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From the editor

Dear Reader,

We are approaching the end of the year and can now look back on an eventful and, I think, mostly positive year for the textile industry and with it the textile machinery industry.

I think that we can view 2013 as the year that made a lot of the changes, facing the global textile industry in the next decade, visible for the first time. Well, perhaps not noticeable for the first time, but definitely increased their clarity and significance. First and foremost is the need for sustainability, which is increasingly moving from the edges into the centre of industry. As the main topic of many conferences and monitoring program of all major trade fairs, sustainability remains on everyone's lips as it changes modern industries worldwide at the request of an increasingly future-conscious, global society. At TexData, we have placed great emphasis on sustainability from the outset and have shown you the issues from many, different perspectives. And this will be continued in the following edition 1 / 2014. In this issue, we will also be looking at another aspect of sustainability, namely recycling.

A second important theme - always concurrent and hotly discussed - are the future production sites and markets of the textile industry. How will China develop as the largest producer of textiles and clothing and will Asia as a whole continue to develop? Who is ahead, who‘s coming up and where are the industry movers? Rising wages, automation, energy costs, resources, ecology, innovations, working conditions, CO2 footprints, „fast fashion“ and „buy local“ are just some of the parameters that ensure perpetual change. In this issue we'll be taking a look at the resources - more precisely on cotton and the alternatives.
Here there is an interesting approach taken from the Bremen Cotton Conference that allows consumers and their needs to be placed at the centre of the future of the cotton. What does he want and where are hidden needs that can be developed?

And, as we approach the end of the year, I'm sure you'll allow me a small peek at what's in store next year. With ITMA Asia, China will surely want to try and fulfil the innovation and automation objectives of the current FYP. The development potential of "domestic markets" is also a cause of great excitement. Will China succeed in establishing its own brands or will established "super brands" from Europe and the United States come out on top in China? Can China maintain its production levels despite sharply rising wages? What course will the crisis in the Eurozone take and will there be a Renaissance within the European textile industry. Headlines such as „A new report claims Leicestershire can become a major textile manufacturing centre again" from the Leceister Mercury (GB) dated November 2013 are getting people's attention at least.
Current development trends offer much uncertainty - but one thing seems certain. 2014 will be an exciting and busy year for our industries. And that is something that we can all look forward to.

We wish you all much success, happy holidays and wish you a Merry Christmas and a Happy New Year!


Cotton 2020:
Blend or Luxury Commodity ?

„That's pure cotton!", "With only 25% polyester." What the well-known German comedian Loriot would tell his customers so disingenuously in his role as textile retailer could become reality in the next 10 to 20 years; cotton is getting scarce, at least when global annual production is compared with the growth of the world population. Over the last 50 years, the phrase "pure cotton" didn't come to stand for brand quality in Germany alone. "That's the real thing! We're not cheating you!"

However, these days have long since passed. With on-going improvements in man-made fibres over the last 30 years and, particularly in the last decade, the development of functional textiles for work, sport and leisure the promise of brand quality that pure cotton came to embody has dwindle in importance. Consumers have come to accept synthetic fibres. In fact, they even prefer them thanks to their many advantages and additional benefits such as breathability, absorption, fit, comfort and durability not to mention the latest developments in terms of water and UV resistance. Of course, this has had consequences for humble cotton that now seems to have had its day. The question is, whether cotton will establish itself as a new raw material, a half-finished product as it were, for a mixed-textiles product or does its future lie in exclusivity and the promise of purity?

And as if that wasn't enough, cotton still has a few other hurdles to deal with. On the one hand there are the commodities speculators, who in 2011 were able to drive cotton prices up to the previously unimagined level of 2 US $ / lb. Even though the price quickly sank and has remained stable between 0.72 and 0.93 US$ / lb. for over a year, this warning shot had done enough, leaving behind it a shaken and more cautious industry.

On the other hand there is the issue of the day; sustainability, which has had a much greater effect on cotton, despite to its renewability, than synthetic fibres based on finite fossil fuels. A substantial increase in mega trendy organic cotton would force a reduction in yields as well as in the volume of available cotton quantities.

2012 Annual report

Let's look at a few figures. The 2012 annual report of the Bremen Cotton Exchange, published during the members meeting in June 2013, puts cotton production at 27.4 million tons during the 2011/2012 period (source: ICAC); the highest ever yields of natural fibres. With processed volumes within the same period at 22.8 million tons there is a clear difference of 4.6 million tons, which leads to a total final stock of 14 million tons. Another unachieved figure, which lies at around 50% production and 62% processed materials.

Of particular interest, are the developments in China. During 2011/2012, China produced 7.4 million tons and processed 8.6 million tons, almost 1 million tons less than in the previous year. China is renowned as a textile country that processes more cotton than it actually produces itself and is therefore dependent on imports. During this same period, imports were significantly high at 5.4 million tons; five times more than was necessary to cover production in the year and more than twice as much as in the previous year.

This allowed China to increase its final stocks from 2.1 to 6.2 million tons thereby retaining more than 44% of global cotton stocks; a trend which sees projected stocks increase to 48% during the 2013/2014 period. China is stockpiling cotton and, according to estimates, with 7.8 million tons for 2013/2014 has almost an entire period's processing volume in reserve. Despite this, it is expected that production in China will decrease to 7 million tons during 2012/2013 and to 6.15 million tons in 2013/2014. Analogously, it is estimated that world cotton production will decrease from a five year high in 2012/2013 of 25.9 million tons to 23.2 million tons in 2013/2014.

The forecast sees a drop in production and an increase in processing, which is largely due to India. After China, India is the world's second largest cotton producer ahead of the USA and in 2011/2012 produced some 6 million tons with a domestic processing volume of 4.4 million tons. This allowed India to export 2.4 million tons of cotton during the 2011/2012 period.

These quantities will no longer be possible in the future as India's cotton processing will grow continuously from 3.8 million tons in 2008/2009 to a projected 5.2 million tons in 2013/2014 with some 5.6 million tons production. It is also expected that other countries will also increase processing volumes such as Pakistan from 2.2 to 2.6, East Asia & Australia from 1.6 to 1.9 as well as Europe & Turkey, Brazil, USA, CIS and other countries 2-4 %.

In the case of exports, reductions in India from 2.4 million tons to 0.75 million tons (-68%) and in Brazil from 1.1 million tons to 0.6 million tons (-45%) will lead to global reductions of all exports from 10 million tons to 7.9 million tons (-21%). Only the CFA Zone will escape the general reduction with an increase of 0.6 million tons to 1 million tons (+67%).

However, as we don't want to get to bogged down with figures we'll just say that, as a whole, cotton processing volumes are quite stable, the likely increase in demand in India and Pakistan are included in forecasts and, excluding China, production is expected to increase in all key production countries. Thanks to a final stock, which almost doubled during 2010/2011, both the cotton and processing industries are able to react to problems such as price and demand volatility and are in a secure position. Future production areas that, according to the Bremen Cotton Exchange, can be increased to 36 million hectares at most are subject to price-related and general competition from other crops, in particular, so-called „food crops". Aside from clothing, the increasing world population also needs to be fed.

Overall, the figures show that the outlook for cotton seems, at least for the foreseeable future, to be secure.

Cotton **2020**

However, what does the long-term outlook look like? One set of figures of particular importance in this respect are exports and corresponding imports. India uses its cotton production to satisfy its domestic markets, allowing the export share of the USA to increase from 25% to 30% despite negative production trends (2.3 million tons). Fast growth of domestic cotton mills as part of President Obama's intended reindustrialisation of the country together with lower energy costs does not seem at all unlikely. In addition Mexico, Central America and the Caribbean offer near-by locations with low wages for potential re-processing. Other countries such as Australia and Brazil could follow this example, making imports more difficult and driving prices up. This is admittedly a very speculative scenario.

Let's not stray from the facts and serious projections of the Bremen Cotton Exchange and ICAC and look at figures for all global, fibre products. Since the 1960s, the percentage of cotton with respect to global fibre production has been decreasing from 68% initially to 33% in 2011. At present, synthetic fibres constitute the lion's share of fibre production with some 58 % of global volumes.

Despite coming from very humble origins in 1960 of approximately 1 million tons, synthetic fibres went on to replace cotton as the world number on in the mid-90s and now enjoy a processing volume of around 40 million tons (58% share). According to the estimates of the Bremen Cotton Exchange this quantity will continue to increase, reaching 56 million tons in 2020. If one is to believe the projections for cotton of 29 million tons, cellulose fibres of 4 million tons and wool of 1 million tons (no change) the share of synthetic fibres should increase to 62%. However, if the optimistic projections for cotton are not shared (in November ICAC released 25.5 million tons for 2013/2014) and a constant level of 25 million tons is assumed, synthetic fibres will enjoy an even greater share of 65%.

The forecast for fibre consumption correlates to population growth. By 2020, the world population is expected to grow by at least another 500 million people, an increase of approx. 7%, a figure which is corrected upwards every year, e.g. last carried out June 2013 by the United Nations. Now it could be argued that this growth will not have any serious knock-on effects before 2020, because cotton processing will easily increase about 107% from 25 million tons to around 26.75 million tons and everything will remain the same. However, it is also obvious that the younger population, in particular, needs much more clothing than the older population who often swap, wear long-term and purchase less. It is not intended to pursue this thought further, rather it should demonstrate that it is likely that not everything will remain constant. The demand for clothing will increase dramatically and the growing market for technical textiles is increasing demand for fibres in general.

The forecasts of the Bremen Cotton Exchange predict an increase from 69 million tons of fibre in 2010 to around 90 million tons in 2020. Therefore much less cotton will be available for the total quantity of textiles produced in 2020 which begs the question, how and for what textiles can cotton be used? What will the industry make from this dwindling resource cotton? Mix it as an additive? Or make it something special?

And what will happen to textiles for which cotton is an intrinsic component such as denim? In the Lenzing Report "Greening of the Denim Supply Chain", Michael Kininmonth points to an ICAC report, which states that around 10% of cotton stocks are used for denim, and confirms this with his own calculations. An increasing demand for jeans seems likely and any increase in this share of stocks would further reduce the use of cotton for other textiles.

The International Cotton Advisory Committee (ICAC) presented current figures at its plenary meeting on the global denim market indicating that between 530,000 tonnes and 760,000 tonnes of denim were traded globally from 2001 to 2011. This corresponds to an average of 670,000 tonnes. The largest denim importer in 2011 was Hong Kong, with imports of 95,000 tonnes that year, followed by Turkey and Mexico with imports of 58,000 tonnes and 53,000 tonnes, respectively. Ranking first in the list of the largest exporters last year was China with 273,000 tonnes, followed by Pakistan with 70,000 tonnes, Turkey (37,000 tonnes), India (36,000 tonnes) and the United States (35,000 tonnes).

Export and import unit values for denim rose from $4 per kilogram in the early 2000s to between $7 and $8 per kilogram in 2011. A doubling in price within 10 years seems less spectacular and corresponds to an annual increase of 7%. But as a scarce commodity, the next doubling of cotton prices could take place significantly quicker. An increase of 12% would see denim prices double after six years and 18% after only four years.

And denim is just one example; men's shirts, T-shirts, bed sheets, underwear, furniture. The list could go on forever making it obvious just how important cotton is for so many different textiles.

Will sustainability quicken scarcity of cotton?

Scarcity through increased demand makes cotton's future volatile enough, but there is one more aspect that must be taken into account. It is just far too important to ignore and we've only really touched upon until now. We mean, of course, sustainability along the supply chain that in the case of cotton begins with cultivation. In order to produce the required 25 million tons of cotton from around 33 million hectares, special fertilizers and chemicals are unavoidable. Criticism surrounding the use of these chemicals, intended to promote their reduction, is getting increasingly vocal, finding more listeners and gaining more support amongst consumers and retail and therefore within the textile industry too.

That’s why a considerable effort has been made within the cotton industry to improve sustainability along the textile value chain.

The most radical form of which is offered by Textile Exchange (formerly Organic Exchange) that defines a cultivation method, which avoids all toxic or persistent pesticides or fertilizers and waste water irrigation. Genetic manipulation and radiation treatment are also prohibited so that cotton produced in this way conforms to true, organic cotton standards.

Other initiatives include the Better Cotton Initiative (BCI), Cotton made in Africa and Fairtrade Cotton. (See TexData magazine issue 1/2013).

During 2009/2010, organic cotton was grown on 461,000 hectares in 23 countries leading to a worldwide, fibre production volume for organic cotton of 241,697 tons (+38%). This small but welcome growth suffered a setback in the following period. Textile Exchange writes in the 2011 report: „Despite the fact that 81 percent of brands and retailers responding to the Textile Exchange (TE) 2011 Market Survey indicated they plan to expand their use of organic cotton, organic cotton production was down 37 percent in 2011.”

In actual fact, the cultivation area for organic cotton was reduced by 30% in 2011 to 324,577 hectares allowing only 151,079 tons of cotton to be produced (-37%). Thanks to the war in Syria production during the 2011/2012 period will also decrease. Alejandro Plastina from ICAC places it at 143,600 tons.

In total, the four stated organisations are expecting 822,548 tons in 2011/2012, of which around 492,000 tons fall upon the Better Cotton Initiative who, in contrast to the other three, take a neutral standpoint on genetic technologies. Together all three initiatives correspond to around 3% of annual production in 2011/2012. Organic cotton alone makes up just over 0.5%.

In this context, the per-hectare yield is of obvious interest. For organic cotton this figure totalled 0.542 tons in 2009/ 2010 and 0.465 tons in 2010/2011 (-12%). The 59 kg/hectare difference demonstrates that cultivation of organic cotton in harmony with nature and without artificial irrigation makes seasonal planning difficult with respect to defined supply volumes. On top of this, for total production of 27,444 million tons on around 36 million hectares an average yield of 0.761 tons/hectare can be calculated; with 0.755 tons/hectare in the previous year. The difference is only 6 kg/hectare (0.7%) and appears to be quite constant. But what do differences between individual countries look like?

Are there large differences here? Indeed, they do exist. Whilst African countries such as Angola, Togo or Ghana achieve between 300 and 400 kg, top class producers such as Israel and Australia achieve around 2 tons! The ITMF spinning committee noted on its 2012 visit to Australia: "With regard to yields the Committee noted that on average cotton lint output increased significantly between 1990 and 2012 from an average of around 1,500 kg per hectare to around 2,000 kg per hectare. This is one of the highest yields per hectare in the world and significantly above the global average of around 750 kg. In some areas the maximum yields per hectare can even reach 2,500-2,700 kg."

With estimates placing them at three times the average yield Australia must have a secret. That is in fact the case as in Australia genetically modified cotton is cultivated. The spinning committee notes further that: „In fact almost 100% of the total area under cotton in Australia is planted with herbicide and/or insect tolerant GM-cotton seeds; only a very small share is planted with conventional (non-GM) cotton seeds. The application of GM-cotton reduces the use of insecticides by 80% when compared to conventional cotton."

We hope that we're not starting to bore you with figures because there are still two interesting conclusions that can be drawn, which we have touched on just slightly. Firstly, global production could increase by around 66 million tons on 33 million hectares, so long as everyone would follow and implement the Australian model. Secondly, total global production would lie at just 16.5 million tons if the whole world cultivated only organic cotton.

And finally, let's determine the output factor between organic cotton on average and in Australia. On average this comes to 2/3 (0.5/0.75) and for the Number One just _ of the yield.

If we assume additional charges along the textile value chain, the finished organic textile would have to be around 1.5 times (reciprocal of 2/3) as expensive as those made from classical cultivation methods.

Is organic cotton the future?

Let’s look at the sales side of textiles, e.g. retail. Textile Exchange writes in the summary of its 2012 market report: „71% of Companies surveyed will increase Organic Cotton use. Key findings include the fact that 71% of respondents are planning to increased organic cotton for 2013 and that additional sustainable fibers are also slated for growth. The Report also shows that C&A, Nudie Jeans, and Puma are prioritizing organic cotton on their preferred fibers lists. C&A and Puma both report that organic cotton provides solid environment credentials specifically in the area of water use. The HIGG Index 1.0 also places organic cotton ahead of conventional options.

Textile Exchange has included two Top 10 lists in the Market Report, one for organic cotton growth by volume and one for organic cotton percentage increase over the previous year. C&A tops both lists with 78% growth in 2012.

This year’s Market Report’s Top 10 organic cotton users by volume are; C&A, H&M, Nike, Puma, Coop Swiss, Anvil, William-Sonoma, Inditex, Carrefour and Target, in order.

For the first time, Top 10 Users by volume had to consume over 2 million pounds of organic cotton to make it onto this list! Another first is the Top 10 Users by Percent Growth. The first time list includes C&A with a growth rate of 78% followed by Nudie Jeans at 69%. Other leaders driving growth include PUMA, Otto, Continental Clothing, Anvil, H&M, Bergman Rivera, Inditex, and Nike. "

Clearly ahead with over 1575 stores in 21 different European countries and more than 37,500 employees, C&A is one of the leading fashion retail companies in Europe and a company of Cofra Holding AG. OTS reported in September 2013 that in the 2012 business year C&A used 22,000 tons of certified cotton (up by 78% over the previous year) and therefore around 2.6% of the cotton produced worldwide by the four organisations. That corresponds to the sale of around 80 million products. In the current 2013 business year, the company plans to increase returns from organic cotton textiles to 100 million items. In addition, C&A has reinforced its long-term company goal of sourcing its entire cotton collection from sustainable production, to which organic cotton belongs, by 2020.

However, what does the price of organic cotton products look like at C&A. Is there a special brand-quality promise and therefore a higher price. The C&A online shop gives the answer, astonishingly, as no.

Screenshot of the C&A webshop with products for the German market

The label referring to organic cotton exists but the price lies within the normal range for children's trousers; in fact, in the pictured series it is even the lowest.

That gives pause for thought. Is it worthwhile to make organic cotton products into something special qualitatively, e.g. a proper category of its own, and to pass the price on to consumers? Or is the product brand with respect to the consumer oriented more to price than production? Do many retailers see organic cotton as just one sales segment of many that must/can be served in order to reach respective target groups despite the engagement of Textile Exchange, within SAC and other initiatives?

Faced with higher prices, will the consumer decide differently, e.g. against organic, in contrast with organic food? And if organic cotton is not successful, how can it generally be possible for cotton to raise the level of the brand promise as achieved successfully with silk or wool, in particular merino and cashmere?

Answers given by Conferences about cotton's future

Answers to the future of organic cotton were heard recently at Textile Sustainability Conference in Istanbul between 11th and 13th November. (*A conference diary is available online for download.* ***Editor's recommendation!***). The Conference in Istanbul kicked off by posing the question: "If you could magically change one thing in the textile industry so that it moves faster towards sustainability, what would it be?"The question has potential as free from everyday parameters and requirements, independent visions of the future can be thrashed out. As TE reports in the diary:" This year's conference focused on five key themes: Strategy, Sourcing and Supply Chain, Indexes and Standards, Design and Materials, and Chemistry and Processing. We deliberately walked conference participants through each segment because we wanted cross-pollination and collaboration between people who normally wouldn't attend the same sessions. We also used tools such as World Café, Gift Garden, and Open Space to facilitate these sessions in a new way.

We wanted to amplify the effects of cross-pollination, foster the co-creation of solutions to old and new issues, and gain a fresh perspective on industry opportunities."

In the diary, the reader will find a quick overview with some guidelines and mindmaps relating to significant topics in graphical form. Clear goals such as "make sustainability cool & sexy!" are highlighted and references are given to other resources.

Answers to the crucial question regarding the future of cotton in general will probably be given at the 23rd Bremen Cotton Conference, which will take place in Bremen from 19th to 21st of March, 2014. Here, all the big names in the international cotton textile industry meet every two years to set the course for development for the near and distant future. The conference announcement (programme is available online) states: „The International Cotton Conference Bremen began in the 1950's and dealt exclusively with matters of cotton testing, before developing over the years to include more and more on cotton production and the next stages of the textile chain. In 2014, for the first time, a change in perspective is taking place."

The stated change of perspective relates to the consumer whose requirements will feature centrally during the conference. The questions they ask are: "What does the consumer expect? - How can the cotton and textile industries meet these expectations? - What exactly makes cotton a unique fibre in the eyes of the people all around the world?"


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The Cotton Conference Bremen will provide the answers: “Analyses, findings, research results and solutions will be presented and discussed on everything from cotton growing through processing and equipment to the everyday comfort. Sustainability in production, textile processing and the use of clothing, which is becoming increasingly important for the end consumer, will also be looked at.”

During its annual conference this September in Columbia, ICAC also tackled many perspectives for the near and distant future of cotton. For example the Round Table for Biotechnology in Cotton which has constituted at the 69th Plenary Meeting held in Lubbock, TX, USA in September 2010 and which objectives are to facilitate sharing of experiences on commercial production, marketing and regulation of biotech cotton has worked out a 20 page statement.

In this case, they say that: “The adoption of biotech crops continues to spread to more countries. Fifteen countries -- Argentina, Australia, Brazil, Burkina Faso, China, Colombia, Costa Rica, India, Mexico, Myanmar, Pakistan, Paraguay, South Africa, Sudan and USA – planted biotech cotton in 2012/13.” And they say:” The success story of biotech cotton in various countries is similar – increased yields, reduced pesticide use, less tillage, increased worker safety - but critics continue to raise issues that cannot be proven scientifically.” And: “All biotech cotton producing countries have reported some unintended consequences.

The most common problem is the development of secondary pests. As pesticide applications for lepidopteran species declines, secondary pests, which had previously been inadvertently controlled by these applications, have increased in numbers to become primary pests.” The situation regarding “Measuring sustainability in cotton farming systems” is given in the SEEP report of the same name which is an Expert Panel on the Social, Environmental, and Economic Performance of Cotton (SEEP) of the ICAC, which has been founded in 2006. The forthcoming report provides an overview of sustainability issues in cotton and takes stock of indicators used to measure sustainability. These are then rated to arrive at a set of common indicators that can serve as a basis for discussion within the industry on the development of a framework to further enhance sustainability.

As the final report will not be ready in time for the upcoming Plenary, it was decided to present an executive summary to provide an idea of the ongoing work. The report begins with a brief overview of cotton production and trade (Chapter 2). It then proceeds with a review of the key components of sustainable development in agriculture as defined by the international community (Chapter 3), followed by a review of the key sustainability issues relevant to cotton production (Chapter 4). This is followed by an inventory, review and analysis of the indicators used for measuring sustainability performance across a range of different cotton-specific supply chain sustainability programmes and initiatives, as well as more generic initiatives aimed at assessing sustainability in agricultural (Chapter 5, with detailed background information on the sustainability initiatives included as Appendices).

The purpose of the analysis was to extract the most relevant indicators from the inventory. The results are presented as a set of recommended indicators to measure sustainability in cotton production (Chapter 7). The report concludes with a discussion on the importance of country and stakeholder perspectives in complementing the recommended indicators with specific priorities (Chapter 8).

The results presented demonstrate that sustainability is of particular importance for ICAC and that much effort is given over to developing and implementing other strategies regarding measuring methodology based on valid data. Concern about sustainability seems to be replacing concern for "Increasing returns – no matter how", which also includes reduced yields. Accordingly, ICAC writes: "The high use of water, insecticides and fertilizer rendered cotton vulnerable to allegations of environmental harm and invited unrealistic yield claims from many quarters."
"Measures to Improve the Sustainability of Cotton Production", the subject suggested for the "2014 Technical Seminar", will most definitely be a component of this. Here they say:

„A technical seminar on "Measures to Improve the Sustainability of Cotton" can address how best to meet plant needs, how to reduce yield losses due to over and under use of inputs, can provide concrete examples, and can address how farmers can be convinced to adopt sustainable production practices. The work of the Expert Panel on Social, Environmental and Economic Performance of cotton will be used as guidelines for making practical improvements."

Other key topics will be biotechnology with the theme „International Exchange of Cotton Germplasm" and fiber quality with „New Developments in Fiber Quality Measurement".

Conclusion

The large number of aspects that affect cotton now and in the near future makes all perspective estimations almost impossible. There are many reasons to think that cotton will become scarcer in the future. Whether this is relative to the growth of the textile market or absolute is not yet known. Aspects of sustainability suggest an absolute scarcity. Whether, in that case, its scarcity will make cotton into a luxury commodity, whether it will be used especially for certain materials such as denim or whether it will be beaten by man-made fibres will depend on the consumer and the efforts of the textile processing industry. Associations, market players and conferences are required now. They will determine the future of cotton. Our, admittedly, very speculative scenarios leave the question of whether cotton is developing into a luxury commodity unanswered. So we are able to hope that the line "that is pure cotton" will once again have a special meaning.

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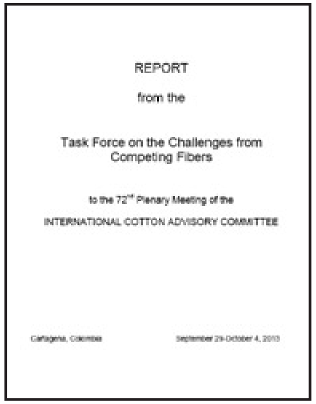

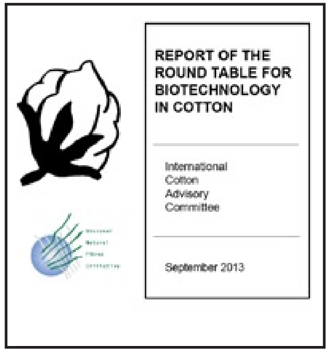

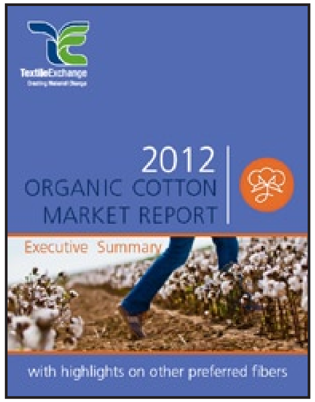

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07.03.2012 Textile chemistry
Clariant awarded the EU Ecolabel for its Advanced Denim Illustration Collection
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BASF achieves top results in 2011 and has ambitious targets for 2012
07.03.2012 Textile chemistry
Denim by Première Vision continues its expedition in Asia, and launches: DENIM BY PREMIÈRE VISION ASIA
07.03.2012 Textile chemistry
Clariant awarded the EU Ecolabel for its Advanced Denim Illustration Collection

Interview with the Board of Composites Germany during the K Trade Fair in Düsseldorf

Interview with:
Chairman of the Board Dr. Michael Effing, AVK,
Prof. Axel Herrmann, CFK-Valley,
Dr. Reinhard Janta, CCeV,
Frank Peters, VDMA.

***Dr. Elmar Witten**, Spokesman for the Management of Composites Germany, interviewed the members of the board of the newly founded trade association at this year's K Trade Fair, which took place from 16 - 23 October 2013 in Düsseldorf. Composites Germany combines the strengths of four major organisations: AVK – Industrievereinigung Verstärkte Kunststoffe e. V. (AVK), Carbon Composites e. V. (CCeV), CFK-Valley Stade e. V. (CFK-Valley) and Forum Composite Technology in the VDMA (VDMA).*

What is the relevance of composites to (German) industry?

Dr. Michael Effing: Germany is a global leader both in the automobile sector and, through Airbus, in the aviation sector as well as in mechanical engineering. As we have just seen at the K Trade Fair in Düsseldorf, we are also a leader in the area of composites – in the production of the materials themselves and the integrative manufacturing technologies. Composites are a key technology and must remain so for us in Germany and Europe.

What was your reason for founding another association for the composites industry?

Dr. Reinhard Janta: We have not founded another association but an umbrella organisation. We aim to bring together the common themes and interests of the individual associations and communicate these to the outside world with a single voice. This will give our industry both a face and a mouthpiece.

What are the benefits of being a member of the umbrella organisation Composites Germany to AVK/ CFK Valley/ CCEV/ VDMA?

Prof. Axel Herrmann: There is massive investment taking place all over the world in CRP technologies. By coordinating and combining our activities in Germany, we can improve the strength of the lightweight construction industry and thus Germany as a location for industry in general. Our international competitiveness will improve and our member companies will profit as a consequence.

What are the special challenges facing Germany as a high wage country as it competes with other composites manufacturing countries?

Frank Peters: The wage component of overall costs, especially for parts manufactured in small numbers using manual processes, is generally quite high. This means that automation and creating links between processes for large series component manufacturing has to be seen as both a challenge and an opportunity. However, Germany's innovative capabilities and know-how in automation mean that it currently plays a leading role in manufacturing composite components.

What are the individual factors driving the development of the composites market?

Dr. Reinhard Janta: For Germany, the development of the market is being driven by important themes such as resource efficiency, the transition to renewable energy sources and the innovations required to accomplish these challenges. Changing conditions are forcing us to seek out new solutions and use our resources more efficiently. We can achieve this better by working together than by working alone.

What material properties do OEMs currently require in the area of aircraft construction?

Prof. Axel Herrmann: Speed is always important – and this is achieved through fast industrial processing and rapid hardening/curing without any drop-off in performance. OEMs are looking for high-performance injection resins or infusion resins as substitutes for prepreg systems, ways to exploit the better drapability of semifinished textile products and efficient materials with the appropriate flame and smoke retardant properties to be used in cabins and interiors. Here too, manufacturers require fast industrial processes and compatible materials. Our vision: the capability to integrate functionality!

What important material properties are OEMs currently seeking in the automotive sector?

Dr. Reinhard Janta: Our cars must become lighter in order to save energy, reduce CO_2 emissions and make electromobility a more realistic and attractive proposition. The aim is to have 1 million electric cars on German roads by 2020. These cars must become much lighter in order to extend their range to an acceptable level. Lightweight construction based on composite materials and structures is one way that this can be achieved.

What are the primary objectives that Composites Germany has set itself?

Dr. Michael Effing: Composites Germany will primarily deal with national and international public relations and the presentation of the sector to the outside world. We see ourselves as the mouthpiece of the composites industry enabling us to speak with a single voice.
Essentially, we are concerned with promoting the innovations and technologies developed by this expanding industry. To achieve this, we are planning coordinated activities under the banner of „Composites Germany“.

Is Composites Germany currently involved in any specific activities?

Frank Peters: Since July 2013, our partner organisations have been conducting semi-annual surveys of all their member companies in order to gather market information. We are also already running projects in the area of norms and standardisation with a focus on material properties and testing methods.
Naturally, we will be continuing our series of joint meetings on specific topics and supplementing these in future with appearances at various trade fairs.

Can other organisations become members of Composites Germany?

Dr. Michael Effing: Composites Germany was founded last September as an umbrella organisation to combine the strengths of 4 major partners (AVK, CCeV, CFK Valley and VDMA). We see 2014 as a year of consolidation. We want to refine our joint strategy and discover synergies. Other associations/organisations will be welcome to apply to become members in 2015.

How can companies contribute to or represent their interests in Composites Germany?

Prof. Axel Herrmann: Joint events, trade fairs and symposia will provide suitable platforms. However, companies can also contact the head office of Composites Germany directly. We will then put them in touch with the appropriate contacts within our existing networks to answer their questions.

What is the importance of composites for final consumers and their product purchasing decisions?

Frank Peters: Composite materials have already acquired a positive image in the leisure sector. In automotive construction, people associate composites with lightweight design and conservation of resources. As BMW‘s „Project i“ clearly demonstrates, promoting composites directly also offers an opportunity to market products through attributes such as innovation and progress.

Outstanding number of exhibitors and a host of new products at Heimtextil 2014

The world's biggest spectrum of textile products, trends and innovations is to be seen at Heimtextil in Frankfurt am Main from 8 to 11 January 2014. Occupying 19 exhibition halls, the leading international trade fair for the sector presents the entire portfolio for textile interior design and textile furnishings for commercial projects: from products for windows, upholstery, floors, walls and sun protection to textiles for the bathroom, bed and table. Additionally, the fair is distinguished by an informative complementary programme for both visitors and exhibitors.

With an outstanding number of registrations, the International Trade Fair for Home and Contract Textiles is now entering the decisive preparatory phase. "The great response and, in particular, the return of many prominent European manufacturers shows clearly that the textile industry continues to rely on Heimtextil as a vital source of new impulses at the beginning of the year", says Olaf Schmidt, Vice President Textiles & Textile Technologies of Messe Frankfurt. Thus, the upward trend of recent years, which has seen a steady increase in exhibitor numbers, continues.

Prominent returnees: Chivasso, Viganò and Zimmer+Rohde

The Who's Who of the international wall-covering sector will make their presentations together with renowned textile publishers in the fully booked-up Hall 3.1. The highlights at Heimtextil 2014 will include the product presentations by Alhambra Internacional (Spain), Arte, N.V. Wind (both from Belgium), A.S. Création Tapeten, Kobe, Tapetenfabrik Rasch (all from Germany), Clarke & Clarke (Great Britain), Elitis, Texdecor (both from France), Erre Erre and Limonta (both from Italy). Among the renowned returnees will be Chivasso (The Netherlands), Diabolo (Belgium), Erfurt and Zimmer+Rohde (both Germany).

SATI Germany is back again in Hall 3.0 where the exhibitor highlights will include Deco Team (Germany) with a comprehensive presentation and programme of events. The companies making up the Deco Team are Alfred Apelt, Gardisette, HECO Textilverlag, Höpke, Porschen, Sonnhaus, Stoeckel & Grimmler and Unland.

Expansion in the digital-printing market: more exhibitors, more exhibition space

There has been an outstanding development in the 'Digital Print' product group in Hall 4.2. The number of exhibitors and the exhibition space occupied have increased significantly for the coming fair. The leading companies – Durst, Reggiani (both from Italy), Hewlett-Packard (USA), Kornit Digital (Israel), Pod Iberia (Portugal) and SPGprints (The Netherlands) – are taking part in Heimtextil or have bigger exhibition stands than in 2013.

Hall 4.1, where the decorative and furniture-fabric specialists of the Consorzio Promozione Tendaggio (Italy) rank among the top exhibitors, is also fully booked up. Moreover, the high-grade product spectrum there will be enriched by the return of premium suppliers, Alois Tessitura Serica, Para, Pienostile and Viganò (Italy) and Deltracon (Belgium).

Decorail (Belgium) is a new exhibitor in the 'sun' section in Hall 5.1. Additionally, Maron (Switzerland) and Schadebo (The Netherlands) are returning to the fair. Other key players in the sector include Coulisse (The Netherlands), Erfal, Gardinia Home Decor, Kadeco, Liedeco, MHZ and Teba (all from Germany).

Bed and bathroom: top players on board

In the household textile sector, the organisers are delighted to report the best booking status in years for Hall 8. The Hall 8 will be the focal point for bed linen, bedding and bathroom textiles at Heimtextil 2014. Almost all key players of the bedding sector will be represented, e.g., Badenia, Billerbeck, Heinrich Häussling, OBB and Traumina (all Germany). Back again is Centa Star (Germany). Growth also comes from Austria, Switzerland and USA with Davilla (Austria) and Merchant Icing (Switzerland) and fabric manufacturer Invista (USA) having registered to exhibit.

Heimtextil is also distinguished by a broad spectrum in the bed-linen segment and all well-known German and international brands will be represented, including Adam Matheis, Biberna Schmänk, Bierbaum, Dibella, Estella, Fleuresse, Formesse, Ibena, Irisette, Kaeppel, Klaus Herding and Wülfing (all Germany), Veba (Czech Republic), Casual Textil (Spain) and CTI - Chaulnes Textiles Industries (France). As in the past, renowned bathroom-textile manufacturers, such as Ernst Feiler und W. F. Gözze (both from Germany), are also taking part.

Arli Group, Casatex and Mastro Raphael

There is also positive news for Hall 11 with Möve Frottana (Germany), Arli Group with the Damai brand (The Netherlands) and Grund (Czech Republic) having announced their return to Hall 11.0. Taking part for the first time will be Bedeck (Great Britain), House in Style (The Netherlands) and Casatex with the Laura Ashley brand (Greece). Other renowned exhibitors include Cawö, Kitan with the Esprit brand, Kleine Wolke, Pichler, Sander (all from Germany), Deschamps with the Tommy Hilfiger brand (Belgium), Desigual (Spain) and Vossen (Austria).

New generation of designers particularly well represented

The established highlights in Hall 11.1 once again include Curt Bauer (Germany), Fischbacher, Schlossberg (both from Switzerland) and Kas (Australia), as well as high-grade exhibitors such as Albrecht Creative (Germany) and returnee Mastro Raphael (Italy). Taking part for the first time are selected young designers who will be presenting inspired and innovative textile developments, as well as creative product ideas for bathroom, bedroom and table textiles, at the 'New&Next' newcomer area.

They include the following companies: Crishome Tex, Sirftex (both from Portugal), Colorkitchen, Lanui (both from Germany), Divine Marquise (Belgium), Leomax Cashmere Collection (United Arab Emirates), Maison des Dunes (Morocco), Orgamint (Latvia) and Slowcolor (USA).

'New & Next' presents fresh design ideas

The 'New & Next' platform for newcomers is a source of fresh design ideas. Among the companies exhibiting there will be Crishome Tex, Sirftex (both Portugal), Colorkitchen, Lanui (both Germany), Devine Marquise (Belgium), Orgamint (Latvia), and Slowcolor (USA) all of which set accents in the household textiles market with their trendy new products.

En vogue: upcycling

Manufacturers of apparel, home textiles and furnishings are giving increasing consideration to the resource-friendly use of materials, and a new product life cycle. Heimtextil also spotlights the subject of upcycling and the work of committed young designers. Thus, the 'Young Creations Award: Upcycling' competition calls on young designers to create original upcycling products for the interior. Following the successful première at the last fair, the next competition on the occasion of the coming Heimtextil will be held with more participants.

Aachen University of Applied Sciences, Coburg University, Stuttgart Technical University and Weissensee School of Art will take part in the competition with creative works and present their models in a special exhibition in Hall 4.2.

‘European Digital Textile Conference’

The first ‘European Digital Textile Conference’ will be held concurrently with Heimtextil 2014 and offer an overview of new technologies, market opportunities, areas of application for mass printing and sustainable production methods. On the second and third days of the fair (9 and 10 January 2014), the World Textile Information Network (WTiN) in cooperation with Heimtextil will hold a dialogue with experts in ‘Saal Europa’ of Hall 4.0. The conference has been held in different parts of Germany for many years. The last time was in Hamburg in 2011. In the past, the focus was on printing textiles for the apparel sector. Now, international experts will speak about areas of application in the expanding field of home and household textiles.

Heimtextil has enlarged its programme of lectures and, at the coming trade fair for home and contract textiles (8 to 11 January 2014), renowned architects and furnishing experts will discuss current issues relating to the contract business at the new ‘**Contract Square**’ area in the foyer of Halls 5.1 / 6.1.

Parallel to this, Heimtextil offers information about e-commerce for retailers and IT developments in the hotel business at **‘Lecture Square’** in Galleria 1. The programme of the world’s leading trade fair for the sector also includes additional conference and lecture themes.

‘Webchance’ specialist forum on e-commerce

Online trading and marketing are currently some of the widely discussed issues in the industry. After the successful première of the specialist forum Webchance last year, Heimtextil will again be offering expert information on matters of e-commerce in 2014. This is why Messe Frankfurt has created the Webchance Academy in this form. Targeting trade visitors, especially small and medium-sized retailers and interior decorators, the forums seeks to provide readily understandable, practical presentations that will convey the required know-how on setting up and operating websites, on online marketing and on webshop design. Naturally, they will also provide examples of how retailers should set up a web shop, promote their business and increase sales using new media, as well as point out the legal aspects to be borne in mind. ‘Webchance’ will be held on 8 and 10 January 2014, in the Lecture Square at Galleria 1, each time from 12:00 to 17:00. All presentations will also be available in English. The entire lecture series can be found at: www.webchance-academy.de/heimtextil-programm

On the first three days of the fair, the lectures at the **'Contract Square'** will focus on issues relating to modern architecture. The location for the lectures, which begin at 13.00 hrs and are being organised in cooperation with AIT architecture magazine, is the foyer of Halls 5.1 / 6.1. 'Contract Square' is recognised by the appropriate architects' chambers as a training event and participation certificates will be available there.

The programme begins with the 'Architecture is Conversion' block on 8 January 2014. In this age of climate change, converting buildings is an increasingly attractive alternative to new buildings. The top speakers, who include Anne Lacaton of Lacaton & Vassal, Paris, Claudia Meixner of Meixner Schlüter Wendt, Frankfurt, will present ways in which existing buildings can be used for new purposes and discuss the creative challenges involved in conversions. On the second day of the fair, lecturers including Yves Schihin of Burkhalter Sumi, Zurich, and Petra Blaisse of inside outside, Amsterdam, will look at 'Hotels Beyond the Standard'.

Finally, on the Friday, the 'Contract Square' programme will examine the subject of 'Living in a Community / Communal Living' with lectures by several top speakers including Susanne Schindler of Parsons School, New York, and Dörte Mandrup of the studio of the same name in Copenhagen. The programme will be chaired by architect critic Andreas Ruby on all three days.

Lecture Square focusing on the hotel business

In cooperation with the German Hotel Association (IHA), Heimtextil will spotlight developments in the hotel business on 9 January 2014. Beginning at 09.30, experts from renowned technology suppliers will provide an overview of the current state-of-the-art and discuss opportunities and potential applications.
"The aim of the event is to help people, especially colleagues from the individual-hotel segment, to make their everyday professional life easier and more efficient", says IHA Chairman Fritz G. Dreesen.

The subjects on the agenda of the Hotel IT Conference range from online direct sales, via big data and media trends, to IT security risks and practical, secure solutions. Rounding off the event will be a 'live hacking' organised in cooperation with the 'IT Security in the Hotel Trade' project of the German Ministry of Economics and Technology (Bundesministerium für Wirtschaft und Technologie – BMWi). Experts from if(is) – Institute for Internet Security – will spotlight potential security risks that occur in everyday hotel life, demonstrate how quickly and easily booking data can be manipulated in online systems and offer tips for simple but effective protective measures.

Wool Lab Interiors

For the first time, The Woolmark Company will present an inspirational trend guide to wool for interiors and design products. Wool is distinguished by a large range of positive qualities for design purposes: comfort, softness, elasticity, moisture absorption, flame resistance, sound and heat protection, naturalness and environmental friendliness. The spectrum of interior applications is equally broad and stretches from bedding and bed linen, via floor coverings, carpets, decorative fabrics and furniture fabrics, to insulation and damping. Ingrid Oomen from Woolmark International will talk about the 'Wool Lab Interiors', a trend presentation for research and promotion of wool, in a workshop at 'Lecture Square' between 15.00 and 18.00 hrs on 9 January 2014. The 'Wool Lab Interiors' is also an inspirational trend book and tool for designers, architects, interior architects and artisans and acts as a guideline to innovative applications for wool in the field of textile furnishings.

'WellMade' – seminar for sustainability in the industry

The Fair Wear Foundation (FWF) will make a contribution to the programme at 'Lecture Square' beginning at 10.00 hrs on 10 January 2014. This independent non-profit organisation works together with companies and manufacturers to improve the conditions of textile workers.

FWF is the leading partner of the 'WellMade' project. Employees of European apparel companies are invited to attend the 'WellMade' seminar to learn about improving working conditions in textile factories. The seminar will present specific solutions for eliminating grievances on the production side.Visitors and exhibitors can also look forward to a spectrum of information on the subject of textile printing. The first 'European Digital Textile Conference: 'Digital Printing for Homes and Interiors' will provide a topical overview of the latest technologies, market opportunities, areas of application for mass printed matter and sustainable production methods. To be held in English with admission at extra cost, the conference will take place in Hall 4.0 on 9 and 10 January 2014.

Heimtextil Trends: seismograph for the new season

The highlight for visitors interested in design is the traditional Trend Show. Visitors and exhibitors can look forward to a host of new design ideas in Forum 0. The elaborate Trend Show and the accompanying programme of lectures will offer a fundamental insight into the latest design issues. The Heimtextil Trends have played a figurehead role at the trade fair for over 20 years. For the 2014/15 season, a team of six international design studios have singled out the most important themes from the multifarious trend currents around the world. This year, the work was led by London's FranklinTill Studio. The British designers are also responsible for planning the Trend Show.

http://heimtextil.messefrankfurt.com/

More than Recycling – the Circular Economy for textiles

In the OECD member states, every citizen consumes an average of 20 kg of clothes and shoes annually. That is demonstrably less than 10 or 20 years ago, but with a population of 1.24 billion it still comes to a grand figure of 24.8 million tons in total. In order to cover this giant demand, some 70 million tons of fibre are produced worldwide of which 40 million tons are synthetic fibres, some 25 million tons are cotton and the remainder is made up of cellulose fibre and wool.

And existing fibres? How many pre-existing fibres are actually recycled and re-used for the production of new textiles? The question is interesting, especially when one considers that in the EU targets for the almost-total recycling of cars have been set for the automobile industry from 2015 and, in order to realise this, car manufacturers are using more textiles as these are more easily recycled than other materials. (TexData Magazine issue III/2013)

In addition, companies like Repreve advertise that they can make materials for new textiles from old PET bottles.

However, we are interested here purely in textile recycling, e.g. old, pre-worn clothes that can be reprocessed. This is nothing new; donation schemes for old clothes have been operated in numerous countries over the last 30 years and the “rag and bone man” dates back to the 19th century. Google returns around 3 million hits for the German term “Textil Recycling” and 12 million for the English “Textile Recycling”.

Many companies offering services associated with this search term are listed on the first pages. One of these pages links to the umbrella organisation FairWertung e.V. Located in Germany, it is a national network of community and church-based organisations working for more transparency and responsibility for the collection and re-use of used clothing.

Fairwertung reports that Germans donate some 750,000 tons of clothing, e.g. an average of 9.375 kg per citizen.

On closer inspection textile recycling turns out to be a bit deceptive as most of the companies involved actually collect huge amounts of clothing to be re-used directly. For example, the recycling company Ecotex states on its website that around 80% of collected clothing is re-worn. The German newspaper Die Zeit reports the following in an article entitled “Big business with clothing donations”: “The best items or the cream, as they’re referred to, are exported to the former Eastern Bloc and the Arabic countries and sold in second-hand shops.

All lower quality items, around 60% of the wearable clothing, are sent to Africa." In Tanzania, around EUR 1.20 can be earned for 1 kg of used textiles. Around 40,000 tons of used clothing are sent there every month from Western countries.

According to details from Wikipedia and Die Zeit, only around 15-20 % of donated clothing, which is deemed no longer "wearable" and therefore used in the production of cleaning cloths and other items, falls into the category of "recycling".

At the same time, all of these companies take great pains to state just how important it is to supply African countries with good quality, used textiles, that there is no local textile industry and that only low sales prices can be achieved.

That might very well be true, even though reports criticising this trade continue to surface every now and then. The problem is that the exported used clothing does not enter a recycling cycle from cradle to cradle, but heads straight for the graves. According to Dr David Meyers of Green Ant Advisors this process has no future. Meyers spoke at the Textile Exchange Conference in Istanbul this November on the topic of "Business Strategy in a Circular Economy" and accused the textile industry of functioning as a linear economy - caught in a take-make-waste cycle.

Well, one could maintain that this is simply the textile value chain which grew over time.

Clothing is worn, gets damaged, perhaps its falls out of fashion and is ultimately replaced. This means that new fibres are cultivated and produced, processed and reach consumers via retail. This creates jobs and forms the basis of our economic system. Meyers and his fellow campaigners Scott Ralston (Desso), Cyndi Rhoades (Worn Again) and Cecilia Strömblad Brännsten (H&M) see that a little differently however. They rightly point out that our planet's resources are finite and that we, as a global community, must start to develop alternative concepts to avoid a future collapse.

Meyer's concept is the "Circular Economy". He demands nothing less than a redefinition of the economy itself. And he stated that the circular economy is the biggest opportunity since the Industrial Revolution.This statement definitely has potential, once one accepts that waste is a valuable raw material. According to Worn Again's rough estimates, 488 million tonnes of polyester have been produced. An estimated 108 million tonnes are still above ground (i.e. not burned or in a landfill), which could all be potential feedstock for new material.The cotton industry could also profit from this, thereby covering any possible supply shortfalls in the future. USD 630 billion could be saved by implementing cradle-to-cradle concepts, said Meyers to the audience.

All this sounds good, well-thought out and reasonable. However, some problems arise in the implementation. Separating cotton and polyester is technically a very demanding task that must be solved however, if the number of potentially recyclable products is to be increased. Worn Again is planning to release a technology to separate the two fibres.

The polyester can be chemically recycled, and the cotton can be broken down into cellulose and reused. This makes closed loop a possibility for a wider range of products.

Worn Again is a highly engaging organisation that works together with numerous textile companies and retailers to realise their vision of a "zero waste future in textiles with regional manufacturing, green jobs, good growth at the heart", but is no technology company which, in collaboration with universities, would have quite different possibilities to develop this huge market.

In particular, the machinery employed along the textile value chain always causes amazement when one considers with what quality and productivity something built by human hand can operate. Using new materials within an economic system must pay off. This also applies to used materials. Consider gold; used or not, no one is going to dispose of it.

At the end of the day, a ton of used cotton must not be more expensive than a ton of new, raw cotton and there shouldn't be any negative differences between the two with respect to processing. In the best case scenario it would be cheaper, better and it would provide a better end product. This is a serious, technical challenge.

Meyers views the following as the main parameter to make a closed-loop system work: : Quality inputs and outputs, competitive price and a holistic system. His ultimate goal: "Abundance. For everyone. Forever."

It may sound a bit too utopian but don't we have to address the challenges of the 21st century and forge completely new paths?

Finally, it may be possible to develop recycling factories in Africa for cotton and polyester. Then re-wearing could be supplemented by recycling and, through the jobs created, direct re-wearing would be reduced automatically over time. It's a wonderful thought that the very fibres of the jeans you buy in the shops were already worn as jeans. Almost like a reunion with an old friend.

http://textileexchange.org
http://www.zeit.de/2011/45/NDR-Reportage-Altkleider-Luege (German language)

DOMOTEX 2014:
ideas and inspiration for the global floor coverings industry

DOMOTEX, the world's leading tradeshow for the floor coverings industry, next runs from 11 to 14 January in Hannover, Germany, where it will once again shine as the premier shop window for new trends and innovative lifestyle design. Some 1,400 companies from 60 nations will converge on the Hannover Exhibition Center to showcase their latest products and new collections. Year after year, DOMOTEX picks up on key trends and innovations and internationally sets the tone in flooring as in intrinsic element of interior design.

And with its new Innovations@DOMOTEX showcase, the upcoming DOMOTEX will give superlative exposure to top product innovations and special designs, with a major pre-show PR campaign on top. "DOMOTEX has a one-of-a-kind lineup in store for its international trade audience," said Dr. Jochen Köckler as the responsible Managing Board member at Deutsche Messe, the company which organizes and stages DOMOTEX. "All the market leaders in each of the show's product segments will be there. Our exhibitors and visitors are in for a highly innovative and very international showcase in January."

The whole world of flooring at one convenient location

The DOMOTEX show's success as a touchstone of key trends lies in its comprehensive coverage. The event features each and every segment of the international floor coverings industry at one convenient time and place, providing a showcase that spans everything from textile and resilient floor coverings for the residential and contract furnishing sectors, to carpets, rugs and laminate flooring, to laying, care and application solutions. The resilient floor coverings display area in particular has gained in popularity over the years and in 2014 will feature a broad array of exciting designs and materials.

DOMOTEX is a global business platform which hosts and features the entire world of flooring markets. Its exhibitors can expect to encounter some 40,000 trade visitors from more than 80 countries. A good 61 percent of these visitors come from outside Germany, and 90 percent of them have a say in their organizations' buying decisions. For visitors from the wholesale and retail flooring sectors, the skilled trades and the architecture and interior design professions, DOMOTEX 2014 will once again serve as a key stepping stone to new contacts and business growth.

Carpets as a lifestyle statement in modern homes

Whether traditional, modern or antique – handmade rugs and carpets play a big part in creating the perfect ambience. They complement home furnishings, can add a sense of luxury or comfort, and also express personality. Individual designer carpets can "make a room", serving either as an iconic design element or harmonizing with other elements to create an overall lifestyle statement. Exhibitors from all over the world will be at DOMOTEX in Hannover from 11 to 14 January 2014 to showcase precious individual pieces and trendy new collections.

Souk Deluxe: Trend show featuring exclusive carpet design

Exclusive, modern handmade carpet designs are the stars of the Trend Show Souk Deluxe in Hall 17. This event will again provide the international elite of carpet design with a platform for their expertise. International designers such as CC-Tapis, Jürgen Dahlmanns, Floor to Heaven, Has Hali, Jan Kath Design, Makalu, Mischioff, Obetee, Reuber Henning, Hossein Rezvani, Sahar, Stile BK, Tissage, Wool & Silk Rugs and Zollanvari will be exhibiting their latest products.

A dazzling array of vibrant colors, original patterns and typographical, Pop Art and abstract motifs will testify to the artistic influences on the carpet market and serve a reminder that there is no limit on creativity.

The Innovations@DOMOTEX area, an integral part of the Souk Deluxe display, offers an overview of new developments and design highlights. For upmarket specialist dealers and interior designers Souk Deluxe represents an invaluable source of information on new products and trends. The event provides great opportunities for in-depth talks with exhibitors at their stands. Visitors can thus obtain a comprehensive market overview at DOMOTEX and select individual products to create their own personal sales collection.

Innovations@DOMOTEX: dedicated showcase for the latest highlights

Next year, DOMOTEX will be geared more strongly than ever towards current flooring industry trends. The new-style showcase Innovations@DOMOTEX featured at the world's leading trade fair for carpets and floor coverings focuses even more on design trends and future-oriented developments. This is due to its exciting concept, which offers DOMOTEX exhibitors completely new opportunities to present their product and design highlights in special display areas providing more scope for variety and innovation.

It is a prospect that attracted the interest of more than 100 companies – some 70 percent of them from outside the host nation Germany. These exhibitors entered no fewer than 200 products in the three display categories textile and resilient floor coverings, parquet and laminated flooring, as well as modern hand-made carpets. A panel of six independent experts, chaired by the Munich-based industrial and product designer Stefan Diez, has decided which products will be at the focus of attention at the world trade fair for carpets und floor coverings from 11-14 January 2014 in Hannover. A total of 70 products will be on display.

Innovation a key selection criterion

All entries were evaluated by the judges on the basis of specific selection criteria. For example, how interesting is the product to different target groups? Is it imaginative, fresh and modern? Does the product represent a technological advance or improvement? Is it distinguished by its design concept and/or quality? The judges‘ choice reflects the very essence of DOMOTEX and reminds visitors what really counts. The Chairman of the panel, Stefan Diez, offered insight into their brief: “We asked ourselves, what does the word ‘innovation’ mean to us today? Obviously, it implies something new and novel, but it could also apply to some clear improvement or new specifications or details, even practical ideas and solutions. As a designer I was interested in the complex question of how practical skills and crafts such as laying, fitting and processing tie in with other criteria.”

Key target groups, in particular planners, architects and interior designers, will find that Innovations@DOMOTEX serves as an important guide and information platform which clearly illustrates product diversity and the benefits of the specific products for their respective areas of use and application.

Extensive promotion of 70 product highlights

The nominated products will be skilfully promoted before, during and after the trade fair. The Innovations@DOMOTEX communication package offers a diverse range of benefits which includes the Innovations@DOMOTEX Guide. This brochure will soon be available and features information on all the selected exhibitors and their products. The information can also be found on the website for DOMOTEX 2014. Visitors will appreciate the value of this informative and comprehensive guide.

The guide will cover all three Innovations@DOMOTEX areas at DOMOTEX 2014. The seventy nominated products take pride of place in these designated areas in Halls 6, 9 und 17 during DOMOTEX 2014. Each of the display areas is dedicated to one of the specific product categories: textile and resilient floor coverings, parquet and laminates, as well as modern hand-made carpets.

The idea for the special display is simple: “Details about the various carpets, laminates and parquet floors can be obtained by the visitors at the exhibition stands – by contrast, the Innovations@DOMOTEX areas are expected to be spectacular and inspiring, as well as offering a distillation of the key trends in this sector”, says Dr. Jochen Köckler, Member of the Managing Board at Deutsche Messe AG. The success of this concept is due in no small part to the internationally famous German architect Jürgen Mayer H., who designed the Innovations@DOMOTEX areas, mindful of the need for areas in which the products can be exhibited attractively.

The judges:

- Stefan Diez, Chairman of the jury, Stefan Diez Office, Munich, Germany
- Manfred Birkenstock, COPA eG, CEO, Hofheim-Wallau, Germany
- Susanne Brandherm, brandherm + krumrey, interior architecture, Cologne, Germany
- Stefan Heinze, boden wand decke, chief editor, Bad Wörishofen, Germany
- Kirstin Ollech, Schöner Wohnen, editor, Hamburg, Germany
- Karl A. Wildermuth, Holz-Zentralblatt publication, editor, Leinfelden-Echterdingen, Germany

Carpet Design Awards in 10 categories

The Carpet Design Awards at DOMOTEX ensure that top-quality carpets receive the attention they deserve. This year sees the presentation of the awards for the ninth time. Makers of handmade rugs and carpets can submit their entries for the 2014 competition up till 5 November. The entries will be judged in 10 categories by an international panel of experts.

1st Rug Avenue: Traditional Oriental carpets are a lifestyle statement

A further new highlight of DOMOTEX in 2014 will be the special display 1st Rug Avenue in Hall 14. Here visitors will see what quality carpets can add to interior design. The display format imaginatively replicates an urban carpet world in the form of a street with individual home settings which illustrate how traditional carpets can be successfully integrated into trendy modern homes. The various houses feature living rooms, dining rooms and bedrooms in which Oriental carpets feature prominently. The 1st Rug Avenue, an initiative by European carpet importers, is organized in cooperation with Deutsche Messe.
Hall 14 will house rare and precious handmade carpets. Pieces like these are much more than objects of desire for collectors – they are also highly suited to modern interiors.

Designers, exclusive furniture stores and the upmarket specialist trade will find an outstanding array of antique carpets at DOMOTEX.

East Anatolian carpet production takes on the world

One of the DOMOTEX's biggest exhibiting nations is Turkey, which next year will use the show to present an extensive offering of hand-knotted and machine-made rugs. For Turkish rug makers, DOMOTEX offers excellent opportunities for tapping into new markets and boosting their exports. In 2011, an EU-funded project was launched to enhance the competitiveness of Turkish firms in the international market.

The project focuses on five Turkish cities, one of which is the Southeast Anatolian city of Gaziantep. There, the project provides support for local production of machine-made rugs – one of the city's most important industries. Some 40 percent of the world's area rugs are made in Gaziantep. Next year, an extensive selection of Gaziantep-made rugs will be on show in halls 2 to 4 at DOMOTEX.

Rallying point for international contract business

With its winning mix of lectures and presentations of innovative materials for the contract business, DOMOTEX is also a must for architects, interior designers, interior decorators and furnishing professionals on the lookout for fresh and creative ideas for their design palettes. The Innovations@DOMOTEX showcase will highlight current flooring trends and new product developments for the diverse range of application areas encompassed by the healthcare, catering, hospitality and education sectors. Thanks to the breadth and quality of the innovations on show, DOMOTEX is sure to put in a strong performance worthy of its status as a leading professional platform for the international contract furnishing sector.

Wood Flooring Summit 2014 heading for new heights

The Wood Flooring Summit will be another major visitor magnet at DOMOTEX 2014. Following its successful premiere in 2012, this special event will once again play host to the leading lights of the international parquet and laminate flooring sector.

Located in Hall 9, it will feature a central exhibition area, a forum for presentations and panel discussions, plus a catered lounge area and after-work-party event for informal networking.

The Innovations@DOMOTEX area in Hall 9 will be an integral part of the Wood Flooring Summit. There, visitors can vote for their personal favorites among the parquet and wood flooring innovations on show, with the winners of the "Best Liked by DOMOTEX Visitors" prize receiving their awards during the fair in the presence of an international trade audience and representatives of the flooring and furnishings sector press. Also among the attractions at the Wood Flooring Summit will be a presentation by the influential trend researcher and futurist Matthias Horx from the Future Institute (Zukunftsinstitut) on 11 January. Horx will outline the Future Institute's latest study, **"The Future of Home Living – Central Trends Through to 2025."**

Next year's DOMOTEX will also be devoting greater attention to outdoor living, with an extensive offering of innovative floor coverings for outdoor use on display in halls 8 and 9. All up, the fair's tally of manufacturers of parquet and laminate flooring and outdoor flooring solutions is expected to top 200.

Skilled Trades Hub Hands-on expertise for flooring practitioners

Located in Hall 7, the SKILLED TRADES HUB keeps parquet recliners, floor layers, painters, interior outfitters and their suppliers up-to-date with the latest flooring technology trends and developments. "Nowhere else can flooring practitioners expect to gain such a quick yet comprehensive overview of the entire market under one roof. They can discover new materials, tools, machines and application systems and test them out on the spot," said Dr. Jochen Köckler, a member of the Managing Board of Deutsche Messe, the company that organizes and runs DOMOTEX. In addition to the SKILLED TRADES HUB, trade visitors will find a comprehensive lineup of parquet and laminate flooring products in halls 7, 8 and 9.
Dialogue, information-sharing, networking

The SKILLED TRADES HUB and its numerous forums are an absolute treasure trove of information and learning opportunities for parquet recliners, floor layers, painters, interior outfitters and carpenters. The showcase offers ample opportunity for them to talk to industry leaders and representatives, share knowledge and expertise and test out new equipment that will make their day-to-day work easier. There is even a rustic-themed beer garden, where flooring professionals can "talk shop" with their peers and exhibitors in a relaxed atmosphere.

Skilled Trades Forum – practical advice from the experts

On each day of the fair, the Skilled Trades Forum hosts expert lectures and presentations on current issues and challenges facing the flooring trades. The forum also focuses on practical, everyday solutions designed to making working life easier for flooring tradespeople. At 10 am and 2 pm on each day of DOMOTEX 2014, Richard A. Kille, a flooring expert at the German Association of Interior Decorators (ZVR) and the Director of the Institute for Floors and Interior Furnishing in Cologne, will give a presentation on the correct laying techniques for innovative designer floor coverings, such as PVC, lino and cork.

Beni Lysser, the Technical Director of the Swiss Parquet Association (ISP), will be running a presentation at 11 am and 3 pm daily on the correct techniques for restoring old timber flooring. And at 12 noon and 4 pm each day, Udo Herrmann, CEO, Herrmann Parkett.Möbel.Räume, will explain the ins and outs of effective marketing for flooring tradespeople. The program is rounded out by the Skilled Trades Forum Expert Quiz in which forum speakers will test attendees on their technical knowledge. The quiz will be held at 1 pm daily throughout the fair.

Lets have at look at some exhibitors.

Allma Volkmann' s ***(Hall 5, Stand A22)*** products for the Domotex are: The Two-for-One Twisting Machine CarpetTwister and the Direct Cabling Machine CarpetCabler. Both have been successfully used to produce high quality, high economy yarns for quality carpets and other textiles for decades. Specially designed unwinding aids of the Two-for-One Twisting Machine CarpetTwister allow even difficult yarn grades e.g. polypropylene BCF yarns to be produced in the up-twisting process. The universal hollow-shaft spindle of the Direct Cabling Machine CarpetCabler allows the simple conversion from the Two-for-One method to the cabling method and vice versa. And the Volkmann Heat-SET integrates heat-setting in the cabling process.

Volkmann Heat-SET integrates heat-setting in the cabling process

AUTEFA Webmaster Card 2 + 2

Autefa Solutions Germany *(Hall 5, Stand E64)* comes with three products of special interest. The needle loom Stylus is equipped with the innovative Variliptic drive system, which enables high production speeds while also ensuring a gentle needling of the nonwoven fabric. This is particularly important during the first process step, the preneedling. The Variliptic drive system optimizes the surface of the nonwoven fabric, while also protecting fibers and minimizing the needle wear. The Webmaster WM 2+2 Card is designed for high productivity and top quality nonwoven materials. The patented system of the intermediate double doffer provides an optimal strip-off at the first cylinder and allows the division of the fiber flow in the intermediate area providing improved blending and fiber distribution on the second cylinder. The Crosslapper Topliner is a key machine in many nonwoven installations. The Crosslapper Topliner increases product quality in new installations or as a replacement in existing lines, while contributing to saving raw materials at the same time.

Brückner Textile Technologies *(Hall 5, Stand E63)* will inform about its high-end solutions for drying. The DUO-THERM dryer is the perfect solution for all thermal treatment processes requiring a differentiation between upper and lower air temperature. It is therefore mainly used in textile and carpet coating lines. Other topics in the focus are the several fabric transport systems in the DUO-THERM dryer and cleaning and maintenance of Brückner dryer. And the carpet dryer SUPRA-FLOW with conveyor system operates on the throughflow principle and offers decisive advantages like maximum air impingement which is prerequisite for a high drying performance.

Dilo Systems *(Hall 5, Stand E63)* will inform about complete staple fibre nonwoven lines for the production of home furnishings, floor coverings, wall coverings and blankets. These lines consist of opening and blending equipment provided by DiloTemafa, card feeding systems and cards manufactured by DiloSpinnbau as well as crosslappers and needle looms designed by DiloMachines.

DILO Complete Nonwoven Line

Eltex *(Hall 5, Stand D01)* presents the Eltex EYE, a flexible system designed for yarn fault detection on tufting machines, which is designed to improve quality and efficiency by reducing mending and down time. Two differnt yarn detection priciples are available.

Compact stands for yarn sensors which are fitted between the feed rollers and the needles. 100% of missing yarn in the carpet are detected. And CoTS (Clamp on Tube Sensors) means that the yarn sensors are fitted on the tubes between the tufting machine and the creel. This system provides 100% End-Out Detection and Tight-End Detection for most yarn types. All events are logged in real time and can be used for statistics and diagnostics.

ELTEX EYE, Compact and CoTS version

Groz-Beckert *(Hall 5, Stand D21)* will inform about their wide range of products for the carpet industry. They offer tufting machine needles, modules, loopers, tufting knives, reed fingers.

In the focus of **Oerlikon Neumag *(Hall 5, Stand A31)*** are latest innovations. Sytec One is a plant with only one yarn end per position. It is a re-invention of the BCF technology for an increase in throughput, for improvement of yarn quality and a reduction of investment. With the S5 Neumag customers reach the next stage of BCF yarn quality on high production levels. The strict modularisation of the S5 makes the plant adaptable to the needs of the individual customer.

And the S+ is a 3-end BCF machine which combines the advantages of the S5 and the Sytec One. Godets, texturing system, cooling drum and winder, are well known from the S5 machine; the straight yarn spinning, the spin-finish application via F-Jet (Finish Jet) and certain winder improvements were transferred from the Sytec One technology.

Power-Heat-Set *(Hall 5, Stand A23)* will present their creation of Compact Heat setting- a completely new method of heat setting yarns. The yarn is treated consistently and gently, using saturated steam under pressure. The machine's yarn transport system is completely new unlike anything else in the industry.Compared to the state of art, Compact Heat setting provides a considerable reduction in energy consumption. Another highlight is GVA 5009 eco. The structural pattern of the different materials will be rearranged during the heat-setting process due to heat in connection with steam.

Saurer Temco *(Hall 5, Stand A22)* will inform about thier range of high quality products for its global customer base, including air jets, bearings, cots and aprons for textile texturing, as well as friction units and discs and textile spindles for the production of continuous synthetic filament yarns. On the same stand **Saurer Fibrevision *(Hall 5, Stand A22)*** will present components for spinning, texturing, twisting and winding. In the focus are solutions for fibre measurement, monitoring and dynamic testing. And the third Saurer Components company, **Saurer Heberlein *(Hall 5, Stand A22)***, will show market leading products for migration, interlacing, air covering, air texturing and detorque as well as complementary products for high-end aspirating, cutting and splicing.

SCHÖNHERR Alpha 400 Series

At the **Schönherr** booth ***(Hall 2, Stand B15)*** visitors can learn more about the ALPHA 400 series which includes 5 different types of machine that are designed for a wide range of demands and customer applications.

Schönherr carpet machines provide maximum flexibility for the production of single and double-face pile, as well as loop carpets.

The double-gripper carpet weaving machines are equipped with Stäubli cam motion or dobby mechanisms and Jacquard machines. Machines are ALPHA 400 EASYSYSTEM, ALPHA 400 UNIVERSAL, ALPHA 400 INNOVATION, ALPHA 400 SINGLELOOP and ALPHA 400 LEANTEC.

Thies *(Hall 5, Stand B03)*, a world market leader in dying machinery, will show suspension rods with spraying device for hankMaster. Completing the Thies range of yarn dyeing machines, the hankMaster has been specifically designed for the dyeing of yarns in hank form. The novel liquor flow ensures perfect dyeing of a wide range of hanked yarns including wool, soft and mercerised cotton, and critical fibres such as viscose, polyamide, silk and high bulk acrylics.

Trützschler Nonwovens *(Hall 5, Stand B11)* comes with the well-proven symTTex-technologies for carpet yarn (BCF) spinning which provide enormous flexibility in choice of polymers (PA, PP and PES) and colours to meet the market demands concerning small lots and colour diversity. symTTex M20 (mono-colour) and T20 (tric-olour) are modular, stand-alone solution for PP and/or PA BCF 2-end processes.

The key features of the symTTex M40 machine are the symmetrical arrangement of the spinning positions and the the straight 4-end yarn path, where the friction within the process is reduced to a minimum level.

TRÜTZSCHLER NONWOVENS symTTex

VAN DE WIELE ***(Hall 5, Stand C55)*** stands for state-of-the-art in face-to-face carpet weaving. The double rapier Rug & Carpet Innovator RCi02 boosts the carpet industry. It is equipped with several servo-motors for an increased flexibility and productivity and comes with a new design for improved access and ergonomics. A very stable machine built in pile width up to 5,2m. The Rug & Carpet Innovator RCi03 inserts three wefts at the same time, weaving the 3-shot structure with 50% more production. The RCi03 jacquard enables a broad range of weavestructures like the 2/3V, 2/2V, 1+2/3V, etc. When equipped with Smart Frames, switching is very easy. And the New HandLook Carpet Pioneer HCP X2 weaves high quality carpets with a hand-knotted back at double production. No ground warps showing through the back results in the hand-knotted look and a perfect pile fixation, with only outside picks.

Hand look carpets are woven in reeds of 240d/m - 300d/m - 500d/m - 700d/m up to reed 1000dents/m. The patented HCP X2 Hand-Look weave structure is woven with 3 rapiers and stationary incorporated pile.

Filling effects on cut-loop carpet made on VAN DE WIELE carpet machine

VERDOL ***(Hall 5, Stand A05)*** will bring out its complete and comprehensive plant management system, M.U.S.T., (Monitoring Unit System for Textile machinery) already installed at major carpet yarn producers. For innovative BCF applications the UT-UTC 60 twister & cabler is the right machine. It offers an optimum of flexibility and variability and is designed with individual motor spindles and online yarn tension control system.

Other Verdol solutions are the CD-DT-CDDT 20 Twisting & Cabling machines for Carpet Yarns which bring flexibility at its highest level and the CD-DT-CDDT 10 Twisting & Cabling machines for carpet Yarn Processing which is perfect for mass production.

Xetma Vollenweider ***(Hall 5, Stand A64/1)*** offers its customers and prospectives compact finishing lines for velour, velvet and plush. The units are specially developed and proved for the finishing of upholstery and furnishing fabrics including carpets and runners and guarantee you the best first-class effects at highest performance - result to last a lifetime. Modular compact structures take up much less floor space and at the same time enable greater ease of operation as well as a more flexible design to the process chain. The comparatively low energy consumption contributes to environmental protection.

VERDOL UTC 60

http://www.domotex.de/

ITMA 2015 to focus more on technical textiles

On 17th November, the German engineering association VDMA reported that ITMA, the leading trade fair of the textile machinery sector, will in future be marketed more intensely towards technical textiles and nonwovens as well as the application areas of clothing and home textiles.

At ITMA 2011, some 18 percent of the more than 100 thousand visitors indicated an interest in machines and accessories for manufacturing technical textiles or nonwovens. Currently, alongside a publication, a conference is also being planned together with a trade fair especially for this growth market. Textile research institutes and colleges are actively involved. A special „research & education pavilion“ is being provided especially for these in a central location.

According to Thomas Waldmann, Managing Director of the VDMA trade association for textile machinery: “From our VDMA textile machinery symposia in Turkey, Indonesia, China, Brazil, India and other markets we know that many conventional textile manufacturers want to develop and produce new products. For these ‘regular ITMA customers’, the trade fair, with its current machines from the entire textile value-chain, is the best platform to learn about new, technical processes concerning recent developments.“

Industry representatives welcome continued development:

Axel Wintermeyer of the technical textiles business unit at Karl Mayer Textilmaschinenfabrik said: „In global terms the use of technical textiles has grown steadily over the last years. Increasing demand has come particularly from coated fabrics, geotextiles and composite materials. In Asia in particular, interest has grown since ITMA 2011. We are delighted to present machines for these technical textiles at ITMA 2015.“

Peter D. Dornier, Chairman of the Board at Lindauer Dornier added: „Thanks to the comprehensive range of services of our web technologies, we are able to meet all the requirements of textile manufacturing: from broad-based solutions for high-end clothing to the production of technical textiles. We looking forward to meeting international experts working to create technologies and solutions for technical textiles at ITMA 2015. Dornier's emphasis on innovation and sustainability will be given centre stage at our trade fair appearance in Milan."

KARL MAYER - Multiaxial, High-tech knitting machine with several weft insertion systems for the production of multiaxial multiply and composite fabrics

Next stop Milan - application of attendance

The next ITMA will take place from 12th to 19th November, 2015, in Milan. Since 15th May, 2013, many companies including those from Germany have submitted their application of attendance via www.itma.com and already rented stand space. Deadline for applications is 4th July, 2014. Companies may apply if they undertake two of the three activities „Development, production and distribution" set out by the product index.

The VDMA offers its member companies extensive consulting and support services regarding trade fair preparations. For example, the webinars are mentioned here. During these telephone conferences, the association staff use online training to demonstrate the online application process verbally and visually to participants and answer any questions about ITMA 2015.

DORNIER - Rapier Weaving Machine P1 for the manufacturing of technical textiles

Russia or, to give it its official name, the Russian Federation, with an area of 17.075.400 km2, has the largest land surface of any country in the world.

With 143 million inhabitants, however, in terms of population statistics it lies only in 20th place and is therefore one of the most sparsely populated territorial states.

The Russian Federation is the „successor state“ to the Soviet Union in international organisations, atomic power and as a Permanent Member of the UN Security Council.

As regards its economy Russia has long been considered along with China as a „sleeping giant“; however, with the recovery from the post-Communist transformation crisis of the 1990‘s it has in the meantime awoken and is one of the countries designated as the BRIC(S) states, a consortium of emergent economies. By virtue of its wealth in natural resources Russia is considered a major industrial nation and has therefore been included as a member of the politico-economic G8. In August 2012 Russia joined the World Trade Organisation (WTO).

On the basis of its gross domestic product (GDP), supplemented by purchasing power parity, Russia is today considered to be the fifth largest economy in the world. Based purely on GDP, which was quoted as 2,029,813 million US $ for 2012 (source IMF), Russia is in 8th place and thus has pulled ahead of countries such as Italy and India. The IMF estimates a GDP of 2,117,831 million US $ for 2013, which equates to a weak economic growth of +1.48 %. In the previous year Russia‘s economy grew further by 9.2 %. The aim of the Russian government is to take 5th place based on GDP by 2020, so that Russia will still have to overtake Brazil, the United Kingdom and France with respect to economic performance.

In 2012 Russia imported goods to the value of 335,446 million US $ - a 1.8 % share of world imports. Against this were set exports of 529,255 million US $, which equates to a 2.88 % share of world exports and led to a surplus of 193,809 million US $.
Major export goods are fuels and mining products at 71.3 million, manufactured goods at 19.6 million and agricultural products at 6.0 million. At 80.1 million, manufactured goods clearly rank before agricultural products at 13.3 million. This makes Russia the eighth largest exporter of goods and puts her in 16th place as regards imports.

Russia‘s most important trading partners are the EU and China.

In September of 2013, Russia's trade surplus decreased to 15.7 billion USD, slightly down from 15.74 billion USD a year earlier. Both exports and imports were up, but purchases grew at a faster pace.

In October, Russian annual inflation rate accelerated to 6.3 percent, from 6.1 percent in September, mainly due to a rise in food cost. In November of 2013, Russia's annual CPI edged up to 6.5 percent, from 6.3 percent in October. On a monthly basis, prices rose 0.6 percent, the same rate recorded in the previous period. In the third quarter of 2013, Russia‘s GDP increased 1.2 percent on an annual basis, the same growth rate as in the previous three-month period. In its November 8th meeting, Bank of Russia decided to leave the one-week auction repo rate at 5.5 percent. The decision was based on inflation risks and sluggish economic growth. The overnight rate remained unchanged at 6.5 percent.

The Russian textile and clothing market

Let us take a look at textiles and clothing. In 2012 Russia imported textiles to a value of 4661 (4439) million US $ and exported to a value of 657 (670) million US $.[1] With respect to the import of clothing Russia is in 6th place with a value of 9 billion US $ (+/- 0%) and this brings her to a 2.1 % share of world clothing imports and to a 2.9 % share of all the country‘s imported goods. In the preceding years there was a clear increase in imports at 23% in 2011 and 85% in 2010. In 2012 clothing exports were at a modest 356 million US $ - a 0.1 % share of total exports of goods.

This means that in 2012 Russia imported some 25 times as much clothing as it exported and with clothing at a value of 3017 million € became one of the largest importers of clothing from the EU, which together with the Number One, China with 3314 million € of clothing imports, accounted for more than 2/3 of Russian imports.

After a clear decline caused by the financial crisis the two values are again converging towards the previous high from the Russian boom phase in 2008 and are expected to exceed the 2008 values for the first time in 2014. EFTEC () estimates that imports from the EU 27 will total 3630 million € for clothing and imports from China are forecast at 4,000 million €. This equates to annual growth of 10% per year and continues to make the Russian clothing market of great interest to the textile and clothing industries.

The question arises as to from which EU countries the most clothing imports come. Here Italy is in the lead with 1144 (+10%) million €, ahead of Germany with 659 (+15%) million € and France is in third place with 210 (+6%) million €. EFTEC considers that growth for 2013 in France will be rather poor at 2%; however, for Italy and Germany at 10%, it may rise to the previous growth level.

The growth in imports has risen even more sharply between 2009 and 2012 in the countries in the subsequent places with Spain (+119%) rising to182 million €, Lithuania (+50%) to 178 million €, UK (+80%) to 124 million €, Latvia (+358%) to 110 million € und Finland (+112%) to 106 million.

Even in the individual clothing segments different rates of growth can be discerned. Thus, the market for men‘s outerwear in the crisis year of 2009 grew from 502 million € to740 million € (+49%), as opposed to the market growth for ladies‘ outerwear from 1107 to 1152 million € (+37%). The most significant sub segment for men is trousers without denim (26.5%), followed by outdoor jackets and coats (15.3%) and suits (11.2%). For ladies it is dresses (18.8%), costumes (16.1%) and trousers without denim (15.1%).
The per capita income was in 2012 14.184 US$, the GDP on a purchasing power parity basis divided by population was at US $ 17.700. The actual income situation looks different, however.

According to EFTEC the monthly income of 13.7 % of the approximately 100 million people in the Russian working population in 2012 was more than 35,000 roubles per month (1,150 US $), 12% had a monthly income of between 25,000 and 35,000 roubles and 25% earned between 15,000 und 25,000 roubles per month. These three groups form the aspiring middle class in Russia and are also the target group on which the clothing industry has set its sights.

One of the projections of the Market Pyramid of Textiles, Clothing and Accessories in Russia, published in 2012 by EFTEC characterises the market as follows. At 5.25 billion €, the luxury segment and premium segment take up a market share of 14%. 20% is allotted to the upper medium segment (7 billion) and 30% is allotted to the medium segment (10.5 billion). The lower medium price market stands at about 8.75 billion (25%) and the low price market € at 3.5 billion € (10%).

In total this gives a market of 35 billion €. Goods in the luxury segment have an average value of 14,000 roubles and those in the premium segment 7,000 roubles. The main sales outlets are luxury mono brand stores and multi brand boutiques. The goods themselves come mainly from Italy, France, Germany and Switzerland. The upper medium market ranges from 3,000 to 6,900 roubles and the medium-priced market from 1,000 to 2,900 roubles.

The goods are distributed via mono brand and multi brand specialty stores, department stores, shop-in-shops and independents (upper medium) as well as domestic and international mono brand and multi brand retail chains, department stores, independents and distance retailers (medium).

Main supplier countries are Russia, Spain, Sweden, Germany, Italy, Spain, France, Turkey, UK, Finland, USA and Poland.
Examples for mono-brand affiliated apparel retail chains, foreign and domestic in the lower medium and medium market with more than 5000 POS are ZARA, H&M, MANGO, BENETTON, RESERVED, NAF NAF, OLSEN, NEW YORKER, TVOE, OODJI, GLANCE, INCITY, SAVAGE, BAON, O'STIN, GLOOM, MODIS, BEEFREE/ZARINA and VESH. Examples for multi-brand affiliated retail chains and department stores in the medium to upper medium market (POS numbers: >600) are HOLDING CENTER, LADY & GENTLEMAN CITY,PODIUM, FASHION CONTINENT, SNOW QUEEN, MODAMO, MOSKOVSKIY, PROKOVSKIY, MARKS+ SPENCER and new: DEBENHAMS.

Multi-Label mixed apparel discount stores and hypermarkets providing the lower medium are for example METRO, REAL, MARKTKAUF and Russian Discounters, Russian low budget casual wear and "family" clothing chains like SELA. New is TAKKO FASHION. And examples for the premium and luxury sales points are GUM, TSUM, LEIPZIG, VESNA and CALIGULA.

Although Russia is a county with several Mega-Cities Moscow (27%), Saint Petersburg(13%) and Yekaterinburg(9%) consume over 50% of whole apparel market. Another 11 "secondary" cities with population of 1 -1.5 million have been the first point of entry for retailers expanding beyond Moscow and St Petersburg. This high-potential cities are attracting shopping center investments. One reason for the balancing of apparel retail climate is the ongoing investments in Shopping and Entertainment Centers in provincial capitals and large cities of in between 500.000 and 750.000 inhabitants. The new trend is encompassing even smaller towns of a population of more than 100.000. Cities and Towns belonging to Moscow Region and Central Russia are the most favoured hot spots for new shopping center allocations.

However, EFTEC also reported a dramatic change in consumer behaviour in Russia. While in the past the buying decision was mostly emotional the new Russian clothing shopper is more and more influenced by rational factors. He judges the price / quality relationship and thinks about a fair price for a peace of garment.

It often comes to the point that purchasing decisions get delayed until the discount phases. Another problem –not only in Russia- is that clothing and brands do not confer status anymore and are replaced by iphones, ipads, handbags and jewelry. In the luxury segment the shopping of clothing is transferred to foreign destinations with half price saving opportunities.

On the other hand online-purchases from international and national e-commerce platforms keep surging. Distance Retail, Mail Order Catalogues and B2C online retail with players like Otto Group, KupiVIP, amoda.ru and wildberries have a comparatively small market share with 2% and will become a growth market for apparel and fashion. Under the umbrella of Otto Group Russia, the Otto Group has been active since 2006 in the Russian market. With about a dozen brands, the group generates here now approximately 550 million euros. The most successful Bonprix brand achieves more than 200 million euros in turnovers. Other strong brands are OTTO, Quelle, Witt, NaDom, Lascana, myToys.ru and Meggy Mall. In order to send the ordered goods as soon as possible to customers, Otto Group Russia operates a logistics center in Tver.

„The Russian operations of the Otto Group can certainly be used as an example of a successful expansion abroad,“ says Dr. Michael Otto, entrepreneur and chairman of the Otto Group. „The group has grown quickly and created more than 2,000 jobs. We are convinced that the Russian distance retail bears still a lot of potential - especially in e-commerce which is already responsible for more than 50 per cent of total turnover. Russia is one of the most exciting markets in the online retail world.“

The outlook for the Russian distance trade, which is composed of the catalogue business and e-commerce, are outstanding. While in Germany the share of distance sales is about 8 per cent of total retail, in Russia this figure is still below three per cent. According to forecasts, especially the online shopping in Russia will develop strongly.
The e-commerce sales will more than double in the next five years from today‘s 8.2 billion euros: Russian customers will spend approximately 19 billion euros by shopping on the net in 2017. Also the catalogue trade is growing parallel to the overall growth of the retail segment.

In order to benefit from the high dynamics of the Russian distance trade, the Otto Group is planning to further invest 50 million euros. A large part of this sum flows in the expansion of logistics infrastructure. Especially the warehouse in Tver will be greatly expanded. In order to grow strongly in the future, the capacity of the logistics center in Tver will be doubled. By that about 700 new jobs will be created.

Also the Hermes-DPD ParcelShop-Network will be extended, where customers can pick up their ordered goods. This network has been established in 2010 by Hermes and DPD on the basis of a joint venture and has since expanded steadily. „Today our network already includes more than 350 ParcelShops in 90 Russian cities - our target is 1,000 stores in 150 cities by 2015. The role model are the ParcelShop-Networks, that Hermes already runs successfully in Germany, Austria and the UK,“ says Hanjo Schneider, Member of the Executive Board Otto Services and CEO Hermes Europe GmbH.

The Russian textile industry

Let us cast a glance over the Russian textile industry.

Textiles and clothing have long and honourable traditions in Russia. Textile industry has been an important sector of the Russian economy. Main textile regions are situated in the Central, Northwestern and Southern Federal Districts. The enterprises of the branch are producing a wide range of textile products. Those are fabrics, home textiles, knitted products, medical and geotextiles, workwear and protective wear, nonwovens and other goods.

Ivanovo, a big city in Central Russia, on the Golden Ring circuit is the capital of Ivanovo Oblast and a former world capital of the textile industry. Although the time of this outstanding position has passed the Ivanovo region is still the main Russian textile producer. Most of the domestic factories producing cotton textiles are situated here. The Ivanovo enterprises develop their manufacturing potential of ecological linen products. The scientific-research and project institutes of the international level are functioning in Ivanovo region.
Advantageous geographic location of the region, important rail- and waterways positively affect the development of the economic relations with other Russian regions and foreign partners. For the hundreds of thousands of women who worked in the textile industry, Ivanovo is jokingly called „The City of Brides."

In the nineties the Russian textile industry faced challenges, but recovered with the beginning of the new century. In the year 2006 the Russian textile industry had sales of US $8 billion. To ward off competition from China, Turkey, India and Pakistan, the textile industry in the country has decided to rely on artificial fiber and chemical thread.
To produce the necessary chemical threads, Russia has plotted to establish petrochemical and chemical fiber plants.

The total market share of textiles and clothing produced in Russia lies between 10% and 20%, depending on which statistics you use. Textiles produced in Russia, in particular Russian brands, are put on the market mainly in the low segment on open markets and in the medium segment via discount stores.

In 2012, according to the Bremen Cotton Exchange only 105,000 tons of cotton were processed. It is expected that the amount of cotton processed for the 2013/2014 season will be further reduced to 85,000 tons. With only some 1,000 hectares of cultivable land, Russia does not emerge as a significant producer of cotton, whereas her neighbour, Uzbekistan is one of the leading cotton producing countries for the 2012/2013 season, with some one million tons of cotton produced on 1.3 million hectares.

This proximity, together with high import taxes, could lead to a shift of cotton processing into the neighbouring country.

Industry outlook

Russia‘s textile industry needs new technologies. On September 7-8 2012 the town of Plyos, the Ivanovo region of Russia, hosted The Golden Ring Forum to discuss mechanisms to support complex investment and innovative projects in textile and light industries under Russia‘s accession to the WTO.

At the forum Deputy Industry and Trade Minister of the Russian Federation Georgy Kalamanov said: „The light industry is among the top three industries that are exposed to risks most in connection with Russia‘s accession to the WTO, and the task of the state is to minimize these risks.“ Yuri Roslyak, Deputy Chairman of the Federation Council Committee on Economic Policy, stated that one had to have innovative transformations in the Russian light industry. He expressed the need to avoid the dependence of raw materials supplies and move towards the diversification of raw materials. He and the Governor of the Ivanovo Region, Mikhail Men, pinned great hopes on a project of the synthetic fiber plant, which is going to be built in the region. The region has been preparing to implement the project for several years already. The projected capacity of the plant is 200 tons of synthetic fiber per year. This amount will satisfy the needs of Russia in this raw material entirely.
The project for the construction of the plant for the production of synthetic fibers in the Ivanovo region is strategically important for the future development of the domestic textile industry, ministerial officials say. The ministry is ready to do everything to facilitate the implementation of the project in the Ivanovo region. „The project is a large-scale one. Its implementation requires about ten billion rubles, so one needs to have all resources involved, including the private sector,“ said Kalamanov.

Investment in man-made fibres and the associated fabrics, as well as upstream production plant seems to be the logical way forward for the Russian textile industry. Like any country, whose economy is built to a large extent on raw materials, in particular fossil energies, Russia is faced with the task of developing sustainable secondary industries to use the raw materials within its own borders. In October 2013 the Russian President Vladimir Putin attended a ceremony to launchTobolsk-Polymer, which is acclaimed as the biggest investment project in the Russian petrochemical industry. Indeed is Tobolsk-Polymer with estimated costs of US$ 1.5 billion one of the largest polypropylene production facilities of the world. And in November 2013 Gazprom and SIBUR signed a deal for considering a gas processing project in Far East. Gazprom would be responsable for construction of a GPP of 60 bcm annual capacity to separate ethane and other gas fractions and SIBUR has to construct a technologically connected petrochemical complex to process ethane and produce monomers and polymers.

Alongside these technological approaches, which have to be expanded by investment in modern textile machinery, there are further ideas and initiatives for assisting growth in the Russian textile industry.

One possibility, certainly, is working in cooperation with foreign textile firms. Here, for instance, the Russia-Europe Textile Alliance (RETA) can contribute.

On May 05, 2011, the delegation from the (RETA) met with the representatives of the Government of the Ivanovo region and discussed the prospects of the mutually beneficial cooperation. Another idea is to strengthen the cooperation between designers and manufacturers of domestic brands to increase the sales of 'Made in Russia' clothing.

A McKinsey survey from 2007 showed that Russians have not much trust in Russian brands and most of them think that foreign brands are higher quality than local brands. To change this image of the domestic brands the Russian light industry has got help from Mercedes Benz Fashion Week (MBFW) Russia.

With the 'Days of Industrial Collections' at the fashion week held in November 2013 in Moscow the Russian Minister of Industry and Trade Denis Manturov and the MBFW created an event where Russian designers presented a corporate collection to demonstrate the power of 'Made in Russia' clothing.

Whether these approaches will be enough to increase the Russian textile and clothing industry's medium and long term share in a growing market, has yet to be seen. It is certain that extensive investment and investment safeguards will be needed from the State.

Radical modernisation has, in fact, also the advantage that the most modern equipment and significant high-tech benefits in production are obtained. And at the same time legislative changes will make it more difficult for foreign textile firm to enter the Russian market. For example -officially per 1 July 2014- the rules for labeling are being expanded for the sake of consumer safety.

[Implications of the new laws can be found in the report, CLOTHING MARKET REPORT RUSSIA 2013 by Reinhard E. Döpfer, Chairman of European Fashion and Textile Export Council (EFTEC)]

To conclude our country focus Russia, it is good to be able to tell you something pleasant about the Russian economy. The World Bank projection for Russia's growth in 2014 remains moderately positive at 3.1 percent (but with downside risks), after the country's economy lost some momentum in 2013.

http://stat.wto.org/CountryProfiles/RU_e.htm
http://cpm-moscow.com/inc/Aussteller/downloads/Market_Report_Russia.pdf
http://english.pravda.ru/
http://ec.europa.eu/enterprise/sectors/textiles/external-dimension/bilateral-dialogues/index_en.htm

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