



MOON
Passion for Tomorrow!



The MOON Concept and the European Textile Automotive Industry

Innovation under Pressure, Tradition in the Crosshairs

Anton Schumann – Gherzi Germany

17.09.2025

Concept MOON – Search for innovation

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- **MISSION concept MOON:** Focus on process innovation for future business models.
- Central question: INNOVATION: **Cost leadership vs. innovation leadership?**
- **MISSION MOON** aims to drive transformation through innovation.
- Key areas:
 - New materials and technologies?
 - Sustainability and resource efficiency?
 - Support for start-ups and companies in innovation processes?
- **Partners:** Hanns A. Pielenz Foundation · Amann Group · AFBW
- Provides an **innovation platform** for companies, organizations, research, and networks.

HANNS A. PIELENZ
STIFTUNG



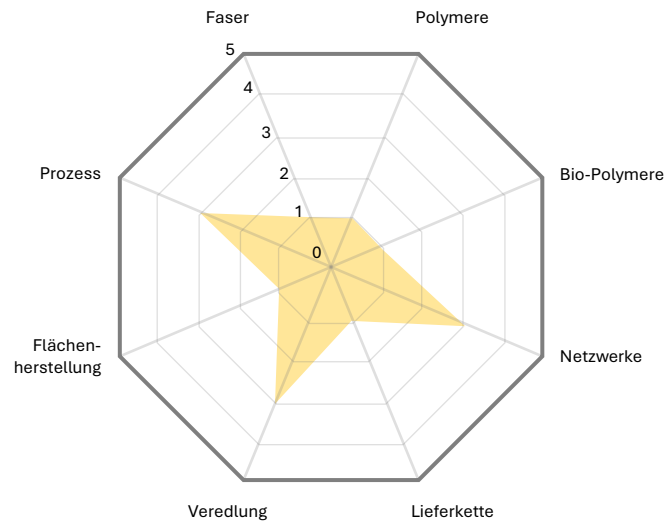
What is Innovation?

Innovation = Continuous Change
Adapt – Improvise – Overcome
BUT: The goal remains the same

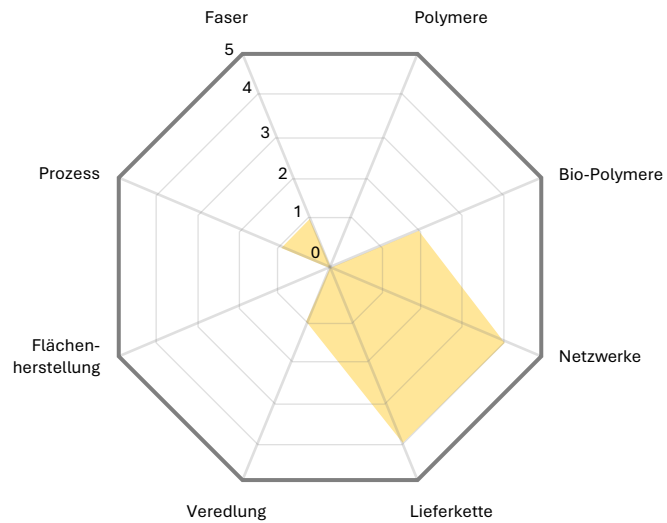


1) Textile global publications (2024)

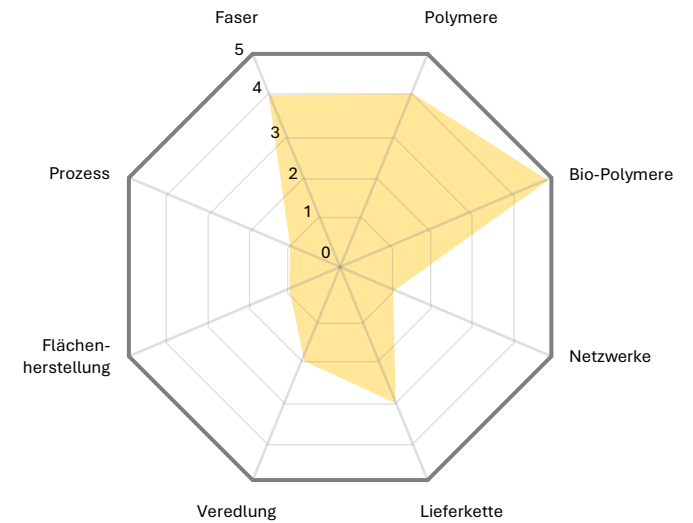
Publikation EUROPA



Publikation NAFTA



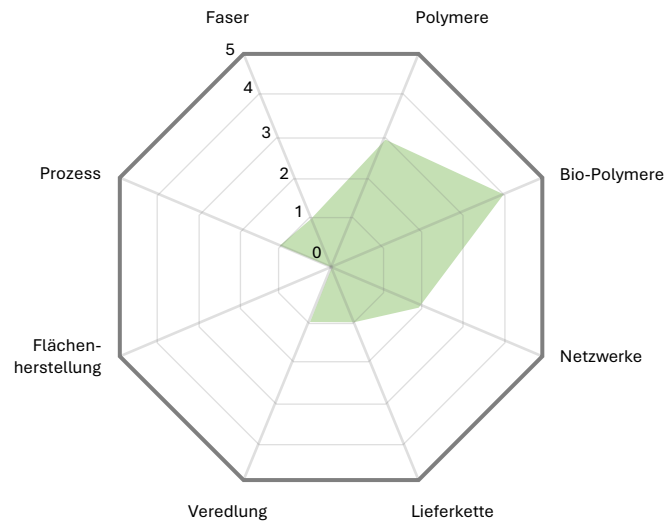
Publikation ASEAN



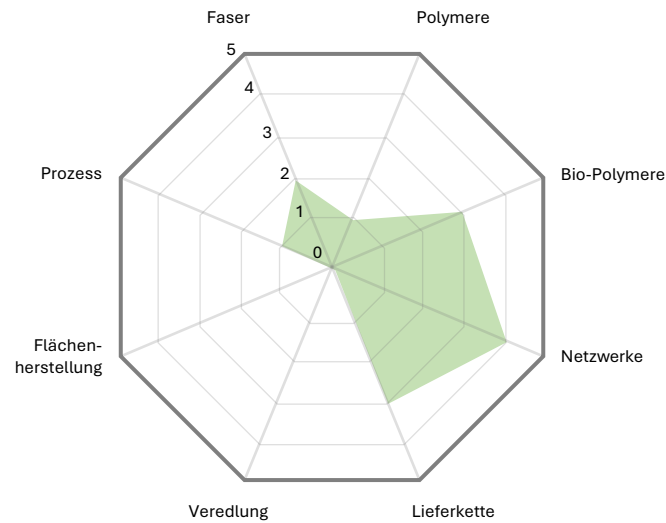
Quellenangabe: Gherzi Germany – Auswertung 12.2022

2) Textile industry R&D key focus areas (2024)

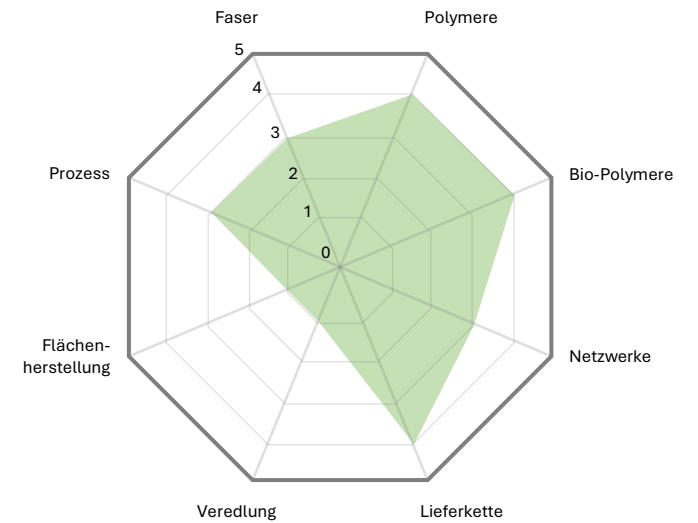
F&E Europe



F&E NAFTA



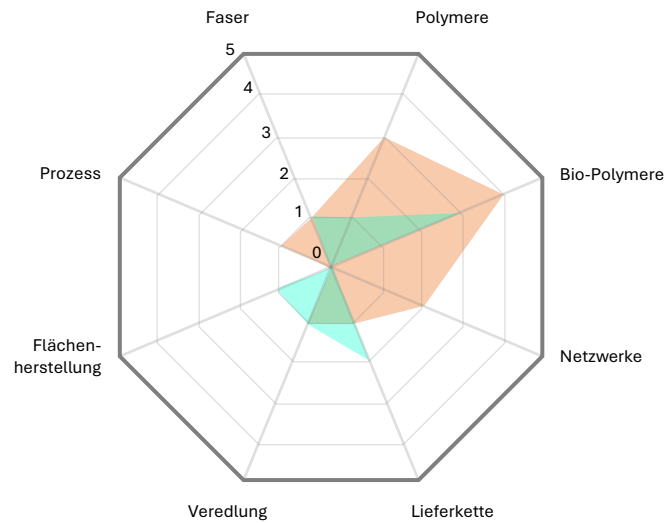
R&D ASIA



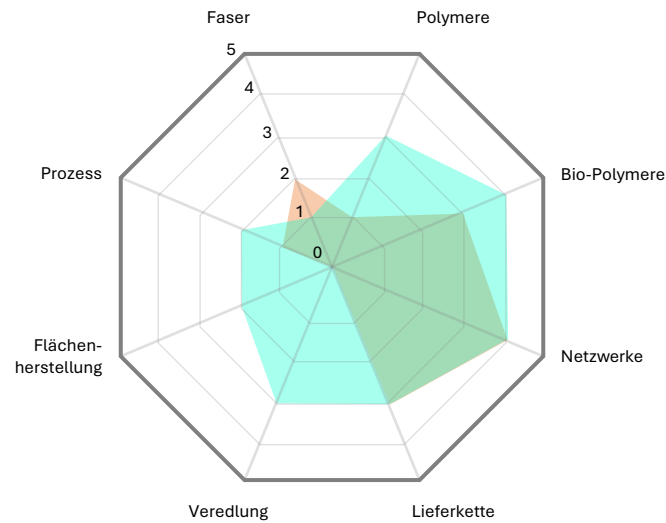
Quellenangabe: Gherzi Germany – Auswertung 12 2022

3) Textile industry investment focus (2023)

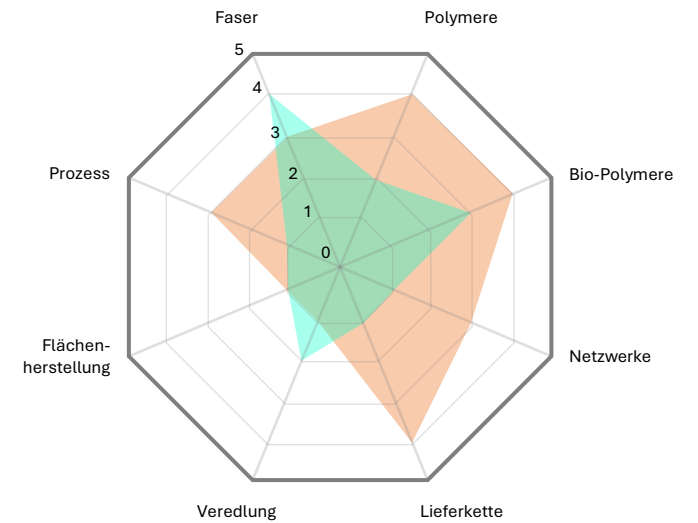
F&E Europe



F&E NAFTA



R&D ASIA

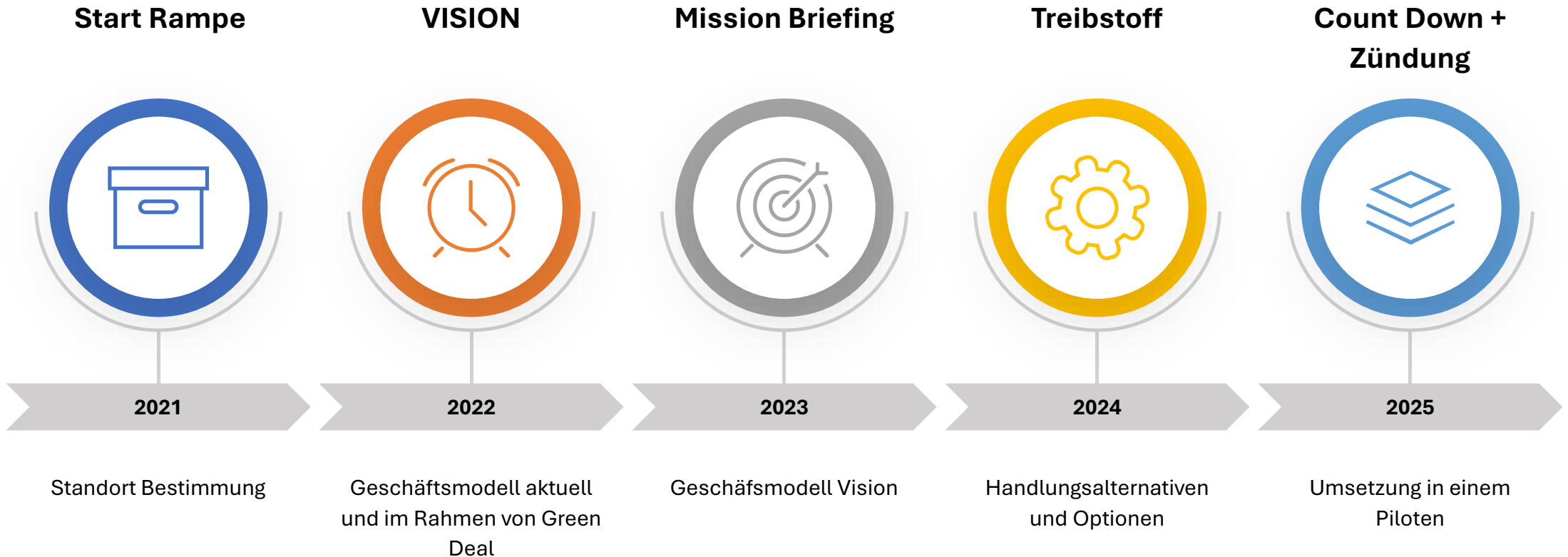


Textile Forschung Fashion For Good + LVMH + o. VC

Quellenangabe: Gherzi Germany – Auswertung 12 2022

Mission MOON Count Down

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MOON 1 ENTWICKLUNGSPHASEN TEXTILINDUSTRIE

Lust auf Zukunft!

Zeiträume und deren treibende Kräfte / Trends	Bis ca. 1850 Vor-INDUSTRIALISIERUNG	1840 – ca. 1920 Das 18. Jahrhundert INDUSTRIALISIERUNG	1920 – 1995 Das 19. Jahrhundert OLD ECONOMY	1995 – 2018 Das 20. Jahrhundert NEW ECONOMY	2018-2030 Das 21. Jahrhundert GREEN ECONOMY	2030-2050 Das 21. Jahrhundert META ECONOMY
Wertesystem – Faktor Mensch (Westlicher Fokus)	Bedarfs-Gesellschaft	Ausbeutung und Konfrontation - Zwang	Festanstellung – sozialer Fokus am entstehen	Zielvereinbarung - war for talents und Personal	Zielvereinbarung und Kooperation	Wertschätzung und NEW WORK
Markt	Bedarfsbezogene Produktion	Bedarfsbezogene Produktion und Konsum für den Adel	Fast Fashion – Outdoor Sport – B2C TechTex: Automotive, Disposals, HelmTex	Medizin / Life Science KONSUM B2B / B2C Hightech: Composites, SmartTex	• Reuse • Recycle • Repair • Bewusster Konsum • Eu Regularien	...
Wertschöpfung / Produktion	DAO	LINEARES GLOBALES Geschäftsmodell		ZIRKULARES REGIONALES Geschäftsmodell	BIG-Global or DAO	
Technologie	• Handwerkskunst • Gilden	SPIELMACHER Baumwolle 1. Industrialisierung in der Spinnerei 2. Industrialisierung in der Weberei 3. Qualitätsstandards des weltweiten Handels mit Baumwolle	SPIELMACHER Synthetikfaser / Chemie • Ausrüstung / Finish / Chemie • TechTex (Garn / Fläche / Finish) • OE-Spinning, Texturierung ... • Beschichtung, Performance ... • Wirkerei, Gelege • ...	SPIELMACHER Globalisierung • Digitalisierung Supply Chain • Automatisierung / Robotik • Schnittstelle: Worker-Maschine-Supply Chain (Meta / Augmented Reality / Artificial Intelligence / BIG DATA / IOT) • ...	SPIELMACHER GREEN • Sustain Supply Chain • CO2 Steuer / Kosten • Energie – Verknappung • Rohstoff-Verknappung	...

1. Launch pad

MOON 2 EIN LEITFADEN FÜR ZUKUNFTSGERECHTES HANDELN! i

Lust auf Zukunft!

GREEN DEAL
„Reuse, Recycle, Repair“

SUSTAINABLE DEVELOPMENT GOALS Disruptives Wertstrom-Design

IMPULSE für eine europäische, ökologische, ökonomische und soziale Textilproduktion

Hintergrund / Ausgangsbasis Etablierung von „ENKELFÄHIGKEIT“ / ZUKUNFTSFÄHIGKEIT von Unternehmen?

- Standortbestimmung (CANVAS)**
- Impact-Bewertung (SCOPE)**
- Systemgrenzen bestimmen und ausdehnen - Kooperation**

- Unabhängigkeit von Energieströmen schaffen
- Unabhängigkeit von Rohstoffquellen etablieren
- Resiliente Märkte und Systeme
- GM Cradle2Cradle

Transformation zur Internationalisierung Chancen erkennen

GREEN DEAL / SDGs

- Energiewende
- Rohstoffkrise
- Netzstörung

Option / Zwang / Chance / Risiko:

- Transformation** in Organisation und Geschäftsmodell (digital & nachhaltig)
- Neue Technologien und Wertschöpfungsketten
- Rahmenbedingungen ändern sich!**
- Grenzen des Wachstums überwinden

→ **Business Modell Innovation & Wertschöpfungsketteninnovation**

Handlungsoptionen / Impulse Zur Transformation Chancen bewerten

	1. Pull Produktion - Logistik 1.F. - Just on demand	2. Pull Marketing - Branding - Bedürfnisorientierung	3. Lizenzierung / Open Innovation / Kooperation	4. Vertikalisierung	5. Diversifizierung	6. Digitalisierung	7. Servitization	8. Generelle Förderungen / Big picture	9. Regionalisierung - local - think global	
1	hoch	hoch	mittel	mittel	gering	hoch	mittel	mittel	hoch	Produkt
Manufakturen	Organisations-Anpassung	Organisations-Anpassung	Netzwerk-Gestaltung	Netzwerk-Gestaltung	Netzwerk-Gestaltung	Kompetenz-Erweiterung	Netzwerk-Gestaltung	Internalisierung	Netzwerk-Gestaltung	Marketing
2	gering	hoch	hoch	mittel	mittel	obligatorisch	mittel	mittel	mittel	Produkt
Industrie / Betriebe	Organisations-Anpassung	Organisations-Anpassung	Geschäftsmodell-Innovation	Netzwerk-Gestaltung	Inkubator	Inkubator, GMI	Netzwerk-Gestaltung	Internalisierung	Netzwerk-Gestaltung	Marketing
3	gering	gering	mittel	mittel	mittel	obligatorisch	mittel	mittel	mittel	Produkt
Global Player	Netzwerk-Gestaltung	Organisations-Anpassung	Geschäftsmodell-Innovation	Netzwerk-Gestaltung	Inkubator	Inkubator	Inkubator	Internalisierung	Inkubator	Marketing
4	hoch	hoch	mittel	hoch	hoch	obligatorisch	hoch	mittel	hoch	Produkt
System / Politik / Verband	Anreize schaffen	Anreize schaffen	Netzwerk-Gestaltung	Anreize schaffen	Netzwerk-Gestaltung	Internalisierung	Netzwerk-Gestaltung	Internalisierung	Anreize schaffen	Marketing

nachhaltig und zirkulär Chancen umsetzen

MOON GHERZI AFEW Anton Schumann Marcus Krahl Version 1 - ©2022 - Gherzi Germany - www.gherzi.de

2. coordinates



MOON 3 **STANDORT BESTIMMUNG**

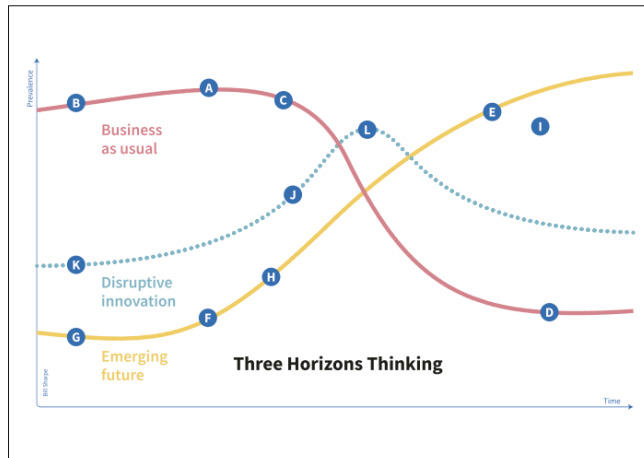
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Fragen zur Standort Bestimmung

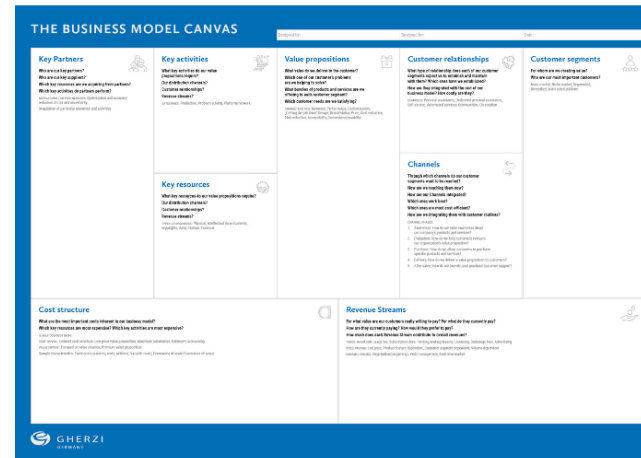
- Beschreiben sie die größten Herausforderungen für das Unternehmen / die Abteilung!
- Beschreiben sie die Mission der Unternehmung / Abteilung!



1. Three Horizon Thinking



2. CANVAS — Einordnung



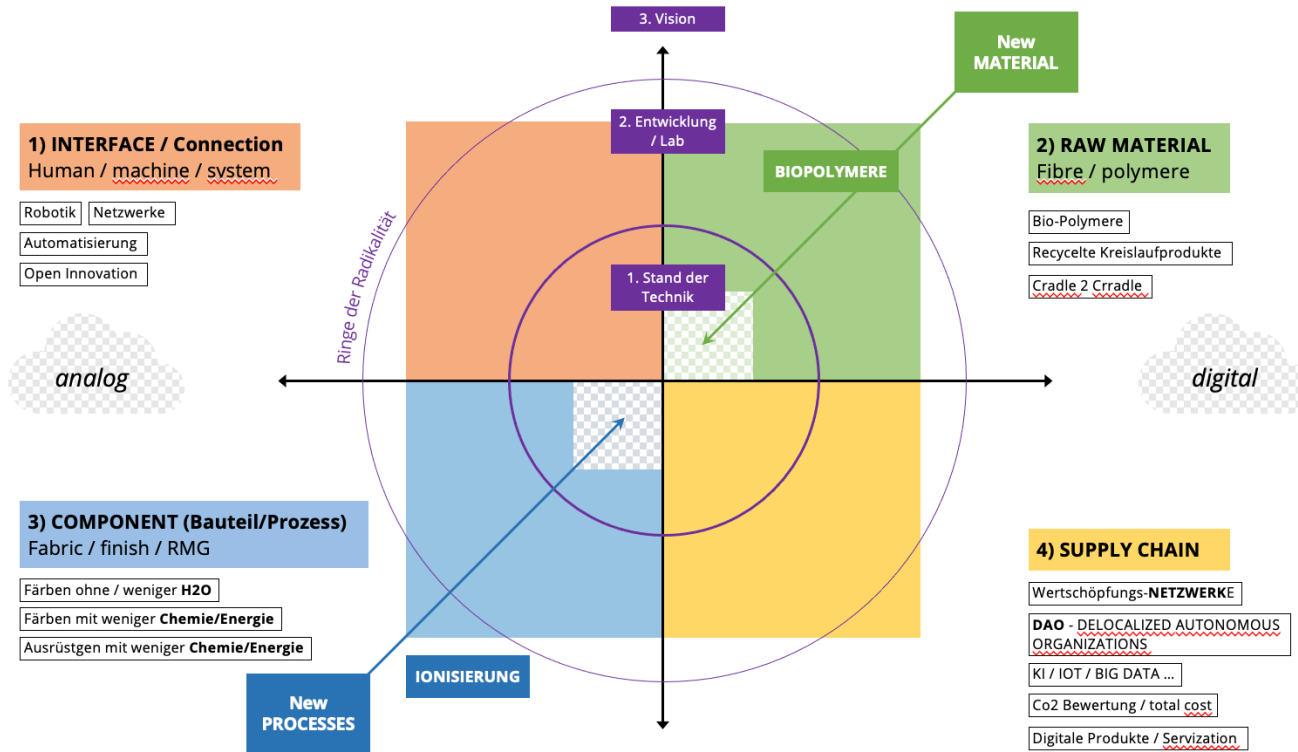
3. Mission briefing



4. Why?

MOON 4 SUCHFELDER der technischen INNOVATION

Lust auf Zukunft!



5. Mission equipment

A MOON Project

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CarTexSax

Strategic impetus for the textile automotive supply chain in south-west Saxony



CAR TEX SAX – Shaping the Future of Saxony’s Textile Industry in Mobility

The Challenge

- Global competition, electrification, and sustainability demands disrupt Saxony’s traditional automotive textile market
- Suppliers face cost pressure, certification hurdles, and shrinking volumes
- Some long-standing companies have already disappeared; others are struggling to survive

The Findings

- Automotive focus alone is too risky
- “Tier Gap”: strong at Tier 3–4, but limited access to Tier 1 and OEM contracts
- Diversification potential in aerospace, rail, construction, medical textiles, filtration, and energy
- Sustainability (recyclable, circular, low CO₂ textiles) as a key differentiator
- Networks, alliances, and automation are crucial for survival and growth
- 2018: 25 companies (5.748 jobs)
2024: 9 companies (1.457 jobs)



CAR TEX SAX – Shaping the Future of Saxony’s Textile Industry in Mobility

Vision 2030 – Three possible Future Models

- Specialized Niche Providers – high-value, small-batch, or luxury applications
- Regionally Anchored System Suppliers – leveraging Saxony’s expertise in production, R&D, and certification
- Members of Global Alliances – integration into international value chains

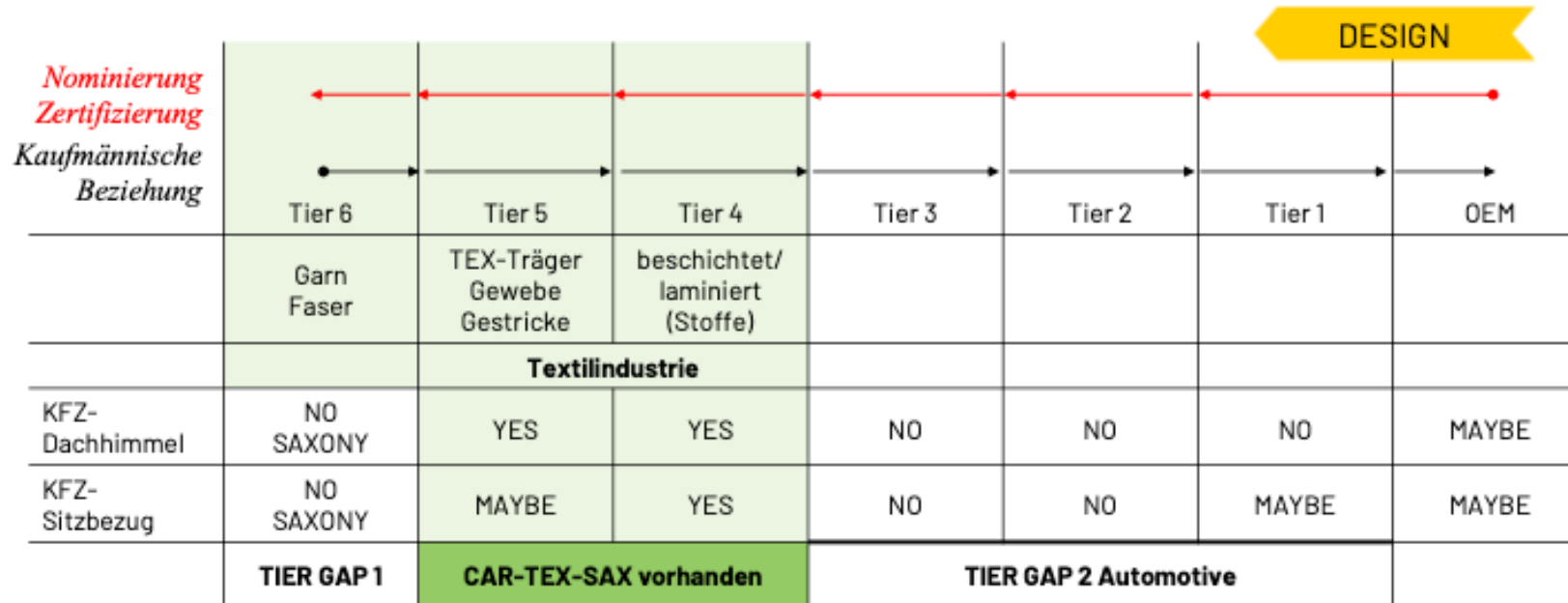
Call to Action

- CarTexSax is not a final report, but a roadmap and wake-up call
- Transformation requires courage, speed, and strategic investment
- Southwest Saxony can remain a hub for textile innovation if companies act decisively
- Next step: European projects, strategic partnerships, and industrial renewal



CAR TEX SAX – The Tier Gap

CAR TEX SAX World / Wertstrom – The Tier Gap



The European Textile-Automotive-Supply-Chain (Example)

Transport Section	Distance (km)	CO2 Emissions (g)	CO2 Emissions (t)
Polyester Fiber Yarn (Zorlu - Trieringen)	2100	130,200	0.13
Knit Fabric (Trieringen - Bad Salzfluren)	500	31,000	0.031
Foam (Porto - Bad Salzfluren)	2200	136,400	0.136
Adhesive Web (Düsseldorf - Bad Salzfluren)	180	11,160	0.011
Climate Seat Component (Bad Salzfluren - Kosice)	1000	62,000	0.062
Leather (Argentina - Kosice)	12000	192,000	0.192
Leather Components (Kosice - Opole)	400	24,800	0.025
Seat Covers (Opole - Pilsen)	280	17,360	0.017
Finished Seats (Pilsen - Sindelfingen)	420	26,040	0.026



Can Saxony Speak for All of Europe?

Beyond Saxony: Rethinking Europe's Textile Path

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- Can one company in Saxony (**CAR TEX SAX**) define the future of Europe's entire automotive and techtext industries?
- Isn't this a dangerous **overgeneralization** that ignores regional diversity?
- If policymakers buy into this narrative, are we risking **misdirected funding and blind strategies**?
- Shouldn't Europe build on **multiple clusters and innovations** instead of one storyline?
- What if the **real future** lies beyond automotive – in **circular textiles, medtech, or energy**?
- ...



Europe's supply chains are being disrupted – markets too.

... so, what's your move: as an entrepreneur, a worker, an investor, a textile visionary?

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Labour Cost Dynamics in Textile Manufacturing: A Strategic Wake-Up Call for Central Europe

2025



Urs Konstantin Rouette



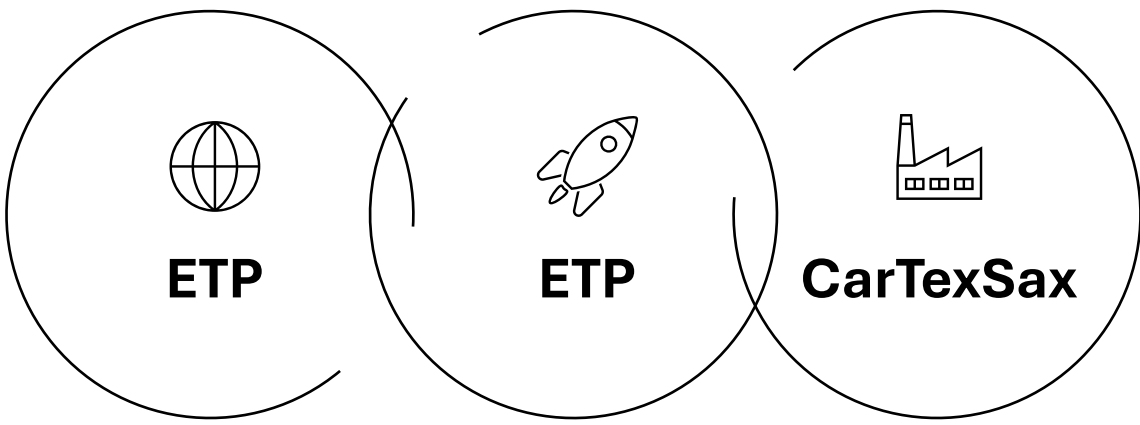
Anton Schumann

Country	Net Hourly Labor Cost	Distance to Berlin	Driving Time (Truck)	CO ₂ Emissions	Estimated CO ₂ Cost
Germany	€ 12.3	0 km	–	0 kg	€ 0
Slovakia	€ 6.3	660 km	~8 h 15 min	816 kg	€ 81.60
Portugal	€ 5.4	2,780 km	~34 h 40 min	3,440 kg	€ 344.00
Bulgaria	€ 4.4	1,470 km	~18 h 20 min	1,824 kg	€ 182.40
Romania	€ 4.2	1,210 km	~15 h 10 min	1,496 kg	€ 149.60
Turkey	€ 4.1	2,355 km	~29 h 25 min	2,922 kg	€ 292.20
Morocco	€ 2.4	2,590 km	~32 h 20 min	3,208 kg	€ 320.80
Tunisia	€ 1.3	1,923 km	~24 h 00 min	2,384 kg	€ 238.40
Egypt	€ 0.6	3,205 km	~40 h 05 min	3,974 kg	€ 397.40



To Discuss:

How can we combine:



to truly transform Europe's
textile supply chains?

MOON Team #1 Germany

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Anton E. Schumann

CEO / Partner

- + Outdoor & Fashion
- + Technical Textiles
- + Int. Supply chain auditing
- + Automotive + Aviation
- + Filtration
- + Transformation
- + Textile Entrepreneur
- + NAFTA + ASEAN

[LinkedIn](#) Chemnitz



Dr. Yves S. Gloy

Senior Consultant

- + R&D
- + Automation
- + Digitalisation
- + Weaving
- + Production
- + Smart Tex
- + Nonwoven
- + Technical Textiles
- + Textile Entrepreneur
- + NAFTA

[LinkedIn](#) Berlin



Sebastiaan van de Loo

Senior Consultant

- + Outdoor
- + Digitalization
- + Supply Chain Management
- + Design thinking
- + Fashion
- + Retail
- + Textile Entrepreneur

[LinkedIn](#) Münster



Eugenia Selkind

Senior Consultant

- + Social and ecological compliance
- + Certification
- + Weaving
- + ASEAN
- + Military
- + Sustainability
- + Supply chain architecture

[LinkedIn](#) Berlin





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Gherzi Vision:

Constant **TRANSFORMATION** of the global textile Industry

Gherzi MISSION:

To **REPURPOSE** raw materials, processes, and supply chain interactions to CO₂ neutrality and circularity



*Enablers to the Industry
since 1929*