

Global Textile Fibre Demand: Trends and Forecast

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International Cotton Advisory Committee

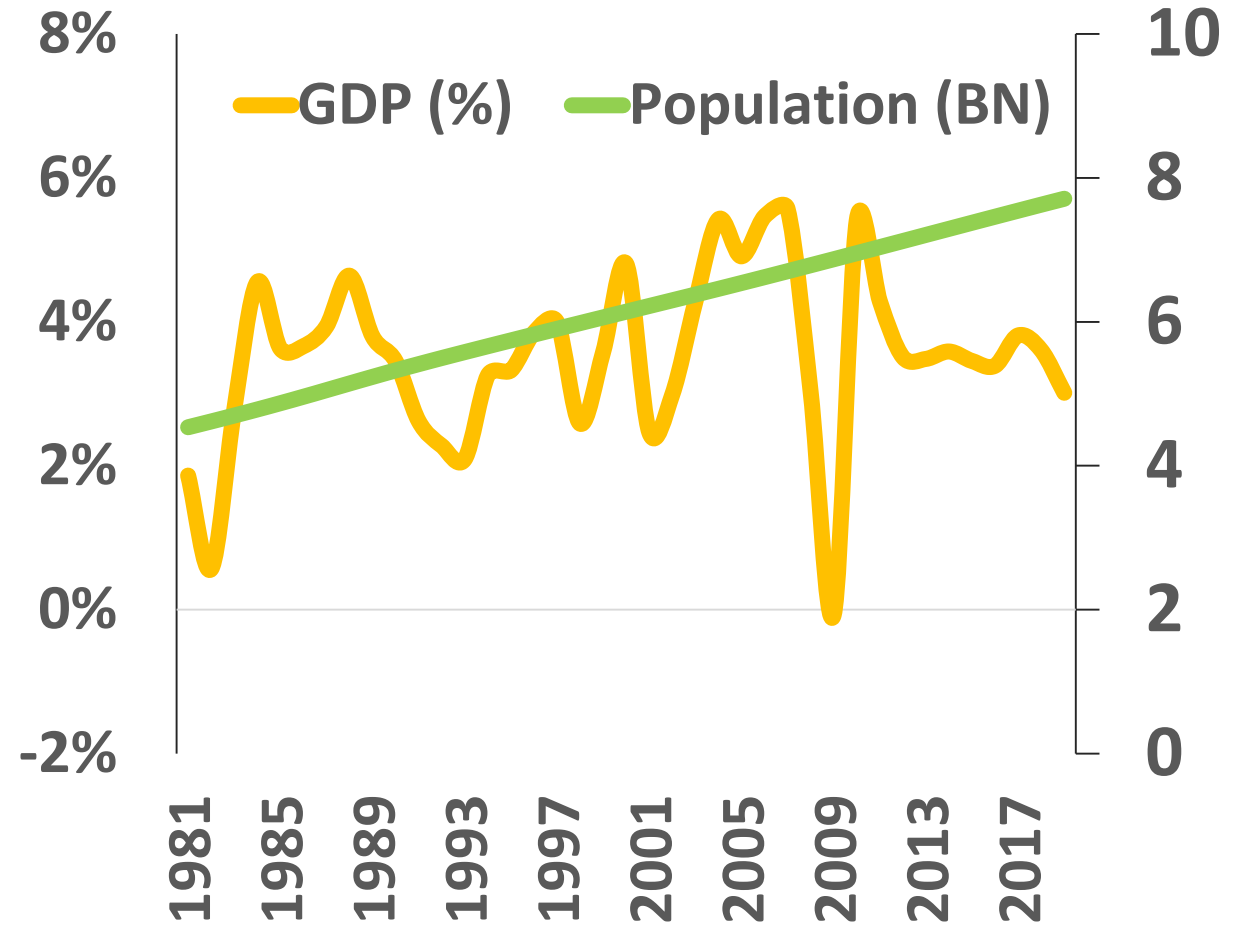
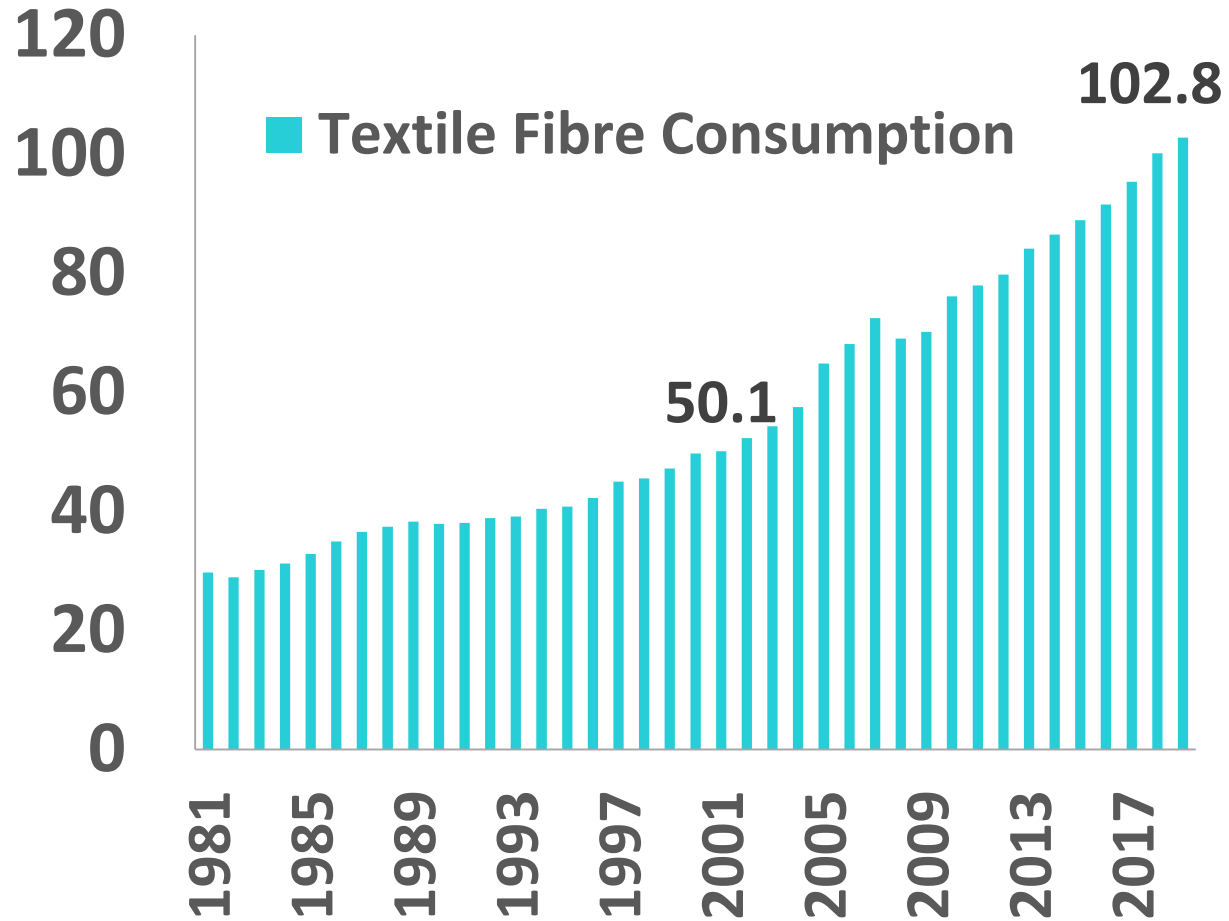


International Cotton
Advisory Committee

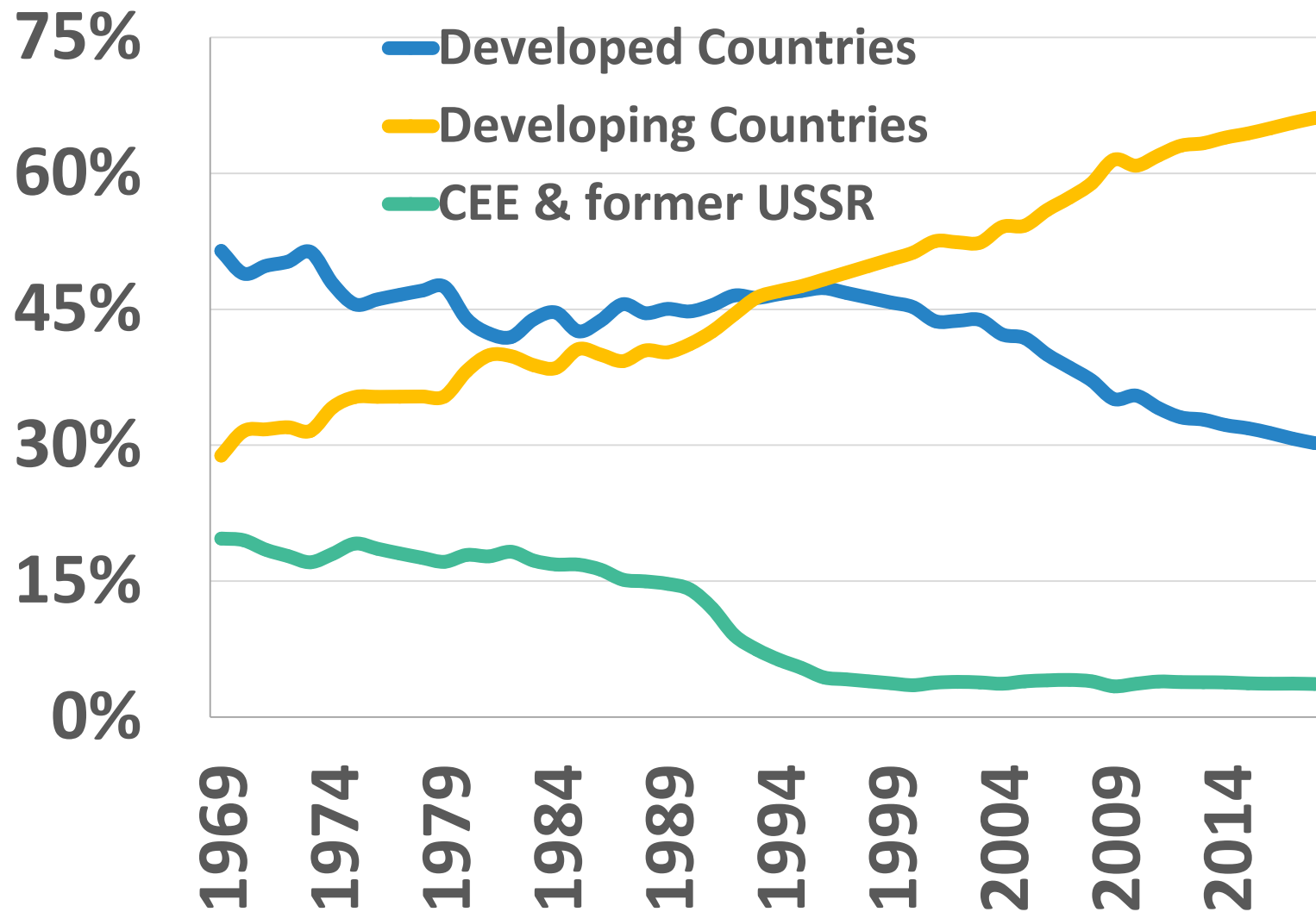


World Textile Fibre Consumption

million tonnes

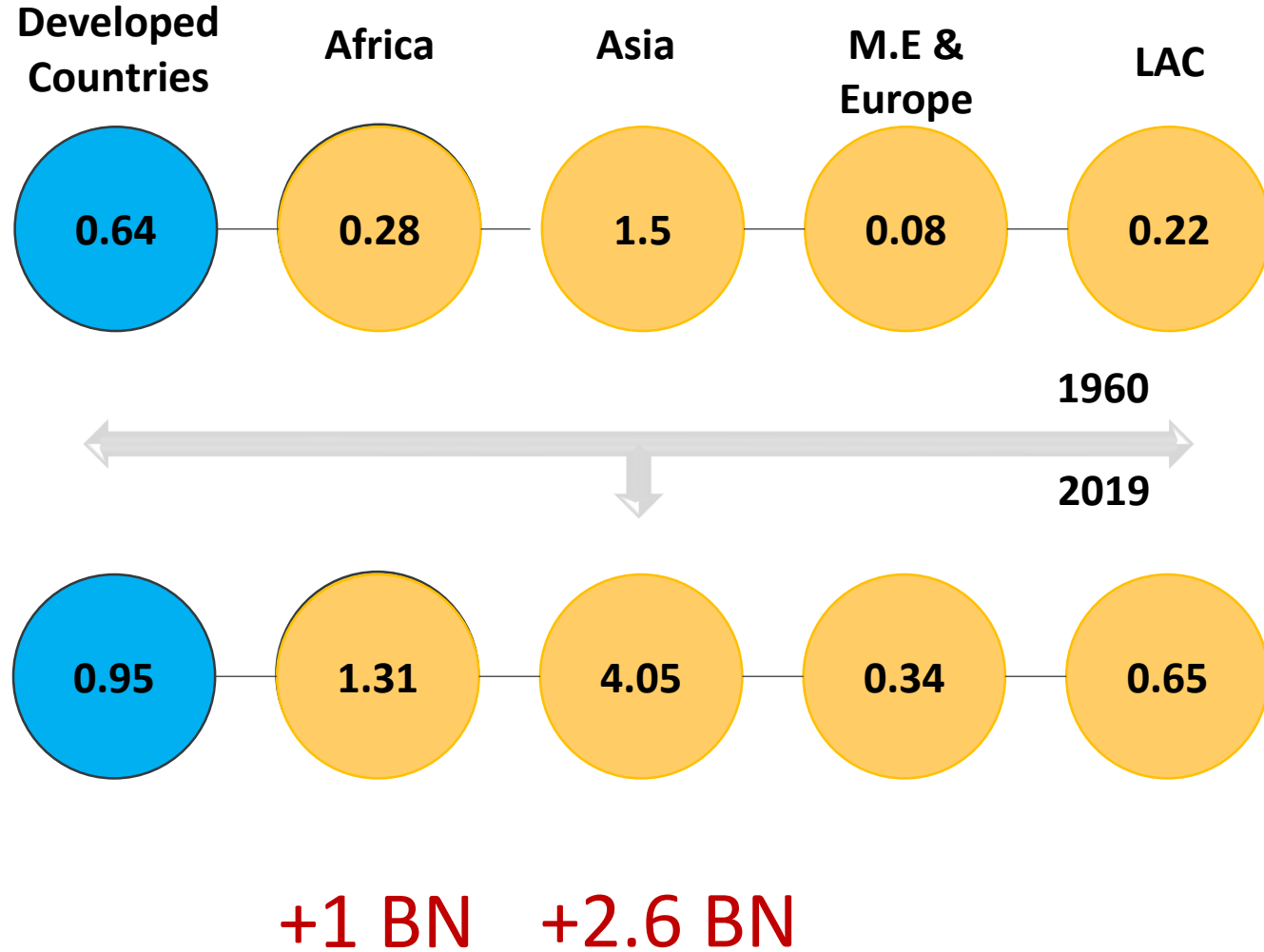
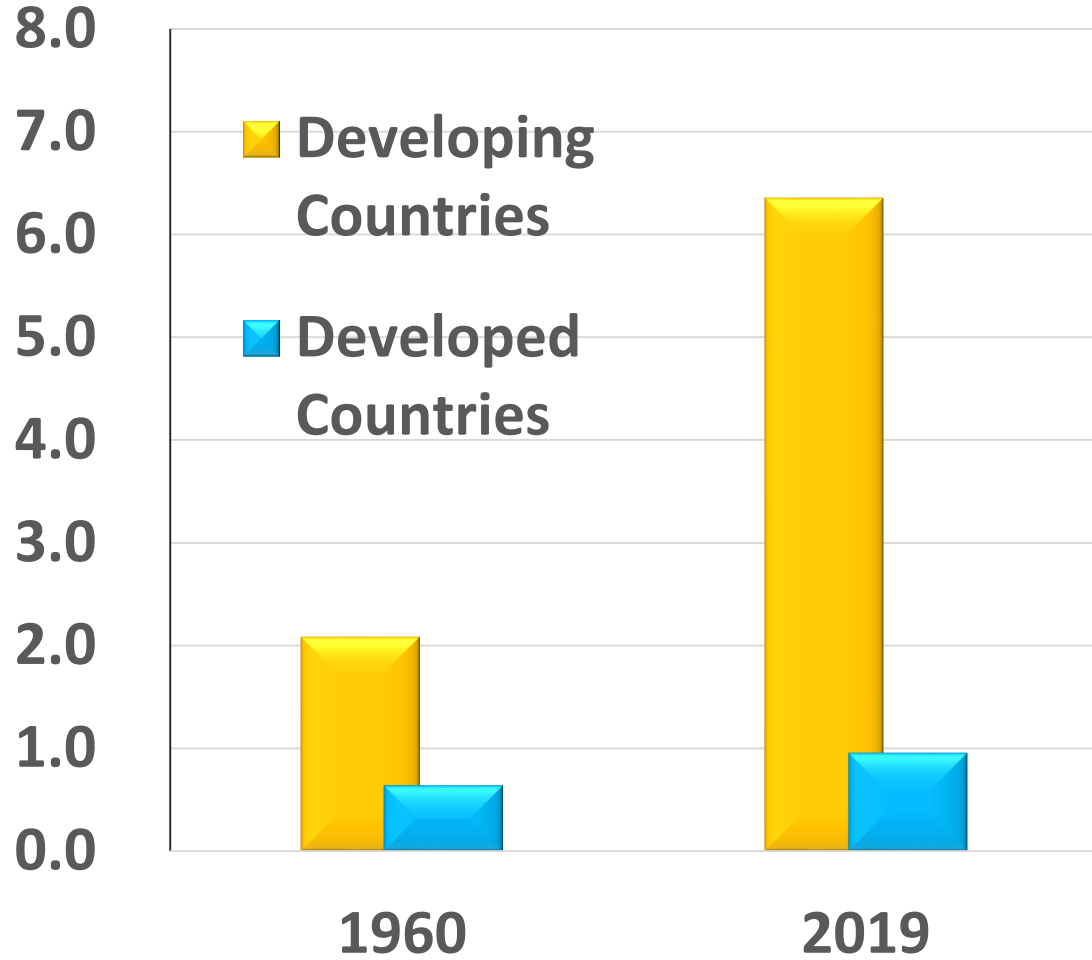


Share of Textile Fibre Consumption by Region (end-use)

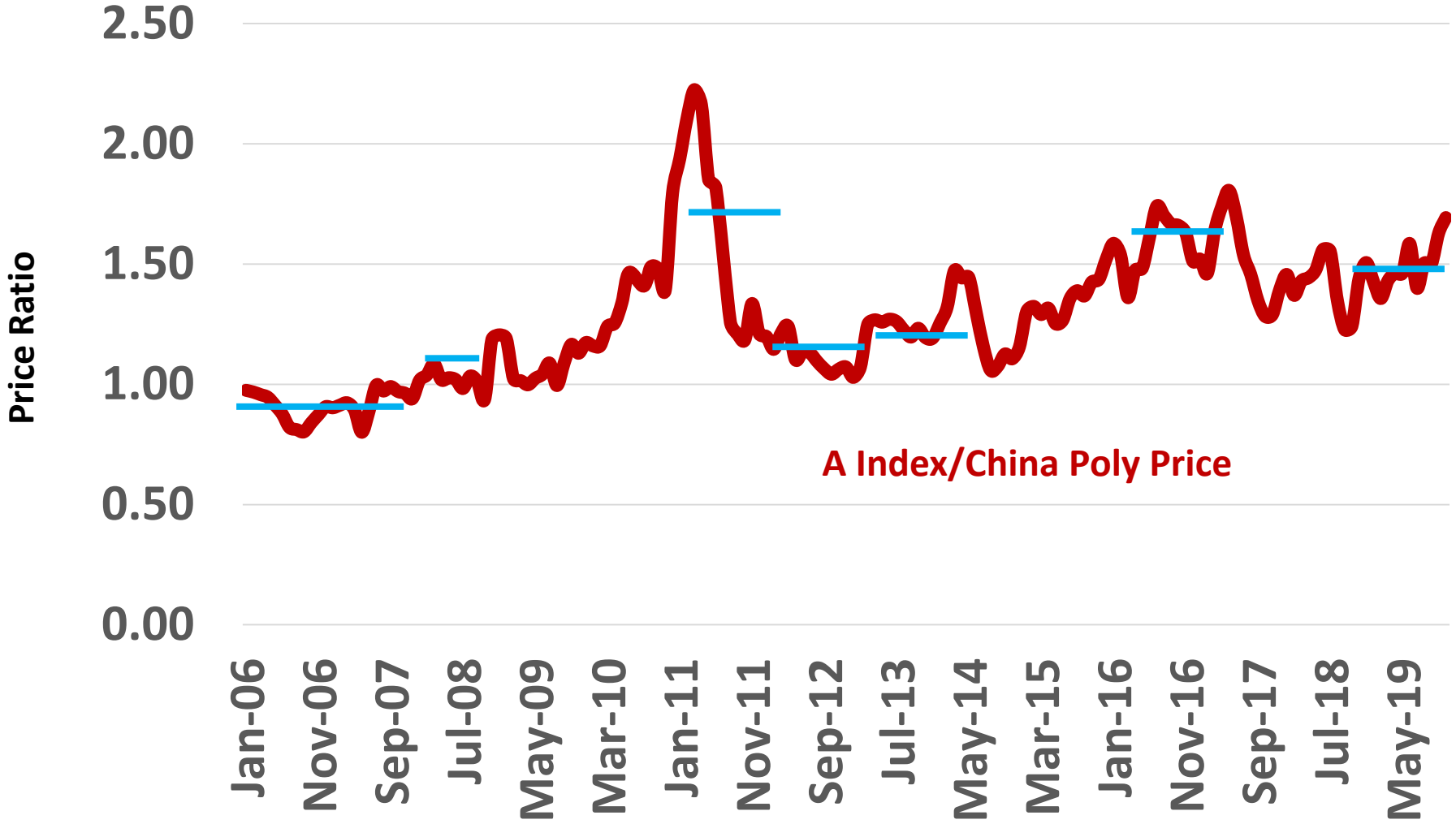


World Population

Billions



Relative Fibre Prices

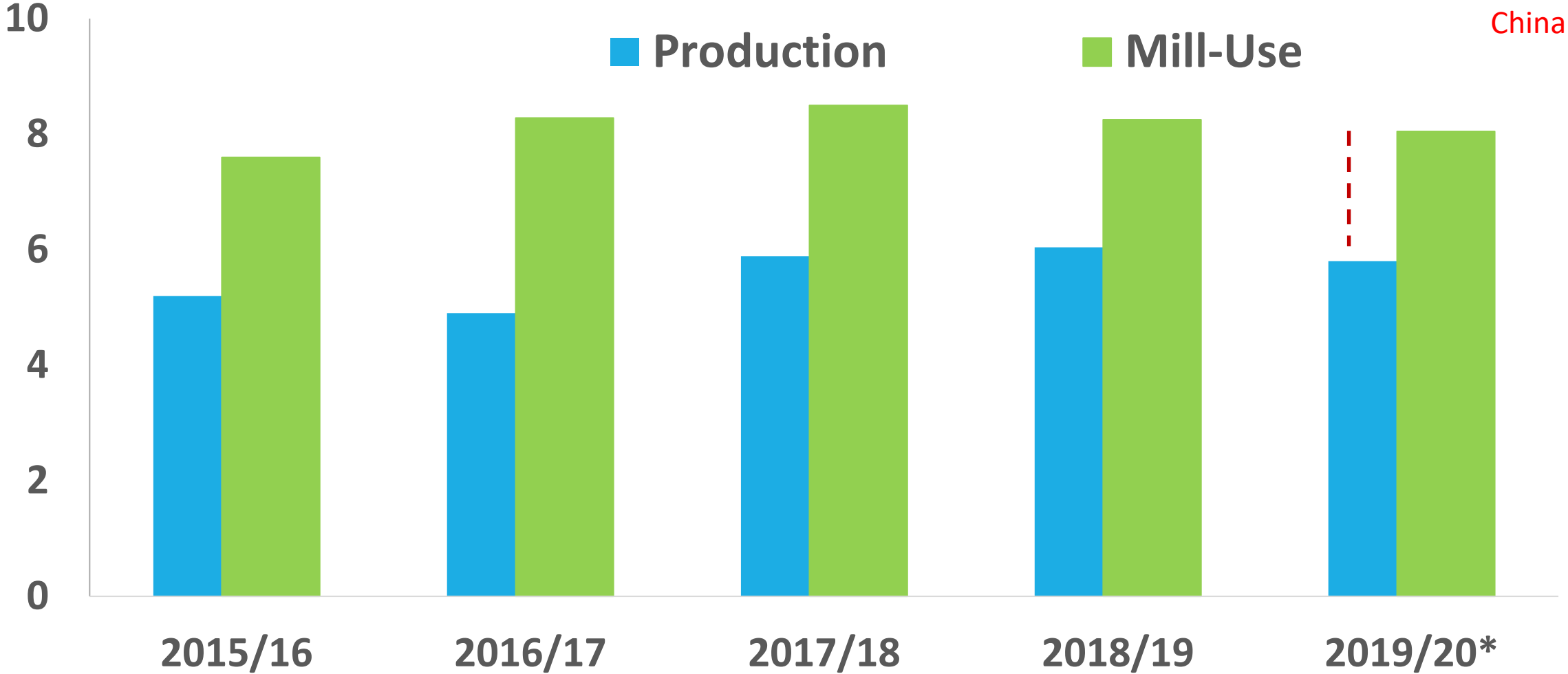


A Index/China Poly Price

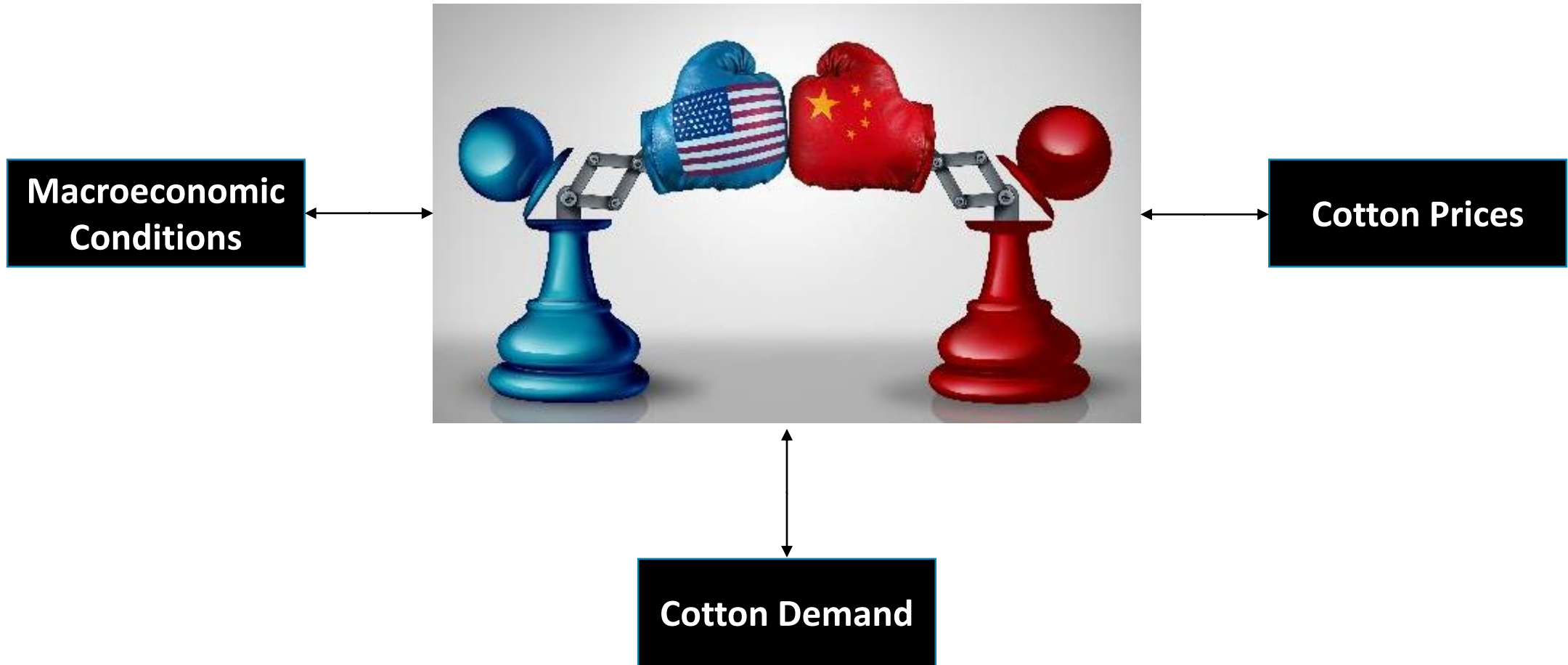


Policies and Trade Barriers

million tonnes

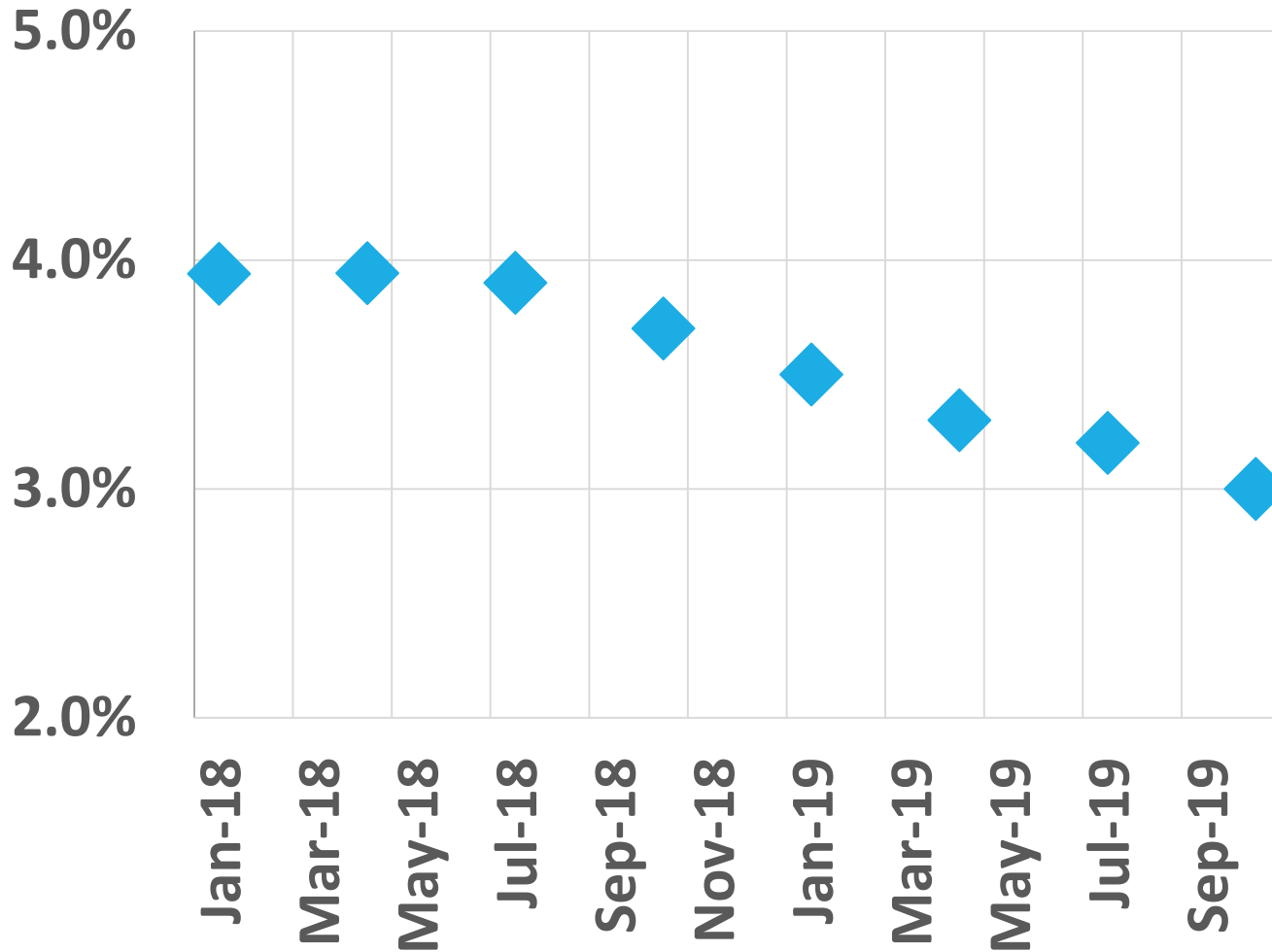


Trade Dispute between The United States and China



Slowing Global Economy

GDP GROWTH IN 2019



- Unresolved U.S-China trade dispute
- Deterioration in manufacturing activity and global trade
- Lower investment
- Weak demand for capital goods
- Uncertainty on Brexit
- Rising geopolitical tensions across the globe



Cotlook A Index

Cents/lb

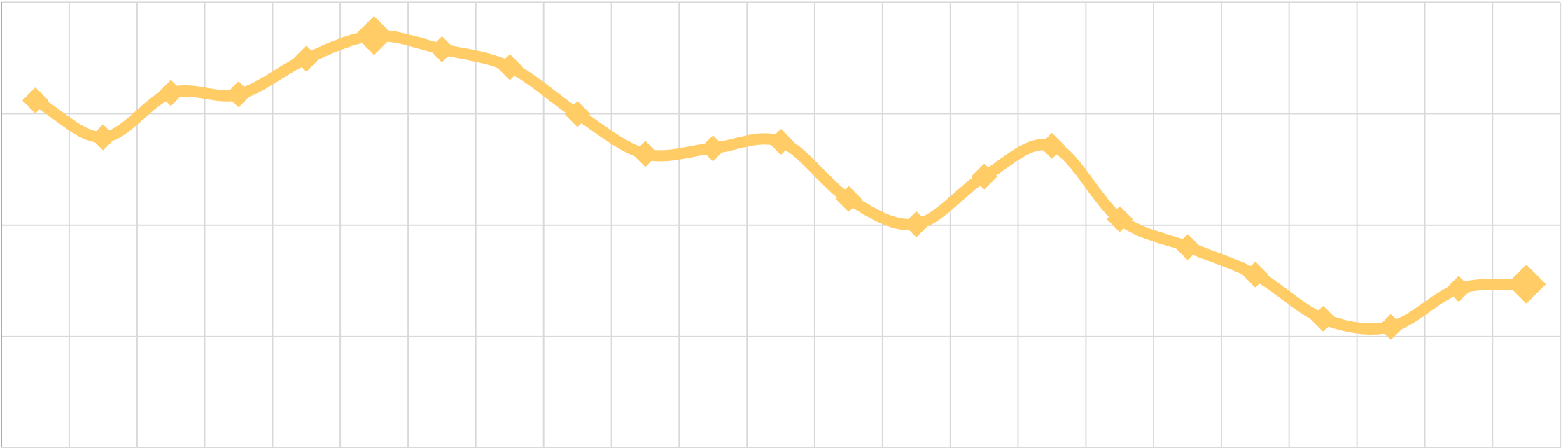
100

90

80

70

60



Jan-18

Feb-18

Mar-18

Apr-18

May-18

Jun-18

Jul-18

Aug-18

Sep-18

Oct-18

Nov-18

Dec-18

Jan-19

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May-19

Jun-19

Jul-19

Aug-19

Sep-19

Oct-19

Nov-19

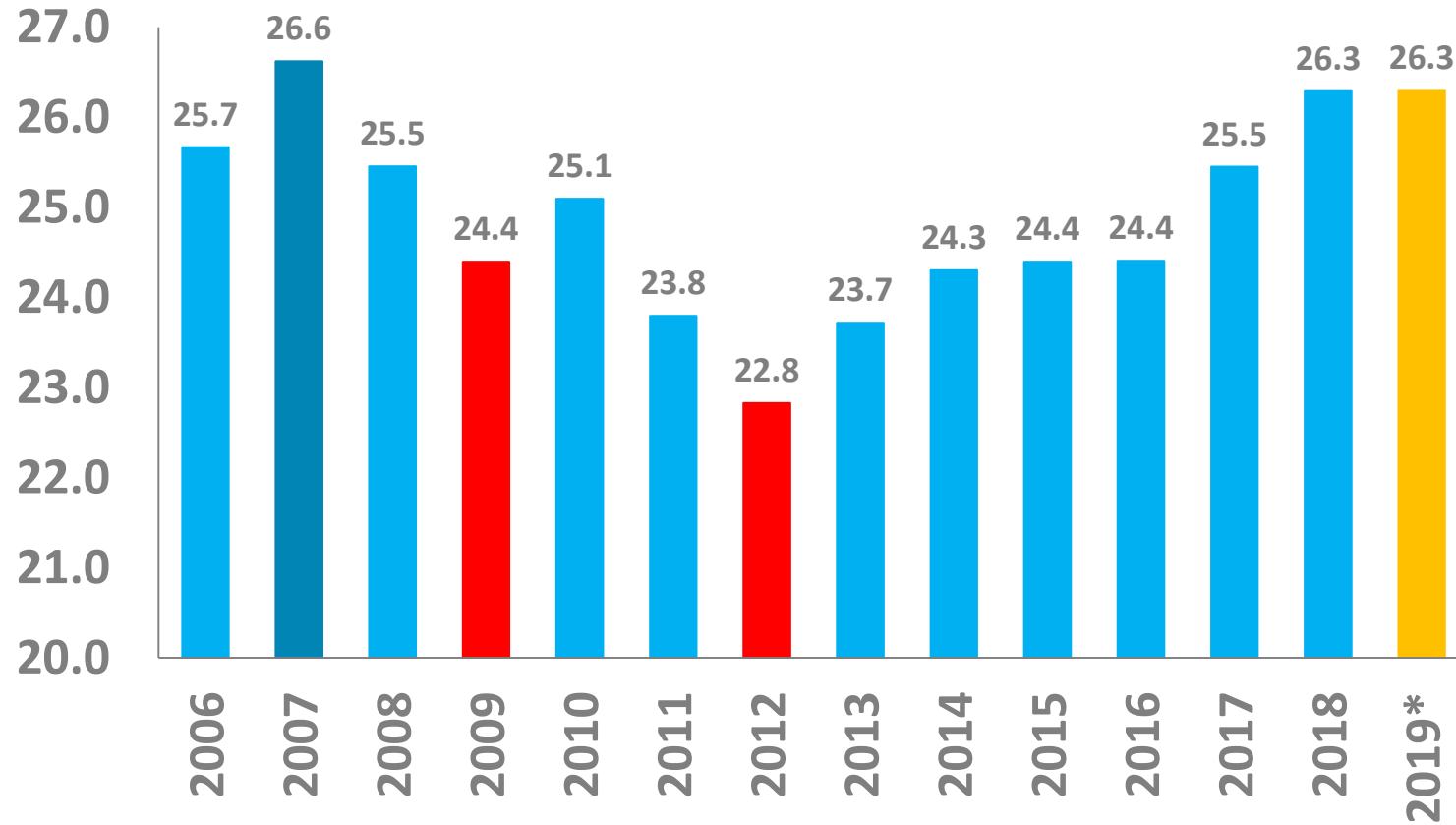


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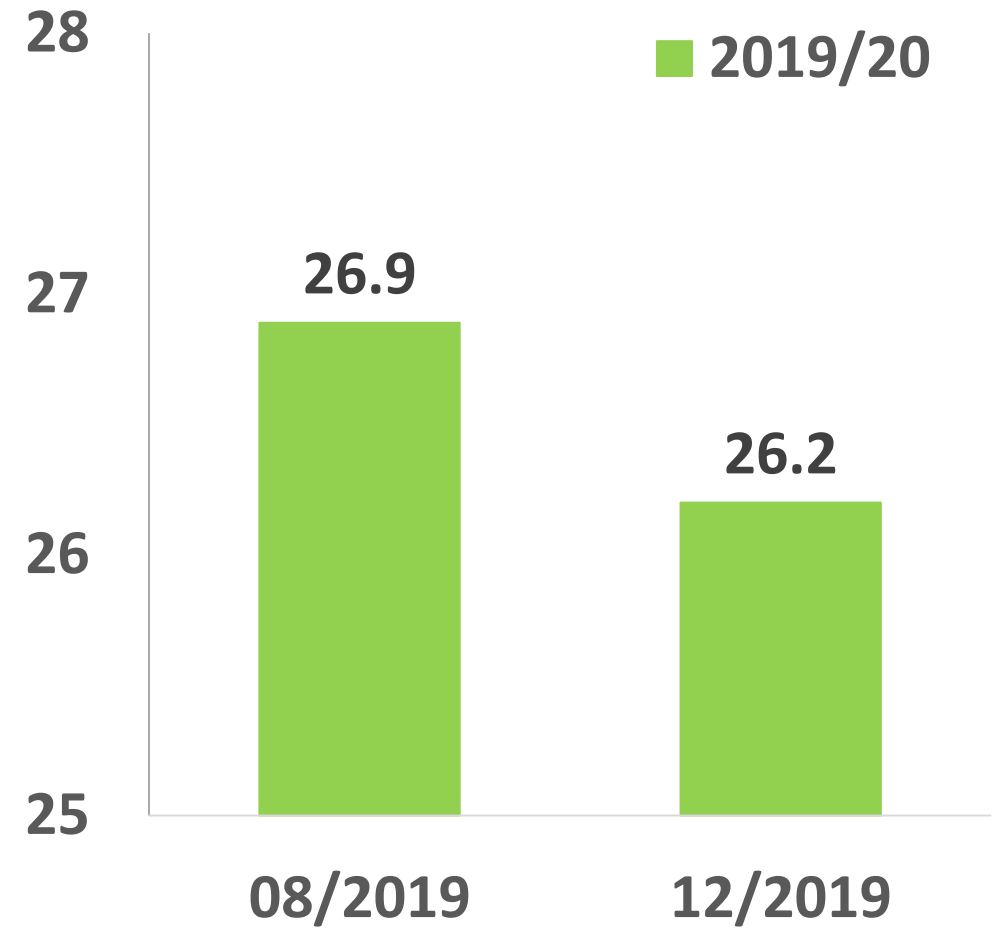
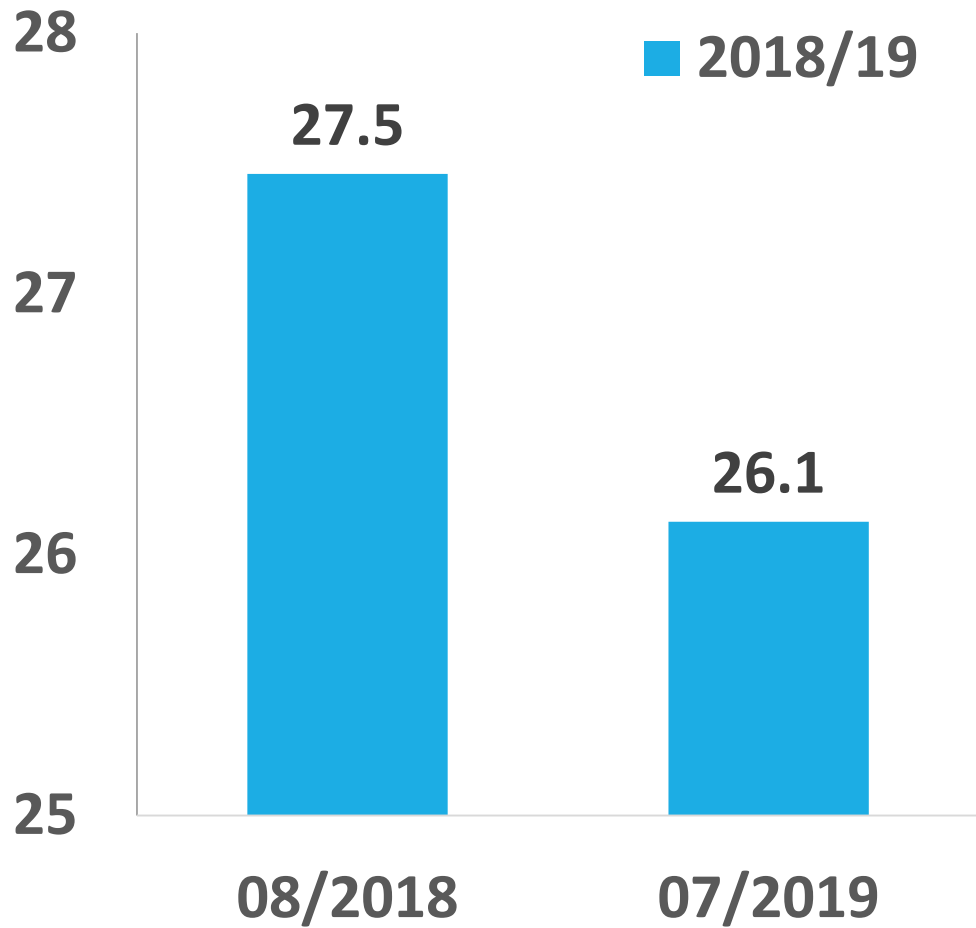
World cotton mill use is estimated at 26.3 million tonnes in 2019, slightly lower than the record of 26.7 million tonnes set in 2007

Million tonnes

Diff: -300,000 tonnes

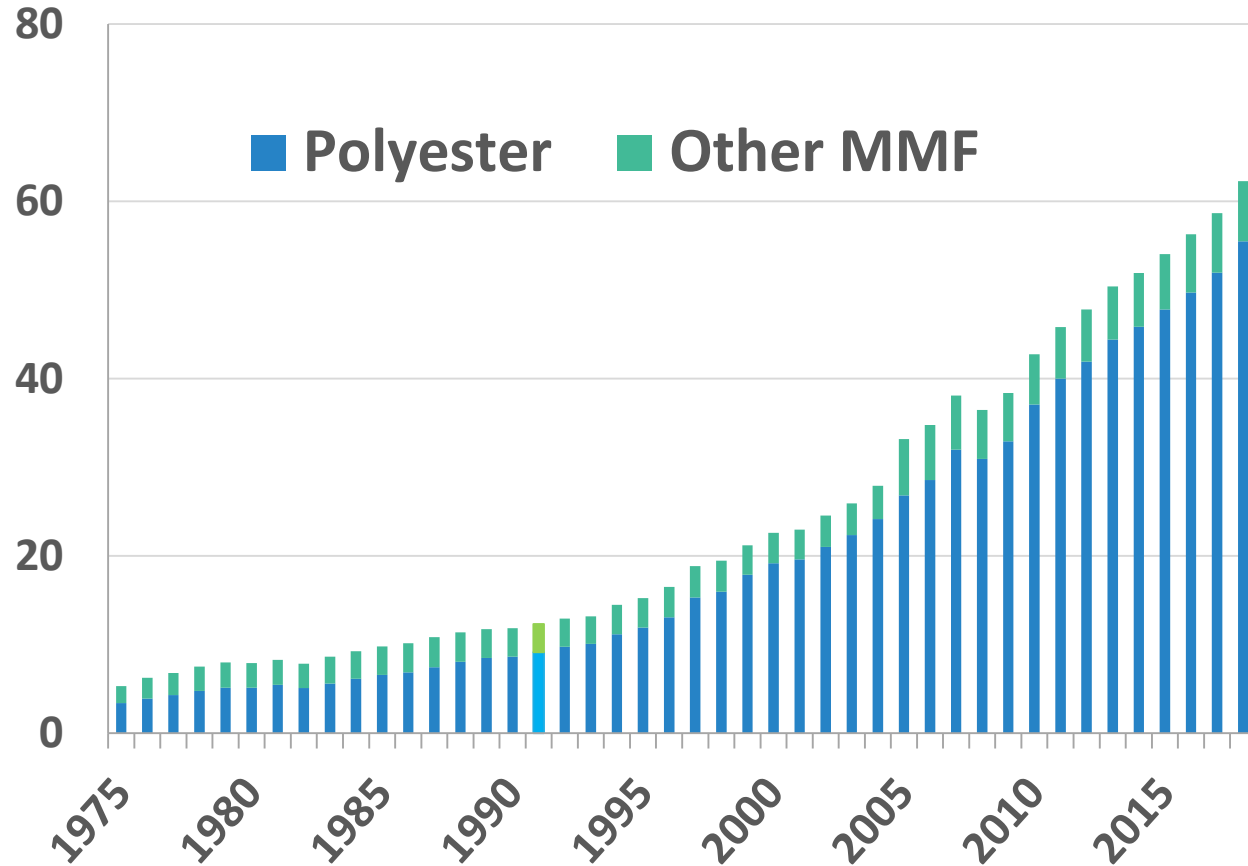


World Cotton Mill Use – Forecasts



Synthetic Fibres Continue to Grow

Million tonnes



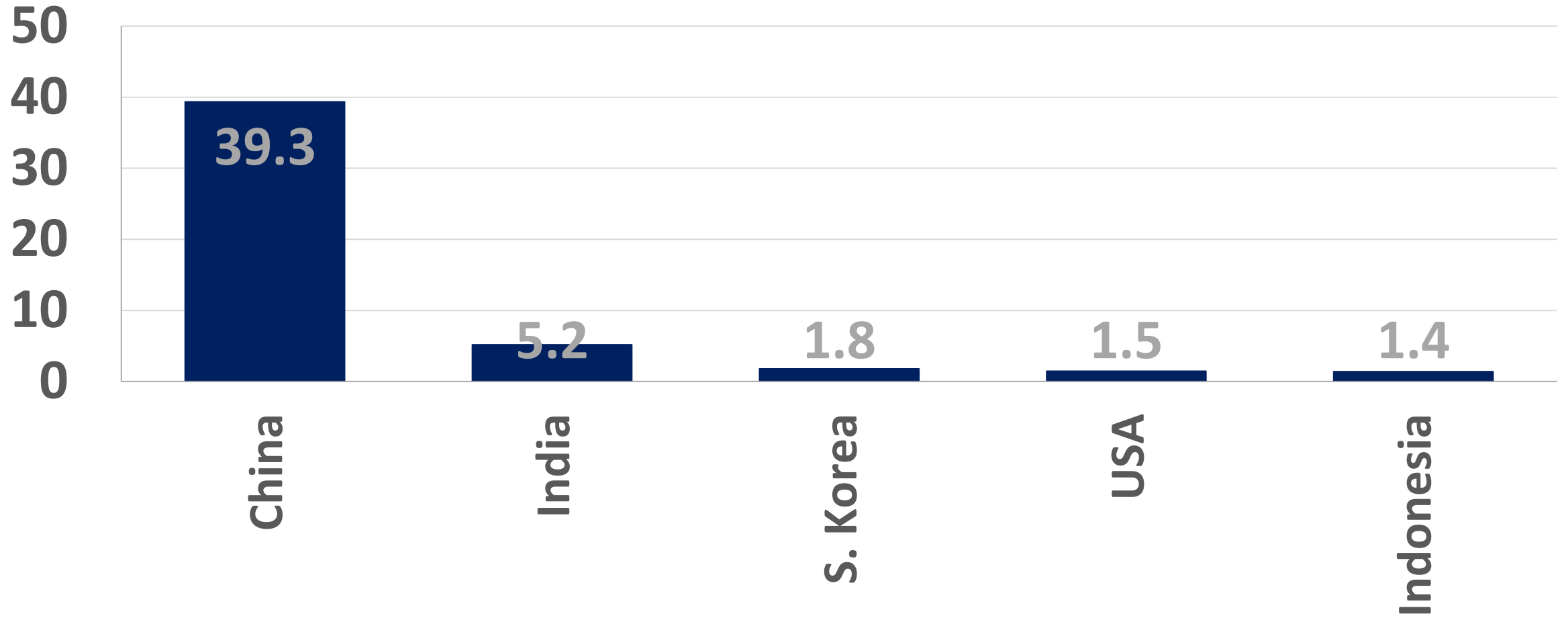
89%

Polyester production is almost 7 times greater than three decades ago, rising from 8.5 million tonnes in 1989 to 55.5 million tonnes in 2018.

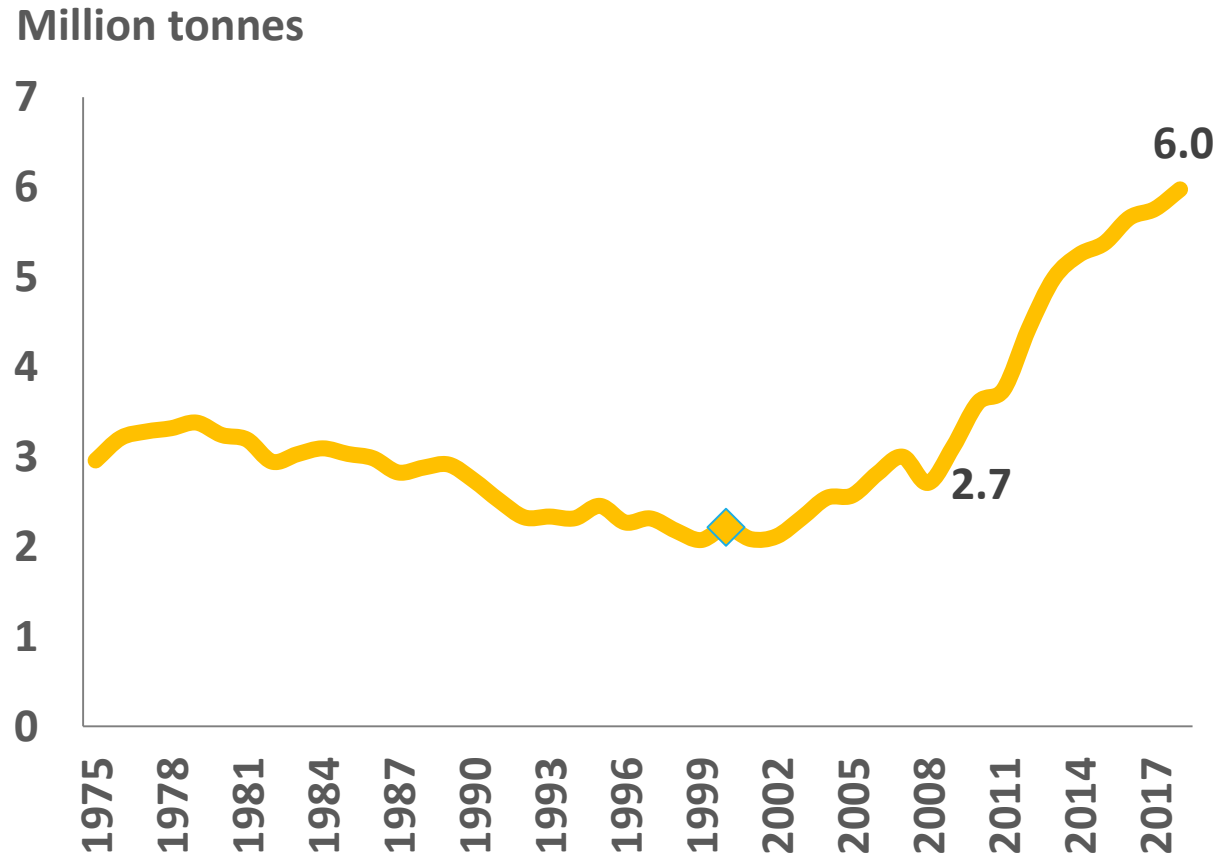


Polyester Fibre Leading Producers in 2018

million tonnes



Cellulosic Fibre Production

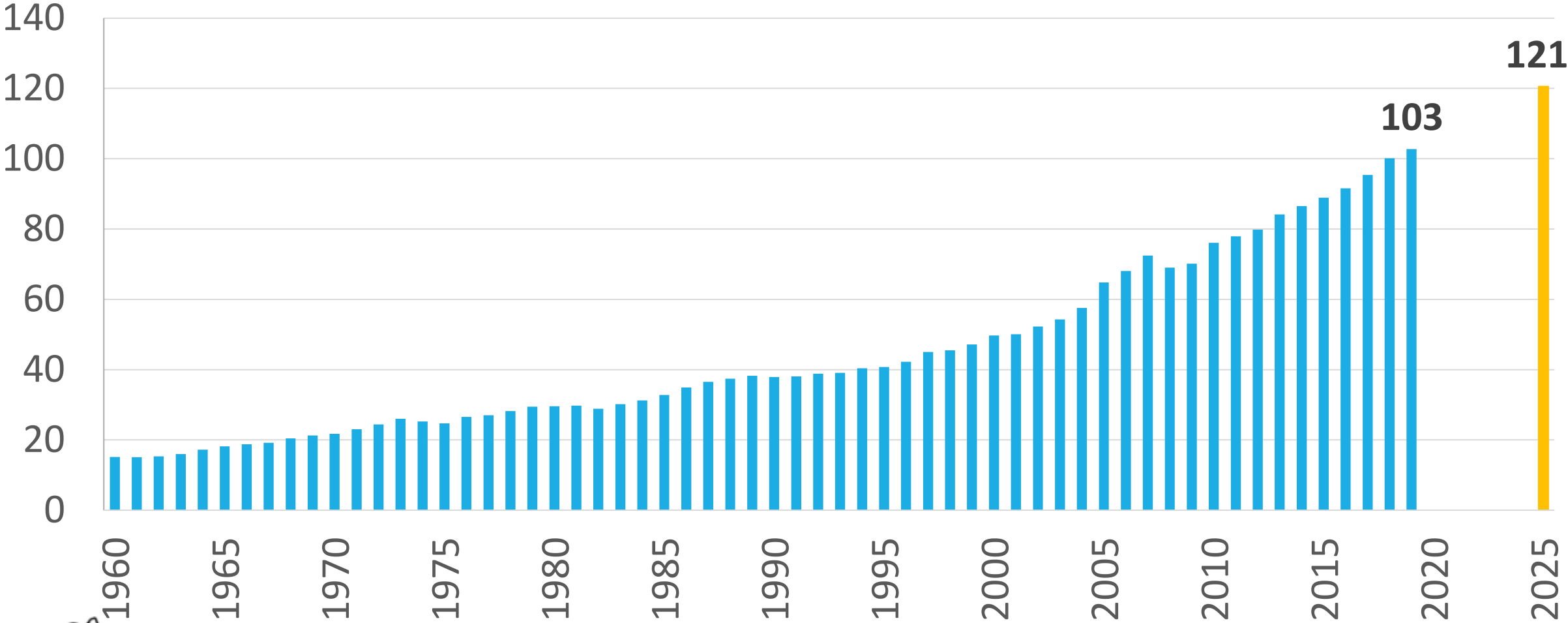


China also accounts for
64% of total cellulosic fibre
production



World Fibre Demand Projected to 2025

million tonnes



Thank you



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