



# Global Textiles

## Industry Profile

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## EXECUTIVE SUMMARY

### **Market Value**

The global textiles market grew by 3.5% in 2006 to reach a value of \$291.9 billion.

### **Market Value Forecast**

In 2011, the global textiles market is forecast to have a value of \$344.5 billion, an increase of 18% since 2006.

### **Market Volume**

The global textiles market grew by 2.9% in 2006 to reach a volume of 39.7 million tons.

### **Market Volume Forecast**

In 2011, the global textiles market is forecast to have a volume of 46.2 million tons, an increase of 16.2% since 2006.

### **Market Segmentation I**

Sales of synthetic fibers account for 41.2% of the global textiles market's value.

### **Market Segmentation II**

Asia-Pacific is the world's largest textiles market and generates 42.8% of the global revenues.

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## **CHAPTER 1 MARKET OVERVIEW**

### **1.1 Market Definition**

The textiles market consists of unprocessed textiles (cotton yarn, rayon & acetate, synthetic fibers and wool yarn). The market is valued at manufacturer selling price (MSP). All currency conversions used in this profile were carried out at constant 2006 annual average exchange rates.

For the purpose of this report the Americas comprises Brazil, Canada, Mexico and the US.

Europe comprises Belgium, the Czech Republic, Denmark, France, Germany, Hungary, Italy, Netherlands, Norway, Poland, Russia, Spain, Sweden and the UK.

Asia-Pacific comprises Australia, China, Japan, India, Singapore, South Korea and Taiwan.

The global figure comprises the Americas, Asia-Pacific and Europe.

### **1.2 Research Highlights**

The global textile market generated total revenues of \$291.9 billion in 2006, this representing a compound annual growth rate (CAGR) of 1.3% for the period spanning 2002-2006.

Textile consumption volumes increased with a CAGR of 2% between 2002-2006, to reach a total of 39.7 million tones in 2006.

The performance of the market is forecast to accelerate, with an anticipated CAGR of 3.4% for the five-year period 2006-2011 expected to drive the market to a value of \$344.5 billion by the end of 2011.

### 1.3 Market Analysis

The global textile market generated total revenues of \$291.9 billion in 2006, this representing a compound annual growth rate (CAGR) of 1.3% for the period spanning 2002-2006. In comparison, the Asia-Pacific and Americas markets grew with CAGRs of 1.4% and 2.1% over the same period, to reach respective values of \$124.8 billion and \$76 billion in 2006.

Textile consumption volumes increased with a CAGR of 2% between 2002-2006, to reach a total of 39.7 million tones in 2006. The market's volume is expected to rise to 46.2 million tones by the end of 2011, this representing a CAGR of 3.1% for the 2006-2011 period.

The synthetic fiber segment was the market's most lucrative in 2006, generating total revenues of \$120.4 billion, equivalent to 41.2% of the market's overall value. The cotton yarn segment contributed revenues of \$109.8 billion in 2006, equating to 37.6% of the market's aggregate revenues.

The performance of the market is forecast to accelerate, with an anticipated CAGR of 3.4% for the five-year period 2006-2011 expected to drive the market to a value of \$344.5 billion by the end of 2011. Comparatively, the Asia-Pacific and Americas market s will grow with CAGRs of 4.7% and 4.2% respectively over the same period, to reach respective values of \$157.1 billion and \$93.4 billion in 2011.

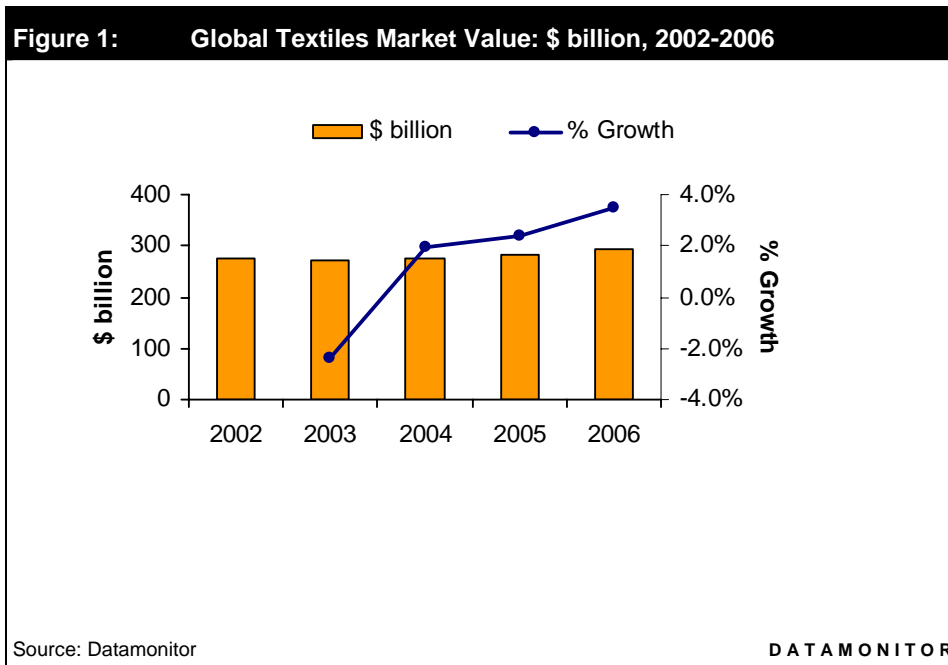
## CHAPTER 2 MARKET VALUE

The global textiles market grew by 3.5% in 2006 to reach a value of \$291.9 billion.

The compound annual growth rate of the market in the period 2002-2006 was 1.3%.

<b>Table 1: Global Textiles Market Value: \$ billion, 2002-2006</b>			
<b>Year</b>	<b>\$ billion</b>	<b>\$ billion</b>	<b>% Growth</b>
2002	276.8	276.8	
2003	270.3	270.3	-2.40%
2004	275.5	275.5	1.90%
2005	282.0	282.0	2.40%
2006	291.9	291.9	3.50%
<b>CAGR, 2002-2006:</b>			<b>1.3%</b>

Source: Datamonitor DATAMONITOR



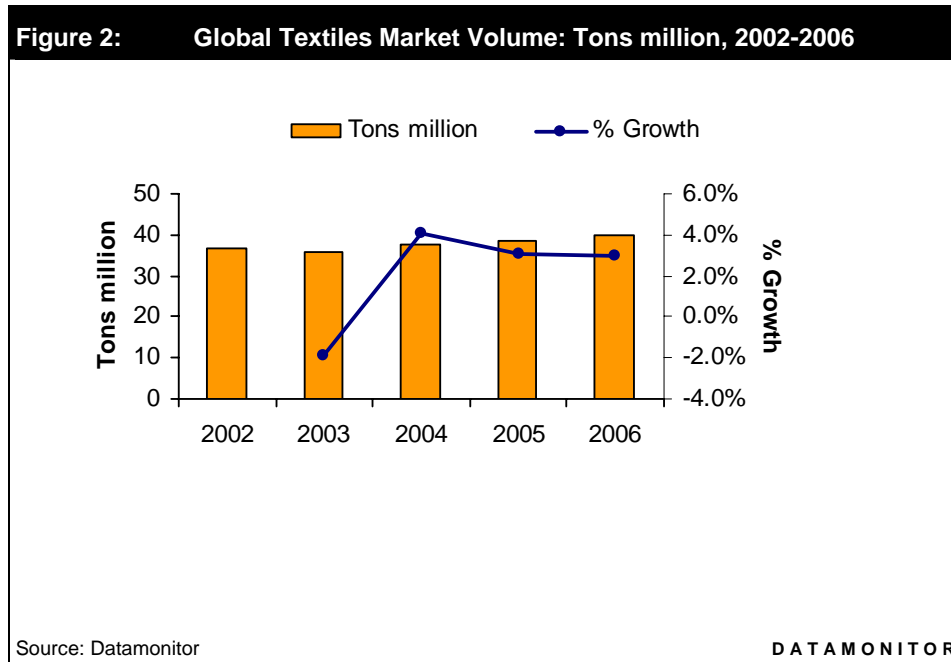
### CHAPTER 3 MARKET VOLUME

The global textiles market grew by 2.9% in 2006 to reach a volume of 39.7 million tons.

The compound annual growth rate of the market volume in the period 2002-2006 was 2%.

Table 2: Global Textiles Market Volume: Tons million, 2002-2006		
Year	Tons million	% Growth
2002	36.7	
2003	36.0	-1.90%
2004	37.4	4.10%
2005	38.6	3.10%
2006	39.7	2.90%
<b>CAGR, 2002-2006:</b>		<b>2.0%</b>

Source: Datamonitor DATAMONITOR



## CHAPTER 4 MARKET SEGMENTATION I

Sales of synthetic fibers account for 41.2% of the global textiles market's value.

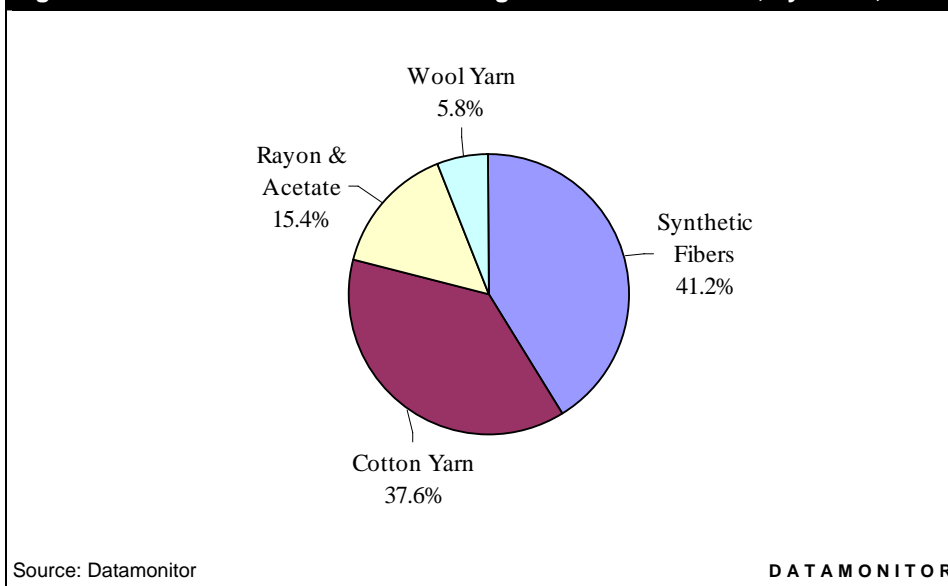
Cotton yarn sales generate a further 37.6% of the market's revenues.

**Table 3: Global Textiles Market Segmentation I: % Share, by Value, 2006**

Category	% Share
Synthetic Fibers	41.20%
Cotton Yarn	37.60%
Rayon & Acetate	15.40%
Wool Yarn	5.80%
<b>Total</b>	<b>100.0%</b>

Source: Datamonitor DATAMONITOR

**Figure 3: Global Textiles Market Segmentation I: % Share, by Value, 2006**



## CHAPTER 5 MARKET SEGMENTATION II

Asia-Pacific is the world's largest textiles market and generates 42.8% of the global revenues.

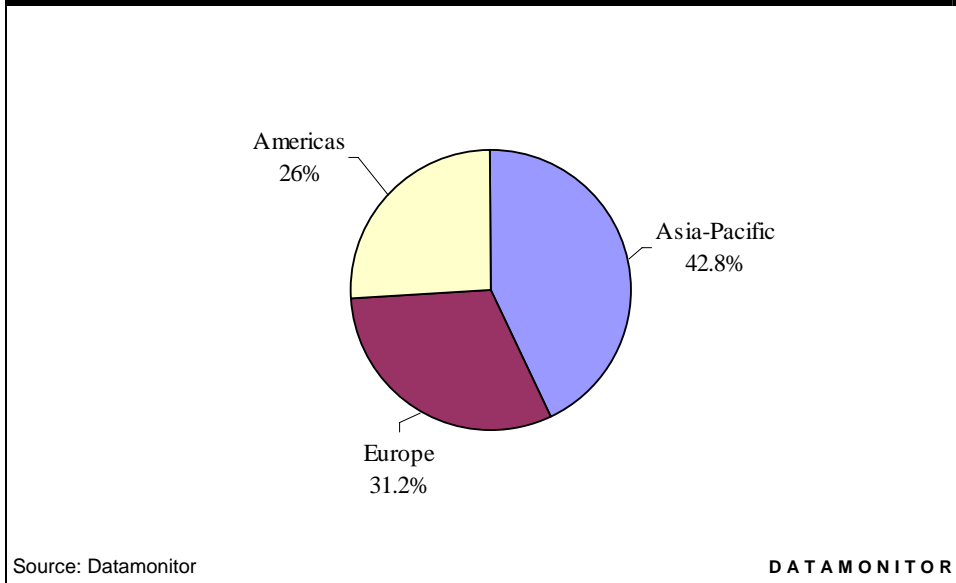
In comparison, Europe accounts for a further 31.2% of the global market's value.

**Table 4: Global Textiles Market Segmentation II: % Share, by Value, 2006**

Geography	% Share
Asia-Pacific	42.80%
Europe	31.20%
Americas	26.00%
<b>Total</b>	<b>100.0%</b>

Source: Datamonitor DATAMONITOR

**Figure 4: Global Textiles Market Segmentation II: % Share, by Value, 2006**



## CHAPTER 6 COMPETITIVE LANDSCAPE

Textile fiber and yarn manufacturers face moderate buyer power from the textile fabric manufacturers that are their main customers. Upstream, suppliers such as extrusion resin manufacturers and cotton traders include some large players, but a yarn producer can defend to some extent against supplier power by diversifying its product line, so that it is not unduly dependent on one kind of raw material.

Diversification also protects against the threat of substitutes: while a specialist manufacturer of (say) woolen yarns is strongly threatened if synthetic yarns become cheap, a diversified manufacturer that can offer its customers either product is less affected. With products that are often hard to differentiate strongly in the marketplace, relatively easy capacity increase, high storage costs, and undramatic market performance in recent years, the degree of rivalry is strong.

The textile market will be analyzed taking manufacturers of textile fibers as players, and producers of textile fabrics as buyers. Fabric manufacturing is more capital-intensive and less labor-intensive than the clothing manufacturing industry downstream, but while more concentrated in most countries than the garment industry downstream, it nevertheless remains fragmented. Fiber manufacturers can expect to sell to large numbers of medium-sized companies, weakening buyer power.

Fabric makers often do not attempt to integrate backwards into fiber manufacturing, and fibers are central to their business, meaning a further diminution of buyer power. However, fairly low switching costs, commoditized products (except for some niche materials), and relative immunity to factors such as brand loyalty strengthen the hand of buyers. Overall, buyer power is moderate.

Suppliers in this market include chemical companies that produce resins for extrusion into synthetic fibers and similar inputs. Some of these are multinationals such as BASF and DuPont, although many of these inputs are commodities, and smaller suppliers exist for them. Suppliers of raw cotton and wool are also significant in the natural fiber segments. While sheep farming itself can be a highly fragmented industry, in some regions, wool pools and similar groups exist, and fiber manufacturers may deal with a small number of wool brokers.

These factors raise supplier power. Supplier power is weakened by the fact that different kinds of fiber require raw materials from radically different industries, and therefore act as alternatives to each other: for example, if cotton prices start to rise, a fiber manufacturer may be able to increase its usage of nylon, provided the company had already invested in suitable equipment; however, it would be very difficult for cotton growers or traders to defend against this strategy by moving into chemical resin manufacturing. Overall, supplier power is moderate.

The threat of new entrants into the textiles market is moderate. The demand for fibers is increasing, especially for synthetics, and therefore the revenues could attract new players to the market. Entry to the global market requires investment in production equipment, such as fiber extruders, carders, and ring spinners, and the need to maintain reasonably large factory facilities increases fixed costs. In a B2B market, factors such as brand strength are of little significance.

As mentioned in the comments on supplier power, a player with appropriately diversified manufacturing capacity can use several different raw materials, and the degree of diversification influences the threat of substitutes. If a fiber manufacturer specializes in one market segment, such as woolen yarns, then the threat of substitutes is strong.

This is because if woolen yarn manufacturers try to raise prices too much, yarn buyers (fabric manufacturers) can reduce their usage of wool and increase production of cotton or synthetic-based textiles - subject, of course, to satisfying demand from their own buyers. A wool fiber specialist cannot readily respond to this, as the production techniques for wool, cotton, and synthetic fibers are quite different, requiring investment in different equipment.

In practice, it is common for textile fiber manufacturers to offer products in more than one market segment. This significantly weakens the threat of substitutes in many cases. The benefits of substitutes to buyers are not always clear-cut. For example, buyers with substantial activities in denim manufacturing cannot readily substitute cotton yarns with a different material, as their own product has to be made mainly of cotton. Overall, the threat of substitutes is no more than moderate.

The degree of rivalry within the textiles market is strong. Due to the need for industry-specific production equipment, the exit barriers are high because it would be relatively hard to divest such specialized assets. In a highly automated industry, with little need for a highly-skilled workforce, production capacity can be ramped up quite readily when needed.

Companies are similar in respect to their production, however some specialize more within natural fibers than synthetic and vice-versa. In many cases, the fiber and yarn production business is highly important to their operation, which means that the competitive stakes are raised. With the exception of some niche, specialist fibers and yarns, most products within each category are only weakly differentiated, boosting rivalry. Overall, rivalry is strong.

## CHAPTER 7 LEADING COMPANIES

### 7.1 China Petroleum & Chemical Corporation (Sinopec)

<b>Table 5: Key Facts: China Petroleum &amp; Chemical Corporation (Sinopec)</b>	
Address:	Zhenzhou Town, Yizheng City, Jiangsu Province, 211900, China
Telephone:	(0514) 3232235
Fax:	(0514)3233880
Website:	www.ycfc.com
Financial Year-End:	December
Ticker:	0386
Stock Exchange:	Hong Kong
Source: Company Website	
<b>DATAMONITOR</b>	

Sinopec Yizheng is the largest manufacturer of polyester and its raw materials in China and the fourth-largest in the world. The Company was set up in February, 2000 by China Petrochemical Corporation (Sinopec Group) as the sole initiator.

China Petroleum & Chemical Corporation (Sinopec) is a leading producer and marketer of oil products and petrochemical products. It is a vertically integrated energy and chemical company with upstream, midstream and downstream operations. The principal operations of Sinopec and its subsidiaries include exploration, development, production and marketing of crude oil and natural gas; oil refining and marketing; production and sales of petrochemicals, chemical fibers, chemical fertilizers and other chemicals.

The company's business activities also include storage and pipeline transportation of crude oil and natural gas, import and export of crude oil, natural gas, refined oil products, petrochemicals, chemicals and other related commodities. Sinopec operates through more than 80 subsidiaries and branches mainly located in China.

Sinopec operates through four segments: exploration and production, refining, marketing and distribution, and chemicals.

The exploration and production segment is engaged in oil and gas exploration and production, as well as the marketing of oil and gas. Most of its oil and gas reserves are located in the eastern, western and southern parts of China, covering 26 provinces. The company has 356 exploration licenses and 204 exploitation licenses. At the end of 2005, Sinopec had proved oil and gas reserves of 3,786 million barrels of oil equivalent (mmbœ). In 2005, the company produced 278.8 million barrels of crude oil and 221.9 billion cubic feet (bcf) of natural gas.

The refining segment processes crude oil, which is sourced from the exploration and production segment of the company and external suppliers, and manufacturers and sells petroleum products. Sinopec is the largest refiner of petroleum in China based on crude oil throughput. At end 2005, the company's total processing capacity reached 149 million tons per annum.

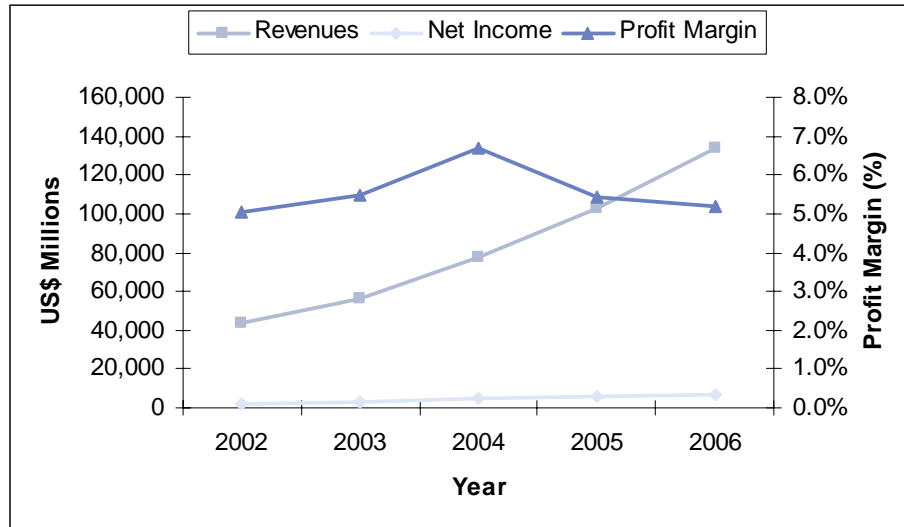
The marketing and distribution segment owns and operates oil depots and service stations in China, and distributes and sells refined petroleum products (mainly gasoline and diesel) in China through wholesale and retail sales networks. At the end of 2005, Sinopec had a total of 29,647 service stations, of which 27,367 stations are owned and operated by the company.

The chemicals segment manufactures and markets petrochemical products, derivative petrochemical products and other chemical products mainly to external customers. Sinopec is the largest producer and distributor of petrochemicals in China. It produces and distributes a range of petrochemical products, including intermediates, synthetic resin, synthetic fiber monomers and polymers, and chemical fertilizer. At the end of 2005, the company had 10 ethylene plants (including two joint venture companies), 23 synthetic resin plants, 13 producers of synthetic fiber monomers and polymers, eight synthetic fiber plants, four synthetic rubber plants, and seven urea plants.

### Key Metrics

<b>Table 6: Key Financials: China Petroleum &amp; Chemical Corporation (Sinopec)</b>					
<b>Metric</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
Revenues	43,875.9	56,273.4	77,665.2	103,142.5	134,229.1
Net Income	2,206.6	3,091.6	5,180.6	5,609.7	6,941.7
Profit Margin	5.0%	5.5%	6.7%	5.4%	5.2%
Total Assets	51,444.1	53,005.4	60,241.0	68,785.7	76,647.3
Total Liabilities	28,747.7	29,497.3	33,709.3	37,720.4	40,695.8
Employees	418,871	400,513	389,451	364,528	340,886
Source: Company Filings					<b>DATAMONITOR</b>

**Figure 5: Revenues & Profitability: China Petroleum & Chemical Corporation (Sinopec)**



Source: Datamonitor

**DATAMONITOR**

## 7.2 Bayer AG

<b>Table 7: Key Facts: Bayer AG</b>	
Address:	Building W 11, Leverkusen 51368, DEU
Telephone:	49 214 30 1
Fax:	49 214 307 1985
Website:	www.bayer.com
Financial Year-End:	December
Ticker:	BAY
Stock Exchange:	Frankfurt
Source: Company Website	
<b>DATAMONITOR</b>	

Bayer is the holding company of the Bayer Group, which includes approximately 280 consolidated subsidiaries worldwide. The group offers a range of products, including ethical pharmaceuticals, diagnostics and other healthcare products, agricultural products and polymers.

The business operations of the group are organized into three divisions: healthcare, crop science and material science.

The healthcare division consists of pharmaceuticals, consumer care, diabetes care, and animal health segments.

The pharmaceuticals segment focuses on the development and marketing of ethical pharmaceuticals. It is divided into the three business units: oncology, primary care and hematology/cardiology. Its major products include Adalat, Ciprofloxacin, Moxifloxacin, Acarbose, Vardenafil, CardioAspirin, Kogenate FS, Helixate FS and Trasylol. The division's principal markets are North America, Western Europe and Asia.

Bayer's consumer care segment develops and markets over-the-counter (OTC) medications, as well as vitamin and nutritional supplements. Its major products include Aspirin, CardioAspirin, Alka-Seltzer Plus, Tabcin, Canesten, Rid, Bepanthen, Alka-Seltzer, One-A-Day, WeightSmart, Flintstones, Supradyn and Berocca.

The diabetes care segment, meanwhile, produces and markets blood glucose monitoring products. Its key products include the multi test and the single test strip platform. Its family of multi test products includes Ascensia Breeze, Ascensia Confirm, Ascensia Dex and Ascensia Esprit.

The group's animal health segment researches, develops and markets new products for animal health care. These products are grouped into two categories: food animal products and companion animal products. This is supplemented by a line of farm hygiene products and other products.

The major products of this segment include K9 Advantix, Advantage, The Droncit and Drontal product family, Bayticol, Baycox and Baytril. This segment operates in all major markets, including China, Vietnam and others in Southeast Asia. Animal health products are sold on a prescription or non-prescription basis based on national legislation. Also, based on national legislation, non-prescription products may be available through over-the-counter retailers, cooperatives, pet shops, integrators in the livestock segment and other specialized channels in the companion animal market.

The crop science division comprises the crop protection segment and environmental science and bioscience segment.

Bayer's crop protection segment distributes chemical crop protection products for the control of insects, weeds and fungi (plant diseases). Its major products include Imidacloprid, Aldicarb, Deltamethrin, Tebuconazole, Trifloxystrobin, Prothioconazole, Glufosinate-Ammonium, Fenoxaprop-P-ethyl and Mesosulfuron-methyl. The group also offers seed treatment products such as Clothianidin and Tebuconazole.

The environmental science serves non-agricultural professional and consumer markets, by developing and marketing products for professional pest control, the green industry, (including the treatment of golf courses, lawn care and industrial vegetation management), lawn, garden and household care, termite and vector control, and rural hygiene. Its major products include Imidacloprid-based Premise, Deltamethrin, Maxforce, Bayer Advanced and Bayer Garden. The bioscience segment focuses on the research, development and marketing of conventional and genetically enhanced seeds and other plant biotechnology products. Its major products include Nunhems, FiberMax, InVigor and Arize.

The material science division comprises the materials segment and the systems segment.

The materials segment comprises the business units, polycarbonates and thermoplastic polyurethanes, as well as subsidiaries Wolff Walsrode and HC Starck. The group's polycarbonate business includes polycarbonates, polycarbonate blends, polycarbonate films and sheets. It also develops, produces and markets cellulose derivatives, as well as various sausage casings. The activities of Wolff Walsrode focus on building materials, industrial coatings, printing inks for soft packaging, and the health care market. In Germany and the US, Wolff Walsrode sells its cellulose products directly. Elsewhere, products are marketed through Bayer's global sales organization. HC Starck supplies materials and components for the electronics, optics, aviation, aerospace and medical technology industries.

The systems segment comprises the polyurethanes; coatings, adhesives and sealants; and inorganic basic chemicals business units.

The group also provides service functions through three service companies: Bayer Business Services, Bayer Technology Services and Bayer Industry Services.

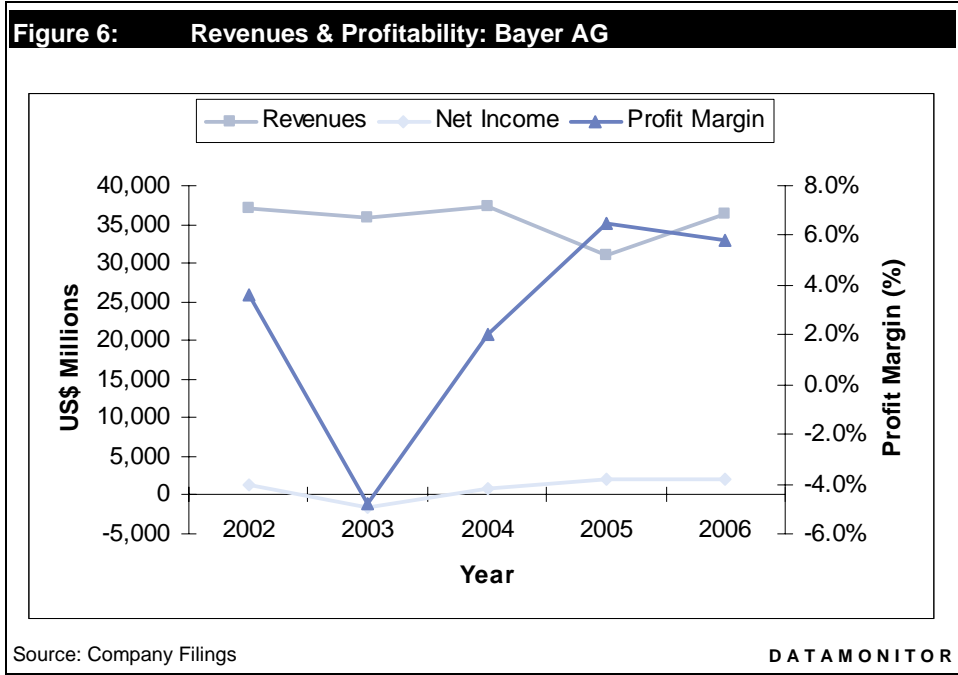
Bayer Business Services is the group's IT-based competence center providing business, administrative and scientific services. It offers a range of services from technical consultancy to the performance of entire business processes in the areas of accounting, procurement, human resources, logistics, IT operations, scientific services, pensions and patents law. It also has subsidiaries that provide travel and media services.

Bayer Technology Services provides the technological backbone of the Bayer Group, developing processes and planning, constructing and optimizing production facilities. It provides complete, cost-effective solutions along the entire life cycle of plants, processes and products.

Bayer Industry Services is the operator of a German chemical park, with sites at Leverkusen, Dormagen, Krefeld-Uerdingen and Brunsbuttel. The group provides customized service portfolios to both internal and external clients, ranging from technology through environmental protection, waste management, utility supply, infrastructure, safety and analytics to vocational training and continuing education courses. It also markets available land and buildings to companies interested in setting up operations within the chemical park.

### Key Metrics

<b>Table 8: Key Financials: Bayer AG</b>					
<b>Metric</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
Revenues	37,168.0	35,841.8	37,336.1	30,991.3	36,329.9
Net Income	1,329.9	-1,707.6	756.6	2,003.7	2,111.6
Profit Margin	3.6%	-4.8%	2.0%	6.5%	5.8%
Total Assets	52,309.2	46,980.7	47,431.1	46,073.5	70,124.1
Total Liabilities	33,069.0	31,657.5	32,038.9	32,175.7	54,105.9
Employees	122,600	115,400	113,000	82,600	106,000
Source: Company Filings					<b>DATAMONITOR</b>



### 7.3 Mohawk Industries, Inc.

<b>Table 9: Key Facts: Mohawk Industries, Inc.</b>	
Address:	160 South Industrial Boulevard, Calhoun, GA 30701, USA
Telephone:	1 706 629 7721
Fax:	1 706 624 3825
Website:	www.mohawkind.com
Financial Year-End:	December
Ticker:	MHK
Stock Exchange:	New York
Source: Company Website	
<b>DATAMONITOR</b>	

Mohawk Industries (Mohawk) is engaged in the production of floor covering products for residential and commercial applications. The company's product offering includes broadloom carpet, ceramic tile, wood, stone, laminate, vinyl, rugs and other home products. The company operates in North America and Europe.

The company operates through three reportable segments: Mohawk, Dal-Tile, and Unilin.

The Mohawk segment primarily designs, manufactures, sources, distributes and markets its floor covering product lines. The segment's product line includes carpet, rug, carpet pad, ceramic tile, laminate, hardwood and resilient for residential and commercial applications. The Mohawk segment markets and distributes its carpets and rugs under its soft surface floor covering brands; and ceramic tile, laminate, hardwood and resilient under its hard surface floor covering brands. The segment's key brand include: Mohawk, Aladdin, Mohawk Home, Bigelow, Custom Weave, Durkan, Helios, Horizon, Karastan, Lees, Merit, Ralph Lauren and WundaWeve.

The Mohawk segment markets and distributes soft and hard surface products to diverse customers, which include independent floor covering retailers, home centers, mass merchandisers, department stores, commercial dealers and commercial end users. The segment also markets some of its products through private labels. The segment's soft surface operations are vertically integrated from the extrusion of resin to the manufacture and shipment of finished carpets and rugs.

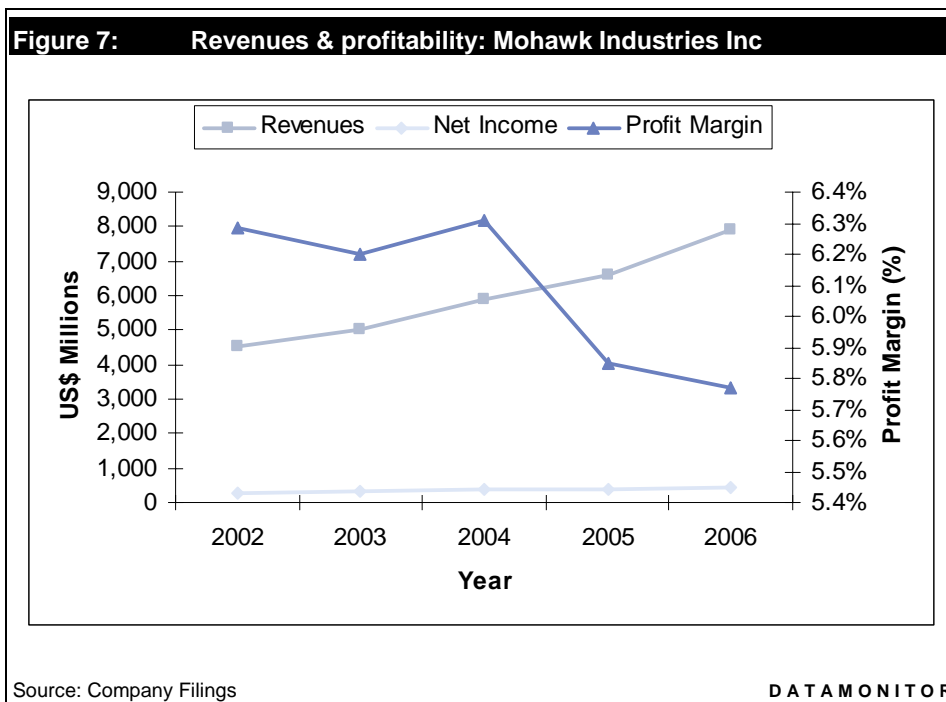
The Dal-Tile segment designs, manufactures, sources, distributes and markets a broad line of ceramic tile, porcelain tile, natural stone and other products for the residential and commercial markets. The segment's products are offered through independent distributors, home center retailers, tile and flooring retailers; and contractors. The segment's ceramic tile products are marketed under the brands: Dal-Tile and American Olean. Dal-Tile's operations are vertically integrated from the production of raw material for body and glaze preparation to the manufacturing and distribution of ceramic and porcelain tile.

The Unilin segment became a part of the company through the acquisition of Unilin Holding in October 2005. Unilin is a leading manufacturer, distributor and marketer of laminate flooring in Europe and the US. Unilin also produces insulated roofing and other wood based panels. Unilin offers its laminate flooring products under the brand: Quick-Step as well as under private label brands. The segment markets its products through independent distributors and specialty stores in Europe and the US as well as through traditional retailers in France, Belgium and Netherlands. Unilin has vertically integrated operations in both laminate flooring and related high density fiberboard.

**Key Metrics**

<b>Table 10: Key Financials: Mohawk Industries Inc</b>					
<b>Metric</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
Revenues	4,517.0	4,999.0	5,880.0	6,620.0	7,906.0
Net Income	284.0	310.0	371.0	387.0	456.0
Profit Margin	6.3%	6.2%	6.3%	5.8%	5.8%
Total Assets	3,597.0	4,164.0	4,403.0	8,040.0	8,178.0
Total Liabilities	1,614.0	1,865.8	1,736.8	4,981.8	4,463.1
Employees	31,780	33,300	34,300	37,700	37,100

Source: Company Filings DATAMONITOR



## 7.4 Toyota Boshoku Corporation

**Table 11: Key Facts: Toyota Boshoku Corporation**

Address:	Toyoda-cho, Kariya-shi, Aichi 448-8651, Japan
Telephone:	81 566236611
Fax:	81 566260400
Website:	<a href="http://www.toyota-boshoku.co.jp">http://www.toyota-boshoku.co.jp</a>
Financial Year-End:	March
Ticker:	3116
Stock Exchange:	Tokyo

Source: Company Website

DATAMONITOR

Toyota Boshoku Corporation initially started business in textile industry in 1918. It is headquartered in Aichi, Japan. The company develops auto interior components such as seats, fabric goods, air bags and seat belt webbing. Also the company is active in textile industry manufacturing socks, blankets, Dust-proof coveralls and similar items.

### Key Metrics

With more than 21000 employees, Toyota Boshoku announced the operational turn over of \$7475 million and declared \$180 million net income.

## CHAPTER 8 MARKET FORECASTS

### 8.1 Market Value Forecast

In 2011, the global textiles market is forecast to have a value of \$344.5 billion, an increase of 18% since 2006.

The compound annual growth rate of the market in the period 2006-2011 is predicted to be 3.4%.

**Table 12: Global Textiles Market Value Forecast: \$ billion, 2006-2011**

Year	\$ billion	\$ billion	% Growth
2006	291.9	291.9	3.50%
2007	301.4	301.4	3.20%
2008	311.6	311.6	3.40%
2009	321.9	321.9	3.30%
2010	332.7	332.7	3.40%
2011	344.5	344.5	3.50%
<b>CAGR, 2006-2011:</b>			<b>3.4%</b>

Source: Datamonitor DATAMONITOR



## 8.2 Market Volume Forecast

In 2011, the global textiles market is forecast to have a volume of 46.2 million tons, an increase of 16.2% since 2006.

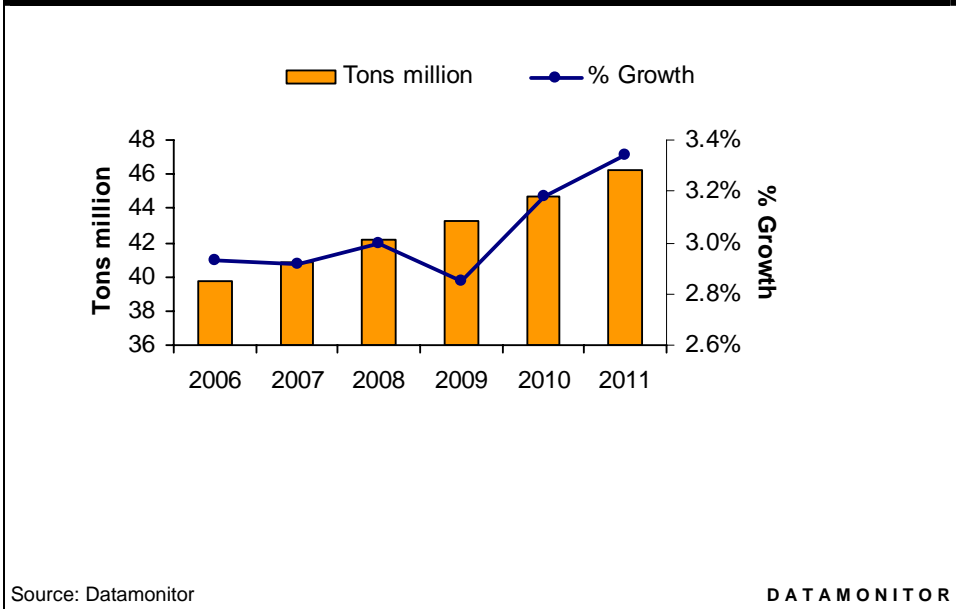
The compound annual growth rate of the market volume in the period 2006-2011 is predicted to be 3.1%.

**Table 13: Global Textiles Market Volume Forecast: Tons million, 2006-2011**

Year	Tons million	% Growth
2006	39.7	2.90%
2007	40.9	2.90%
2008	42.1	3.00%
2009	43.3	2.80%
2010	44.7	3.20%
2011	46.2	3.30%
<b>CAGR, 2006-2011:</b>		<b>3.1%</b>

Source: Datamonitor DATAMONITOR

**Figure 9: Global Textiles Market Volume Forecast: Tons million, 2006-2011**



## CHAPTER 9 APPENDIX

### 9.1 Methodology

Datamonitor Industry Profiles draw on extensive primary and secondary research, all aggregated, analyzed, cross-checked and presented in a consistent and accessible style.

**Review of in-house databases** – Created using 250,000+ industry interviews and consumer surveys and supported by analysis from industry experts using highly complex modeling & forecasting tools, Datamonitor's in-house databases provide the foundation for all related industry profiles

**Preparatory research** – We also maintain extensive in-house databases of news, analyst commentary, company profiles and macroeconomic & demographic information, which enable our researchers to build an accurate market overview

**Definitions** – Market definitions are standardized to allow comparison from country to country. The parameters of each definition are carefully reviewed at the start of the research process to ensure they match the requirements of both the market and our clients

**Extensive secondary research** activities ensure we are always fully up-to-date with the latest industry events and trends

Datamonitor aggregates and analyzes a number of secondary information sources, including:

- National/Governmental statistics
- International data (official international sources)
- National and International trade associations
- Broker and analyst reports
- Company Annual Reports
- Business information libraries and databases

**Modeling & forecasting tools** – Datamonitor has developed powerful tools that allow quantitative and qualitative data to be combined with related macroeconomic and demographic drivers to create market models and forecasts, which can then be refined according to specific competitive, regulatory and demand-related factors

**Continuous quality control** ensures that our processes and profiles remain focused, accurate and up-to-date

## **9.2 Industry Associations**

### **International Textile and Apparel Association, Inc.**

P.O. Box 1360. Monument, CO 80132, US

Fax: 719 488 3716

<http://www.itaonline.org>

### **International Textile Manufacturers Federation (ITMF)**

Am Schanzengraben 29, Postfach CH-8039, Zürich

Tel: 41 44 283 6380

Fax: 41 44 283 6389

<http://www.itmf.org>

## **9.3 Related Datamonitor Research**

### **Datamonitor Industry Profiles**

Textiles in Europe

Textiles in Asia-Pacific

Textiles in France

Textiles in Germany

Textiles in the United Kingdom

Textiles in Japan

Textiles in the United States

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