World Markets for Technical Textiles To 2022

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NARROW WOVEN FABRICS

TABLE 10.2

USA: consumption of narrow woven fabrics*, by fibre type, 2005-2022 ('000 tonnes)								
	2005	**2010**	**2011**	**2012**	**2013**	**2014**	**2018P**	**2022P**
Cellulosic filament yarn	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Cellulosic spun yarn	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Synthetic filament yarn	50,1	39,4	38,2	39,3	39,1	39,7	45,0	49,7
Synthetic spun yarn	5,4	2,6	2,2	2,6	2,0	1,9	2,1	2,3
Cotton	6,1	3,4	3,4	N.A.	N.A.	N.A.		
Wool	0,0	0,0	0,0	N.A.	N.A.	N.A.		
Total	**61,6**	**45,4**	**43,8**	**41,9**	**41,1**	**41,6**	**47,1**	**52,1**
* Includes woven labels, industrial webbing, tapes (including Venetian blinds), seat belts, outdoor furniture webs and tapes for zips.								
Source: *Fiber Organon*, various issues, Fiber Economics Bureau, The American Fiber Manufacturers Association, Inc. (AFMA)								
P: projections calculated with inputs from Technical Textiles August 2014, Commerzbank; OECD; WTO Secretariat; and Euratex.								

Despite an overall and constant decline in total narrow woven fabrics consumption since 2005 until 2013 (from 61,600 to 41,100 tonnes), it has slightly recovered in 2014 and it is foreseen that it will exceed the 47,000 and 52,000 tonnes in 2018 and 2022, respectively, principally as a result of a growth in domestic automobile production.

Synthetic filament accounts for 90% of all fibres used in the manufacture of narrow woven fabrics.

MEDICAL, SURGICAL AND SANITARY APPLICATIONS

TABLE 10.3

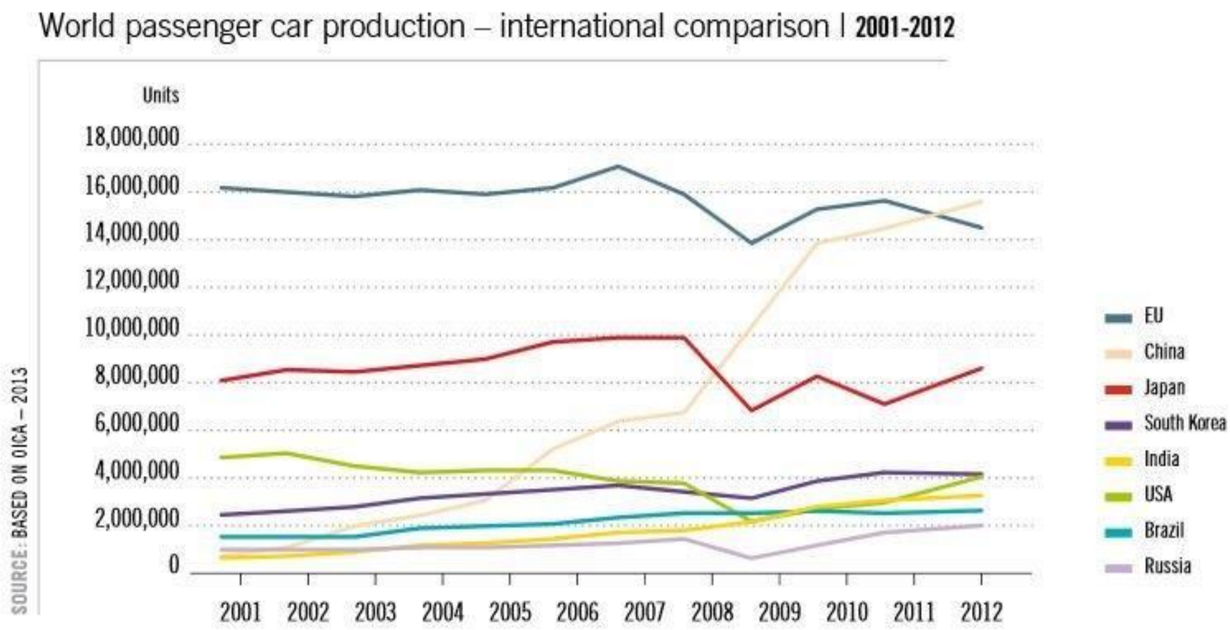
USA: consumption of medical, surgical and sanitary applications*, by fibre type, 2005-2022 ('000 tonnes)								
	2005	**2010**	**2011**	**2012**	**2013**	**2014**	**2018P**	**2022P**
Cellulosic filament yarn	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Cellulosic spun yarn	27,9	35,4	35,0	34,3	33,0	36,7	41,5	45,9
Synthetic filament yarn	97,9	90,8	91,3	91,2	89,5	89,9	101,7	112,5
Synthetic spun yarn	128,5	81,7	84,1	88,2	86,4	89,1	100,9	111,5
Cotton	32,9	13,7	12,8	N.A.	N.A.	N.A.		
Wool	0,0	0,0	0,0	N.A.	N.A.	N.A.		
Total	**287,3**	**221,6**	**223,3**	**213,6**	**208,9**	**215,6**	**244,1**	**270,0**
* Includes bandages, gauzes, adhesive tapes and plasters, sanitary towels and tampons, disposable nappies and surgical gowns.								
Source: *Fiber Organon*, various issues, Fiber Economics Bureau, The American Fiber Manufacturers Association, Inc. (AFMA)								
P: projections calculated with inputs from Technical Textiles August 2014, Commerzbank; OECD; WTO Secretariat; and Euratex.								

In terms of volumes, the market for medical, surgical and sanitary application is an important one compared to other end uses. For medical, surgical and sanitary applications, consumption of fibres has shown a negative evolution since 2005 but levels have stagnated since 2010. Indeed, the average consumption per year during the 2010-2014 period has been 216,600 tonnes.

Synthetic filament represents 40.5% of total fibres consumed for medical, surgical and sanitary applications.
Synthetic staple also accounts for 40.5% of total fibres usage, but has lost share compared with 45% in 2005. It is projected that such share has reached a floor and thus will remain constant towards 2022. On the contrary, consumption of cellulosic spun yarn usage has increased from 27,900 (9.7% of total fibres consumed) in 2005 to 36,700 tonnes (17% of total fibres consumed) in 2014.

12.5 Outlook for Asia

The automobile sector, main demander of technical textiles, has been performing relatively well in Asia and especially in China as it can be seen in the graph below:



Source: ACEA, The Automobile Industry Pocket Guide 2013.

Recent figures also from ACEA confirm the overall positive trend for Asian passenger car production. The following information is available for selected countries:

Table 12.9: Asian passenger car production, 2014-2015 (in units)

	2015	2014	% change 15/14
ASIA	36,349,672	36,024,817	+0.9
China	18,137,264	17,473,310	+3.8
Japan	7,648,641	8,169,024	-6.4
South Korea	4,168,142	4,162,932	+0.1
India	3,298,267	3,072,610	+7.3
Indonesia	854,768	1,001,686	-14.7
Thailand	890,677	839,195	+6.1
Others in Asia *	1,351,913	1,306,060	+3.5

Source: European Automobile Manufacturers Association (ACEA) Economic and Market Report: Q4 2015.
* includes Taiwan, Australia, Malaysia, Pakistan, The Philippines and Vietnam.

According to a first study from McKinsey&Company[1], China is already the world's largest automobile market with 19 million vehicles sold in 2012 and it is projected that new car sales will grow 6% a year between 2012 and 2020. It also identifies the aftersales market in China as the one becoming the most important: aftersales automotive parts revenues could grow from approximately EUR 20 billion in 2012 by 20% a year and reach nearly EUR 100 billion by 2020.
The second article predicts that in 2020 China with 22.2 million units will even exceed North America (16.8 million units) and Europe (19.9 million units) to become the No. 1 area market.

[1] a) *The road to 2020 and beyond: What's driving the global automotive industry?*, August 2013 and b) *Bigger, better, broader: A perspective on China's auto market in 2020*, November 2012.