Textile Machinery in Catalonia: Sector Snapshot

ACCIÓ
Government of Catalonia

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Elaborated by
Catalonia Trade & Investment. Strategy and Competitive Intelligence Unit

Barcelona, June 2019
The Textile Machinery Industry in Catalonia

- Textile machinery in Catalonia
- Trends and challenges
- Internationalization opportunities
- Attracting FDI
- Talent and creativity
- Innovation ecosystem
# The Textile Machinery Industry in Figures

<table>
<thead>
<tr>
<th><strong>104 companies</strong> in Catalonia</th>
<th><strong>€221 million turnover</strong></th>
<th><strong>1,253 people</strong> employed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>99% of companies are SMEs</strong></td>
<td><strong>65% of companies are exporters</strong></td>
<td><strong>5.7% of companies have subsidiaries abroad</strong></td>
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Catalonia is the **top region in Spain in terms of the number of companies producing textile machinery**. It accounts for **54% of all companies**.

Of the **10 leading companies** in the Spanish textile machinery industry, **seven are Catalan**.

Source: EIC (DGI-ACCIÓ), based on data from Orbis and AMEC
The Value Chain of the Textile Machinery Industry

**Production**
- Spinning: Yarn treatment, Yarns, Flexing and twisting, Finishing
- Weaving: Fabric, Mesh, Weaving, Non-woven fabrics
- Dyeing and finishing: Preparation, Bleaching, Dyeing, Printing, Washing

**Clients**
- Textiles and fashion
- Home textiles
- Technical and non-woven fabrics
- Client company
  - Automotive
  - Hygiene and medicine
  - Agriculture
  - Packaging
  - Chemicals
  - Construction

**Sales**
- Footwear
- Leather goods
- Jewellery
- Costume jewellery

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**Technical and non-woven fabrics**
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**Client company**
- Automotive
- Hygiene and medicine
- Agriculture
- Packaging
- Chemicals
- Construction

**Other public and private actors that form part of the business ecosystem:**
Universities, research centres, clusters, business associations, public administrations, importing companies, etc.

**Source:** EIC (DGI-ACCIÓ), based on “The textile and fashion sector in Catalonia” report by the Department of Strategic Analysis, Directorate-General of Industry
The Value Chain of the Textile Machinery Industry

Production

Suppliers of raw materials and trims

- Fibres
  - Natural
  - Artificial
  - Synthetic
  - Non-organic

Machinery used for obtaining raw materials and for manufacturing

- Spinning
  - GALAN
  - MOTOCONO
  - TINUS
  - EUROFIBRA
  - ELECTRO-JET
  - Rollers
  - VOLKMAN

- Dyeing and finishing
  - TVE-ESCALE
  - SEKAISA
  - ROBLOC
  - THERMAPREN, S.L.
  - NORMATEX

- Fabric
  - S2RUS
  - ELENA
  - MEGADYNE
  - DAVID
  - COMSRT

- Apparel
  - MATIC
  - IBERLASER
  - CARBONELL
  - MARCAN
  - REXON
  - FATEX
  - OACOSTA

Cross-sector activities

- Footwear and Leather Goods
- Jewellery and Costume Jewellery

- Design and production management

- Tanned and finished leather goods

- Cutting and joining

- Suppliers of synthetic materials

- Trim assembly

Source: EIC (DGI-ACCIÓ)
Leading Companies in the Industry

No. of companies
By county (2019)

Osona

Bages

Other counties

Vallès Oriental

Vallès Occidental

Maresme

Source: EIC (DGI-ACCIÓ), based on data from Orbis (CNAE 2894: Manufacture of Machinery for the Textile, Apparel and Leather Industries) and AMEC

Five counties are home to 81% of companies
Foreign Trade

- **Catalonia’s exports** of textile machinery accounted for **70% of Spanish exports** in this sector for the 2009-2018 period. The corresponding figure for 2018 was **75%**.

- In 2018, Catalonia's imports accounted for **50%** of the Spanish total.

- There was a **positive balance of trade** for the 2009-2018 period, while imports and exports both grew.

Exports and imports for the textile machinery industry
millions of euros (2009-2018)

Note: (*) provisional data for 2018.

Source: ACCIÓ (DGI-ACCIÓ), based on data from Datacomex (CNAE 2894)
Textile Machinery in Catalonia | Sector Snapshot

Internationalization Opportunities

**AMERICAS**

**GUATEMALA / EL SALVADOR**
Machinery and intermediate products for the textile industry. The textile industry in Guatemala and El Salvador is looking for suppliers of raw materials, equipment and supplies for the textile and apparel sectors.

**EUROPE**

**ITALY**
Italian fashion and textiles are renowned throughout the world for their exceptional quality and design. In 2018, following two years of decline, the Italian textile industry began to grow again. The introduction of innovative new processes, machinery and techniques is vital to making sure the Italian textile industry is able to produce exceptional fabrics and materials, and to ensure the constant flow of new apparel onto the market.

**TURKEY**
Turkey needs industrial machinery. Catalan companies have the opportunity to supply machinery of all types, particularly for the textile, agricultural and packaging industries, as Turkish manufacturers are currently investing in replacing and improving their industrial machinery.

**ASIA-PACIFIC**

**BANGLADESH**
Tax benefits for yarn in Bangladesh. The Bangladeshi government is committed to developing the yarn sector as a complement to the substantial textile and apparel industry that is being established. The main objective is to open industrial plants, which will then require machinery.

**AFRICA**

**ETHIOPIA**
Ethiopia will become the world’s premier textile and leather workshop. Competitive labour costs, the availability of raw materials and low energy costs have made Ethiopia an attractive destination for investment by textile companies and the leather industry.

**INDIA**
India is weaving the future. It is one of the world’s leading producers of cotton, jute, polyester, silk and fibres. The availability of raw materials and low production costs make India the ideal location for garment manufacture.

Source: EIC (DGI-ACCIÓ), 2019 Global Map of Internationalization
Catalonia: A Magnet for Foreign Investment

An excellent geostrategic location that allows for efficient intercontinental connections while facilitating local distribution to Europe and Africa.

An ideal combination: economic growth, an industrial ecosystem and cutting-edge technology clusters.

Barcelona: the entrepreneurial driver of Catalonia.

A pool of local and international talent. The Catalan university system stands out for its capacity to attract international talent and boost creativity.

The city provides a support network for the textile sector with the aim of positioning Catalonia at the heart of the fashion industry.
Talent and Creativity in Catalonia

The talent and creativity of the textile and fashion industries are vital to making the textile machinery industry more competitive.

Catalonia’s dynamic university ecosystem:

- 12 universities
- More than 50 design schools
- 481 degree programmes
- 14,000 professors at 33 research centres
- 236,000 university students
- 570 master’s degree programmes

Some of the institutions that offer specialist programmes in textiles and fashion:

- BCD
- ESDAP
- ELISAVA
- IED Barcelona
- LCI

Events and awards related to textiles and fashion in Catalonia:

- 080 Barcelona Fashion
- Bridal Fashion Week
- Textile

Design-oriented centres, institutions and initiatives:

- BCD
- Design Hub Barcelona
- fadfest

Source: The Catalan Ministry of Education and the Catalan Ministry of Business and Knowledge; barcelona.cat; Barcelona Bridal Fashion Week; TecnoCampus Mataró; Elle magazine.
Innovation Ecosystem

Technological elements of the fashion and textile industries

How technological elements are applied in the fashion and textile industries:

- Product design and characteristics
- Production process
- Marketing and knowing the customer / user

TECNIO centres specializing in textile machinery:

Source: EIC (DGI-ACCIÓ).
Textile and Garment Technology Exhibition

ITMA 2019 is a knowledge- and market-oriented platform for the textile industry
Barcelona, 20 to 26 June 2019

- Exhibitors from 19 different sectors
  Integrated solutions for the entire value chain

- 220,000 m² of exhibition space
  Advanced technologies and live demonstrations of machinery

- 1,700 accredited bodies and exhibitors
  Manufacturers from 45 countries

- 120,000 visitors expected
  From 147 countries

- First-class networking opportunities
  Leading decision-makers, influencers and industry experts

- Global information, trends and issues
  Conferences and forums

Source: ITMA website
Trends and Challenges (I)

Sustainability / circular economy

The circular economy is a cross-cutting trend whose potential scope of application encompasses many different sectors. The textile and fashion industries are not immune to this global trend, whose impact is also being felt in the textile machinery industry. Additionally, there are numerous challenges and opportunities related to sustainability. Examples include:

1. Reducing the amount of water consumed during the production process, especially when obtaining raw materials and for processes such as dyeing and finishing.
2. Reducing the amount of waste generated during production. Recycling used fabrics and production waste to make new products.

3D printing

The development of new production technologies may bring about changes in industry production processes. 3D printing technology can now be applied to textile and fashion manufacturing. This innovative new technology provides greater flexibility and customization, reduces the time to market, makes more efficient use of raw materials, and allows for more localized manufacturing. It is an optimal solution for both standardized and customized products.

Source: EIC (DGI-ACCIÓ)
Trends and Challenges (II)

Automation

Production processes are being automated in every industry and sector. Automation of the production chain allows for more efficient and reliable production at a lower cost. Machines can be used to produce goods with only minimal human intervention.

Flexibility

Companies in the textile and fashion industries are embracing new production methods adapted to meet growing consumer demand for customized products. This trend requires machines that are able to apply changes to the production process, minimize the costs of adapting the production process, and make short production runs profitable.

Source: EIC (DGI-ACCIÓ)
Read the full report:

More information on the industry, related news and opportunities:
http://catalonia.com/trade-with-catalonia/textile_machinery.jsp