

Overall Shipments of New Textile Machinery Slightly Down in 2014

Decline in Short-staple and Draw-Texturing Spindles; Increase in Flat Knitting Machines

Shipments in most of the textile machinery segments experienced declines in 2014. Deliveries of new short-staple spindles fell by 15% from 2013 to 2014. Shipped long-staple spindles and open-end rotors increased by 70% and 2.6% respectively. The number of shipped draw-texturing spindles grew by close to 12%. Shuttle-less looms and new large circular knitting machines also dropped by 14% and 22% year-on-year. In contrast, shipments of flat-knitting machines rose by 31%.

These are the main results of the 37th 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 2014 survey has been compiled in cooperation with some 110 textile machinery manufacturers after 112 in 2013, representing a comprehensive measure of world production.

Spinning Machinery

Shipments of new *short-staple spindles* fell by 15% in 2014 year-on-year and more than reversed the increase of 10% in 2013. The level of short staple spindles declined to 9.8 million spindles, the lowest level since 2009 and also lower than the ten-year-average of 10.9 million. Most of the new short staple spindles (91%) were shipped to Asia, whereby shipments fell by nearly 17% year-on-year. Thereby China, the world's largest investor of short-staple spindles, experienced a decline of nearly 29%. Four of the five largest investors for short-staple spindles originate from Asia. Including China these are India, Viet Nam and Indonesia. Shipments to Turkey, the fourth largest investor, increased by 5% in 2014, the third consecutive increase.

Global shipments of *long-staple (wool) spindles* increased by 70% from 80,800 in 2013 to 137,650 in 2014. That is the strongest increase since 2012. The majority of long-staple spindles (69%) were shipped to Europe. Thereby, shipments to Turkey rose to 67,000 which is equivalent to a share of 49% of global shipments. Within Europe Belarus and Italy came second and third with shipments numbering 21,216 and 10,584 spindles. In 2014, shipments to Asia increased marginally by 0.2% to 29,000 spindles. While North and South America did not receive any shipments of long-staple spindles, shipments to Africa amounted to 432.

Shipments of *open-end rotors* improved moderately in 2014 by 2.6% after they declined in the previous two years. The number of shipments reached to 454,720, the highest level since 2011 and well above the long-term average of 402,669. Nearly 67% of worldwide shipments of open-end rotors were destined for Asia though the pace is declining. Shipments to Asia fell by 13% after declines of 13.9% and 11.9% in 2013 and 2012 respectively. Also, in South America shipments declined (-9.3%). In contrast, shipments to Europe and, especially, North America saw strong increases of nearly 27% and 402% respectively.

Texturing Machinery

Global shipments of *single heater draw-texturing spindles* (mainly used for polyamide filaments) increased by 76% from 2,600 in 2013 to 4,576 in 2014. With nearly 57% Asia is the region where most of the single heater draw-texturing spindles were shipped to followed by Western Europe with 20% and South America with close to 15%.

In the segment of *double heater draw-texturing spindles* (mainly used for polyester filaments) the the downward trend continued and global shipments fell by 12% on an annual basis to 443,352. However, the pace of decline moderated somewhat compared to 2013 when shipments fell by nearly 30%. Asia's share of worldwide shipments amounted to close to 88%. Thereby, China remained the largest investor accounting for 60% of global shipments.

Weaving Machinery

In 2014, worldwide shipments of *shuttle-less looms* fell by 14% to 71,667 units, the third decline in a row. Thereby, shipments of water-jet shuttle-less looms dropped by 30% to 24,220, the third fall since 2012. Shipments of air-jet looms also declined though this was the first fall after four years of increases. The number of shipped air jet looms contracted by 19% to 20,176 in 2014. In contrast, deliveries of rapier/projectile looms shipments rose by 14% from 23,828 in 2013 to 27,271 in 2014, the highest level since 2006.

As in previous years the main destination of shuttle-less looms was Asia amounting to a share of 97% of worldwide deliveries. Thereby, the percentage of the three subcategories is relatively even. Water-jet looms measure 36% of shipments to Asia, 35% are rapier/projectile looms and 29% are air-jet looms. In Europe and North America 73% and 54% of shipments are for rapier/projectile looms, while the share of water-jet looms is only 7% and 11% respectively.

Circular & Flat Knitting Machinery

Global shipments of *large circular knitting machines* fell by 22% from 36,575 in 2013 to 28,502 in 2014, the lowest level since 2009. Also for this category Asia is the world's leading investor. Nearly 88% of all circular knitting machines are shipped to Asia and with a share of 60% (close to 17,000 shipments) of worldwide deliveries China is the single largest investor. India and Turkey rank second and third with 2,464 (8.6%) and 1,325 units (4.6%) respectively.

2014 was a good year for the segment of *electronic flat knitting machines* as global shipments grew by 31% to 46,100 machines. This was the first increase since 2011. Not surprisingly, Asia received the highest share of shipments. Over 85% of all deliveries went to Asia with China being the largest investor with a share of 42% equivalent to over 19,000 units. Including China, four of the five largest investors for flat knitting machines are Asian countries. Second and third are Bangladesh (11,312 units) and Viet Nam (1,956). Turkey ranks fourth with 1,879 machines and India fifth with 1,840 units.

Finishing Machinery

The 2014 edition of ITMF's International Textile Machinery Shipments Statistics included for the ninth time also data on *finishing machinery* (wovens and knits continuous machinery).

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