

Texprocess Frankfurt, June 21-24, 2022

International press conference
April 6, 2022

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Texprocess - Current Situation in the Customer Industries



- **Effects and aftermath of the pandemic**
 - Difficult procurement situation:
 - Material shortage
 - Availability issues
 - Long delivery times
 - Increased costs (materials, logistics, production)
- **Increased energy costs**
- **Increased labor costs**
- **Labor shortage**
- **Covid as an accelerator of the changes already underway in the garment industry**



Texprocess - Current Situation in the Customer Industries



- **Two opposing movements:**
 - Fast Fashion
 - Online trade
 - Shorter fashion cycles
 - Steadily rising consumption
 - Slow Fashion
 - Increased consumer awareness
 - Higher quality materials with a longer service life
 - Eco textiles
 - Recyclable materials





Texprocess - Current Situation in the Customer Industries



Sustainability:

- Increased requirements for sustainable production
 - On the part of politics
 - On the part of the consumer
- Sustainability along the entire supply chain
- Extension of the product life cycle
 - Second hand market
 - Clothing leasing models
 - Repair services
 - Exchange platforms



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Texprocess - Requirements from the Customer Industries



- **More flexible production**
 - Faster production response
 - Pandemic as a digitalization accelerator
 - External circumstances require faster implementation of new business models
 - Flexible adjustment
 - More flexible ways of working



Texprocess - Requirements from the Customer Industries



- **Sustainable production**
 - Circular economy
 - New, biodegradable materials
 - Recycling/upcycling
 - Dealing with microplastics
 - Traceable supply chains and
 - Sustainability along the entire supply chain
 - Expectation of ecologically, socially acceptable products and thus sustainable solutions



Texprocess - Requirements from the Customer Industries



- **Regional production**
 - Production closer to the consumer
 - Minimization of supply chain risks
 - Demand for individual, customized products



Texprocess - Solutions from the Technology Manufacturers



Digitization and automation

- Digital business models
- Worldwide networking of machines
- Virtual commissioning
- Remote Maintenance
- Digital direct printing
- Software for 3D collection development
- Solutions for the virtual fitting room
- Digitization of sewing production



Texprocess - Solutions from the Technology Manufacturers



Sustainability through:

- Software in product development (design sustainably)
- Fit improvements through body scanning and customization
- Zero-Waste-Cutting
- 3D Printing Printer
- Optimization of resource consumption



Texprocess - current Challenges of the Industry



- **Still unforeseeable consequences of the war in Ukraine**
- **Effects of the pandemic**
 - Shortage of raw materials and precursors as well as enormous cost increases
 - Exploding logistics costs
 - Travel restrictions
 - Restrictions trade fair activities
- **Exploding energy costs**
- **Enormous shortage of skilled workers**
- **Supply Chain Law**



Texprocess - Current economic Developments in the Industry in Figures*.



Order intake and sales in Germany in 2021

- Order intake plus 34.7% Jan. 2021 - Dec. 2021 (real)
- Sales minus 13.2% Jan 2021 - Dec 2021 (real)

In a 3-month comparison:

- Order intake plus 117% Nov 2021- Jan 2022 (real)
- Sales minus 1.4% Nov 2021- Jan 2022 (real)

*The entire sewing and garment technology, as well as laundry and cleaning technology.



Texprocess - Current economic Developments in the Industry in Figures



Exports of German sewing and garment technology 2021

- **Export growth of 7.6% to €439 million**
 - Most important export markets in 2021: Poland, USA, France, China and Italy
 - Exports within the EU 27: plus 11% to €252 million
 - 74 million to Poland (plus 32%)
 - 38 million to France (down 4.5%)
 - 32 million to Italy (plus 9%)
 - Exports to the USA: down 0.5% to €42 million
 - Exports to China: up 30% to €33 million



Texprocess - Current economic Developments in the Industry in Figures



Exports of European sewing and garment technology 2021

- **Exports up 8.5% to €1,356 billion**
 - Most important export markets in 2021: Germany, USA, Poland, France, Italy and China
 - Exports within the EU 27: plus 5% to €762 million
 - 204 million to Germany (plus 14%)
 - € 99 million to Poland (plus 28%)
 - 97 million to France (plus 1%)
 - 77 million to Italy (plus 15%)
 - Exports to the USA: up 16% to €107 million
 - Exports to China: up 39% to €68 million



Thank you
Thank you
for your attention!