

## Press release

For business editors

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### Commerzbank: technical textiles conquering new application areas

- **New industry report sees considerable growth potential worldwide, 2% increase in production forecast for 2015**
- **Construction and vehicle manufacturing continue to be very attractive buyer areas, ecotextiles also see pleasing development**
- **Successful structural change to specialised manufacturers of highly technical and high-quality products, increasing networking with research**

In the period from 2007 to 2013, the European manufacturers of technical textiles saw stronger growth than the European economy as a whole. In the crisis years 2008 and, in particular, 2009, above-average slumps were visible, however. The sub-segment non-woven fabrics, the production of which has increased by 11% since 2011, made a substantial contribution to this growth. For 2015, it is to be assumed that this area, as well as the other technical textiles, will see a moderate rise of approximately 2% in the production index, according to the industry report. With the textile-reinforced fibre composites – the so-called composites – the high level seen in 2007 will not be attained again due to weak demand in France, Spain, and Italy, however. In contrast, German, British, and eastern European manufacturers posted considerable increases in production.

Technical textiles are conquering more and more new application areas and are superseding conventional materials. Examples of this are reinforcement materials made of textile in concrete construction, artificial arteries in medical technology, and textile sandwich materials in vehicle construction and sport. Thus, the winning goal in the 2014 World Cup final was scored by Mario Götze wearing a “knitted” shoe. At the same time, new manufacturing methods are constantly being developed. Technology leadership is, therefore, a key success factor. “The German sector is regarded – also thanks to the excellent networking with the German research sector, which is itself unique worldwide – as the global technology market leader,” said Jürgen Grebe, Corporate Sector Analyst and author of the report, at the press conference at Frankfurt trade fair grounds as part of this year’s leading industry trade fair show *Techtextil*. In this respect, he stated, the focus was on high-quality, sophisticated product areas, and the sector was avoiding to the greatest possible degree competition with suppliers of mass-produced goods and low-quality products, that were primarily based in Asia. “Looked at that way, the German sector is predominantly the result of a successful structural change on the part of producers of traditional textiles to become highly technical and specialist manufacturers of high-quality textile products,” added Grebe.

Through to 2018, the global market for conventional textiles is set to grow from somewhat more than 130 billion US dollars at present to as much as 160 billion US dollars, states the report. In this respect the most important buyer area remains the vehicle construction industry. Yet sectors such as construction textiles and geotextiles, as well as niches such as ecotextiles, are gaining in significance. With non-woven fabrics it is expected that sales worldwide will increase from 33 billion US dollars at present to more than 42 billion US dollars by 2017. Here the biggest buyer area remains the hygiene sector. Higher growth rates are believed to be possible for composites – in particular due to strong demand in the buyer sectors vehicle construction, wind energy, and aviation. At present the global market volume for fibre-reinforced materials is estimated to be just less than 100 billion US dollars. In total the global market volume for technical textiles is currently more than 250 billion US dollars.

Viewed regionally the best outlook is attributed to the Asian market, headed by China. Yet other threshold countries are gaining in significance for German manufacturers, whose export quota for technical textiles in 2013 amounted to 62% and to 58% for non-woven fabrics. In this respect German producers are increasingly worried by a lack of know-how protection and rising administrative costs, for example in the use of origination regulations for primary materials, as well as the development of energy costs.

On the whole the German sector – 600 companies with more than 20 employees and a turnover of more than 6 billion euros each – is regarded as the market leader in Europe. Nearly 50% of the entire German textile production is already accounted for by technical textiles. As a consequence of the in part already highly extensive foreign production and other statistical demarcation problems, the actual turnover of the German manufacturers is likely to be very much higher, however.

The full industry report may be ordered free of charge in both English and German from the press office of Commerzbank.

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### **About Commerzbank**

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