

# SMART TEXTILES IN APPAREL: MARKETS, APPLICATIONS AND TECHNOLOGIES

## Contents

Contents .....	3
List of Tables .....	7
List of Figures .....	7
Introduction .....	11
How to Use This Report .....	11
Wearable Technologies and the 4 <sup>th</sup> Industrial Revolution.....	12
The Evolution of Wearable Technologies .....	13
Defining Smart Textiles.....	18
Factors Affecting The Adoption of Smart Textiles.....	21
Cost.....	21
Accuracy .....	21
On Shoring .....	22
Power management.....	22
Security and Privacy .....	23
Markets.....	24
Total Market Growth and CAGR.....	24
Market Growth By Application.....	25
Adding Value To Textiles Through Technology .....	30
How Nanomaterials Add Functionality and Value .....	35
Business Models .....	37
Applications.....	39
Clothing and Apparel.....	39
Nano-Antibacterial Clothing Textiles .....	44
Silver Nanoparticles.....	45
Nanosilver Safety Concerns .....	49
Zinc/Copper/Doped Zinc Oxides .....	49
UV/Sun/Radiation Protection .....	50
Hassle-free Clothing: Stain/Oil/Water Repellence, Anti-Static, Anti- Wrinkle.....	51
Anti-Fade .....	52
Comfort Issues: Perspiration Control, Moisture Management.....	53
Creative Appearance and Scent for High Street Fashions.....	55
Anti-Counterfeiting .....	60

Current Adopters of Nanotechnology in Clothing/Apparel Textiles.....	62
Sports and Wellbeing .....	70
1 <sup>st</sup> Generation Technologies .....	70
Under Armour Healthbox Wearables .....	70
Adidas MiCoach .....	71
Sensoria .....	71
EMPA's Long Term Research .....	74
2 <sup>nd</sup> Generation Technologies.....	74
Google's Project Jacquard.....	74
Samsung Creative Lab .....	78
Microsoft Collaborations .....	79
Intel Systems on a Chip .....	79
Flex (Formerly Flextronics) and MAS Holdings .....	80
Jiobit.....	81
Asensei Personal Trainer.....	82
OmSignal Smart Clothing.....	83
Ralph Lauren PoloTech.....	84
Hexoskin Performance Management .....	86
Jabil Circuit Textile Heart Monitoring .....	86
Stretch Sense Sensors.....	88
NTT Data and Toray .....	89
Goldwin Inc. and DoCoMo.....	90
SupaSpot Inc Smart Sensors.....	91
Wearable Experiments and Brand Marketing .....	92
Wearable Life Sciences Antelope.....	92
Textronics NuMetrex .....	94
3 <sup>rd</sup> Generation Technologies .....	95
AdvanPro Pressure Sensing Shoes .....	95
Tamicare 3D printed Wearables with Integrated Sensors.....	97
AiQ Smart Clothing Stainless Steel Yarns.....	99
Flex Printed Inks And Conductive Yarns.....	101
Sensing Tech Conductive Inks.....	103
EHO Textiles Body Motion Monitoring.....	103
Bebop Sensors Washable E-Ink Sensors .....	105
Fraunhofer Institute for Silicate Research Piezoelectric Polymer Sensors .....	106
CLIM8 GEAR Heated Textiles .....	109
VTT Smart Clothing Human Thermal Model .....	109
ATTACH (Adaptive Textiles Technology with Active Cooling and Heating) .....	111

Energy Storage and Generation .....	113
Intelligent Textiles Military Uniforms .....	113
BAE Systems Broadsword Spine.....	114
Stretchable Batteries.....	115
LG Chem Cable Batteries .....	116
Supercapacitors.....	118
Swinburne Graphene Supercapacitors .....	118
MIT Niobium Nanowire Supercapacitors .....	118
Energy Harvesting .....	121
Kinetic .....	121
StretchSense Energy Harvesting Kit .....	121
NASA Environmental Sensing Fibers .....	121
Solar.....	123
Powertextiles.....	123
Sphelar Power Corp Solar Textiles .....	123
Ohmatex and Powerweave .....	124
Fashion .....	124
1 <sup>st</sup> Generation Technologies .....	127
Cute Circuit LED Couture.....	127
MAKEFASHION LED Couture.....	129
2 <sup>nd</sup> Generation Technologies.....	129
Covestro Luminous Clothing.....	130
3rd Generation Technologies.....	131
The Unseen Temperature Sensitive Dyes .....	131
Entertainment .....	134
Wearable Experiments Marketing .....	134
Key Technologies .....	136
Circuitry .....	136
Conductive Inks for Fabrics .....	136
Conductive Ink For Printing On Stretchable Fabrics.....	136
Creative Materials Conductive Inks And Adhesives.....	136
Dupont Stretchable Electronic Inks.....	137
Aluminium Inks From Alink Co .....	137
Conductive Fibres.....	138
Circuitex Silver Coated Nylon .....	138
Textronics Yarns and Fibres .....	138
Novonic Elastic Conductive Yarn.....	139
Copper Coated Polyacrylonitrile (PAN) Fibres .....	139
Printed electronics .....	141
Covestro TPU Films for Flexible Circuits .....	141

Sensors .....	143
Electrical .....	143
Hitoe .....	143
Cocomi .....	144
Panasonic Polymer Resin.....	145
Cardiac Monitoring .....	146
Mechanical .....	149
Strain.....	149
Textile-Based Weft Knitted Strain Sensors.....	149
Chain Mail Fabric for Smart Textiles .....	149
Nano-Treatment for Conductive Fiber/Sensors .....	152
Piezoceramic materials .....	152
Graphene-Based Woven Fabric.....	153
Pressure Sensing.....	153
LG Innotek Flexible Textile Pressure Sensors.....	153
Hong Kong Polytechnic University Pressure Sensing Fibers.....	155
Conductive Polymer Composite Coatings .....	158
Printed Textile Sensors To Track Movement .....	161
Environment.....	163
Photochromic Textiles.....	163
Temperature.....	163
Sefar PowerSens.....	163
Gasses & Chemicals .....	163
Textile Gas Sensors .....	163
Energy.....	166
Storage .....	166
Graphene Supercapacitors .....	166
Niobium Nanowire Supercapacitors .....	166
Stretchy supercapacitors .....	168
Energy Generation .....	169
StretchSense Energy Harvesting Kit .....	169
Piezoelectric Or Thermoelectric Coated Fibres .....	170
Optical .....	173
Light Emitting .....	173
University of Manchester Electroluminescent Inks and Yarns ...	173
Polyera Wove .....	174
Companies Mentioned .....	177
Companies/Research Institutes Applying Nanotechnologies to the Textile Industry.....	179
Selected Company Profiles.....	202

List of Tables

Table 1 CAGR by application .....	25
Table 2 Value of market by application 2016-25 (millions USD) .....	27
Table 3 % market share by application .....	29
Table 4 CAGR 2016-25 by application.....	29
Table 5 Technology-Enabled Market Growth in Textile by Sector (2016-22)	31
Table 6 Value of nanomaterials by sector 2016-22 (\$ Millions).....	37

List of Figures

Figure 1 The 4th Industrial Revolution (World Economic Forum).....	12
Figure 2 Block Diagram of typical MEMS digital output motion sensor: ultra low-power high performance 3-axis “femto” accelerometer used in fitness tracking devices.....	14
Figure 3 Interior of Fitbit Flex device (from iFixit) .....	15
Figure 4 Internal layout of Fitbit Flex. Red is the main CPU, orange is the BTLE chip, blue is a charger, yellow is the accelerometer (from iFixit)...	15
Figure 5 Intel’s Curie processor stretches the definition of 'wearable' .....	15
Figure 6 Typical Textile Based Wearable System Components .....	16
Figure 7 The Chromat Aeros Sports Bra "powered by Intel, inspired by wind, air and flight." .....	17
Figure 8 The Evolution of Smart textiles .....	18
Figure 9 Goldwin's C2fit IN-pulse sportswear using Toray's Hitoe .....	19
Figure 10 Sensoglove reads grip pressure for golfers .....	19
Figure 11 Textile Based Wearables Growth 2016-25(USD Millions).....	24
Figure 12 Total market for textile based wearables 2016-25 (USD Millions) .	25
Figure 13 Health and Sports Market Size 2016-20 (USD Millions) .....	26
Figure 14 Health and Sports Market Size 2016-25 (USD Millions) .....	27
Figure 15 Critical steps for obtaining FDA medical device approval .....	28
Figure 16 Market split between wellbeing and medical 2016-25.....	29
Figure 17 Current World Textile Market by Sector (2016).....	30
Figure 18 The Global Textile Market By Sector (\$ Millions) .....	30
Figure 19 Compound Annual Growth Rates (CAGR) by Sector (2016-25) ....	32
Figure 20 The Global Textile Market in 2022 .....	33
Figure 21 The Global Textile Market in 2025 .....	34
Figure 22 Textile Market Evolution (2012-2025).....	34
Figure 23 Total Value of Nanomaterials in Textiles 2012-2022 (\$ Millions)....	35

Figure 24 Value of Nanomaterials in Textiles by Sector 2016-2025 (\$ Millions)	36
Figure 25 'Intimacy White' and 'Intimacy Black' introduced by the Dutch firm Studio Roosegaarde	40
Figure 26 Functional fashion Levi's using Schoeller's nanosphere technology	43
Figure 27 The Market for Anti-Bacterial Textiles	44
Figure 28 How antibacterial 'SmartSilver works	45
Figure 29 Typical delivery formats of nano silver (from NanoHorizons Inc.)	46
Figure 30 A fiber coated with silver nanoparticles	47
Figure 31 BASF Ultramid BS416N® with TiO2 nanoparticles for UV protection	50
Figure 32 Oil resistance of Inanova®	52
Figure 33 Klimeo - Microcapsules containing a natural temperature-regulating ingredient are applied in and on the fabric	54
Figure 34 Karma Chameleon Chenille Strip Prototype - photonic bandgap (PBG) fibers woven on a computer-controlled electronic Jacquard loom	57
Figure 35 Karma Chameleon Leaf pattern using a white cotton warp, a white cotton weft and a PBG fiber weft to create individual illuminated designs	57
Figure 36 Products with Nano-Metal Coating Effect, Courtesy of Suzutora	58
Figure 37 Teijin's Morphotex allows colors without the use of dyes	59
Figure 38 Donna Sgro's Morphotex dress	60
Figure 39 Garments treated with metallic nanoparticles from the fashion line, "Glitterati	64
Figure 40 Clothing designed by Olivia Ong. The dress and jacket contain nanoparticles with antibacterial and air-purifying qualities	65
Figure 41 A scanning electron microscope image showing a cotton fiber with palladium nanoparticle coating	66
Figure 42 Smart Fabrics Offer Designers New Possibilities in Fashion	67
Figure 43 Nanotechnology Enabled Clothing/Apparel Textiles Market 2016-2022	68
Figure 44 Value of Nanotech Inputs in Clothing Textiles 2012-22	69
Figure 45 Adidas miCoach Connect Heart Rate Monitor	71
Figure 46 Sensoria's Hear Rate Monitoring Garments	72
Figure 47 Flexible components used in Google's Project Jacquard	75
Figure 48 Google and Levi's Smart Jacket	76
Figure 49 Embedded electronics Google's Project Jacquard	77
Figure 50 Samsung's WELT 'smart' belt	78

Figure 51 Samsung Body Compass at CES16 .....	79
Figure 52 Lumo Run washable motion sensor.....	80
Figure 53 OMSignal's Smart Bra.....	84
Figure 54 PoloTech Shirt from Ralph Lauren .....	85
Figure 55 Hexoskin Data Acquisition and Processing .....	86
Figure 56 Peak+™ Hear Rate Monitoring Garment .....	87
Figure 57 StretchSense CEO Ben O'Brien, with a fabric stretch sensor .....	88
Figure 58 C3fit Pulse from Goldwin Inc .....	90
Figure 59 The Antelope Tank-Top.....	93
Figure 60 Sportswear with integrated sensors from Textronix .....	95
Figure 61 AdvanPro's pressure sensing insoles .....	96
Figure 62 AdvanPro's pressure sensing textile.....	97
Figure 63 Tamicare 3D Printing Sensors and Apparel .....	98
Figure 64 Smart clothing using stainless steel yarns and textile sensors from AiQ .....	100
Figure 65 EHO Smart Sock .....	104
Figure 66 BeBop Smart Car Seat Sensor .....	106
Figure 67 Non-transparent printed sensors from Fraunhofer ISC .....	108
Figure 68 Clim8 Intelligent Heat Regulating Shirt .....	109
Figure 69 Temperature regulating smart fabric printed at UC San Diego....	111
Figure 70 Intelligent Textiles Ltd smart uniform .....	114
Figure 71 BAE Systems Broadsword Spine.....	115
Figure 72 LG Chem cable-shaped lithium-ion battery powers an LED display even when twisted and strained .....	116
Figure 73 Supercapacitor yarn made of niobium nanowires .....	119
Figure 74 Sphelar Textile.....	124
Figure 75 Sphelar Textile Solar Cells .....	124
Figure 76 Katy Perry wears Cute Circuit in 2010 .....	126
Figure 77 Cute Circuit K Dress.....	128
Figure 78 MAKEFASHION runway at the Brother's "Back to Business" conference, Nashville 2016.....	129
Figure 79 Covestro material with LEDs are positioned on formable films made from thermoplastic polyurethane (TPU). .....	130
Figure 80 Unseen headpiece, made of 4000 conductive Swarovski stones, changes color to correspond with localized brain activity.....	131
Figure 81 Eightsense a coded couture piece.....	133
Figure 82 Durex Fundawear .....	134
Figure 83 Printed fabric sensors from the University of Tokyo.....	136
Figure 84 Tony Kanaan's shirt with electrically conductive nano-fibers.....	143
Figure 85 Panasonic stretchable resin technology .....	145

Figure 86 Nanoflex monitoring system .....	147
Figure 87 Knitted strain sensors .....	149
Figure 88 Chain Mail Fabric for Smart Textiles .....	150
Figure 89 Electroplated Fabric .....	151
Figure 90 LG Innotek flexible textile pressure sensors .....	154
Figure 91 Smart Footwear installed with fabric sensors. (Credit: Image courtesy of The Hong Kong Polytechnic University).....	156
Figure 92 SOFTCEPTOR™ textile strain sensors .....	158
Figure 93 conductive polymer composite coating for pressure sensing .....	159
Figure 94 Fraunhofer ISC_ printed sensor .....	161
Figure 95 The graphene-coated yarn sensor. (Image: ETRI).....	164
Figure 96 Supercapacitor yarn made of niobium nanowires .....	167
Figure 97 StretchSense Energy Harvesting Kit.....	170
Figure 98 Energy harvesting textiles at the University of Southampton .....	171
Figure 99 Polyera Wove Flexible Screen.....	175