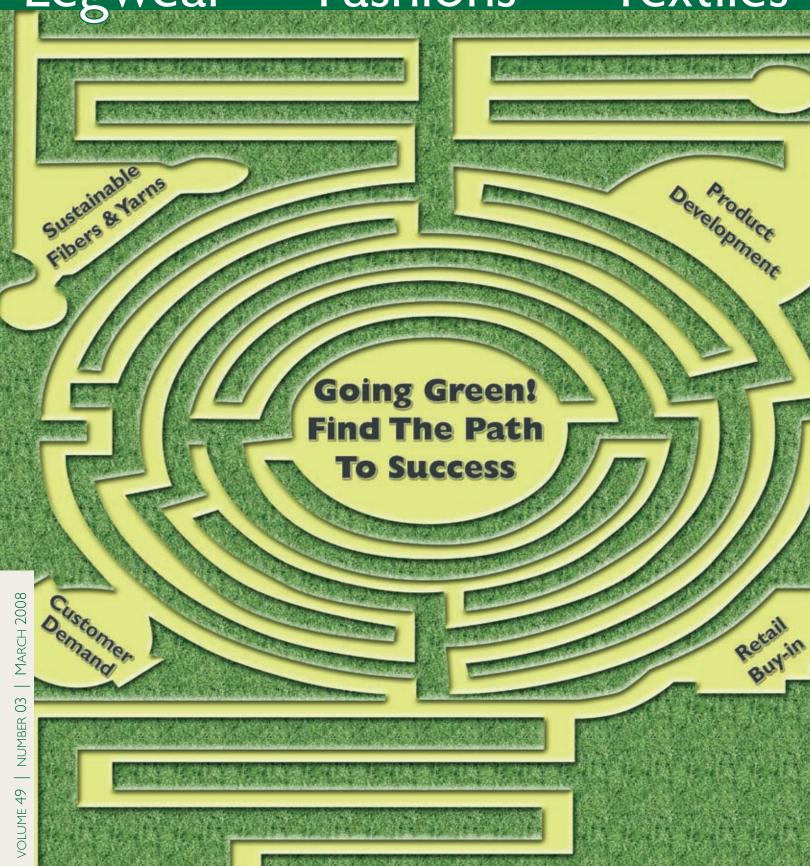
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legislative column

by PAUL FOGLEMAN, Director, Hosiery Governmental Affairs Council



The May 6 primaries in North Carolina will take on special significance as Democratic presidential hopefuls elbow each other for delegates. Barack Obama in March led Hillary Clinton by about 150 delegates. He also had won more states in primaries and caucuses and was ahead in the popular

But the Clintons are fierce competitors. Pennsylvania comes before the primaries for North Carolina and Indiana on May 6. Sen. Clinton is expected to win a majority in Pennsylvania but not enough to threaten Obama's lead. The Tarheel state is predicted to be in the Obama camp. Indiana: a toss-up.

Obama's candidacy is expected to attract thousands of new voters to the polls—younger voters and African-Americans. In a few of the state's districts this could affect the primaries for Democratic legislators. In the gubernatorial race, Treasurer Richard Moore has endorsed Obama. Lt. Gov. Beverly Perdue has remained neutral. Moore's endorsement has yet to move the polls which show Perdue ahead by 12 percentage points.

When it comes to power in the nation's capitol, North Carolina didn't stack up well.

Technology consulting firm Knowledge ranked congressional delegations on leadership positions, indirect influence, legislative activity and earmarks. Scores also included a "sizzle/fizzle" factor.

The average score for North Carolina was 17.07—giving the state a rank of 44th.

Freshman U.S. Senator Richard Burr scored 18.94, ranking 69th in the Senate. Sen. Elizabeth Dole, who is running for re-election, scored 13.39 putting her in the 93rd spot.

As members of the majority party, Democrats fared better than Republicans. In the House, Rep. Mel Watt, who headed the Black Caucus, scored 32.75 ranking 53rd; Rep. David Price, a member of the Appropriations Committee, scored 30.16, ranking 67th.

The least influential were Republicans Rep. Robin Hayes who scored 9.56 and ranked 360th and Rep. Virginia Foxx who scored 6.49 and ranked 399th. There are 435 House members.

It was good news and bad news for Alabama government when it got a report card recently. State government improved from a C-minus to a C-plus. Good news.

But it remained below the national average of B-minus.

The Grading the States report released by the Pew Center on the States said Alabama has made improvements in financial planning and budgeting. But it criticized the state for having numerous problems mainly caused by overly-earmarked taxes.

In 2005, Alabama tied with California for last place in the rankings.

NAFTA On Radar Screen In U.S. Presidential Election

As the U.S. presidential race narrows down to three candidates (Huckabee and Nader not withstanding), public sentiment on global trade appears to loom as a paramount issue.

In the final hours before the March 4 primaries, Democratic candidates Hillary Clinton and Barack Obama both insisted the North American Free Trade Agreement (NAFTA) should be renegotiated. Their rhetoric was aimed at hundreds of thousands of displaced workers—and voters—in Ohio. Thousands of jobs have gone to China and working class voters say they want change.

But how realistic is it to expect NAFTA can be renegotiated with Mexico and Canada? And specifically, what changes would the candidates seek?

Obama has warned "we can't build a moat abound the U.S. economy." We have to maintain our role in a global marketplace, he says. But he would eliminate tax breaks for companies that ship jobs overseas and give more incentives to companies that keep jobs in the U.S.

Sen Clinton insists she was cool to NAFTA when it was promoted and adopted during her husband's administration. Now she wants to see the treaty changed to eliminate threats of lawsuits filed by competitors in the other countries. Individual companies can be held liable for failure to abide by regulations spelled out in the NAFTA document.

Republican frontrunner John McCain has talked about putting U.S. manufacturers on "a level playing field." He has not spelled out any specifics. Nor have the Democrats.

The tense arguments over illegal immigration have not helped relations with Mexico and charges of Canadian government interference with U.S. elections are creating a tough climate for negotiations. The uproar over a proposed "NAFTA highway" spanning Western third of the U.S. is boiling over in Texas.

NAFTA is an issue that is not likely to fade away, but grow louder until the November elections.



ore retailers are talking big about being green, but do they mean it? Or are they hiding behind yellow?

Manufacturers of textiles and hosiery products who are being led to embrace sustainable practices wonder. There are costs involved. Are retailers willing to pay more for a green inventory?

This question was asked at a recent Carolina hosiery meeting in Winston-Salem and a panelist said "no." He was not challenged by others on the panel. And with the case of mass merchandisers, he probably gave the correct answer.

But an in-depth discussion of sustainability a week later at a gathering of yarn and fiber producers, "going green" was touted as the wave of the future for U.S. manufacturers. Several speakers said it gives Americans a competitive edge in the marketplace.

Marta Swain, founder and owner of a retail store called Clothing Matters, deals exclusively in apparel made from natural and sustainable man-made fibers. It's a niche that has attracted customers from throughout the Midwest to her Lansing, MI store. She touts clothing made of hemp, bamboo, organic cotton and wool.

Swain said there is a growing market for clothes that travel well, breathe with value-added performance. "Consumers want clothes that can reduce their carbon footprint," she said.

World-famous brand marketer Patagonia is racking up sales in excess of a half billion dollars a year with sustainable apparel. The company also is dedicating 1 percent of sales—last year \$29 million—for save-the-earth organizations and their projects.

Randy Harward, quality director for Patagonia, recounted the history of Patagonia's movement to earth-friendly operations. In 1991, the company partnered with Wellman Inc. to use polyester made from recycled bottles. In 1996, the move was to all-organic cotton. By 2010, the goal is to have nylon and polyester into closed loops products.

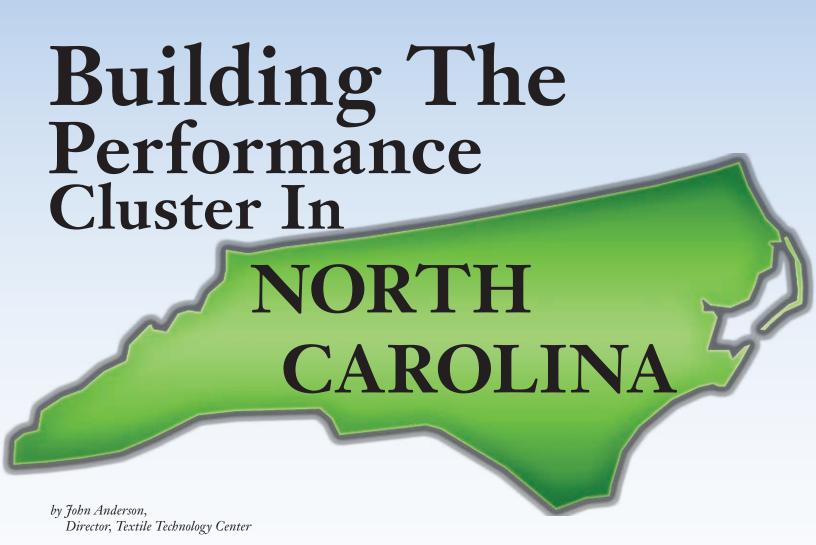
In 1998, the company headquarters in Ventura, CA moved to all wind-powered energy. Seven years later, solar panels were added. For Patagonia, marketing sustainable products has been extremely profitable.

Earlier this year, Wal-Mart announced it was expanding

its initiates to establish environmental standards. CEO Lee Scott told some 7,000 store managers that this year the company will pursue goals to use less energy, cut down on solid waste in packaging, and sell more environmentally-friendly products.

Scott said the day is coming when stores could install windmills or solar panels that would allow shoppers to charge electric vehicles. He also announced that Wal-Mart will launch an effort with other major retailers to improve "social, ethical and environmental standards among its global suppliers."

In China, Wal-Mart's largest supplier, Scott said the company will work with the government to make sure suppliers comply with Chinese environmental laws.



On February 18th and 19th, 2008, North Carolina State University's College of Textiles held four focus groups dedicated towards understanding the protective (military), industrial, medical, and geotextile performance market segments in North Carolina.

The focus groups served as Phase II of the North Carolina Department of Commerce research project. Phase I was completed June 2007 with an inaugural focus group session specific to understanding the performance textile industry, as reported in Trends. The Phase II focus groups continued this discussion with a more narrowed approach. Thirty eight industry representatives attended the focus groups and represented 37 North Carolina companies. Phase II focus groups provided industry with the opportunity to discuss current and future business development opportunities as well as provide the North Carolina Department of Commerce with strategies for assistance. John Anderson, Director of East Campus and Textile Technology Center at Gaston College served as the primary moderator for each focus group. Holli Nelson, graduate student, helped

to guide the discussion as well. Nelson was responsible for all of the logistics and succeeded in assembling four distinct panels of industry leaders, consultants, and association representatives.

She prepared the executive summary of the two days plus supplementary phone interviews. Her work is drawn on heavily throughout this article.

Each two hour focus group was centered on several distinct areas vital to understanding the market structure and its needs. These topics included: global competitiveness factors, growth potential, market trends, innovation, added value, quality, standards, technical performance, industry needs, and recommendations.

As in June, the industry participants were extremely knowledgeable, and vocal on issues in their market segments. The interesting feature of these sessions was group size and scope. By segmenting

markets within the broad umbrella of "Performance Fabrics," the smaller groups were able to focus on specific needs within the subset. In the larger June 2007 session, the broad categories of needs were summarized as "Standards, Innovation Support And Communications."

This time around, based on the input from the focus groups, common needs were summarized by Nelson as:

- Increased innovation communication (innovation partnerships with academia, commerce, industry, and entrepreneurs).
- Commercialization assistance (assistance in bringing innovations, new products, and technologies to market).
- Workforce recruitment, retention and

development (attract workers to the performance textile industry).

- Increased promotion of <u>www.</u>
 <u>nctextileconnect.com</u> and, promote the availability of statewide networking sessions for business partnerships, development, and supply chain needs.
- Development of a more attractive business environment in North Carolina.

While there was a great deal of commonality between groups, there were also some significant differences by market area.

The Protective (Military) market was perhaps the most animated of the four, reflecting the dynamics of that market. The 12 participants included representatives from industry as well as the North Carolina Military Business Center, the Military Foundation and the Defense and Security Technology Accelerator.

Opportunities for innovation and growth seem to abound in this segment, but navigating the government bureaucracy and actually connecting with individuals who can articulate needs and make a decision creates a major challenge for textile firms focusing on this sector. In addition, the buying patterns of the military procurement agencies are mercurial, and create additional challenges for suppliers.

Communication and the need for future forums and facilitation was my takeaway from this group. The level of enthusiastic networking by the participants before and after the sessions and during a break was further evidence of this need.

The Medical Textile segment was equally intriguing, but more reserved in its overall tone. This is another growth market, and a discussion of the driving forces revealed why. "The aging population, the war in Iraq, returning soldiers, infection control, functional products, over the counter medications, anti viral, anti bird flu, corporate America's need to protect employees, chemical warfare, consumer lifestyle changes, shorter operating times, less invasive surgeries, the lack of technical equipment/machinery for innovative medical products, and athletic performance enhancement," were all raised by the group as drivers of need for both product and for innovation.

Challenges are present in this sector as well. Firms which successfully navigate the labyrinth of government regulation, health organization buying offices, long development cycles and other obstacles find themselves challenged by workforce issues in North Carolina and cited the negative image that cast on the textile industry by media, and even the State's own drive to attract people to biotech and other "high tech segments."

The participants in this group all gave the impression that they are succeeding in spite of the challenges. The firms were

PERFORMANCE DESCRIPTIONS



John Anderson, Director, Textile Technology Center

quite specialized, and the products that they produced were leaders in that niche.

The Industrial Textile focus group was smaller than the others in number but populated with industry leaders and innovators who had either led their organizations through a metamorphosis from commodity producer to specialty provider, or who had successfully created or applied emerging technology to their benefit. Rory Holmes of INDA was a participant in this group, and shared the perspective of the nonwoven portion of the industry, which continues to grow in North Carolina.

There was a lot of energy in this group around the opportunities and challenges that accompany a growing interest in "sustainability" in portions of the industrial textile segment. Legitimate third party testing and certification also got significant air time, as did the workforce issues that had been raised by previous groups.

The final focus group examined textiles for construction and civil engineering. While this area uses significant amounts of textile product in the geotextile arena which has a lot of similarities with commodity textiles, there are also opportunities for firms who innovate and specialize. Most of the product in this market is specified, in many cases by government agencies where best long term solutions often take a back seat to budget pressures or a requirement to use low bidders.



(continued on page 12)

NEW VISION WOULD PRESERVE

by Paul Fogleman, Editor

The vision is to preserve manufacturing in America. A \$35 million institution in South Carolina has been created to fulfill that mission.

A visit to the Southeastern Institute for Manufacturing and Technology is a mind-bending experience for proponents of traditional and emerging industries hosiery and textiles and apparel included. Under the leadership of the Hosiery Technology Center and Catawba Valley Community College, some 25 business leaders and educators recently toured the facilities in a search for a North Carolina model.

The SIMT is an arm of the Florence-Darlington Technical College. But it does not exist to serve as an educational component.

"We are a business operation. Our model is to be self-sufficient," explained Charles W. Gould, president and motivator behind the six-year undertaking. Although state and local funds were used in the creation of the center—including a \$25 million institutional bond issue—the vision is for business revenue to support the center and its staff.

The concept on the drawing board at CVCC also calls for a business-driven program modeled after the Hosiery Technology Center. The Center for **Emerging Manufacturing Solutions** (CEMS) would deliver for-fee services including research and development, prototyping, testing, market analysis, and specialized presentations. Revenue would be re-invested in the center for new technologies.

The SIMT has to be one of the most diverse centers of its kind in the United States. Within the 177,000 square foot facilities are a 605-seat auditorium, a 20,000 square foot multi-purpose room for conferences, conventions, and foodservice events, numerous conference rooms, and multi-media presentation centers.

Garrett Hinshaw, president of CVCC, envisions more modest operations to initiate CEMS—something around 45,000 square feet. Such a center would include a high-tech visual center to assist









Top: Jack Roach, SIMT director, emphasizes the business-driven mission of the center. Center: Garrett Hinshaw, right, president of CVCC, listens to background on SIMT development. Bottom: Hickory area education and business leaders during orientation.

NORTH CAROLINA MANUFACTURING









manufacturers with the development of three-dimensional presentations for sales and marketing. The center also would train information technology (IT) personnel for companies.

In addition to hosiery and textiles, CEMS would include the furniture technology center, and comparable services for foodservice, packaging, and related industries.

The SIMT is careful to keep academic influence at a long arm's length from its operations. Laboratory trainees wear white coats. Engineering students wear uniforms with blue knit shirts. Administrative personnel are at a minimum and overhead costs are low.

Additionally, the offices of the Florence County Economic Development Partnership are located within the building. Assistant Director Kyle Edney says the partnership uses the building to showcase the region's commitment to new and emerging businesses, as well as those looking to locate in the region.

A top priority is outreach to existing businesses, insists Jack Roach, director of SIMT. As an example, he cites a recent conference for 300 Honda executives. Using the center's extensive visual and meeting capabilities, local management was able to convince headquarters in Japan to send more programs to the area's plant.

Technical colleges and community colleges in South Carolina have more leeway in operations and management of their funds. Setting up a comparable system in North Carolina would entail more state input and private funds, it was observed.

The payoffs for the business-driven centers are impressive. Graduates get two-year associate degrees and 90 percent of them stay in the Pee Dee region, Dr. Gould said. Their presence attracts more companies and more jobs.

The 146-acre campus is to be designated as a foreign trade zone and seven more buildings are in the long-range plan, Roach said.

The "build it and they will come" philosophy is driving the SIMT. But Hinshaw has concluded they already are here—the manufacturers of North Carolina are ready for his vision.

The ABCs Of Textiles Manufacturing Now Include LCAs For New Era

Knowing the ABCs of yarns and fibers is not enough. You also have to know the LCAs.

That was made clear at the recent "Sustainable is Attainable" conference for textiles executives and marketers sponsored by the Synthetic Yarn and Fiber Association and the Fiber Surface Group (FSG).

The LCA is the life cycle assessment of a fiber. And walking the 300 persons through the process was Lee Woodard, quality manager for the North America division of Guilford Performance Textiles.

Woodard was not the only speaker to address the LCAs of fibers. But he went into more detail,

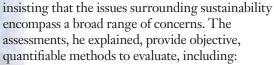
of species.

- Petrochemical oxidant potential: the release of harmful substances which react to form ground level ozone, followed by vegetation damage and human health problems.
- Toxicity—human and terrestrial—by the use and release of toxic substances in the production process.

Woodard said that U.S. manufacturers have to understand the intent of the LCAs.

The intent goes beyond environmental protection, he emphasized. The intent involves waste elimination and social responsibility which are concerns of consumers.

Woodard was not the only speaker to address the LCAs of fibers. But he went into more detail, insisting that the issues surrounding sustainability encompass a broad range of concerns.



- Embodied energy: amount of energy contained in the raw material and the ultimate product and the energy required in the manufacturing process.
- Amount of water required in the production cycle and the disposal or recycling of the water.
- The carbon footprint—the global warming potential with the release of gases like carbon dioxide and methane that contribute to global warming.
- The acidification potential: the release of materials that can cause damage to buildings and harm terrestrial, animal, plant and human health.
- Ozone depletion potential with the release of substances that help destroy the earth's ozone layer.
- The impact of nitrogen or phosphorus released into the soil which results in loss of biodiversity

Using the theme "just say know" (paraphrasing former First Lady Nancy Reagan) Woodard said textile manufacturers need to "know change." People are aware of the environmental change and are looking for responsible strategies from businesses, he continued.

Businesses must also recognize there are stakeholders in the sustainability movement: the green community (consumers), activist shareholders, government agencies, and financial services.

Textile markets are finding that "carbon neutral" is a phrase that can eventually give U.S producers a leg up in the global marketplace, it was suggested. "Organizations representing some manufacturing segments—carpeting and business office furniture—have realized this and have adopted standards for sustainability," Woodard said.

Manufacturers have three sources of capital, he stressed. There are financial capital, natural capital and human capital. And all are wrapped up in the sustainability movement, he concluded.

Cajah Sold To Irish Textiles Medical Firm

BeoCare Inc., an Irish manufacturer of textile-based medical products, has acquired Cajah Corporation based in Hudson NC.

Founded as a sheer hosiery manufacturer, Cajah has moved to seamless textile manufacturing in recent years. BeoCare is a division of BeoCare Group based in Ireland.

BeoCare is upgrading the 100,000-square-foot facility in Caldwell County to meet healthcare industry quality and environmental standards, a news release announced. The plant soon will be certified to ISO 9000, ISO 13485, and ISO 14001 standards required by major international medical customers, it was reported.

"This acquisition gives us



highly-skilled and talented personnel in a modern facility that will allow us to further expand and develop our activities with our expanding U.S. customer base," said Joseph Gallagher, president and CEO of BeoCare Inc.

The 85 employees of Cajah have been retained by BeoCare.

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Building The Performance Cluster..... from page 7

Innovative materials developed for these markets do give their inventors a payback that can last many years until an even more innovative approach comes along.

By getting to a more market specific level, the groups not only validated the concept of a growing Performance textile industry in North Carolina, but also articulated needs that NC Department of Commerce and others can put into actionable support for the industry. As before, I was impressed with the level of professionalism exhibited by both students and faculty at NC State College of Textiles and the Department of Commerce.

There never has been one magic formula for economic success in an increasingly competitive global textile market. The 37 North Carolina companies which participated in this project all exhibited one common trait: adaptability. Each participant related a significant strategic initiative which allowed that firm to thrive in the face of change. The fact that the State of North Carolina continues to invest resources to help such companies succeed is a credit to the leadership in the State House as well.

(Acknowledgments: Holli Nelson, the Graduate Student at North Carolina State College of Textiles who is engaged in this project, wrote an excellent "Executive Summary" of the meeting. Her summary served as the basic building block for this article. The writer directed the discussions. This article is a compilation of Holli Nelson's summary and my impressions).



NTA, 11 Other Textile Groups, Urge Funding for TC² & NTC

Twelve textile and related industry trade groups have written to the Senate and the House committees with jurisdiction over Department of Commerce funding on behalf of our nation's yarn, fabric, apparel and home furnishings industries which employ 600,000 workers, expressing strong support of continued funding for both the Textile/Clothing Technology Corporation [TC]² and the National Textile Center (NTC) and stating:

As you are aware, funding for these two important programs has traditionally been included in the Commerce, Justice, Science and Related Agencies (CJS) Appropriations bill. This funding has supported a wide array of basic and applied research programs, as well as demonstration and education efforts designed to enhance the competitiveness of the U.S. textile and apparel industries. These two organizations operate synergistically through unique collaborative structures. For example, the NTC combines the knowledge and expertise of the nation's eight leading textile research universities while [TC]² is a consortium of fiber, fabric and apparel producers, organized labor groups, and retailers.

Among other things, [TC]² and NTC research has focused on the enhancement of critical industry and national needs, such as protective clothing, biomedical textiles, electronics, alternative energy sources, mass customization, body scanning, 3D product development, the digital supply chain and environmental sustainability. The goal is to assist in transforming the U.S. textile and apparel sector into a highly flexible supply chain, capable of responding to rapidly changing market demands.

Clearly these two research consortiums are critical components of the U.S. industry's ongoing effort to remain globally competitive. Moreover, we believe that these organizations have been excellent stewards of past funding provided by Congress. For these reasons, we strongly encourage you to assign \$13 million for the NTC and \$3.5 million for [TC]², which are levels equivalent to traditional funding amounts approved for these programs.

Thank you for your consideration of our request in regard to the FY 2009 CJS appropriations bill.

The letters were signed by

- American Apparel and Footwear Association (AAFA)
- American Manufacturing Trade Action Coalition (AMTAC)
- Hosiery Technology Center (HTC)
- INDA, Association of the Nonwoven Fabrics Industry
- National Association for the Sewn Products Industry (SEAMS)
- National Cotton Council of America (NCC)
- National Council of Textile Organizations (NCTO)
- National Textile Association (NTA)
- Outdoor Industry Association (OIA)
- Sewn Products Equipment & Suppliers of the Americas (SPESA)
- The Hosiery Association (THA)
- United States Industrial Fabrics Institute (USIFI)

The Textile Technology Center



Industry Briefs

Co-Founder New CEO For NanoHorizons Inc.

Dr. Daniel Hayes has been appointed president and CEO of NanoHorizons Inc.

Haves is co-founder of the company which has emerged as a leader in applied nanoscale materials which is a growing part of the hosiery and textile industries. He formerly directed research, development and operations.

Hayes was instrumental in developing NanoHorizons' first generation of silver antimicrobial additives for textiles. That led to important partnerships with Indo Poly LTD, Faytex Inc., and G.J. Littlewood. Now under the SmartSilver brand, these additives are used to impart antimicrobial and antifungal properties to yarns and fabrics.

Dr. Stephen Fonash, chairman of NanoHorizons, said Hayes will provide the leadership for continued expansion of SmartSilver in fabrics and fibers while expanding the nanoparticle business in other sectors.

Invista's COOLMAX® Rolls Out New **Lines For Outdoor Apparel**

Invista has announced two new innovations to its COOLMAX® program.

During the January Outdoor Retailer Show in Salt Lake City, Invista rolled out COOLMAX® XtraLife for socks which was featured in the Cloud 9 Collection of DeFeet.

"Our Cloud 9 Collection with COOLMAX® XtraLife fabric has been one of our best-selling lines. It offers the amazing moisture wicking of COOLMAX® fabric with the incredible abrasion resistance of CORDURA® fabric. Not only is it durable, it feels like butter," said Shane Cooper, founder of DeFeet.

Also introduced was COOLMAX® fabric for wool. It is produced from a staple fiber blend that is compatible with traditional woolen fiber processing. It is described as fastdrying, comfortable, and machine-washable.

For more information about COOLMAX® XtraLife fabric, contact John Haigh at john.r.haigh@invista.com, or (336) 538-0333. For information about COOLMAX® fabric for wool. contact Sharon Osborne at Sharon.Osborne@invista.com.

Wellman Announces Price Increase

Wellman Inc. has announced that effective April 15, the price of all Fortrel polyester stable fiber products will increase by four cents per pound.

The rapidly rising price of crude oil which has topped \$1.10 a barrel was cited as the reason for the increase.

Steve Ates, vice president for sales and marketing, said "The price of crude oil has risen to unprecedented levels, placing continued upward pricing pressure on our chemical-based raw material and energy costs."

Wellman remains committed to providing the high level of quality products and support services customers have come to expect, Ates asserted.

Comer Appointed Director, International Sales For PrimaLoft Yarn Division

Ronald Comer, a 21-year veteran sales and marketing executive in the yarn industry, has been named director of international sales for the Yarn Division of PrimaLoft, a part of Albany International Corp.

Comer was most recently director of international sales and marketing at Tuscarora Yarns, Inc., based in Mt. Pleasant, NC. Prior to joining Tuscarora Yarns, he held the position of domestic and international sales manager at Ramtex, Inc., in Ramseur, NC. Comer holds a B.S. in Accounting from Auburn University, Auburn, AL.

Comer reports directly to Joe Rumiesz, PrimaLoft vice president and general manager. He is based in Charlotte, NC, and can be reached at ron.comer@albint.com, or (704) 846-2424.

"Since our successful 2006 PrimaLoft Yarn launch in socks, we've been working on introducing PrimaLoft Yarn to additional product categories such as sweaters and other knit apparel," said Rumiesz. "Ron's extensive sales experience and knowledge of the yarn industry is a valuable asset towards our continued efforts in growing this PrimaLoft division."

PrimaLoft® Insulation TechnologyTM, is manufactured by and a registered trademark of Albany International Corp. and is featured worldwide in leading brands of outerwear, sleeping bags, gloves, footwear, socks, and luxury bedding. PrimaLoft's manufacturing facilities are located in the US, Europe and China.



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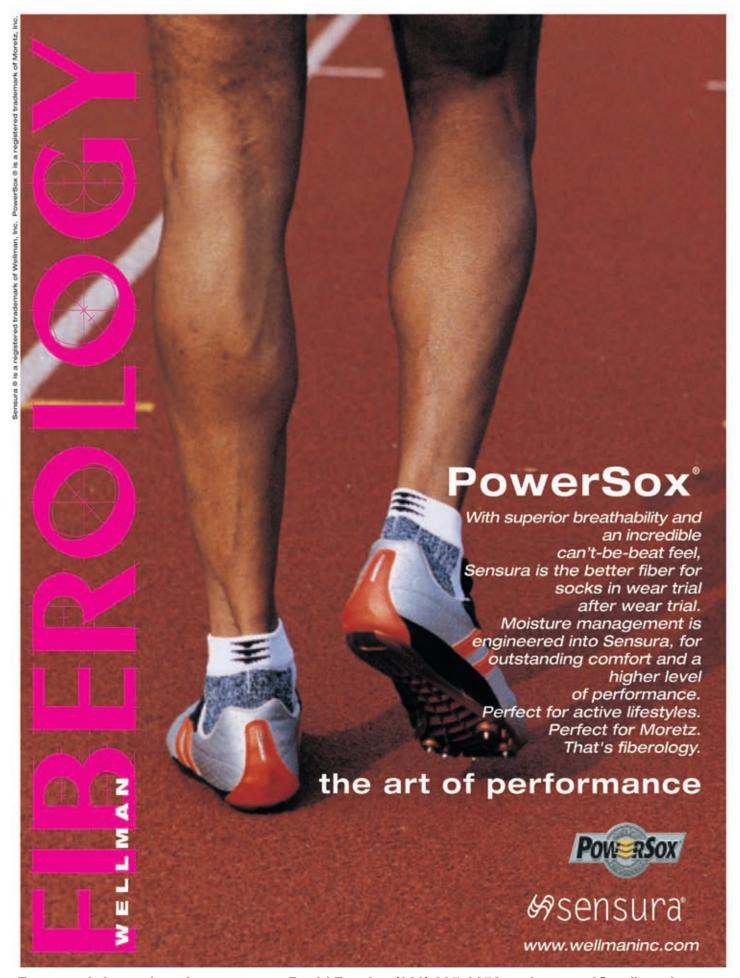
The Hosiery Technology Center at the new Center for Emerging Manufacturing Solutions (CEMS) is supporting companies

with research and development, testing and sourcing, marketing and sales. From production to retailing, the center is engaged in supply chain services. That includes training and lean manufacturing strategies.

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