World Markets for Spun Yarns:

Forecasts to 2010

Biggest supplier to a growing textile and apparel market

Spun yarns are used worldwide in a wide range of textiles, apparel and other manufactured products. With a total output of 28 million tons, spun yarns satisfy more than half the needs of the global textile and clothing industry. Furthermore, the market is growing. Between 2000 and 2010 the demand for spun yarns worldwide is forecast to rise by almost 25%.

Production is shifting from developed economies

Growth will not, however, be evenly spread. Spinning capacity is increasingly shifting towards developing economies as investors install new machinery in lower cost regions. Asian countries in particular stand to benefit the most in the medium term.

In developed and newly industrialised countries, on the other hand, spinners are highly vulnerable to growing imports of "downstream" textiles and apparel. Spinners also face growing competition from filament yarns and nonwovens.

Some producers in developed economies are finding new ways to compete

But many producers in developed economies are managing to remain competitive. Italy still has a buoyant spinning sector, despite its high labour costs. Some spinners are employing economies of scale while others are using state-of-the-art technology to minimise their dependence on expensive labour. Electronic monitoring and control systems help to improve productivity, speed, quality and flexibility. Many spinners are developing skills in design and innovation – often using new and innovative fibres to differentiate their products from those of their competitors.

But all spinners will have to prepare for the end of quotas

All spinners, however, will face a major challenge over the next few years as quotas restricting international textile and clothing trade are eliminated. Spinners in advanced economies will increasingly be forced to move closer to centres of textile and apparel production in order to be able to offer quick response and lower prices.

WHAT DOES THE REPORT COVER?

Global forecasts

World Markets for Spun Yarns: Forecasts to 2010 addresses these and other key issues, and provides a comprehensive set of predictions for the worldwide spun yarns market to 2010.

World Markets for Spun Yarns: Forecasts to 2010 will also provide you with:

- production cost breakdowns for different countries;
- an assessment of the technologies employed at all stages of the spinning process;
- information on the responses of technology developers to new requirements imposed by weavers, knitters and finishers;
- an insight into how fibre quality is being improved to ensure that new technologies operate efficiently;
- authoritative predictions of the future global market for spun yarns, with particular emphasis on expected trading patterns and factors likely to affect competition; and
- expert forecasts of global and regional markets for spun yarns to 2010.

THE REPORT IS DIVIDED INTO 13 CHAPTERS

Chapter 1 provides an *executive summary*.

Chapter 2 highlights the key trends in short staple and long staple *spinning capacity*, focusing on Western Europe, Eastern Europe, Russia, Asia, North America and South America.

Chapter 3 assesses the key changes in *fibre consumption*. In particular, it identifies the threat to cotton's dominance as man-made fibre producers develop innovative fibre types, as processors seek faster running speeds and as consumers demand easy care and more durable garments.

Chapter 4 examines *technological change* in spinning processes, concentrating on improvements in productivity, speed and quality assurance, increased flexibility and the continued growth in electronic monitoring and control systems.

Chapter 5 looks at the *properties and utilisation* of spun yarns. It analyses the improvements in specifications being achieved in short and long staple spun yarns as a result of increased cooperation and competition between fibre producers, textile processors and textile machinery manufacturers, and the greater use of electronics. It analyses the advantages and disadvantages of ring spun, rotor spun, compact spun and air-jet yarns – comparing their qualities and their suitability for various end uses.

Chapter 6 identifies the factors affecting *fibre quality*. Yarns can be improved by using finer fibres and fibres with better tensile properties. New developments – especially in finishes – are enabling modifications to be made to surface character. This chapter illustrates the need for producers to improve sliver quality, and to manufacture yarn to higher standards in order to meet the ever more stringent demands of the weaving and knitting industries.

Chapter 7 examines the impact on spun yarn manufacture of *downstream technical developments* in weaving and knitting. New, higher performance yarns are being developed to meet the challenges of higher machine speeds and computerised control systems. Yarns are being modified to take account of growing environmental awareness – by enabling energy and water consumption to be reduced in dyeing and finishing.

Chapter 8 compares the *costs of manufacturing spun yarns* in major producing countries. It assesses the extent to which such costs are affected by yarn fineness, age of machinery, the process technology used and developments in automation.

Chapters 9-12 analyse in detail the *markets for spun yarns to 2010* in four key regions: Europe (comprising Western Europe, Eastern Europe and Turkey); Asia; North and South America; and Russia and other CIS countries. These chapters identify those regions and countries which are expected to show the biggest gains in the period to 2010 – along with those likely to suffer the biggest losses.

Chapter 13 examines future technology, productivity, quality assurance, inter-fibre competition, quick response, and the environment. It reviews the dynamics of the market, identifies the key "drivers" and assesses the sector's *future prospects*.

YOUR PANEL OF EXPERTS

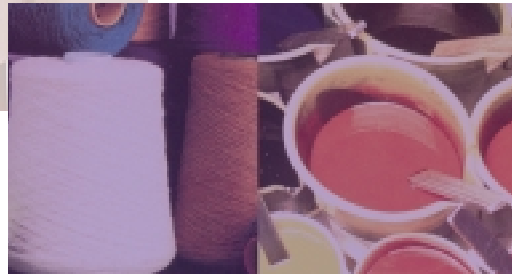
World Markets for Spun Yarns: Forecasts to 2010 has been researched and prepared by a team of leading experts in their field, drawn from ten leading organisations and companies based in eight countries. It has been produced by CIRFS, the Brussels-based Comité International de la Rayonne et des Fibres Synthétiques.

VITAL INFORMATION

Much of the information has been obtained from interviews with companies and is not available elsewhere. **World Markets for Spun Yarns: Forecasts to 2010** provides vital information about present and future trends for anyone with an involvement in the global fibres, textiles and clothing business – whether as importer/exporter, manufacturer, machinery maker, merchant, retailer, investment analyst or consultant.

THE AUTHORS

The report is based on research conducted by a spun yarns working group within the Brussels-based organisation CIRFS (Comité International de la Rayonne et des Fibres Synthétiques). The members of the working group were: Mr Frederic Bietrix of Tergal, France; Mr Iain Clegg of DuPontSA, UK; Mr Johann Leitner of Lenzing, Austria; Dr Stefano Minetti of Nylstar, Italy; Mr Carlos Oliveira of Trevira Fibras, Portugal; Mr Roberto Presotto of Montefibre, Italy; Dr Francesco Prezzavento, a consultant previously with Montefibre, Italy; Mr Zdenek Spevacek of Spolana, Czech Republic; Mr Robin Thomas of Acordis, UK; and Mr Mithat Okay of Aksa, Turkey. The report was written by David Morris and produced by Deborah Tunney of the CIRFS secretariat.



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Published July 2001 ISBN 1 902625 05 6

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