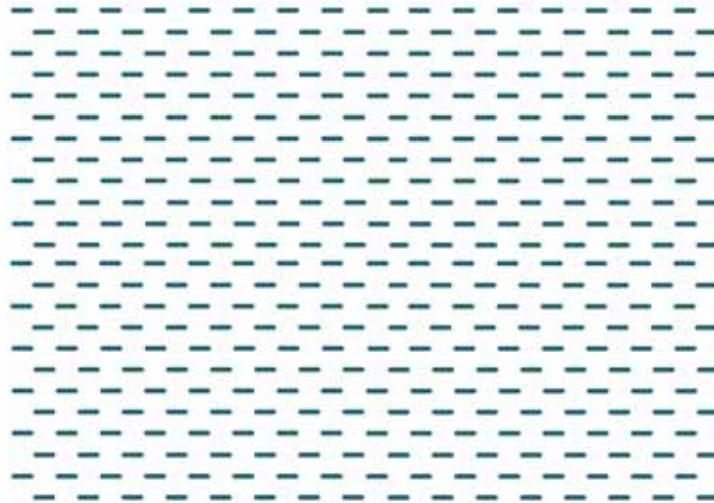
Our history starts in 1973

Fitesa was founded to produce PP packaging, carpet backing and fibers for textile applications

Nonwoven Capacity, all technologies



Markets and Trends



Essentials

Comfort

Functional

Tailor - Made

Green





Hygiene

Baby Care
Fem Care
Adult Care

- **Developing Market**
 - Purchasing power
 - Political and economic instability
- **Global players**
 - KC and P&G
 - Daio (Santher) , Drylock (Capricho), Essity, Ontex (Hypermarcas), Unicharm
 - Private label
- **Baby Care**
 - Product “s sophistication” process
 - Pant style and elastic components remain “niche”
 - Driven by Market Leaders
 - Interrupted by the pandemic (cost reduction initiatives)
- **Sustainability**
 - Green Products remain niche



Healthcare

Surgical Protection
Respiratory Protection
Overall Protection
Cleaning and Sanitization

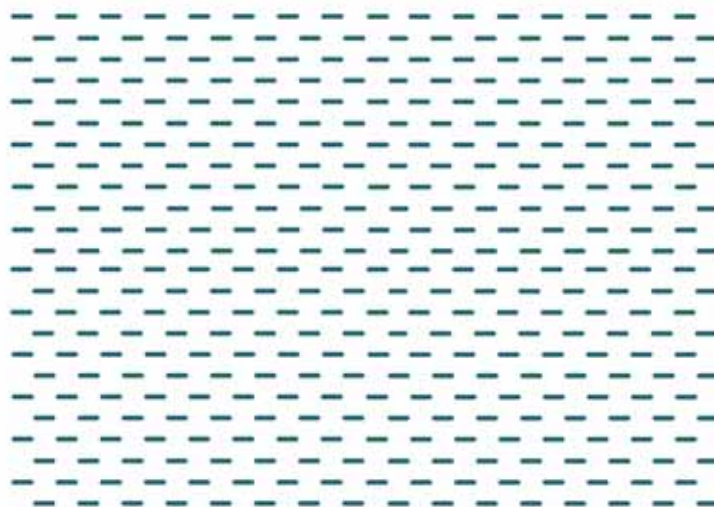
- **Developing Market**
 - Highly impacted by the pandemic
 - Technical standards
 - Sanitizing wipes
- **Local manufacturing**
 - Growing imports of finished products from China
- **Essentials**
 - Cost and Performance
 - Functional (antimicrobial nonwoven for face masks)

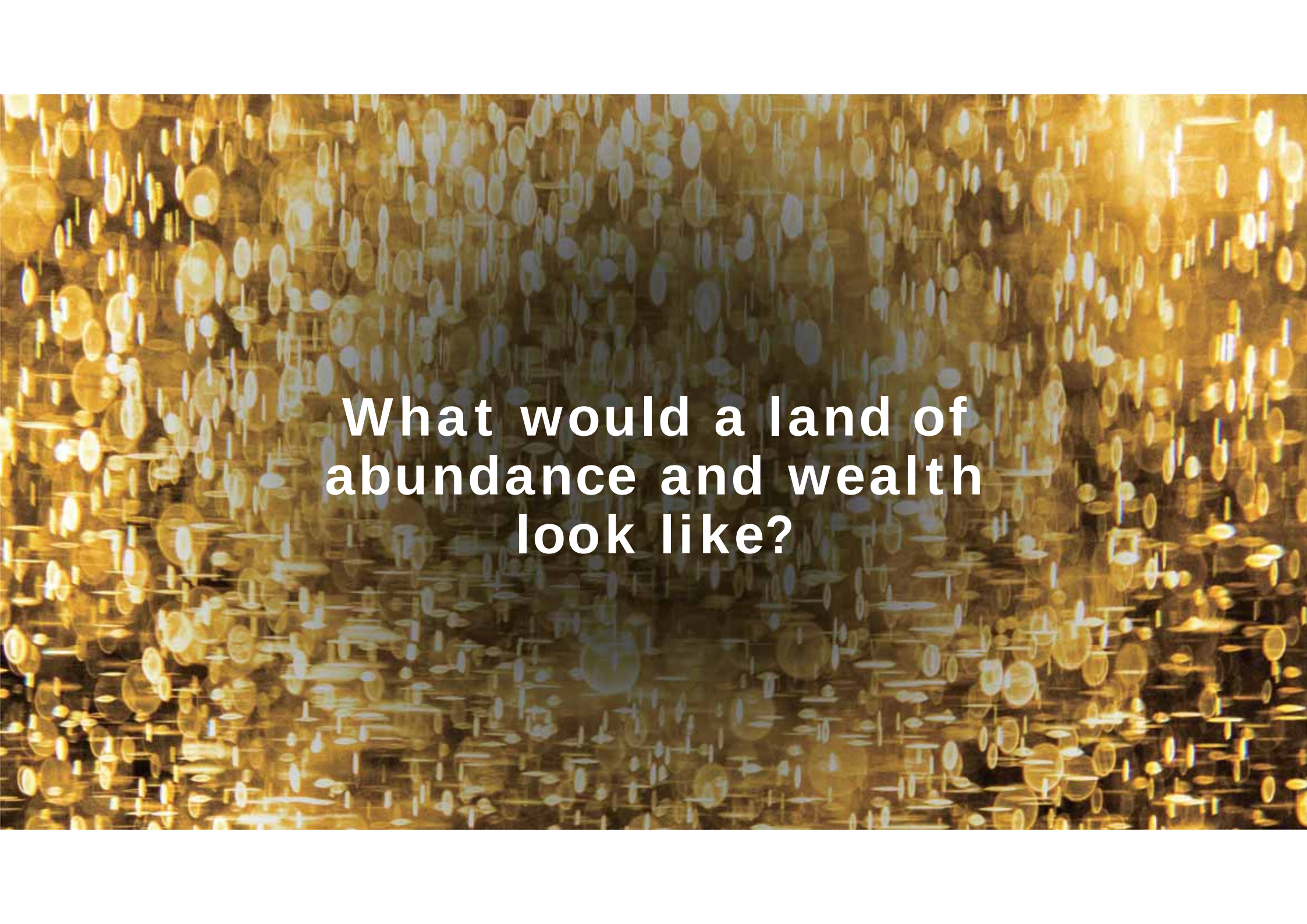


Industrial

- **“Pulverized” Market**
 - High number of companies and applications
- **Local manufacturing**
- **Essentials**
 - Cost

South America in Numbers



The background of the image is a dense, continuous stream of gold coins falling from the top. The coins are in various stages of motion, creating a sense of dynamic abundance. They are rendered with a soft, golden glow and some motion blur, giving the impression of a heavy rain of wealth. The overall color palette is warm, dominated by shades of gold and yellow.

**What would a land of
abundance and wealth
look like?**

Economy and Demography

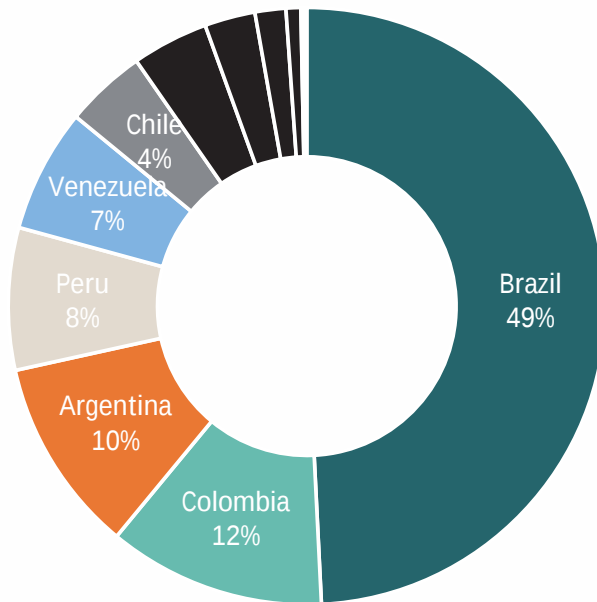
Source: The World Bank, IMF

	South America			2030		
Indicator	2010	2022	2030	US	EU	ASEAN
Population 0-4 years (MM people)	33.35	31.87 (-4.5%)	29.95 (-6.0%)	20.69	19.77	53.42
Female Population 15-49 years (MM people)	106.12	114.71 (+8.1%)	115.84 (+1.0%)	78.09	87.68	181.42
Population 65+ (MM people)	27.85	44.18 (+58.6%)	59.11 (+33.8%)	70.42	109.69	74.83
Urbanization (Urban population/Total population)	82.3%	84.9%	86.5%	84.9%	77.5%	55.7%
GDP PPP (trillions of international dollars)	5.43	6.31 (+16.2%)	8.61 (+36.47%)	29.10	27.17	13.07

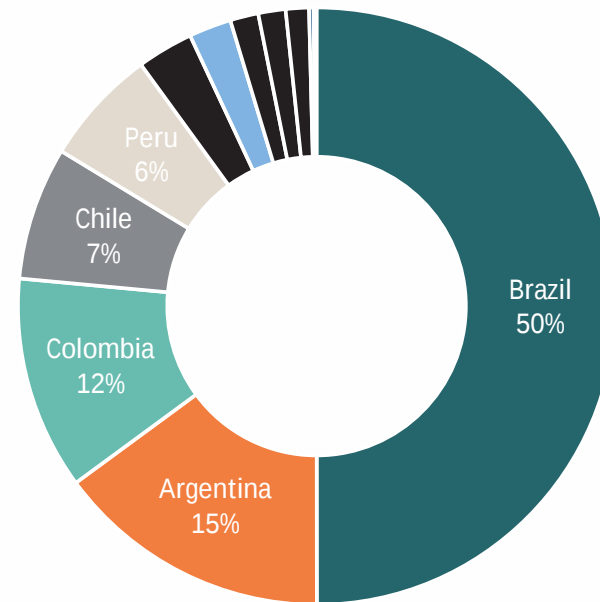
Economy and Demography

Source: The World Bank, IMF

Population
2022

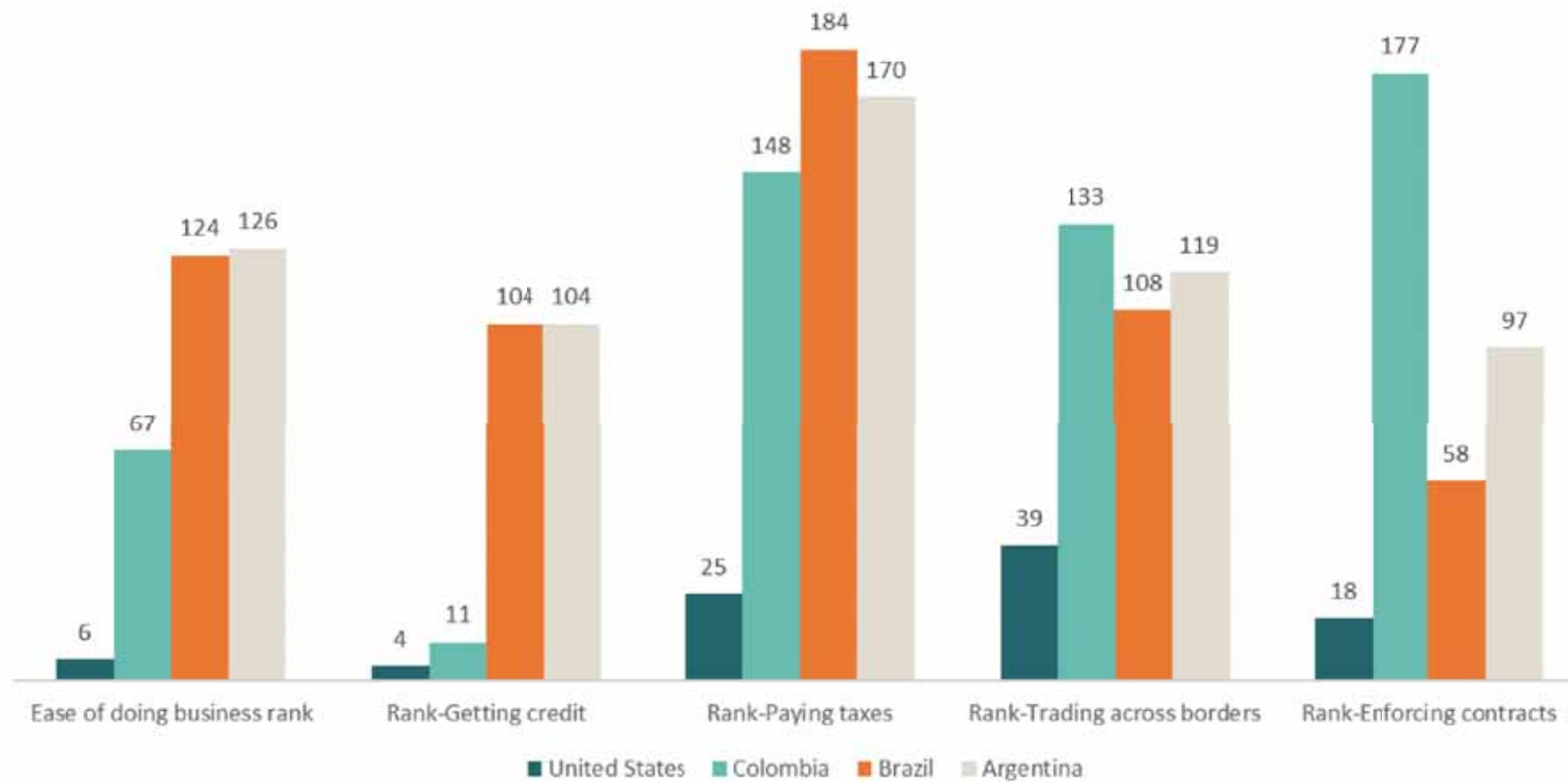


GDP PPP
2020



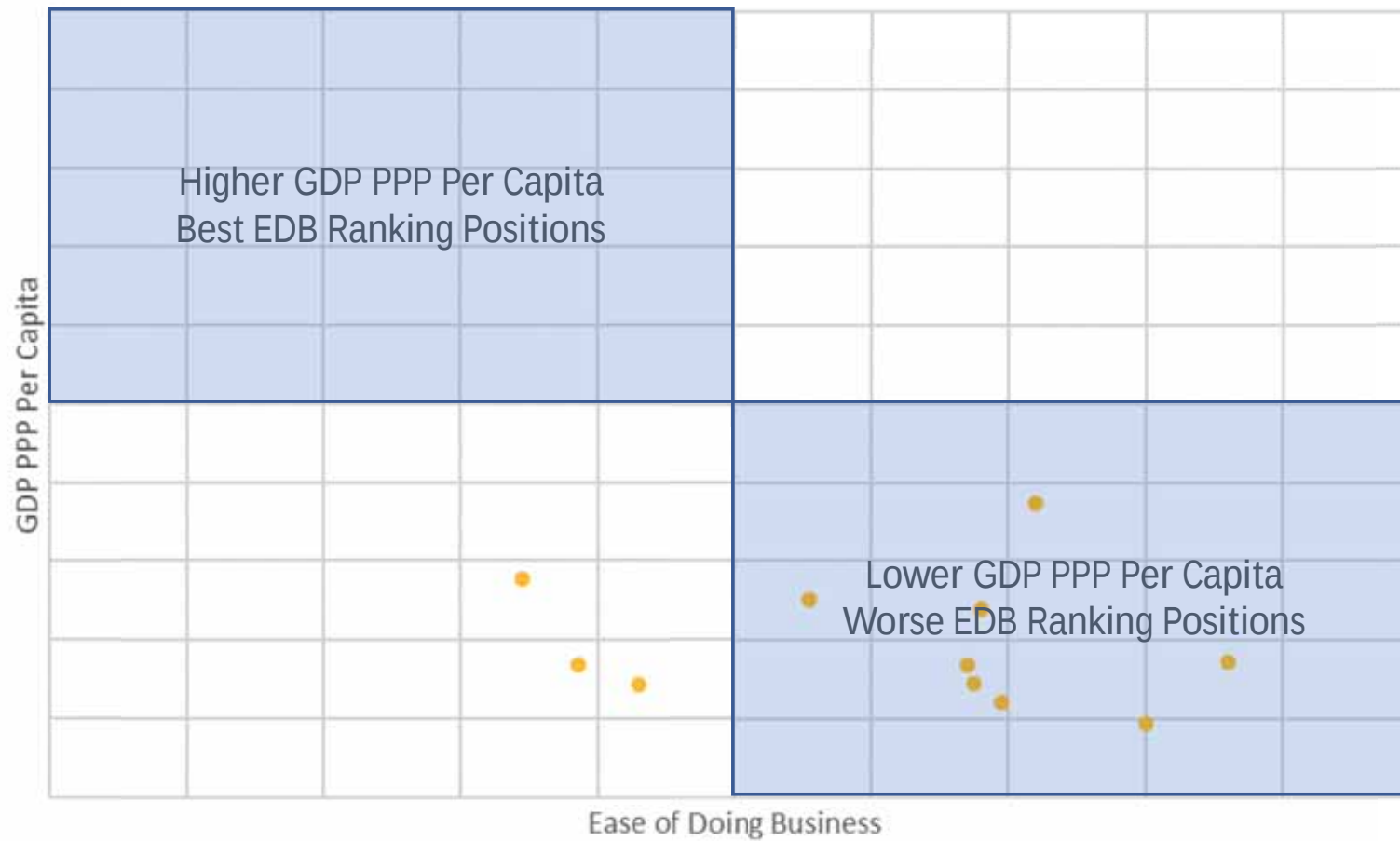
Business Environment

Source: 2020 Doing Business Ranking, The World Bank



Business Environment

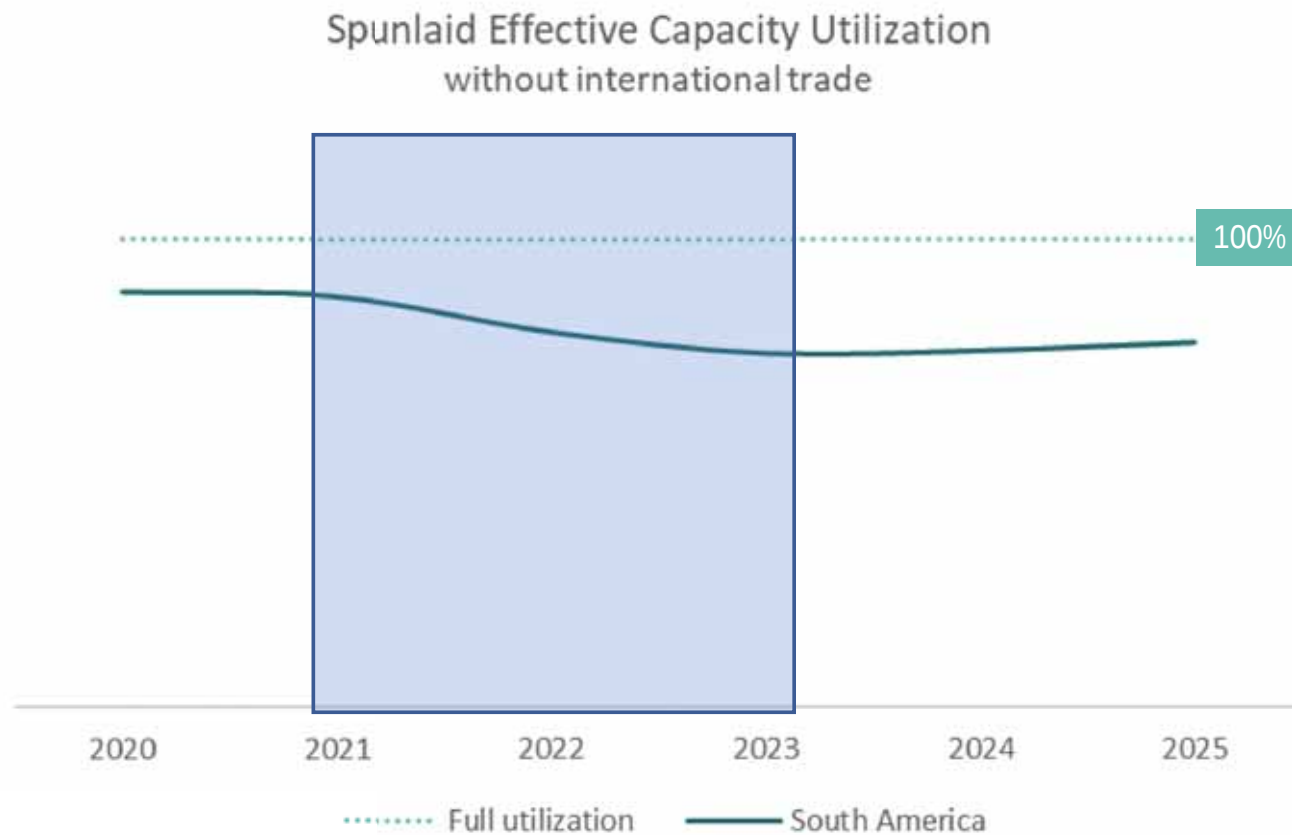
Source: 2020 Doing Business Ranking, The World Bank



>30
Spunlaid
Producers

Business Environment

Source: Fitesa, UN Comtrade



Net importer of nonwovens
2019 imports were 159%
higher than exports

Conclusion

- Mix of different countries and cultures
- Market Potential
- Instability
 - COVID-19 Pandemic/Crisis
 - Logistic Challenges
- Land for the strong-hearted... but that was clear in the myth of the El Dorado.

#workeasier

#lifebetter

Obrigado

Thank you

Grazie

ขอบคุณ

谢谢

Gracias

Tack

Dankeschön

Köszönöm

Dank je

धन्यवाद

شكرا لكم

有難うございました

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