



# Belfast 2023



## Market Report: Vegetable Fibres

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# Friedrich Platt GmbH



- Established 1849 in Eberbach
- as a manufacture of curled hair for mattresses, sofas or chairs





# Friedrich Platt GmbH



- Brushes and Broom Filaments

- We are specialized in tipping, flagging & mixing of broom and brush filaments for different uses like paintbrushes, brooms, medical uses, food industrie, industrial & technical brushes,
  - Natural fibres like Arenga, Coconut Fibre, Tampico
  - Synthetic fibres like different kinds of Nylon, PPC, PVC...
  - animal hairs like horse tail hair, pig bristles and cattle tail hair ...
- tipped, flagged, mixed or pure
- and also epoxy resin



# Friedrich Platt GmbH



- and for mattresses, sofas or chairs
  - ⇒ our foam plastics branch
    - form cuts for furniture, automobiles, medical products or technical uses

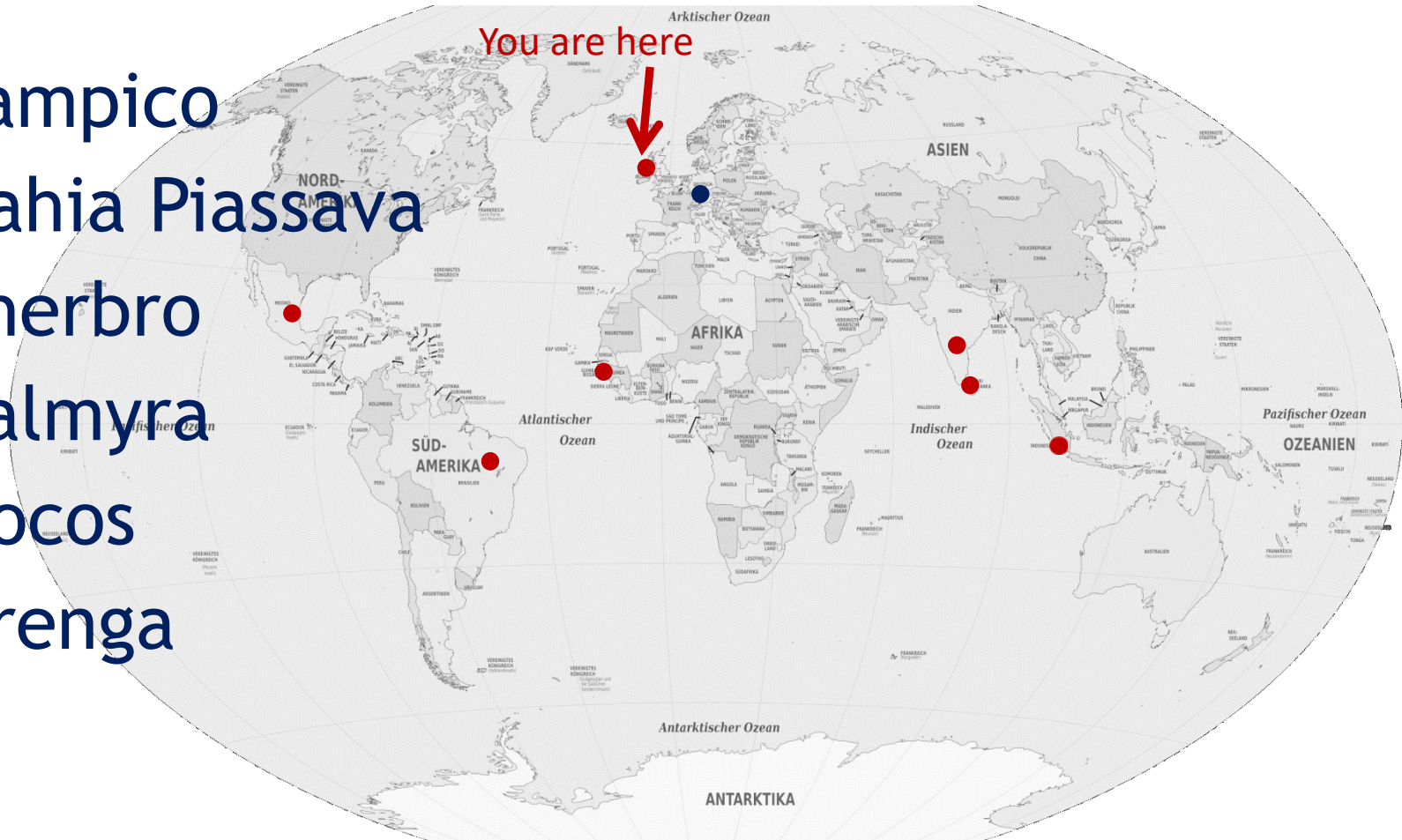




# Content



- Tampico
- Bahia Piassava
- Sherbro
- Palmyra
- Cocos
- Arenga



# Content



# Summary



Material	Availability	Quality	Price
Tampico			
Bahia Piassava			
Sherbro			
Palmyra			
Coconut			
Arenga			



# Tampico





# Tampico



Prices: Prices continue rising and for the near future a change is not to be expected.




Reasons: continuous increases on

- energy
- ground transportation costs
- production costs
- the ongoing re-evaluation of the Peso versus the US Dollar.

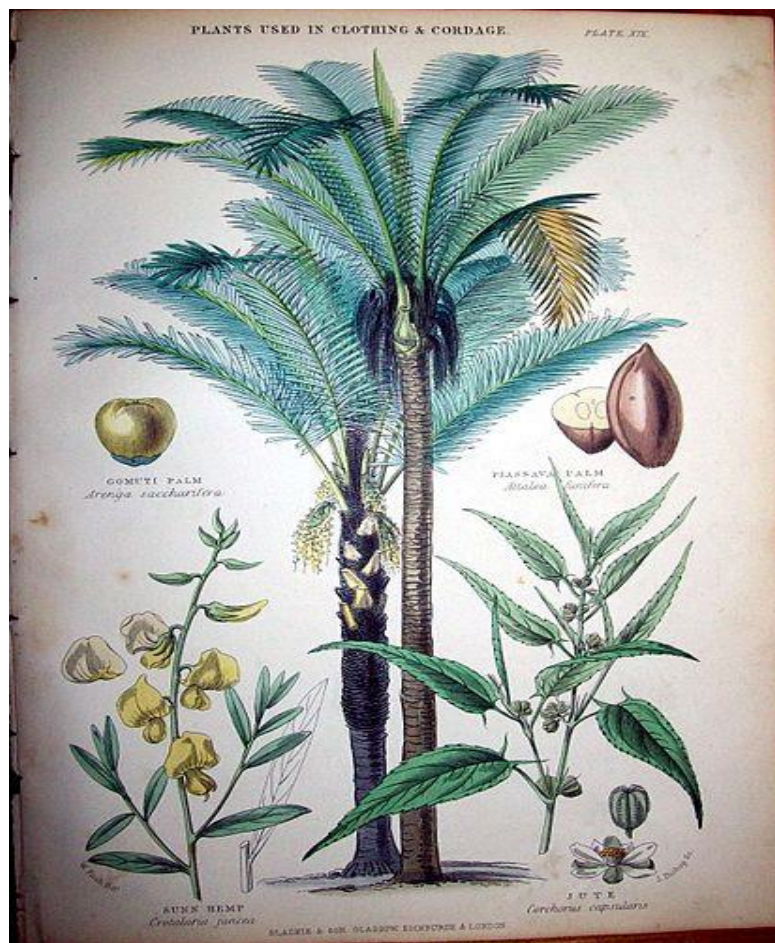
On most of these factors, the producers do not have an influence.

Quality: The drought has still impacts on the Tampico harvest region and on the fibres' quality. In spite of all, serious producers are committed to deliver the best possible quality.

Availability: The drought's impacts combined with a lack of harvest workforce has affected the fibre's availability and has driven up the price. Presumably, this situation will remain the same in the coming years.

Material	Availability	Quality	Price
Tampico			

# Bahia Piassava





# Bahia Piassava

gained from palm trees








# Bahia Piassava





# Bahia Piassava



Material	Availability	Quality	Price
Bahia Piassava			

Prices: The present price situation is very uncertain. The existence of many small companies is threatened. The suppliers do their best to maintain the present price until end of this year, but price raises can happen if there is any unpredicted event.

Quality: The fibre's quality varies in each region and depends strongly on the fabricator. There is required good experience to classify the fibre's quality.

Availability: For the future of the fibres, the problem is not a lack in raw fibre, but rather a very high national demand. The domestic market currently absorbs a big part of the fibre. Moreover, the younger generation is no longer interested in doing the collecting labour.

# Bahia Piassava








# Sherbro



# Sherbro



Material	Availability	Quality	Price
Sherbro			

Prices: The prices continue rising because of the impacts of the Russian-Ukraine war and increasing gas and fuel prices.

Quality: Remains constant.

Availability: The production is on a very low level as there are hardly demands and orders.





# Palmyra





# Palmyra





# Palmyra



Prices: Negative economic perspectives have entailed a recession. A declining demand in 2022-2023, particularly from foreign countries as the USA, had a considerable impact on the price. The sellers are forced to supply high-quality material at low margins.

Quality: The quality has not changed. However, the volumes decline and the processing costs are expensive. Further problems are the hard manual labour and the low payment. Younger generations look for better jobs.

The climate situation means another unpredictable risk factor.

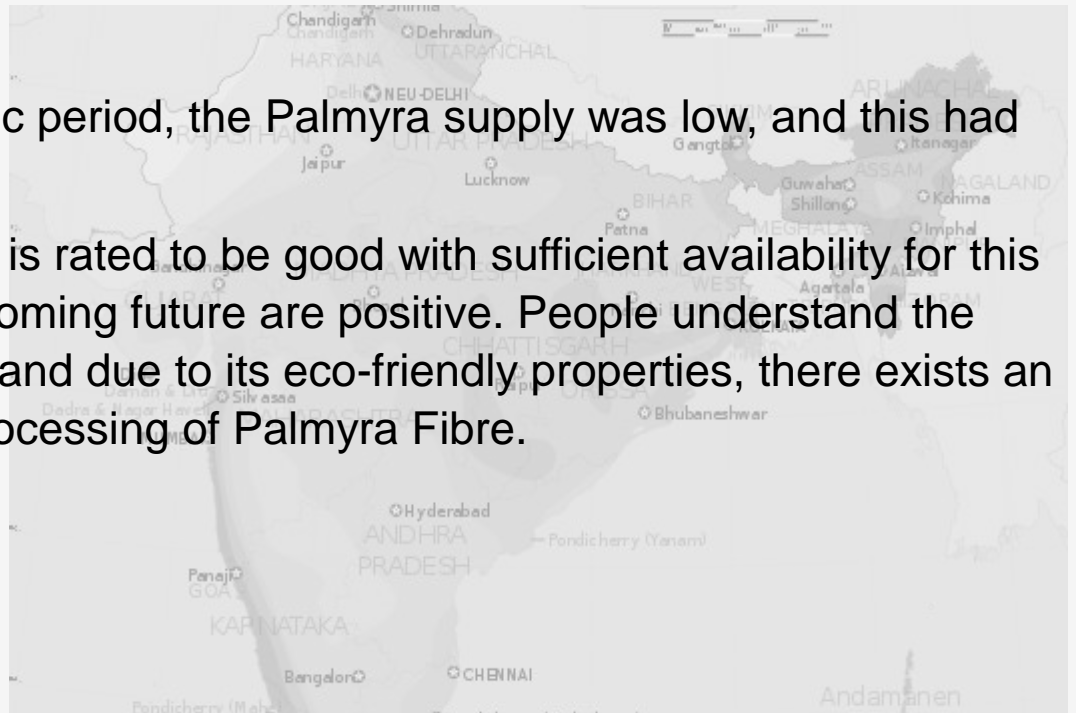
Serious producers do their best to obtain high quality materials from reliable suppliers and make constantly controls. Trustful regions and skilled workers are essential. In spite of all, the suppliers keep a stock of high quality to be prepared for orders.




# Palmyra



Availability: During the Pandemic period, the Palmyra supply was low, and this had affected the industry.

But the present supply situation is rated to be good with sufficient availability for this year. The perspectives for the coming future are positive. People understand the importance of natural materials and due to its eco-friendly properties, there exists an interest in the cultivation and processing of Palmyra Fibre.



Material	Availability	Quality	Price
Palmyra			



# Coconut Fibre



# Coconut Fibre



Prices: The following factors affect the price:

- a) Global demand
- b) Weather conditions in the cultivation country
- c) Annual harvest yields
- d) High inflation level caused by a persisting economic crisis after the Covid-19 Pandemic

Regarding the weather and harvest levels, there are not expected great variations. In 2022, the global demand for Coconut Fibre had dropped, and for the next year, a slight increase in demand is expected because of a slight reduction of freighting costs. The Sri Lankan inflation rate has been very high in 2023 due to the prevailing economic prices. Regarding the global demand and the inflation level there might be a slight increase in the coir fibre prices towards the end of 2023.






# Coconut Fibre



Quality: Weather and demand have the greatest influence on the quality. At a high demand, the producers rather focus on high quantity volumes than on good quality. The forecast for 2023 is a similar or even slightly better quality than in 2022.

Availability: As the Coconut harvests are similar to those of last year, there will presumably not be a shortage of material. But the delivery times can take longer as some millers have reduced their production due to a lower demand.

Material	Availability	Quality	Price
Cocos			

# Arenga





# Arenga






Prices: The raw material price is rising.

Declining quality and risen raw material costs raise the production costs, and the production capacity has reduced. A persisting high inflation has caused risen domestic transport costs.

Additionally, the cost compensation by to the exchange rate Rupiah/USD could fall out because the Indonesian Central Bank considers appreciating these currencies.

It looks as if at the moment the exchange rate improves and possibly a cheaper selling price could re-establish. Producers do their best to keep the prices stable until end of 2023.

Material	Availability	Quality	Price
Arenga			

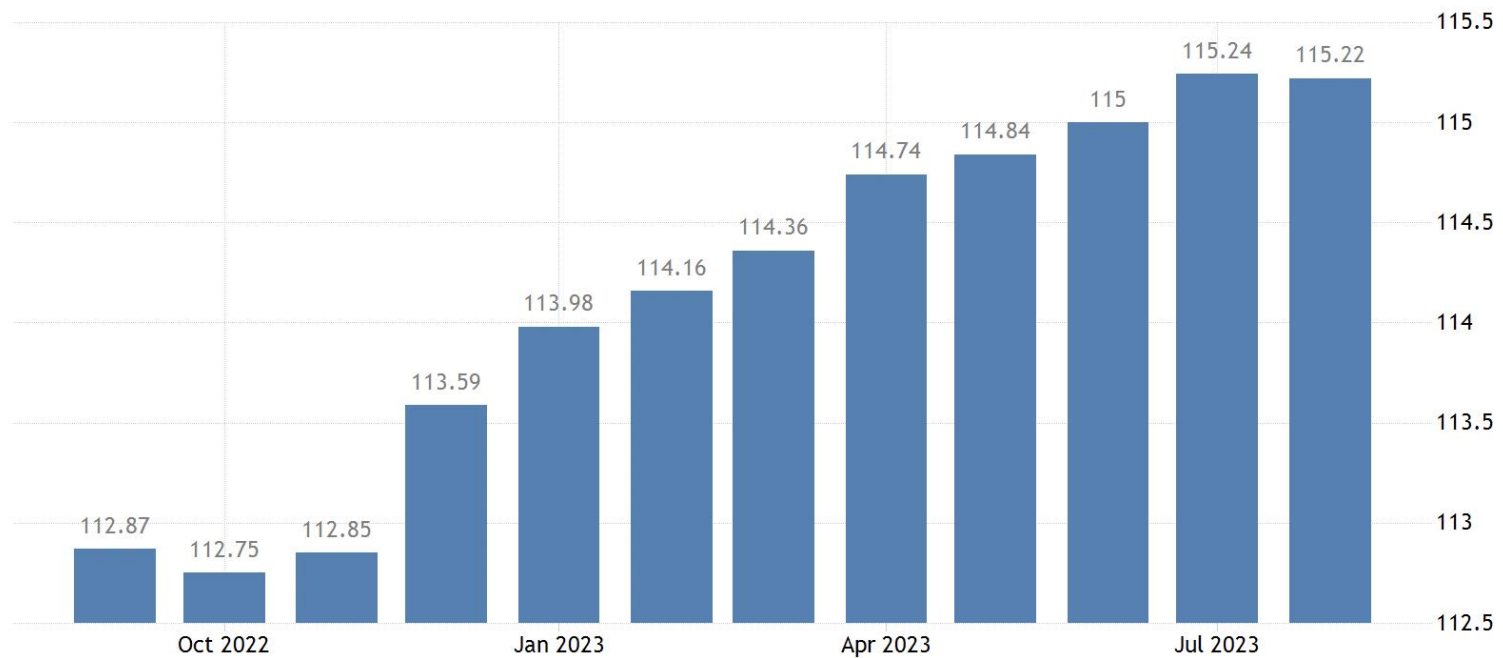
# Arenga



## Indonesia Consumer Price Index (CPI)

Summary Forecast Stats Download ▾

1Y 5Y 10Y 25Y MAX Chart ▾ Compare Export API Embed








# Arenga



Quality: The key influencing factors on the quality are humans, raw materials and nature. The manual extraction/exploitation creates diverse qualities. This requires constantly trained staff with a specific knowledge. The assorting and classifying at the quality control must be done very accurately to ensure the quality standards. Several new areas as raw material sources are made accessible, but the qualities there are not yet very good. The selling companies hope that the qualities over there will improve when the trees continue growing. To keep the quality table the effort rises.

Availability: The basic raw material situation is good but the percentage of export quality is shrinking because sorting and processing for that quality take more time.

Material	Availability	Quality	Price
Arenga			

# Thank You!

