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ITMF's International Textile Machinery Shipment Statistics Vol. 34 / 2011

Record Levels in Global Shipments of New Textile Machinery in 2011

After a sharp reduction in global shipments of new textile machinery in 2008 and 2009 as a result of the global financial and economic crisis in 2008/2009, deliveries of new textile machinery surged in 2010 and even stronger in 2011, in most cases to new record highs. In comparison to 2010 global shipments of new spinning machinery increased by +15% (short-staple spindles), by +35% (long-staple spindles) and by +27% (open-end rotors), of new draw-texturing spindles by +42%, of new shuttle-less looms by +44%, and of new electronic flat-knitting machines by +37%. Only worldwide shipments of new large circular knitting machines dropped in 2011 by -16%.

These are the main results of the 34th annual International Textile Machinery Shipment Statistics (ITMSS) just released by the International Textile Manufacturers Federation (ITMF). The report covers six types of textile machinery, namely spinning, texturing, weaving, large circular knitting, flat knitting and finishing machinery. The 2011 survey has been compiled in cooperation with some 118 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 jumped back in 2010 (+75%) to pre-crisis levels and increased in 2011 by a further +15% reaching 14.33 million, an all-time high. 94% of all shipped short-staple spindles were destined for Asia (13.46 million), with China alone absorbing 8.90 million or 62% of global shipments, followed by India as distant second (2.49 million spindles or 17%), Bangladesh (639,000 or 4.5%), Turkey (628,000 or 4.4%) and Indonesia (517,000 or 3.6%).

Global shipments of *long-staple (wool) spindles* soared in 2011 by +35% to 113,250. Europe was the main recipient (53,750 or 47%), followed by Asia (49,000 or 43%), the America (8,750 or 7.7%) and Africa (2,000 or 1.8%). The single biggest investor in long-staple (wool) spindles was Turkey (32,500), followed by China (23,400), Iran (14,300), U.A. Emirates (9,000) and Italy (8,800).

Investments in *open-end rotors* jumped in 2011 by +27% to 572,250, a new record high. Asia was once again by far the biggest investor in this spinning technology installing in total 463,250 new rotors or 81% of global shipments. China was by far the biggest single investor in rotors absorbing 388,250 or 68% of global shipments. India was again distant second with a total of 37,750 new open-end rotors (6.6%), followed by Turkey with 35,250 rotors (6.2%), Uzbekistan with 10,250 rotors (1.8%), Brazil with 30,250 rotors (5.3%) and the USA with 12,250 rotors (2.1%).

Texturing Machinery

Shipments of *single heater draw-texturing spindles* (for polyamide filaments) fell from 13,200 in 2010 to 1,824 in 2011 (-86%). Only two countries, Taiwan, China (1,536) and Vietnam (288) were installing new texturing spindles of this type.

In the segment of *double heater draw-texturing spindles* (for polyester filament) investments surged from 568,250 texturing spindles in 2010 to 826,500 in 2011, an increase of +45%. This meant also a new all time high of newly shipped double-heater draw-texturing spindles. By far the biggest investor in this type of machinery was China where 624,500 new spindles or 76% of global shipments were installed, followed by distant second India with 90,000 or 11%, Turkey with 20,000 or 2.4%, Japan with 19,750 or 2.4% and Taiwan with 7,500 or 0.9%.

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Weaving Machinery

Worldwide shipments of *shuttle-less looms* continued soaring in 2011 to 153,750 machines, an increase of +44% from last year's record of 107,000. The main reason behind this development is the surge in shipments of water-jet looms. After a skyrocketing jump of +537% to 73,250 in 2010, which was partially due to the fact that more weaving machinery manufacturers reported for the first time in 2010, global deliveries in this shuttle-less loom segment continued soaring by +54% to 113,000 machines in 2011. In the shuttle-less loom segment of rapier/projectile looms shipments increased from 16,000 in 2010 to 19,250 in 2011, an increase of +20%. Also deliveries of shuttle-less air-jet looms increased from 17,750 in 2010 to 21,500 in 2011 (+21%). As in previous years the main destination of shuttle-less looms was Asia, where 148,500 or 96% of all new shuttle-less looms were installed. Country-wise the biggest global investor was again China with 128,100 looms (83%), of which 106,000 were water-jet looms, 13,900 air-jet looms and 8,250 rapier/projectile looms. With 9,100 looms (6%) of global shipments India was the second biggest investor, followed by Indonesia with 2,900 (1.9%) and Korea with 2,500 looms (1.6%).

Circular & Flat Knitting Machinery

Global shipments of *large circular knitting machines* decreased by -16% from 34,500 in 2010 to 28,900 in 2011. Nevertheless, this was still the 3rd highest number of large circular knitting machines ever shipped. Also in this segment Asia was the main regional investor in this type of machinery absorbing 26,400 machines or 91% of all machines shipped in 2011. The biggest single investor was again China with a total of 21,200 machines (a global market share of 73%) followed by India with 1,500 machines (or 5.2%), Bangladesh with 1,050 machines (or 3.6%) and Turkey with 900 machines (or 3.1%).

In the segment of *electronic flat knitting machines*, global shipments in 2011 jumped by +37% to 70,000 machines. The bulk of global shipments of electronic flat knitting machines was delivered to Asia (65,250 or 93%), while Europe's (including Turkey) share reached 5.8% (= 4,100 machines). The biggest single investor in 2011 was again China, where 54,800 new machines (78%) were installed, followed by Bangladesh with 4,475 machines (6.4%), Hong Kong with 2,930 machines (4.2%), Turkey with 2,150 machines (3.1%) and Italy with 1,120 machines (1.6%).

Finishing Machinery

The 2011 edition of ITMF's International Textile Machinery Shipments Statistics included for the seventh time also data on *finishing machinery* (wovens and knits continuous machinery).

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