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# World Markets for Knitted Textiles and Apparel: Forecasts to 2010



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by CIRFS





# World Markets for Knitted Textiles and Apparel: Forecasts to 2010

## Knitting: a growth sector

The world produces over 17 mn tons of knitted textiles and apparel annually – representing one third of the global textile market. Moreover, output is forecast to grow by 25% over the next ten years, reaching more than 21 mn tons.

## New fibres open up new markets

Knitted textiles and apparel are used in a wide range of basic apparel items such as T-shirts, underwear and sweaters. But the industry is changing. New markets are emerging as high-tech fibres are used and manufacturing technology becomes more sophisticated. Designers are discovering that knitted goods now offer more scope than ever before, to be used in an increasingly sophisticated range of products.

## New technology offers more flexibility, customised products, smaller order sizes

Producers are investing in machinery which offers the latest technological developments in order to become more flexible and make better quality products. Automation has been used in the past to produce large orders at low prices. But today's technological advances are providing producers with the flexibility to offer small bespoke, customised orders tailored to specific customer requirements at competitive prices.

**World Markets for Knitted Textiles and Apparel: Forecasts to 2010** examines all these issues and more. In particular, it will provide you with:

- details of **trends in knitting capacity, production, and investments** in circular knitting, warp knitting, hosiery knitting, flat knitting, fully fashioned knitting and speciality knitting;
- a survey of **manufacturing costs in major producing countries**, including the impact of new and old machinery, developments in automation and technology, and labour costs;
- a detailed description of the **manufacturing technologies** employed in the knitting sector, and an assessment of **technological changes** and the impact of quick response;
- details of the **effects on productivity of increased automation** and the introduction of seamless technology;
- comparisons between different types of **staple fibres** and **continuous filament yarn**, and their suitability for various end uses;
- assessments of **process developments** in knitting and downstream marketing, with particular emphasis on apparel, hosiery, home furnishing, automotive and technical textile markets;
- detailed analyses of the world's **key markets**, including Western Europe, Eastern Europe, Turkey, Asia, North and South America, Russia and other CIS countries, and Africa;
- a comprehensive set of **predictions and forecasts** to 2010.

## WHAT DOES THE REPORT COVER?

**World Markets for Knitted Textiles and Apparel: Forecasts to 2010** will provide you with:

- production cost breakdowns for different countries;
- an assessment of the technologies employed in the production of knitted fabrics and apparel;

- information on the responses of technology developers to new requirements imposed by knitters, garment makers and garment specifiers;
- authoritative predictions of the future global market for knitted textiles and apparel, with an emphasis on trading patterns and factors likely to affect competition; and
- expert forecasts to 2010 of global and regional markets for knitted textiles and apparel.

## THE REPORT IS DIVIDED INTO 12 CHAPTERS

**Chapter 1** provides an *executive summary*.

**Chapter 2** highlights the key developments in *knitting technology*, and assesses the most important *technological changes*.

**Chapter 3** examines the leading trends in global and regional machinery *investments* and *capacities*.

**Chapter 4** examines the *properties of fibres and yarns* used in knitting, and compares the qualities and suitability for various end uses of *staple fibres versus continuous filament yarn*.

**Chapter 5** examines *process developments* in knitting, and looks at the downstream movement of companies into different markets – including traditional markets for knitted goods such as apparel, hosiery and home furnishings, and newer areas such as *automotive* and *technical textile markets*.

**Chapter 6** compares the *costs of manufacturing* knitwear in major producing countries. It assesses the extent to which such costs are affected by labour costs, age of machinery, the process technology used and developments in automation.

**Chapters 7-11** analyse in detail the knitting *markets in five key regions*: Europe (comprising Western Europe, Eastern Europe and Turkey); Asia; North and South America; Russia and other CIS countries; and Africa. These chapters identify those regions and countries which are expected to show the biggest gains in the period to 2010 – as well as those which are likely to suffer the biggest losses.

**Chapter 12** analyses the likely effect of *improved technology*, *increased productivity*, *quality assurance* and *quick response* on the knitting sector *in the future*.

## YOUR PANEL OF EXPERTS

### **World Markets for Knitted Textiles and Apparel:**

**Forecasts to 2010** has been researched and prepared by a team of leading experts in their field, drawn from twelve leading organisations and companies based in seven countries. It has been produced by CIRFS, the Brussels-based Comité International de la Rayonne et des Fibres Synthétiques.

## VITAL INFORMATION

Much of the information has been obtained from interviews with companies and is not available elsewhere. **World Markets for Knitted Textiles and Apparel: Forecasts to 2010** 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.

## THE AUTHORS

This report is based on research originally conducted by a knitting working group within the Brussels-based organisation CIRFS (Comité International de la Rayonne et des Fibres Synthétiques). The members of the working group were: Maurizio Cavallini of Montefibre, Italy; Wolfgang Denfeld of Enka, Germany; Walter Helskens of Setila, France; Arnaud Lepeltier of Shell Chemicals, Belgium; Vally Mamad of Fisipte, Portugal; Maria Materna of Elana, Poland; Dr Francesco Prezzavento, a consultant previously with Montefibre, Italy, and currently with Assofibre, Italy; Gerd Saalfrank, Du Pont de Nemours, Germany; Mark Schmitt, Trevira, Germany; Darren Sunderland, Unifi International Europe, UK; and Michael Wayne, DuPontSA, UK. In addition, David Tyler of Manchester Metropolitan University, UK, contributed to Chapter 2 on knitted products and manufacturing technologies. The report was written by David Morris and produced by Deborah Tunney, both of the CIRFS secretariat, and was edited by Fiona Butterworth and Robin Anson at Textiles Intelligence.

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