

Global Technical Textiles Business Update, 1st quarter 2009



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The first quarter of 2009 was a busy period for the global technical textile sector. 3M completed its acquisition of the Futuro product line from Beiersdorf. Adidas acquired Textronics, a leader in the development of wearable textile sensors. Benninger sold its weaving preparation division to Karl Mayer, and DSM reached an agreement to sell its Solutech business to Lydall. Polyamide High Performance (PHP) acquired Diolen Industrial Fibers, and TenCate announced its intention to take a holding in the synthetic turf company TigerTurf.

In business news, a US court ruled in favour of Gurit and against Zoltek concerning a dispute over a 10-year carbon fibre supply agreement. DSM Dyneema won a patent battle in Europe with Teijin Aramid, and Fiberweb announced plant closures in France, Germany and Sweden. Meanwhile, Teijin reorganised its High Performance Fibers Business Group into two new groups.

In investment news, Bayer MaterialScience announced plans to construct the world's biggest plant for producing carbon nanotubes, and Elmarco moved to a newly constructed research, development and production centre for nanofibre technology. But Teijin announced that it had delayed plans to build a new facility for producing Technora ultra-fine para-aramid powder because of the economic crisis. Meanwhile, Elmarco and Avgol will cooperate in the manufacture of nonwoven fabrics using a technique based on Nanospider technology.

In market news, the US advanced wound care market is forecast to be worth US\$6.0 bn in 2013, according to a recent report from BCC research, while The Freedonia group has predicted that US demand for coated fabrics will reach 655 mn yd² in 2012 and US demand for geosynthetics will reach 905 mn yd².

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SUMMARY

ACQUISITIONS

3M has completed its acquisition of the Futuro health supports and compression hosiery product line from Beiersdorf

Adidas's acquisition of Textronics suggests a potential mass market for wearable sensors

Benninger has sold its weaving preparation division to Karl Mayer

DSM has agreed to sell Solutech to Lydall

Polyamide High Performance (PHP) has acquired Diolen Industrial Fibers and renamed it Polyester High Performance

TenCate intends to take a holding in the synthetic turf company TigerTurf

BUSINESS NEWS

A US court has ruled against Zoltek and in favour of Gurit concerning a dispute over a 10-year carbon fibre supply agreement

DSM Dyneema has won a patent battle in Europe with Teijin Aramid

Fiberweb has announced plant closures in France, Germany and Sweden

Teijin has reorganised its High Performance Fibers Business Group into an Aramid Fibers Business Group and a Carbon Fibers Business Group

INVESTMENTS

Bayer MaterialScience is investing in the world's biggest plant for producing carbon nanotubes
Elmarco has moved to a new research, development and production centre for nanofibre technology in Liberec

Teijin has delayed its plans to build a new facility for producing Technora ultra-fine para-aramid powder

JOINT VENTURES

Avgol and Elmarco will cooperate in the manufacture of nonwoven fabrics using a technique based on Nanospider technology

MARKETS

The US advanced wound care market will be worth US\$6.0 bn in 2013

US demand for coated fabrics is forecast to reach 655 mn square yards in 2012

US demand for geosynthetics is forecast to reach 905 mn square yards in 2012

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Table 1: USA: demand for coated fabrics, 2002-12

Table 2: USA: demand for geosynthetics, 2002-12

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