World Textile Fibers

Industry Study with Forecasts for **2012 & 2017**

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Industry Study with Forecasts for ***2012 & 2017***

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WESTERN EUROPE

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INDUSTRY STRUCTURE

World Textile Fibers

Industry Study with Forecasts for ***2012 & 2017***

Increases in industrial activity will promote gains in technical yarns and fabrics, while rising personal incomes will promote demand for textile fibers used in apparel and household items.

Global demand to increase 4.7% yearly through 2012

World demand for manufactured fibers is forecast to increase 4.7 percent per year to more than 58 million metric tons in 2012, outpacing real (inflation-adjusted) gains in GDP. Overall growth will be supported by the continued replacement of natural fibers by less costly, better performing manmade alternatives in many market applications. The global manufactured fiber market will also benefit from a generally sound macro-economic outlook. Increases in industrial activity will promote gains in technical yarns and fabrics (e.g., tire cord, airbags and geotextiles), while the rising level of personal income in both developed and developing countries will promote demand for textile fibers used in apparel and household items such as furnishings, bed sheets, towels, blankets and quilts, as well as floor coverings.

World Manufactured Fiber Production, 2007
(46.3 million metric tons)

Asia to remain dominant market, grow the fastest

Maintaining an established trend, the world manufactured fiber industry will continue to be concentrated in Asia, particularly China and India, where the fastest growth is also expected. For instance, by 2012 China is expected to account for 70 percent of global polyester output. India will also post strong increases, but total production levels will remain well below that of China. In these countries, strong gains in fiber production and demand reflect vast spinning and weaving sectors, coupled with growing domestic markets for fibers and lower labor costs. As a result of this intense competition, countries such as Japan, South Korea and Taiwan have shifted away from fiber commodities such as polyester, and moved toward lower-volume, higher-end products with specialized market niches.

North American and European mills will continue to face tough challenges, including market maturity, capacity rationalization, competition from imports and business shifting to nations that benefit from lower production costs. For their part, Latin America, Eastern Europe and the Africa/Mideast region are expected to fare better, experiencing slow growth compared to the Asia/Pacific region, but growth nonetheless. In particular, Brazil and Turkey should continue to evolve into major factors in manufactured fibers, bolstering their already strong positions in cotton.

Polyester, specialty fibers to record rapid advances

Polyester fibers will record rapid advances and remain the largest manufactured fiber segment by far, due to their versatility and favorable cost-performance characteristics, but even faster growth in specialty fibers will reflect the continuing strength in the outlook for spandex, aramid and carbon fibers.

Sample Text, Table & Chart

TABLE VI-26

THAILAND -- MANUFACTURED FIBER SUPPLY & DEMAND (thousand metric tons)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006$)					[illegible]14
kg per 000$ GDP					[illegible]4
Manufactured Fiber Demand					[illegible]0
Synthetic Fibers					[illegible]0
Cellulosic Fibers					[illegible]0
+ net exports & stock changes					[illegible]4
Manufactured Fiber Production					[illegible]4
Synthetic Fibers:					[illegible]3
Polyester					[illegible]0
Olefin					[illegible]2
Nylon					[illegible]6
Acrylic & Modacrylic					[illegible]5
Cellulosic Fibers					[illegible]1

SAMPLE TABLE

ASIA/PACIFIC

Thailand: Suppliers & Capacity

Production capacity for manufactured fibers in Thailand
million metric tons in 2007, with over 90 percent of this total
to synthetic fibers. Actual production of manufactured fibers
totaled … 7, yielding an industry-wid
rate of … cers such as Indorama are
focuse… industry also supports uni
produc… ropylene and rayon as evi
the pre… Thai Acrylic Fibre and Th
Public … part of the India-based A
Group. … as Asahi Kasei, Teijin and
Industries have also been active in establishing manufacturin
in the Thai market.

SAMPLE TEXT

Indorama's Indo Poly Thailand subsidiary produces pol[illegible] staple fiber, oriented yarn and fully-drawn yarn, among other polyester materials. These fibers are produced in a variety of sizes and lusters, and can be used to make apparel, upholstery and furnishings, and sanitary products. The company maintains a manufacturing plant in Nakornprathom that has a production capacity of 93,000 metric tons of polyester per year.

Thai Acrylic Fibre is a leading acrylic fiber producer serving the global market. The company has an annual capacity of 100,000 metric tons, and 85 percent of its acrylic fiber production is exported to Australia, Africa, China, Iran, Indonesia, India, Nepal and other Asian nations.

Thai Rayon Public Company is a major manufacturer of viscose rayon staple fiber in Thailand and one the largest exporters in the world. The company operates as a joint venture with the Aditya Birla Group of India. Thai Rayon has production capacity of over 100,000 metric tons per year, and exports about 40,000 metric tons per annum to Australia,

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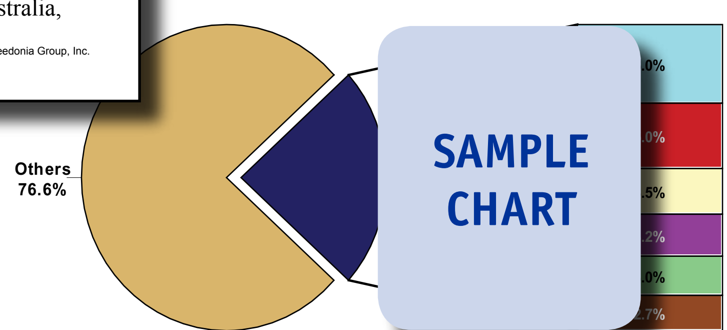
CHART VIII-1

WORLD MANUFACTURED FIBER MARKET SHARE BY COMPANY, 2007 ($100 billion)



World Textile Fibers

Industry Study with Forecasts for ***2012 & 2017***

Sample Profile, Table & Forecast

TABLE VI-25

THAILAND -- TOTAL TEXTILE FIBER DEMAND
(thousand metric tons)

Item	1997	2002	2007	2012	2017
Population (million)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
GDP per capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gross Domestic Product (bil 2006$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
kg per capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
kg per 000$ GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Textile Fiber Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Manufactured Fibers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Natural Fibers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% manufactured	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% natural	[illegible]	[illegible]	[illegible]	[illegible]	30.1

SAMPLE TABLE

COMPANY PROFILES

Far Eastern Textile Limited
36F Taipei Metro Tower, 207 Tun
Hwa South Road, Section 2
Taipei
Taiwan
886-2-2733-8
http://www.fe

Revenues: U
Employment:
Key Products ethylene tere-
phthalate and polylactic acid
spun yarn; purified terephthalic acid; and nylon 6,6 fiber

SAMPLE PROFILE

Far Eastern Textile is a manufacturer of textile fibers and fabrics. The Company is owned by the Far Eastern Group, a Taiwan-based industrial conglomerate. Far Eastern Textile operates through two segments: Fiber and Textile.

The Company is active in the world textile fibers industry through both segments. The Fiber segment, which accounted for 80 percent, or about US$1.2 billion, of Far Eastern Textile's 2007 revenues, manufactures polyester staple fiber and yarn, as well as other polyester products. The segment operates through three divisions, of which the Staple Fiber SBU and Filament SBU divisions manufacture textile fibers. The Staple Fiber SBU division manufactures polyester staple fiber at four production facilities, which produced a total of 242,000 metric tons of staple fiber in 2007. Far Eastern Textile's polyester staple fibers are primarily sold under the EASTLON brand name, and include flame-retardant, antibacterial, heavy metal-free, easy-dye and other types. In addition, the Company makes bicomponent staple fibers and microfibers, including polyester/polyester and polyester/nylon varieties.

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"Fiber production in Thailand is forecast to increase 1.7 percent per year to 1.1 million metric tons in 2012, decreasing the country's trade surplus in manufactured fibers. Promoting output growth is the presence of multinational firms -- especially Japan-based ones -- operating modern facilities that are competitive in global markets. This includes joint ventures between Thai and foreign companies that are setting up plants in Thailand."

--Section VI, pg. 208

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Other Studies

World Textile Chemicals

This study analyzes the global textile chemical industry. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by product (e.g., colorants, auxiliaries, coatings, sizing agents, finishing chemicals, preparation chemicals), geographic region (e.g., Asia/Pacific, North America, Western Europe) and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2426 .... 12/2008.................... $5700

World Flooring & Carpets

This study analyzes the global flooring and carpet industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 by flooring and carpet product (e.g., ceramic, wood, laminate, vinyl, tufted), market (e.g., residential buildings, nonresidential buildings, transportation equipment), world region and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2417 .... 10/2008.................... $5800

World Flame Retardants

World flame retardant demand will grow 4.7% per year through 2011. Gains in developing countries will be driven by more stringent flammability regulations and the use of more plastics. More mature markets will experience an acceleration in demand due to an upswing in manufacturing. This study analyzes the $3.6 billion world flame retardant industry, with forecasts for 2011 and 2016 by product, market, world region and 17 countries. It also details company market share and profiles major players.

#2277 .... 12/2007.................... $5400

Nonwovens

US demand for nonwoven roll goods will grow 4.5% annually through 2011, driven by healthy gains in key markets such as filtration, construction and wipes. Spunbonded nonwovens will remain the dominant product based on performance advantages, new applications and more demand for composite nonwovens featuring spunbonded webs. This study analyzes the $4.7 billion US nonwovens industry, with forecasts for 2011 and 2016 by material, product and market. It also details market share and profiles major firms.

#2271 .... 11/2007.................... $4600

World Wipes

Global wipes demand will grow 6.1% yearly through 2011. Developed markets in the US, Western Europe and Japan will remain dominant, while faster growth will occur in developing nations such as China and India. Baby wipes will stay the largest type while household, personal care and health care wipes lead gains. This study analyzes the $5.8 billion world wipes industry, with forecasts for 2011 and 2016 by product, world region and for 14 countries. It also details market share and profiles major producers.

#2231 .... 08/2007.................... $5400

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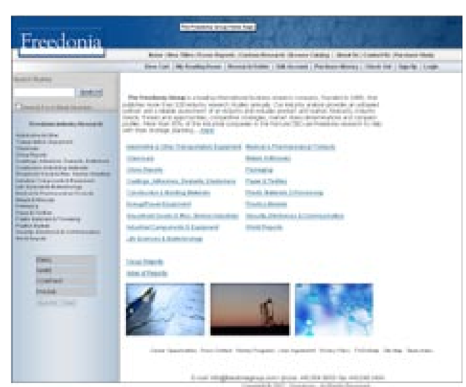

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