Global fibre production is up and specialist European industry body IVC says manmade fibre manufacturers in Austria, Switzerland and Germany deserve to grow their market share, claiming theirs is the greenest and most innovative production in the sector.

Fibre production passes major milestone

Total global production of fibres in 2016 was 100 million tonnes, an increase year on year of 3.2% (not including recycled fibres), driven, industry observers say, by ongoing growth in demand for polyamide and a nylon revival. There has been a high level of investment in raw material production and spinning of these fibres in China, for example, as part of a strategy for the industry there to become self-reliant.

Globally, it's the first time fibre producers have surpassed what Andreas Engelhardt, founder and general manager of The Fiber Year, which reports on the industry's performance, has called this "historic milestone". Together, synthetic manmade fibres (64%) and cellulosic manmade fibres (6%) commanded a share of 70% of the 100 million tonnes produced, leaving natural fibres with 30%. Ten years ago, the split was only slightly in favour of synthetics at 51%-49%.

Demand slows down

However, on launching the The Fiber Year 2017 report at Techtextil in Frankfurt in May, Mr Engelhardt immediately pointed out that the "incredible volume" of fibre that manufacturers produced last year coincided with deceleration in demand, and 2016 was the fourth year running in which growth in the end use of these fibres, natural and manmade, slowed down. Fibre use grew overall by a little over 1% in 2016, with natural fibres unchanged and synthetics growing by less than 2%.

Manmade fibres industry association IVC still has 20 members in Germany, Austria and Switzerland, turning over a combined total of €3 billion and employing 12,000 people. Together, these 20 companies increased their production by 2.1% in 2016.

For Stefan Braun, chief executive of North Rhine-Westphalia-based acrylic fibre manufacturer Dralon, if IVC member companies have been able to survive until now it's only because of the levels of investment they have made in environmental management and in innovation. He is grateful for strong relationships with universities and institutions as these can generate excellent new ideas, some of which may bring commercial success even if many will not. With examples such as Indorama's acquisition of Trevira in mind, he says global players in the manmade fibre market want to buy into European producers, especially to use them as "innovation hubs".



New ideas. EcoVero is a new brand name for eco-friendly viscose from Lenzing. The Austrian company says there is little point in offering products that customers can buy more cheaply elsewhere.

Lenzing AG / E. Grebe

Teabags and T-shirts

Recent examples of this innovation are wide-ranging and involve more applications than just clothing. Swiss mono- and multi-filament producer Monosuisse has begun to have success in supplying polyamide for pyramid-shaped tea-bags and the demand for these products is highest in Asia. Chief commercial

COPYRIGHT ©

officer, Martin Bucher, explains that many teas in places such as Japan, Taiwan, Hong Kong or China are high-value products rather than commodities. "Consumers like to be able to see inside the bags to make sure the tea inside is the genuine article," he says.

New ideas are seldom in short supply at cellulosic fibre manufacturer Lenzing. There's now something of a push at the Austrian company to develop agricultural solutions, with its Tencel fibres going into ropes and nonwoven, anti-weed crop covers. Earlier this year, an initiative called Refibra, a new fibre based on cotton scraps and wood, made using the Tencel production process, quickly caught the attention of garment manufacturers such as Indian company BM Textiles. Commercial director for textiles in Europe and the Americas, Andreas Dorner, says Lenzing will scale up the production of Refibra because more apparel brands want to use it. "It's certainly true that European companies have to innovate," he comments, "but customers still expect good prices. There is no point in just offering products that are the same as those customers can buy elsewhere; we'd have to ask them to pay more and they are not willing to do so."

Public domain

Bavarian viscose fibres specialist Kelheim Fibres is equally unlikely to run out of innovative projects to work on because it has taken its search for new ways to use viscose fibres into the public domain, setting up an open competition. This has attracted entries from university students already engaged in the subject, as well as from members of the wider public. "Six ideas that we think are worth pursuing came out of what we call this open innovation," says Walter Roggenstein, Kelheim's research and development manager. "One idea is for a filtration application." Internally, the Kelheim team continues to come up with



It would be good if European sports brands offered greater support to the European fibre industry. Too much of their focus is on avoiding duties and keeping costs down.

adidas

COPYRIGHT ©

ideas of its own. "We know they cannot all become a commercial success," Mr Roggenstein admits. "We came up with Bramante [a fibre with a segmented hollow structure with increased levels of absorbency] but there's no market for it." Olea, which combines the typical properties of a viscose fibre such as softness, skin-friendliness and comfort, with water-repellency, came out around the same time, 2013. An additive is incorporated into the fibre matrix itself to create the hydrophobic effect, which means it is durable and cannot be washed out.

Olea, which has been more successful, Walter Roggenstein says, is an idea that came out of a meeting with a customer. "This customer did not believe in polyester or polypropylene because they are made from hydrocarbons and asked us if it was possible to create a hydrophobic viscose fibre. We consulted with a technical expert we know and with whom we have a good relationship and he suggested a particular additive. It worked and now that person shares the patent for Olea."

Clothe the world

Stefan Braun's view is that the necessary expense of achieving the highest levels of environmental management in the world, which governments in their part of Europe demand, means Dralon and its fellow IVC members have less to spend on promoting their products, or even on business efficiencies that could help boost profits. Turnover, therefore, is "not growing", he complains.

But it's manmade fibres that will have to "clothe the world" in the future, he insists because cotton's fight with food crops for space in farmers' fields will continue, leading to cotton's share of the fibre market falling further. Manmade fibre production capacity is increasing globally, particularly in China if not for IVC members. Their contribution to total global volumes could grow, he argues, and (for obvious reasons) he would like it to; it currently stands at 1.5%. "Our production costs are at the same level now as they were at the start of this century," he says, "but Germany alone is currently importing more than 600,000 tonnes of manmade fibres per year. Yes, production capacity is increasing in China but it often seems to me is that it's an increase without a masterplan. Plus, state intervention there is widespread and we don't have access to this; we don't want it, we believe in fair competition."

To source without barriers

He is less than impressed with the levels of support available to IVC members from the European Commission in pursuit of this fair competition. "The European Union stopped defending textiles some time ago to concentrate



Dralon chief executive, Stefan Braun.
Dralon

on other industries," he says, "and the bilateral agreements we have in place are not made for textiles." German apparel brands, including sports apparel brands, consume acrylic fibre and are among Dralon's customers, so Mr Braun is at pains to remain diplomatic when he talks about them. Without naming names, he says that what these brands want is to source without barriers. The suggestion is that they will not contemplate sourcing more fibre from IVC members out of a desire to help fellow citizens, and if they buy fibre from Germany, Austria or Switzerland, it will be because these are the only places where they can find what they are looking for. Mr Braun explains: "We are asking for a fairer environment, while they, the brands, are much more driven by economics. They restrict their sourcing strategies and it's all about avoiding duties and keeping costs down."

The Dralon chief executive accepts that consumers must have a choice; his hope is that IVC members can convince them to choose what's innovative and environmentally responsible. "We can help inform consumer choice by making sure people know about our industry," he says. "I remember learning about textiles in school in the late 1960s, but my children have never learned anything about textiles in school. Sometimes now I travel to Iran and people there talk about a German fabric producer called NINO [founded near Münster in 1897 but absorbed into a new company after a management buy-out in 1996]. People in Iran remember the high-quality fabrics for women's clothes that company produced while no one in Germany today has heard of NINO. It's a pity."

COPYRIGHT ITP ©