

WORLD SYNTHETIC FIBRES Supply/Demand Report 2010

PCI Fibres

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This edition of the PCI Fibres **Red Book** (World Synthetic Fibres Supply/Demand Report 2010) provides the very latest review of the market, noting especially the changing influence of fibre supply in natural and manufactured fibres, all in the context of a global economy that has been pumped up with money in order to stave off the threat of deflation.

The new report addresses questions such as the following.

- What is the full extent of the slowdown in the major developed economies?
- Will consumer demand for MMF continue to grow in the developing world at the high rates seen in recent years?
- Are China and India expanding their exports of textiles and apparels?
- Is the 'invest-for-export' model still viable in terms of international trade in fibres, yarns, textiles and apparel?
- Can acrylic and nylon demand maintain volume given the high cost of their raw materials? Can the cellulose find enough raw material to support new growth? And will cotton become a specialty fibre like wool?

These and many other questions relevant to textile fibre markets worldwide are covered in this new edition of the PCI Fibres **Red Book**.

Demand prospects at consumer and mill level for all types of textile fibre (natural and manufactured) are analysed, with production estimates that relate to existing and future capacity for the main synthetics (acrylic, nylon, polyester).

The mill demand analysis splits out the various components of nylon and polyester filament; that is, as textile, industrial and carpet filament, with allowance for variants such as filament spunbonded fabrics. The supply side in the different types of nylon and polyester fibre is presented in the form of country production data and company capacity by plant.

The report for 2010 contains over 400 pages. Data years run from 1990 to 2010 for acrylic, nylon and polyester, with forecasts from 2011 to 2020.

The full table of contents follows in this document. If you wish to place an order or need further information please contact us by phone or e-mail or by faxing the subscription form found on the fourth page of this notice.

PETER DRISCOLL

Managing Director
PCI Fibres
Mayfield, England
May 2011



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World Population

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SUPPLY/DEMAND

World and Regional Comparisons

SUPPLY

Production (Acrylic, Nylon, Polyester)

World (Region and Country Summary)

North America

Canada
USA

Latin America

Argentina
Bolivia
Brazil
Chile
Colombia
Costa Rica
Ecuador
El Salvador
Honduras
Mexico
Peru
Uruguay
Venezuela

West Europe

Austria
Belgium
France
Germany
Greece
Ireland
Italy
Luxembourg
Malta
Netherlands
Portugal
Spain
Switzerland
United Kingdom

East Europe

Belarus
Bosnia, Croatia and Macedonia
Bulgaria
Czech Republic
Georgia
Hungary
Latvia
Poland
Romania
Russia
Serbia
Slovakia
Slovenia
Ukraine
Uzbekistan and other CIS

Turkey

Africa/Middle East

Egypt
Iran
Israel
Kenya
Lebanon
Morocco
Nigeria
Saudi Arabia
South Africa
Tanzania

Australasia

Australia

South Asia

Bangladesh
Indonesia
Malaysia
Pakistan
Philippines
Sri Lanka
Thailand
Vietnam

India

China (with Hong Kong)

South Korea

Taiwan

Japan

DEMAND

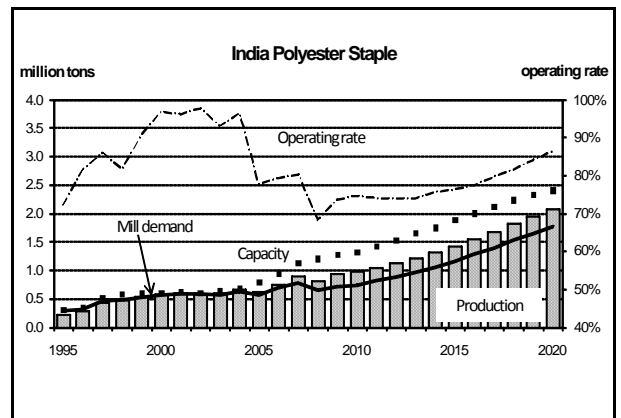
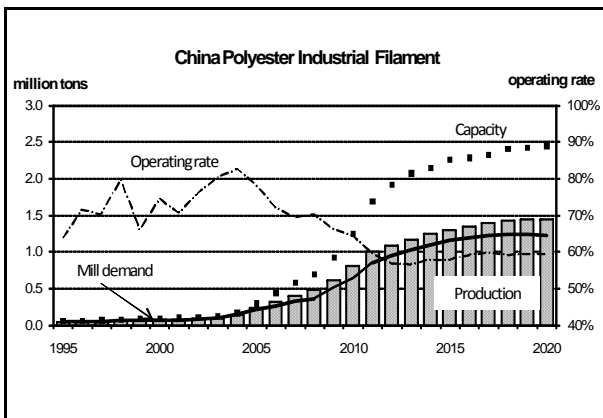
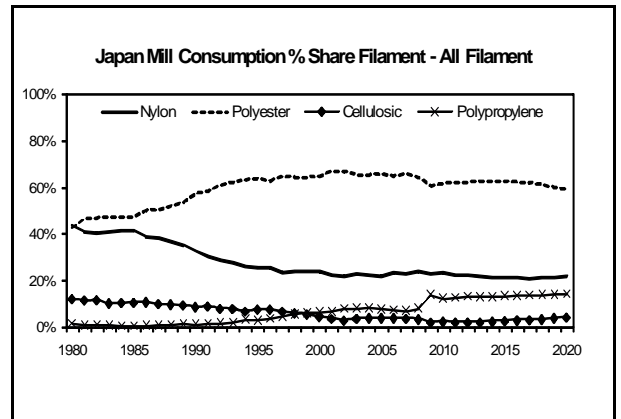
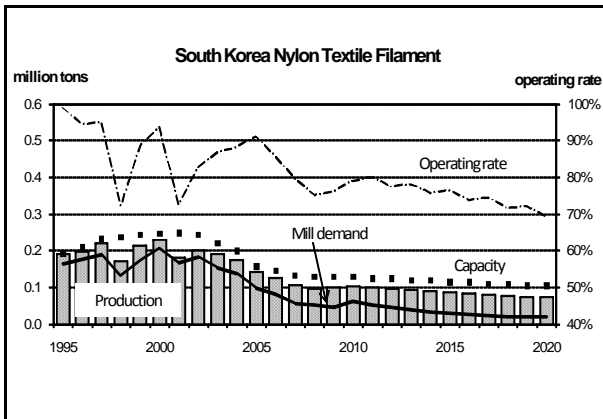
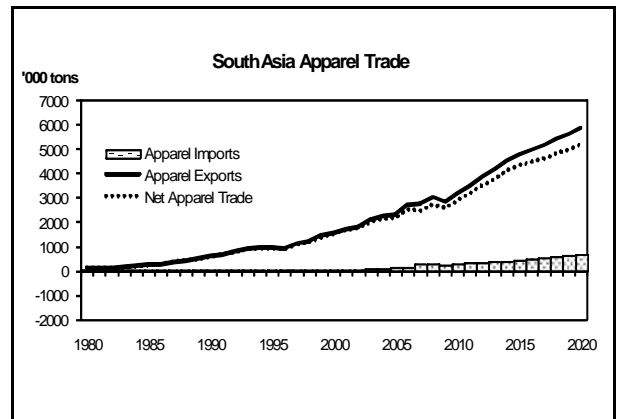
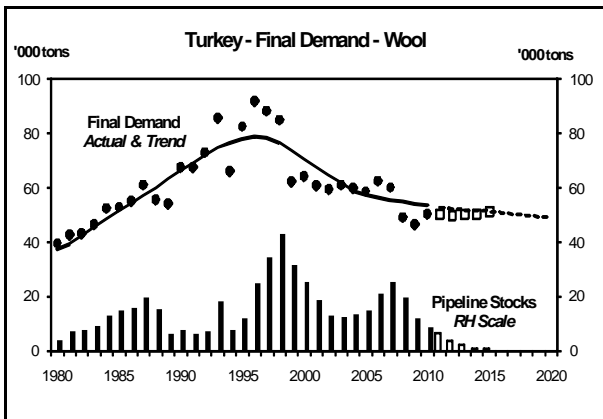
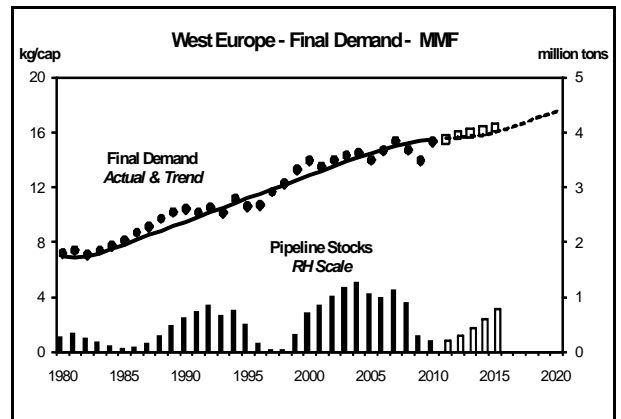
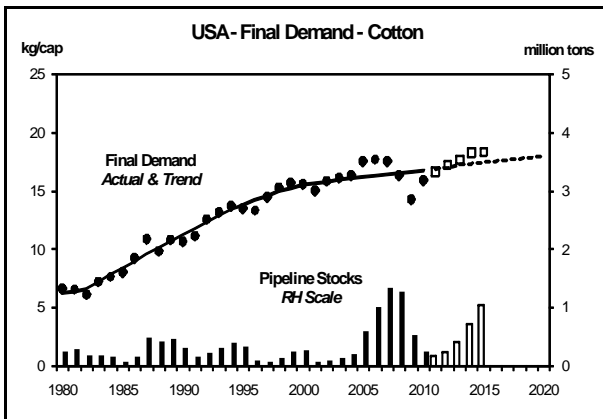
Demand by region

World
North America
Latin America
Western Europe
Eastern Europe
Turkey
Africa/Middle East
Australasia
South Asia
India
China (with Hong Kong)
South Korea
Taiwan
Japan

APPENDIX

Fibre Production Capacities

Acrylic Fibres - by region and country
Acrylic Fibres - by company with notes
Nylon Fibres - by region and country
Nylon Staple - by company
Nylon Filament - by company
Nylon Fibres - notes
Polyester Fibres - by region and country
Polyester Fibres - by company
Polyester Fibres - notes



WORLD SYNTHETIC FIBRES SUPPLY/DEMAND REPORT KEY POINTS FROM THE VERY LATEST DEMAND ANALYSIS

- Global demand for **textile fibres of all types** declined in 2008 by 6% to 69.3 million tons, compared with the 2000-10 rate of 4% per annum. 2009 however recovered by 3% to reach 71.7 million tons, and 2010 is estimated to have reached 77.1 million tons, up 8%. The long-term trend is for growth of 3% per annum..
- Wool demand** declined further in 2008, by 6%, to 1.2 million tons, with another decline of 7% in 2009 before a recovery of 2% in 2010. China's textile industry remains the biggest consumer of wool, followed by West Europe. Long-term growth worldwide is forecast at 1.3% per annum.
- Cotton's mill consumption** hit a peak in 2007 at 26.5 million tons, as a result of ample supply and still relatively low prices. 2008 however saw a fall of 6% with little change in 2009. For 2010 there was an increase of 2% which means that pipeline stocks still need to be brought under control. The price increases of 2010/11 might well help in this process by deflating demand. The long-term forecast is for growth of 1.7% per annum. The major textile users are China (41% of world activity), South Asia (17%) and India (18%).
- For **manufactured fibres (MMF)**, 2008 saw decline of 6% to 43.3 millions tons, to be followed by a rebound of 6% in 2009 and then a further 11% in 2010. Given that long-term growth over 2010-20 is forecast to be just 3% per annum, and the forecast for 2011 is for a further strong increase of 7%, it can be seen that the medium-term prospect is for some slowdown, particularly in the period 2013-15 as a readjustment takes place in China. China (with mill consumption of 29 million tons) was up 13% in 2010, to represent 58% of global textile activity in MMF.
- Among the synthetics the acrylics in 2010 showed little or no growth, while nylon filament demand was up a surprising 12% due to a surge in China. Nylon staple demand was down 21%. **Acrylic** consumption is growing by 0.5% per annum long-term and **nylon filament** by 1.4%.
- 2010 was a strong year for polyester: **polyester filament** mill consumption grew by 15% and **polyester staple** by 7%. In the long-term polyester filament growth is put at 3.6% per annum and polyester staple at 3.0%. In 2000 polyester fibre demand represented 60% of MMF activity, and by 2015 is forecast to be at 75%.

SUBSCRIPTION DETAILS: WORLD SYNTHETIC FIBRES SUPPLY/DEMAND REPORT 2010

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