Overall Shipments of New Textile Machinery Slightly Down in 2013

Increase in Short-staple Spindles and Again High Level in Circular Knitting Machines

In 2013 shipments fell in most segments though remained on a relatively high level. In comparison to 2012 global shipments of new short-staple spindles rose by +10% while those of open-end rotors decreased slightly by -2% and those of long-staple spindles dropped by -45%. Also the number of new draw-texturing spindles shipped was down by -29%, those of new shuttle-less looms by -4%,and those of new electronic flat-knitting machines by -24%. Worldwide shipments of new large circular knitting machines in 2013 remained unchanged on the record level of 2012.

These are the main results of the 36th annual International Textile Machinery Shipment Statistics (ITMSS) just released by the International Textile Manufacturers Federation (ITMF). The report covers six segments of textile machinery, namely spinning, draw-texturing, weaving, large circular knitting, flat knitting and finishing machinery. The 2013 survey has been compiled in cooperation with some 117 textile machinery manufacturers, representing a comprehensive measure of world production.

Spinning Machinery

After shipments of new *short-staple spindles* plummeted in 2008 (-33%) and 2009 (-17%) they soared in 2010 (+75%) to pre-crisis levels and increased in 2011 by a further +15% reaching 14.33 million, an all-time high. In 2012 shipments of short-staple spindles fell by -27% to 10.51 million spindles but rose again in 2013 by +10% to 11.56 million. 93% of all shipped short-staple spindles in 2013 were destined for Asia (10.72 million), with China alone absorbing 6.21 million or 54% of global shipments, followed by India as distant second (2.19 million spindles or 19%), Indonesia (757,000 or 6.6%), Turkey (566,000 or 4.9%) and Pakistan (546,000 or 4.7%).

Global shipments of l*ong-staple (wool) spindles* dropped in 2013 by -45% from 146,400 to 80,800. Europe was the main recipient (49,900 or 62%), followed by Asia (28,950 or 36%) and the Americas (1,900 or 2.4%). The single biggest investor in long-staple (wool) spindles was Turkey wit 34,300 spindles (or 43%), followed by China with 26,550 spindles (or 33%), Romania with 6,050 (or 8%), Italy with 5,000 spindles (or 6%) and Poland with 2,900 (or 4%).

As far as *open-end rotors* are concerned global investments decreased slightly in 2013 by -2% to 443,200. Asia was once again the region that absorbed by far most of the new rotors (351,400 or 79% of global shipments). By country, China was the dominant investor putting in place 271,740 or 61% of global shipments. India was again distant second with a total of 30,980 new open-end rotors (7.0%), followed by Turkey with 28,640 rotors (6.5%), Brazil with 13,780 rotors (3.1%), Vietnam with 13,660 rotors (3.1%) and Malaysia with 12,040 rotors (2.7%).

Texturing Machinery

From 2010 to 2011 global shipments plummeted from 13,200 to only 1,824 (-86%). In 2012 no shipments of *single heater draw-texturing spindles* (mainly used for polyamide filaments) were recorded. In 2013 shipments reached 2,600 spindles of which 2,120 went to Asia (China 960, Chinese Taipei 840 and Thailand 320) and 480 to Europe, Others (Turkey).

In the segment of *double heater draw-texturing spindles* (mainly used for polyester filaments) investments dropped from 717,760 to 505,080, a decline of -29%. 90% (or 455,640) of all shipments went to Asia. By far the biggest single investor in this type of draw-texturing machinery was again China where 366,480 new spindles or 73% of global shipments were installed, followed by distant second Japan with 30,860 or 6.1%, India with 21,640 or 4.3%, Vietnam with 8,160 or 1.6%, and Egypt with 7,920 or 1.6%.

Weaving Machinery

Worldwide shipments of *shuttle-less looms* fell slightly in 2013 from 86,450 machines to 83,420, a fall of -4%. The main reason for this development was a further decline in shipments of water-jet looms. After a skyrocketing jump of +537% to 73,250 in 2010 and to 112,930 in 2011, which was partially due to the fact that more weaving machinery manufacturers reported for the first time in 2010, global deliveries of water-jet shuttle-less looms dropped by -65% to 39,920 machines in 2012 and by -13% to 34,580 in 2013. In the shuttle-less loom segment of rapier/projectile looms shipments increased marginally from 23,250 in 2012 to 23,830 in 2013, an increase of +2.5%. Also deliveries of shuttle-less air-jet looms increased from 23,300 in 2012 to 25,010 (+7%). As in previous years the main destination of shuttle-less looms was Asia, where 76,390 or 92% of all new shuttle-less looms were installed. Country-wise the biggest global investor was again China with 54,830 looms (66%), of which 30,590 were water-jet looms, 16,330 air-jet looms and 7,910 rapier/projectile looms. With 10,060 shuttle-less looms (12%) of global shipments India was the second biggest investor, followed by Indonesia (3,110 or 3.7%), Turkey (3,010 or 3.6%), Bangladesh (2,820 or 3.4%) and Korea (1,290 or 1.5%).

Circular & Flat Knitting Machinery

Global shipments of *large circular knitting machines* increased by +27% from 28,900 in 2011 to 36,640 in 2012 which set a new record. In 2013 the amount of machines remained practrically unchanged at 36,575. Also in this segment Asia was the main regional investor in this type of machinery absorbing 33,440 units or 91% of all new machines shipped in 2013. The biggest single investor was once more China with a total of 27,460 (a global market share of 75%) followed by India with 1,600 (or 4.4%), Turkey with 1,490 (or 4.1%), Bangladesh with 910 (or 2.5%), and Indonesia with 850 (or 2.3%).

In the segment of *electronic flat knitting machines*, global shipments in 2012 dropped by -34% to 46,100 machines. Also in 2013 global shipments recorded a decline of -24% to 35,180. The bulk of global shipments of electronic flat knitting machines was delivered to Asia (30,300 or 86%), while Europe's share (including Turkey) reached 12% (4,350 machines). The biggest single investor in 2013 was China with 20,800 new machines (59%), followed by Bangladesh with 3,960 (11.3%), Turkey with 2,790 (7.9%), Hong Kong with 1,850 (5.3%) and Italy with 790 (2.3%).

Finishing Machinery

The 2013 edition of ITMF's International Textile Machinery Shipments Statistics included for the nineth time also data on *finishing machinery* (wovens and knits continuous machinery).

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