

Natural and Man-Made Fibres in Asia

FORECASTS TO 2005

Can the momentum in Asia be maintained?

Asia is the world's largest fibre-producing region. And manufacturing capacity is growing rapidly to feed Asia's expanding textile and clothing production as manufacturing shifts from advanced Western economies. But can growth be maintained?

Will China continue to be the dominant market?

Within Asia, China is the world's second biggest man-made fibre producer and the world's largest consumer of cotton. And China and Japan are two of the three largest consumers of wool. Can China maintain its dominant position?

Which fibre type offers the best growth prospects?

Polyester staple fibre capacity will continue to grow rapidly. Can growth be maintained? Or will there be a switch to textile filament yarn, or to industrial filament yarn for such uses

as infrastructure projects, or medical and hygiene?

Which end uses will see the fastest growth?

What will be the future for outward processing?

Outward processing trade in the region has become important thanks to Japanese duty reductions on goods made from Japanese materials. Will outward processing grow further? Or will labour costs cease to be important as technology advances towards complete automation?

Will Asian trading blocs restrict imports?

Asian trading blocs are likely to grow in importance. This could mean lower trade barriers for bloc members. How will non-Asian fibre producers respond to this potential threat to one of their fastest growing markets?

And what will be the impact of the Asian financial crisis?

The region has been hit hard by the Asian financial crisis. Plans for self-sufficiency have had to be curtailed and many small producers have been forced to close. How will the crisis affect production and consumption growth in the long term? Who will be the survivors?

Natural and Man-Made Fibres in Asia:

Forecasts to 2005, published by Textiles

Intelligence in association with the Brussels-based CIRFS, addresses these and other issues.

The report:

- examines recent economic and political developments in Asia, and predicts how these are likely to impact upon the fibre market;
- assesses the competitiveness of Asian fibres compared with other regions of the world;
- highlights potential competitive threats but also helps to identify areas for investment;
- examines production, consumption and trade in Asian man-made and natural fibres;
- traces the growth of offshore processing and identifies the main participants;
- examines the phasing out of quotas between Asia and the West and its implications for future trade.

Natural and Man-Made Fibres

in Asia: Forecasts to 2005

will provide you with:

- comparisons of labour costs in Asia and other countries;
- details of Asian tariffs and tariff reductions in fibres, textiles and clothing;
- comprehensive data on Asia's yarn and fabric production;
- data on the age and amount of textile machinery in Asia;
- detailed forecasts of fibre supply and textile demand in Asia to the year 2005;
- in-depth information on production capacities throughout Asia, by country and by company;
- profiles of the leading fibre manufacturers in six Asian countries.

THE REPORT IS DIVIDED INTO 11 CHAPTERS AND 3 APPENDICES

- **Chapter 1** provides an *executive summary*.
- **Chapter 2** assesses the *extent of economic and political change within the region*, making distinctions between South Asia, South East Asia, China and the more advanced economies of Hong Kong, Japan, South Korea and Taiwan.
- **Chapter 3** analyses data on man-made fibre *production and capacities* in Asia, and *presents forecasts to the year 2005*. It also provides information on the *availability of raw materials* for fibre manufacture. In addition, it includes a *comparison of production costs* in Asia and the West, and comments upon *environmental issues* associated with the region.
- **Chapter 4** looks at Asia's *trade in man-made fibres*, noting how trade with the USA has slowed down while Asian exports to the EU have risen sharply. It also comments on the impact of EU anti-dumping duties.

● **Chapter 5** provides *data on the amount of man-made fibres consumed by Asia's textile mills*. Increases are expected up to 2005 in order to clothe Asia's large and growing populations. Growth will be particularly strong in China after decades of suppressed domestic demand.

● **Chapter 6** examines the *market for natural fibres* in Asia, providing forecasts to 2005.

● **Chapter 7** looks at *trends in shipments of textile machinery*. Capacities in South Asia are increasing rapidly. But much of China's ring spinning machinery is more than ten years old, and will have to be replaced or updated if the Chinese industry is to stay competitive.

● **Chapter 8** focuses on *yarn production, consumption and trade in Asia*, with forecasts to 2005. There have been substantial increases in yarn manufacture, especially as the availability of raw materials has improved. However, when quotas are eliminated, countries which do not have their own supply of raw materials will find it difficult to compete.

● **Chapter 9** examines *fabric production, consumption and trade*. Production has grown especially rapidly in South Asia. Forecasts are provided to 2005.

● **Chapter 10** tracks the *growth of outward processing trade* within Asia as companies search for ever lower labour costs.

● **Chapter 11** examines the *future prospects for man-made fibres* in Asia, predicting that the region's market potential will continue to be very high.

● **Appendix 1** provides *economic and political data for 20 Asian countries*, including exchange rates, GDP growth and inflation rates.

● **Appendix 2** presents *profiles of 19 leading Asian fibre producers*, with details of main products and capacities, as well as the extent of integration upstream and downstream and joint ventures.

● **Appendix 3** provides *names, addresses and contact numbers of over 150 producers* in 11 Asian countries.

VITAL INFORMATION

Natural and Man-Made

Fibres in Asia: Forecasts to 2005 provides vital information about present and future trends for anyone with an involvement in the global fibres, textiles and clothing business — whether as importer/exporter, manufacturer, machinery maker, merchant, retailer, investment analyst or consultant.

Almost all of the information has been obtained from independent private research and from the opinions of company representatives, and is not available elsewhere.

YOUR PANEL OF EXPERTS

Natural and Man-Made Fibres in Asia: Forecasts to 2005 has been

researched and prepared by a team of leading experts in their field, drawn from nine leading organisations in nine different countries.

The report is based on research conducted by an Asia Working Group within the Brussels based organisation CIRFS (Comité International de la Rayonne et des Fibres Synthétiques). Dr Alex Krieger of CIRFS assumed responsibility for the study. The working group was chaired by Mr J Crehalet of Rhodia. The other group members were: Mr J Bachinger of Lenzing, Austria; Mr D David of Fisipe, Portugal; Mr R Dee of Du Pont, UK; Mr T Johnson of Acordis (formerly Courtaulds), UK; Mr H-B Lüchtfeld of Trevira, Germany; Mr C Maia Jorge of Fisipe, Portugal; Mr E Männistö of Säteri, Finland; Mr M Pietsch of Acordis (formerly Akzo Nobel), Netherlands; and Dr F Prezzavento, a consultant previously with Montefibre.

This report was written by David Morris and produced by Deborah Tunney of CIRFS.

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