

The Global Market for Cellulose Nanofibers 2020

Table of contents

1 EXECUTIVE SUMMARY.....	22
1.1 The market in 2019.....	24
1.2 Future global market outlook.....	26
1.3 Global cellulose nanofibers production.....	27
1.3.1 Total global production capacity 2019, by type.....	28
1.3.2 Cellulose nanofibers (CNF) production capacities 2019, by producer.....	29
1.3.3 Microfibrillated cellulose (MFC) production capacities 2019.....	30
1.4 Global cellulose nanofibers market demand, 2018–2030, tons.....	30
1.5 Market challenges for cellulose nanofibers.....	31
1.6 Cellulose nanofiber commercial products.....	33
1.7 Cellulose nanofibers market by region.....	37
1.7.1 Japan.....	37
1.7.2 China.....	39
1.7.3 Malaysia.....	39
1.7.4 Western Europe.....	40
1.7.5 North America.....	40
1.8 Global government funding.....	41
2 OVERVIEW OF CELLULOSE NANOFIBERS.....	42
2.1 Cellulose.....	42
2.2 Nanocellulose.....	43
2.3 Manufacture of cellulose nanofibers.....	46
2.3.1 Microfibrillated cellulose (MFC).....	48
2.3.2 Cellulose nanofibers (CNF).....	48
2.3.2.1 Applications.....	49
3 REGULATIONS AND STANDARDS.....	50
3.1 Standards.....	50
3.1.1 International Standards Organization (ISO).....	50
3.1.2 American National Standards.....	50
3.1.3 CSA Group.....	50

3.2	Toxicity.....	51
3.3	Regulation.....	53
4	CELLULOSE NANOFIBERS SUPPLY CHAIN.....	54
5	CELLULOSE NANOFIBERS PRICING.....	56
6	PATENTS AND PUBLICATIONS.....	58
7	CELLULOSE NANOFIBERS IN COMPOSITES.....	62
7.1	Market overview.....	62
7.2	Market prospects.....	63
7.3	Market assessment.....	64
7.4	Applications map.....	68
7.5	Global market in tons, historical and forecast to 2030.....	68
7.6	Product developer profiles.....	70
8	CELLULOSE NANOFIBERS IN AUTOMOTIVE.....	72
8.1	Market overview.....	72
8.2	Market prospects.....	73
8.3	Market assessment.....	73
8.4	Applications map.....	76
8.5	Global market in tons, historical and forecast to 2030.....	76
8.6	Product developer profiles.....	78
9	CELLULOSE NANOFIBERS IN CONSTRUCTION.....	82
9.1	Market overview.....	82
9.2	Market prospects.....	82
9.3	Market assessment.....	83
9.4	Applications map.....	86
9.5	Global market in tons, historical and forecast to 2030.....	86
9.6	Product developer profiles.....	88
10	CELLULOSE NANOFIBERS IN PAPER AND BOARD PACKAGING	89
10.1	Market prospects.....	89
10.2	Market assessment.....	90
10.3	Applications map.....	95
10.4	Global market in tons, historical and forecast to 2030.....	96
10.5	Product developer profiles.....	97

11 CELLULOSE NANOFIBERS TEXTILES AND APPAREL.....	99
11.1 Market overview.....	99
11.2 Market prospects.....	99
11.3 Market assessment.....	100
11.4 Applications map.....	104
11.5 Global market in tons, historical and forecast to 2030.....	104
11.6 Product developer profiles.....	106
12 CELLULOSE NANOFIBERS IN MEDICINE AND HEALTHCARE.	107
12.1 Market overview.....	107
12.2 Market prospects.....	108
12.3 Market assessment.....	109
12.4 Applications map.....	113
12.5 Global market in tons, historical and forecast to 2030.....	114
12.6 Product developer profiles.....	116
13 CELLULOSE NANOFIBERS IN PAINTS AND COATINGS.....	118
13.1 Market overview.....	118
13.2 Market prospects.....	118
13.3 Market assessment.....	119
13.4 Applications map.....	122
13.5 Global market in tons, historical and forecast to 2030.....	123
13.6 Product developer profiles.....	124
14 CELLULOSE NANOFIBERS IN AEROGELS.....	126
14.1 Market overview.....	126
14.2 Market prospects.....	126
14.3 Market assessment.....	127
14.4 Global market in tons, historical and forecast to 2030.....	129
14.5 Product developer profiles.....	130
15 CELLULOSE NANOFIBERS IN OIL AND GAS.....	131
15.1 Market overview.....	131
15.2 Market prospects.....	131
15.3 Market assessment.....	132
15.4 Global market in tons, historical and forecast to 2030.....	134

15.5	Product developer profiles.....	135
16 CELLULOSE NANOFIBERS IN FILTRATION.....		137
16.1	Market overview.....	137
16.2	Market prospects.....	139
16.3	Market assessment.....	139
16.4	Applications map.....	142
16.5	Global market in tons, historical and forecast to 2030.....	143
16.6	Product developer profiles.....	144
17 CELLULOSE NANOFIBERS IN RHEOLOGY MODIFIERS FOR COSMETICS, PHARMA AND FOOD ADDITIVES.....		145
17.1	Market overview.....	145
17.2	Market prospects.....	146
17.3	Market assessment.....	146
17.4	Applications map.....	148
17.5	Global market in tons, historical and forecast to 2030.....	148
17.6	Product developer profiles.....	150
18 OTHER MARKETS FOR NANOCELLULOSE.....		152
18.1	CELLULOSE NANOFIBERS IN PRINTED, STRETCHABLE AND FLEXIBLE ELECTRONICS	152
18.1.1	Market assessment.....	152
18.1.2	Product developer profiles.....	155
18.2	CELLULOSE NANOFIBERS IN 3D PRINTING.....	158
18.2.1	Market assessment.....	158
18.2.2	Product developer profiles.....	160
18.3	CELLULOSE NANOFIBERS IN AEROSPACE.....	161
18.3.1	Market assessment.....	161
18.3.2	Product developer profiles.....	162
19 CELLULOSE NANOFIBER COMPANY PROFILES.....		163
20 RESEARCH SCOPE AND METHODOLOGY.....		282
20.1	Report scope.....	282
20.2	Research methodology.....	282
21 REFERENCES.....		284

Tables

Table 1: Market summary for nanocellulose-Selling grade particle diameter, usage, advantages, average price/ton, market estimates, global consumption, main current applications, future applications.....	23
Table 2. Markets and applications for cellulose nanofibers.....	24
Table 3. Classification of nanocellulose applications by type of industrial product ranged in terms of their potential of consumption.....	26
Table 4: Global demand for cellulose nanofibers in 2019, tons.....	27
Table 5: Market segmentation by type of nanocellulose, capacities and demand 2018.....	28
Table 6. CNF production capacities and production process, by producer.....	29
Table 7: MFC production capacities and production process, by producer.....	30
Table 8: Global demand for cellulose nanofibers/MFC by market, 2018-2030.....	30
Table 9: Market and technical challenges in cellulose nanofibers.....	32
Table 10: Regional demand for cellulose nanofibers, 2019, tons (total excludes MFC).....	37
Table 11. Cellulose nanofibers producers and product developers in Japan.....	37
Table 12. Cellulose nanofiber research centres, universities and companies in China.....	39
Table 13. Cellulose nanofibers producers and product developers in Europe.....	40
Table 14. Cellulose nanofibers producers and product developers in North America.....	40
Table 15. Types of nanocellulose and dimensions.....	43
Table 16: Types of nanocellulose and properties.....	45
Table 17: Applications of cellulose nanofibers (CNF).....	49
Table 18: Safety of Micro/Nanofibrillated cellulose.....	51
Table 19: Global cellulose nanofibers market supply chain analysis.....	54
Table 20: Product/price/application matrix of cellulose nanofiber producers.....	56
Table 21: Nanocellulose patents and scientific articles by organisation.....	60

Table 22: Main patent assignees for CNF.....	61
Table 23. Market overview for nanocellulose in composites.....	62
Table 24. Comparative properties of polymer composites reinforcing materials.....	62
Table 25. Scorecard for cellulose nanofibers in composites.....	63
Table 26. Market assessment for cellulose nanofibers in composites-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global composites OEMs.....	64
Table 27: Global market demand for cellulose nanofibers in composites, 2018-2030 (tons).....	68
Table 28: Companies developing cellulose nanofibers composites.....	70
Table 29. Market overview for cellulose nanofibers in automotive.....	72
Table 30. Scorecard for cellulose nanofibers in automotive.....	73
Table 31. Market assessment for cellulose nanofibers in automotive-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global automotive OEMs.....	73
Table 32: Global market demand for cellulose nanofibers in the automotive sector 2018-2030 (tons).....	76
Table 33: Companies developing cellulose nanofibers products in the automotive industry.....	78
Table 34. Market overview for cellulose nanofibers in construction.....	82
Table 35. Scorecard for cellulose nanofibers in construction.....	82
Table 36. Market assessment for cellulose nanofibers in construction-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global construction OEMs.....	83
Table 37: Market demand for cellulose nanofibers in construction, 2018-2030 (tons).....	86
Table 38: Companies developing cellulose nanofibers in construction.....	88
Table 39. Oxygen permeability of nanocellulose films compared to those made form commercially available petroleum-based materials and other polymers.....	89
Table 40. Scorecard for cellulose nanofibers in paper and board packaging.....	89
Table 41. Market assessment for cellulose nanofibers in paper and board packaging-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global paper and board packaging OEMs.....	90

Table 42: Global demand for cellulose nanofibers in paper & board packaging, 2018-2030 (tons).....	96
Table 43: Companies developing cellulose nanofibers products in paper and board.....	97
Table 44. Market overview for cellulose nanofibers in textiles and apparel.....	99
Table 45. Scorecard for cellulose nanofibers in textiles and apparel.....	99
Table 46. Market assessment for cellulose nanofibers in textiles and apparel-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global textiles and apparel OEMs.....	100
Table 47: Demand for cellulose nanofibers in textiles, 2018-2030 (tons).....	104
Table 48: Companies developing nanocellulose products in textiles and apparel.....	106
Table 49. Market overview for cellulose nanofibers in medicine and healthcare.....	107
Table 50. Scorecard for cellulose nanofibers in medicine and healthcare.....	108
Table 51. Market assessment for cellulose nanofibers in medicine and healthcare-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global medicine and healthcare OEMs.....	109
Table 52: Global demand for cellulose nanofibers in medical and healthcare, 2018-2030 (tons).....	114
Table 53: Global demand for cellulose nanofibers in hygiene and absorbents, 2018-2030 (tons).....	115
Table 54: Cellulose nanofibers product developers in medicine and healthcare.....	116
Table 55. Market overview for cellulose nanofibers in paints and coatings.....	118
Table 56. Scorecard for cellulose nanofibers in paints and coatings.....	118
Table 57. Market assessment for cellulose nanofibers in paints and coatings-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global paints and coatings OEMs.....	119
Table 58: Global demand for cellulose nanofibers in paint and coatings, 2018-2030 (tons).....	123
Table 59: Companies developing cellulose nanofibers products in paints and coatings, applications targeted and stage of commercialization.....	124
Table 60. Market overview for cellulose nanofibers in aerogels.....	126
Table 61. Scorecard for cellulose nanofibers in aerogels.....	126

Table 62. Market assessment for cellulose nanofibers in aerogels-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global aerogels OEMs.....	127
Table 63: Global demand for cellulose nanofibers in aerogels, 2018-2030 (tons).....	129
Table 64: cellulose nanofibers product developers in aerogels.....	130
Table 65. Market overview for cellulose nanofibers in oil and gas.....	131
Table 66. Scorecard for cellulose nanofibers in oil and gas.....	131
Table 67. Market assessment for cellulose nanofibers in oil and gas-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global oil and gas OEMs.....	132
Table 68: Global demand for cellulose nanofibers in the oil and gas market, 2018-2030 (tons).....	134
Table 69: Cellulose nanofibers product developers in oil and gas exploration.....	135
Table 70. CNF membranes.....	138
Table 71. Market overview for cellulose nanofibers in filtration.....	138
Table 72. Scorecard for cellulose nanofibers in filtration.....	139
Table 73. Market assessment for cellulose nanofibers in filtration-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global filtration OEMs.....	139
Table 74: Global demand for cellulose nanofibers in the filtration market, 2018-2030 (tons).....	143
Table 75: Companies developing cellulose nanofibers products in filtration.....	144
Table 76. Market overview for cellulose nanofibers in rheology modifiers.....	145
Table 77. Scorecard for cellulose nanofibers in rheology modifiers.....	146
Table 78. Market assessment for cellulose nanofibers in rheology modifiers-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global rheology modifier OEMs.....	146
Table 79: Global demand for cellulose nanofibers in the rheology modifiers market, 2018-2030 (tons).....	148
Table 80: Commercial activity in cellulose nanofibers rheology modifiers.....	150
Table 81. Properties of flexible electronics-cellulose nanofiber film (nanopaper).....	152

Table 82. Market assessment for cellulose nanofibers in printed, stretchable and flexible electronics-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global printed, flexible and stretchable electronics OEMs. 153

Table 83: Companies developing cellulose nanofiber products in printed, stretchable and flexible electronics..... 155

Table 84. Market assessment for cellulose nanofibers in 3D printing-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global 3D printing OEMs..... 158

Table 85: Companies developing cellulose nanofibers 3D printing products..... 160

Table 86. Market assessment for cellulose nanofibers in aerospace-application, key benefits and motivation for use, megatrends, market drivers, technology drawbacks, competing materials, material loading, main global aerospace OEMs..... 161

Table 87: Companies developing cellulose nanofibers products in aircraft and aerospace..... 162

Table 88: Granbio Nanocellulose Processes..... 164

Table 89: Oji Holdings CNF products..... 239

Figures

Figure 1: Market segmentation by type of nanocellulose, capacities and demand 2019..... 28

Figure 2: Global demand for cellulose nanofibers/MFC by market, 2018-2030..... 31

Figure 3: Cellulose nanofiber-based commercial products..... 33

Figure 4. Dorayaki..... 33

Figure 5. ENASAVE NEXT..... 33

Figure 6. GEL-KAYANO™..... 34

Figure 7. Kirekira! toilet wipes..... 35

Figure 8. "Poise" series Super strong deodorant sheet..... 35

Figure 9. SC-3 (B) speakers..... 35

Figure 10. SE-MONITOR5 headphones..... 36

Figure 11. "Skin Care Acty" series Adult diapers.....	36
Figure 12. "SURISURI" Lotion.....	36
Figure 13: Schematic diagram of partial molecular structure of cellulose chain with numbering for carbon atoms and n= number of cellobiose repeating unit.....	42
Figure 14: Types of nanocellulose.....	44
Figure 15: Relationship between different kinds of nanocelluloses.....	44
Figure 16: Scale of cellulose materials.....	46
Figure 17. Various preparation methods for nanocellulose.....	48
Figure 18: CNF gel.....	48
Figure 19: (a) Number of research publications on the different nomenclatures of nanocellulosic materials per year during the last decade. (b) Cumulative number of research article number published per nomenclature.....	58
Figure 20. Published patent publications for nanocellulose, 2009-2018.....	59
Figure 21: Nanocellulose patents by field of application.....	59
Figure 22. Applications of cellulose nanofibers in composites.....	68
Figure 23: Global market demand for cellulose nanofibers in composites, 2018-2030 (tons).....	69
Figure 24. CNF mixed PLA (Poly Lactic Acid).....	70
Figure 25: CNF resin products.....	71
Figure 26. Interior of NCV concept car.....	72
Figure 27. Applications of nanocellulose in automotive.....	76
Figure 28: Global demand for cellulose nanofibers in the automotive sector, 2018-2030 (tons).....	77
Figure 29: Daio Paper's cellulose nanofiber material in doors and hood of race car.....	78
Figure 30: CNF composite.....	79
Figure 31: Engine cover utilizing Kao CNF composite resins.....	79
Figure 32. The structure of the CNF-based front hood.....	80

Figure 33. CNF car engine cover developed in Japan Ministry of the Environment’s (MOE) Nano Cellulose Vehicle (NCV) Project..... 80

Figure 34. Comparison of nanofillers with supplementary cementitious materials and aggregates in concrete..... 83

Figure 35. Applications of cellulose nanofibers in construction..... 86

Figure 36: Demand for cellulose nanofibers in construction, 2018-2030 (tons)..... 87

Figure 37. Applications of cellulose nanofibers in paper and board packaging..... 96

Figure 38: Global demand for cellulose nanofibers in the paper & board/packaging, 2018-2030 (tons)..... 97

Figure 39. Applications of cellulose nanofibers in textiles and apparel..... 104

Figure 40: Demand for cellulose nanofibers in the textiles, 2018-2030 (tons)..... 105

Figure 41: CNF deodorant products..... 106

Figure 42. Applications of cellulose nanofibers in medicine and healthcare..... 113

Figure 43: Global demand for cellulose nanofibers in medical and healthcare, 2018-2030 (tons)..... 114

Figure 44: Global demand for cellulose nanofibers in hygiene and absorbents 2018-2030 (tons)..... 115

Figure 45. Fibnano..... 117

Figure 46. Applications of cellulose nanofibers in paints and coatings..... 122

Figure 47: Global demand for cellulose nanofibers in paint and coatings, 2018-2030 (tons)..... 123

Figure 48. Hefcel-coated wood (left) and untreated wood (right) after 30 seconds flame test..... 125

Figure 49: Global demand for cellulose nanofibers in aerogels, 2018-2030 (tons)..... 130

Figure 50: Global demand for cellulose nanofibers in the oil and gas market, 2018-2030 (tons)..... 135

Figure 51. Nanocellulose sponge developed by EMPA for potential applications in oil recovery..... 136

Figure 52. Applications of cellulose nanofibers in filtration..... 143

Figure 53: Global demand for cellulose nanofibers in the filtration market, 2018-2030 (tons)..... 144

Figure 54. Multi-layered cross section of CNF-nw..... 144

Figure 55. Applications of cellulose nanofibers in rheology modifiers..... 148

Figure 56: Global demand for cellulose nanofibers in the rheology modifiers market, 2018-2030 (tons)...	149
Figure 57. "SURISURI" products.....	151
Figure 58: Foldable nanopaper antenna.....	153
Figure 59: Flexible electronic substrate made from CNF.....	156
Figure 60. Oji CNF transparent sheets.....	156
Figure 61. Electronic components using NFC as insulating materials.....	157
Figure 62. American Process, Inc. CNF production process.....	165
Figure 63: Anpoly cellulose nanofiber hydrogel.....	168
Figure 64. MEDICELLU™	168
Figure 65: Ashai Kasei CNF production process.....	170
Figure 66: Asahi Kasei CNF fabric sheet.....	170
Figure 67: Properties of Asahi Kasei cellulose nanofiber nonwoven fabric.....	171
Figure 68: CNF nonwoven fabric.....	172
Figure 69. Borregaard Chemcell CNF production process.....	175
Figure 70. nanoforest products.....	182
Figure 71. Chuetsu Pulp & Paper CNF production process.....	182
Figure 72. nanoforest-S.....	183
Figure 73. nanoforest-PDP.....	183
Figure 74. nanoforest-MB.....	184
Figure 75. Daicel Corporation CNF production process.....	185
Figure 76. Celish.....	186
Figure 77: Trunk lid incorporating CNF.....	187
Figure 78. Daio Paper CNF production process.....	188
Figure 79. ELLEX products.....	189

Figure 80. CNF-reinforced PP compounds.....	189
Figure 81. Kirekiral toilet wipes.....	190
Figure 82. Color CNF.....	191
Figure 83. DIC Products CNF production process.....	193
Figure 84. DKS Co. Ltd. CNF production process.....	195
Figure 85: Rheocrysta spray.....	195
Figure 86. DKS CNF products.....	196
Figure 87: CNF based on citrus peel.....	197
Figure 88. Imerys CNF production process.....	199
Figure 89. Filler Bank CNC products.....	200
Figure 90: Cellulose Nanofiber (CNF) composite with polyethylene (PE).....	202
Figure 91: CNF products from Furukawa Electric.....	203
Figure 92: Cutlery samples (spoon, knife, fork) made of nano cellulose and biodegradable plastic composite materials.....	204
Figure 93. Non-aqueous CNF dispersion "Senaf" (Photo shows 5% of plasticizer).....	205
Figure 94: CNF gel.....	206
Figure 95: Block nanocellulose material.....	207
Figure 96: CNF products developed by Hokuetsu.....	207
Figure 97. Innventia CNF production process.....	209
Figure 98: Innventia AB movable nanocellulose demo plant.....	210
Figure 99. Kami Shoji CNF products.....	213
Figure 100: Engine cover utilizing Kao CNF composite resins.....	214
Figure 101: 0.3% aqueous dispersion of sulfated esterified CNF and dried transparent film (front side)...	215
Figure 102. Kruger Biomaterials, Inc. CNF production process.....	216

Figure 103. CNF deodorant.....	218
Figure 104. Chitin nanofiber product.....	219
Figure 105. Marusumi Paper cellulose nanofiber products.....	220
Figure 106. FibriMa cellulose nanofiber powder.....	221
Figure 107. Cellulomix production process.....	222
Figure 108. Nanobase versus conventional products.....	223
Figure 109. Uni-ball Signo UMN-307.....	223
Figure 110: CNF slurries.....	224
Figure 111. Range of CNF products.....	225
Figure 112: Nanocell serum product.....	226
Figure 113: Hydrophobization facilities for raw pulp.....	227
Figure 114: Mixing facilities for CNF-reinforced plastic.....	227
Figure 115. Nippon Paper CNF production process.....	229
Figure 116: Nippon Paper Industries' adult diapers.....	231
Figure 117. All-resin forceps incorporating CNF.....	232
Figure 118. CNF paint product.....	233
Figure 119: CNF wet powder.....	235
Figure 120: CNF transparent film.....	235
Figure 121: Transparent CNF sheets.....	236
Figure 122. Oji Paper CNF production process.....	237
Figure 123: CNF clear sheets.....	239
Figure 124: Fluorene cellulose ® powder.....	241
Figure 125. Performance Biofilaments CNF production process.....	242
Figure 126: XCNF.....	244

Figure 127: CNF insulation flat plates.....	246
Figure 128. Seiko PMC CNF production process.....	249
Figure 129: Rubber soles incorporating CNF.....	251
Figure 130. CNF dispersion and powder from Starlite.....	252
Figure 131. Stora Enso CNF production process.....	253
Figure 132. Sugino Machine CNF production process.....	255
Figure 133: High Pressure Water Jet Process.....	255
Figure 134: 2 wt.% CNF suspension.....	256
Figure 135. BiNFi-s Dry Powder.....	256
Figure 136. BiNFi-s Dry Powder and Propylene (PP) Complex Pellet.....	257
Figure 137: Silk nanofiber (right) and cocoon of raw material.....	257
Figure 138: SVILOSA AD CNC products.....	259
Figure 139: Silver / CNF composite dispersions.....	263
Figure 140: CNF/nanosilver powder.....	263
Figure 141: Comparison of weight reduction effect using CNF.....	264
Figure 142: CNF resin products.....	266
Figure 143. University of Maine CNF production process.....	268
Figure 144. UPM-Kymmene CNF production process.....	270
Figure 145. US Forest Service Products Laboratory CNF production process.....	272
Figure 146: Flexible electronic substrate made from CNF.....	273
Figure 147. VTT 100% bio-based stand-up pouches.....	275
Figure 148. VTT CNF production process.....	276
Figure 149: HefCel-coated wood (left) and untreated wood (right) after 30 seconds flame test.....	277
Figure 150: Bio-based barrier bags prepared from Tempo-CNF coated bio-HDPE film.....	278

Figure 151. Zelfo Technology GmbH CNF production process..... 280