Global Textile Fibre Demand: Trends and Forecast

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

- Developed Countries
- Developing Countries
- CEE & former USSR

Graph showing the percentage of textile fibre consumption by region from 1969 to 2014.
World Population

- **Developing Countries**: 2019: 6.0, 1960: 1.0
- **Developed Countries**: 2019: 1.0, 1960: 0.64

- **World Population Growth (Billions)**
  - Africa: 1.31
  - Asia: 4.05
  - M.E & Europe: 0.34
  - LAC: 0.65

- **Changes from 1960 to 2019**
  - +1 BN in Africa
  - +2.6 BN in Asia

Source: www.icac.org
Policies and Trade Barriers

million tonnes

- **Production**
- **Mill-Use**

Year: 2015/16
- Production: 5.5 million tonnes
- Mill-Use: 7.5 million tonnes

Year: 2016/17
- Production: 5.5 million tonnes
- Mill-Use: 8.0 million tonnes

Year: 2017/18
- Production: 6.0 million tonnes
- Mill-Use: 8.5 million tonnes

Year: 2018/19
- Production: 6.0 million tonnes
- Mill-Use: 8.0 million tonnes

Year: 2019/20*
- Production: 5.5 million tonnes
- Mill-Use: 8.0 million tonnes

China
Trade Dispute between The United States and China

Macroeconomic Conditions

Cotton Demand

Cotton Prices
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 vs. Months
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.
World Cotton Mill Use – Forecasts

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<thead>
<tr>
<th></th>
<th>2018/19</th>
<th>2019/20</th>
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<tbody>
<tr>
<td>08/2018</td>
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<td>12/2019</td>
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Synthetic Fibres Continue to Grow

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

- China: 39.3 million tonnes
- India: 5.2 million tonnes
- S. Korea: 1.8 million tonnes
- USA: 1.5 million tonnes
- Indonesia: 1.4 million tonnes
Cellulosic Fibre Production

China also accounts for 64% of total cellulosic fibre production.
World Fibre Demand Projected to 2025

million tonnes

www.icac.org
Thank you