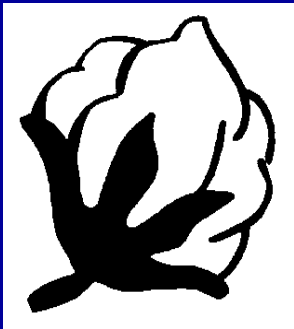
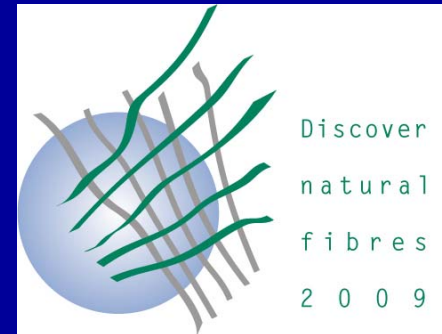


World Textile Demand



**Alejandro Plastina, ICAC
Research Associate Program
April 8, 2009**



Overview

- Facts
- ICAC Textile Demand Model
- Forecasts

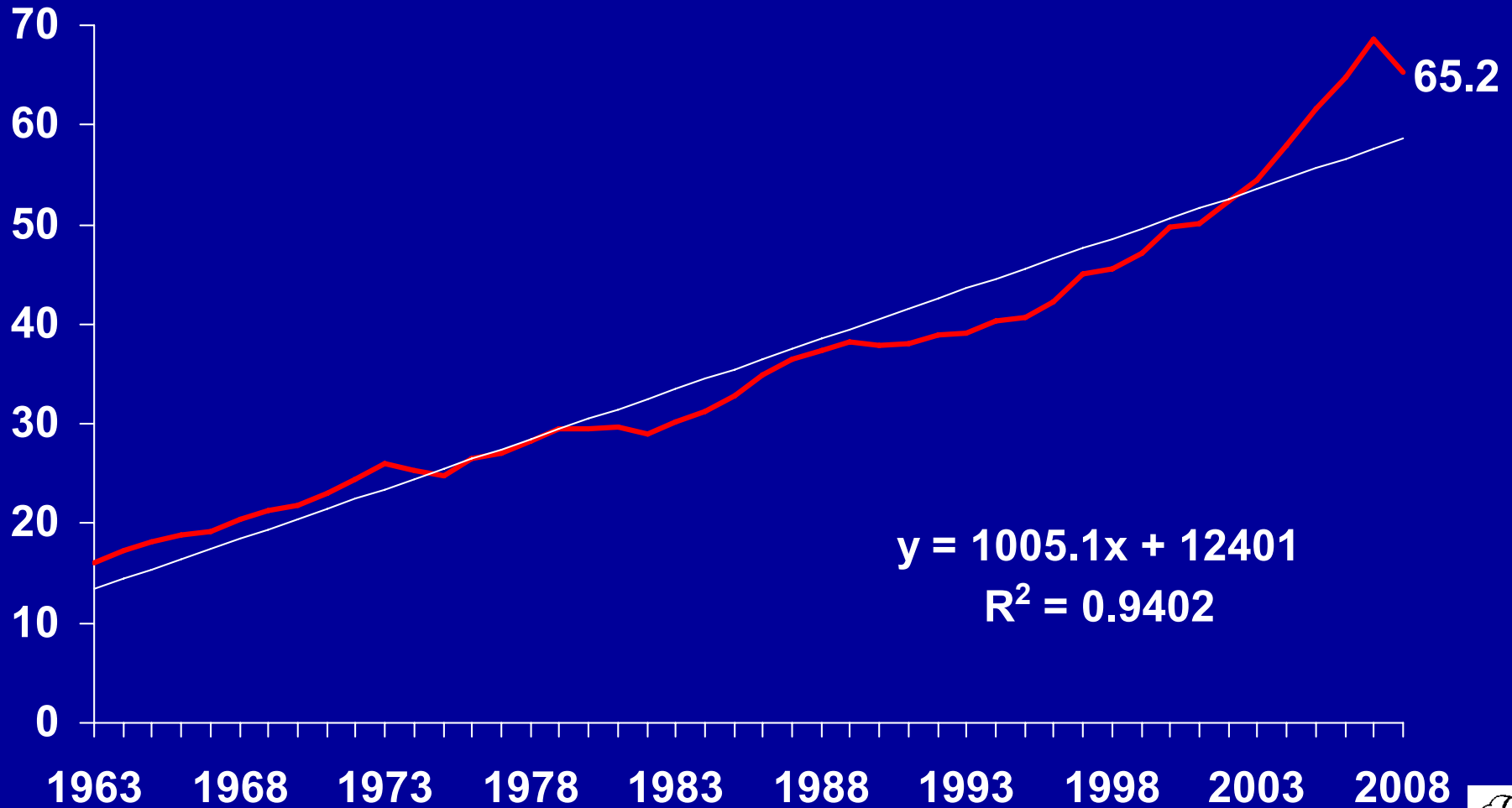


World Textile Demand Facts



World End-Use Textile Fiber Consumption

Million tons



End-Use Textile Fiber Consumption by Region

Million tons

80

60

40

20

0

- Lat.Am.&Carib.
- Mid. East & Dev'ping Europe
- Dev'ping Asia
- Africa
- Industrial Countries
- CEE&Ex-USSR

1968

1978

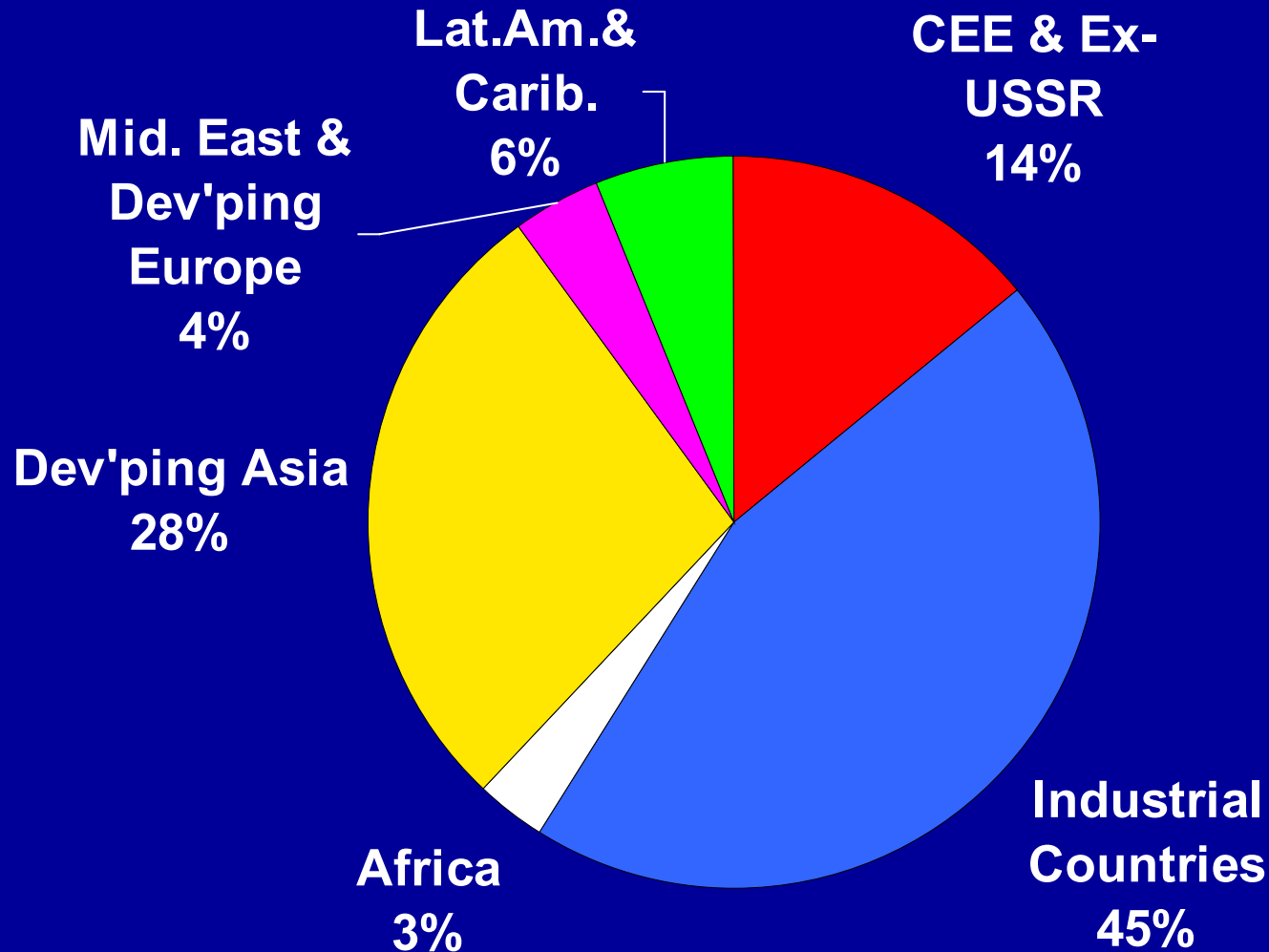
1988

1998

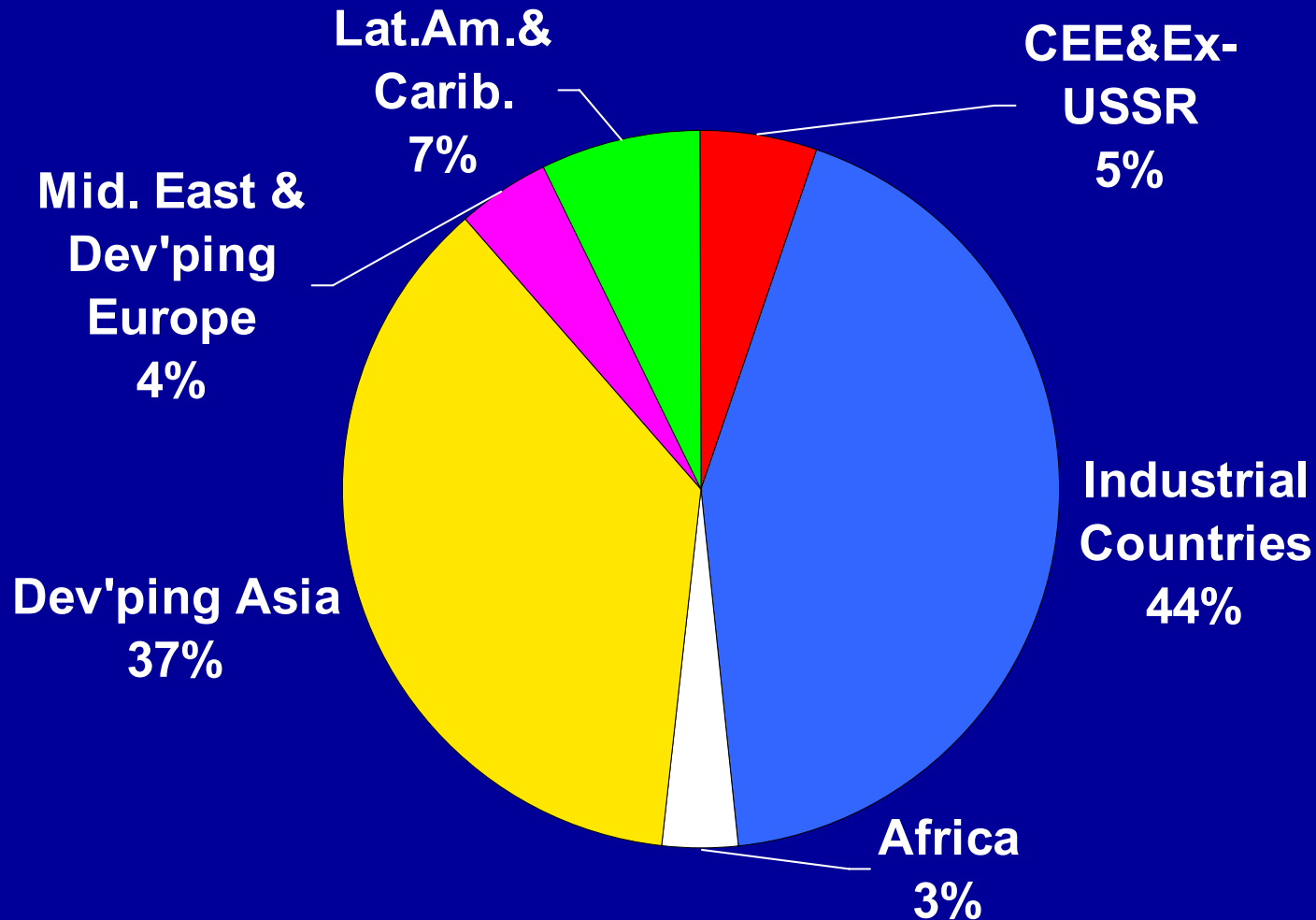
2008



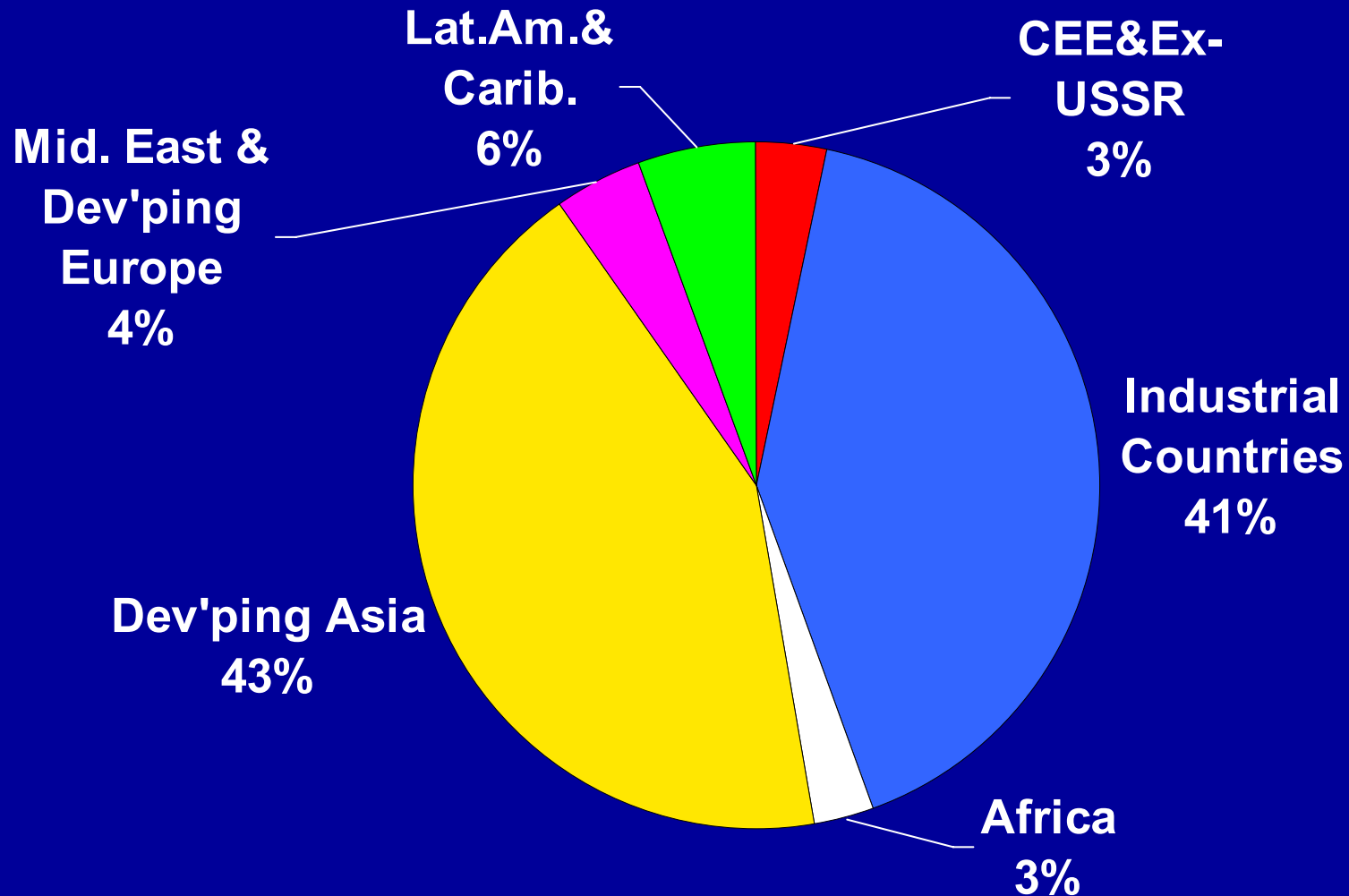
End-Use Textile Fiber Consumption by Region - 1990



End-Use Textile Fiber Consumption by Region - 2000

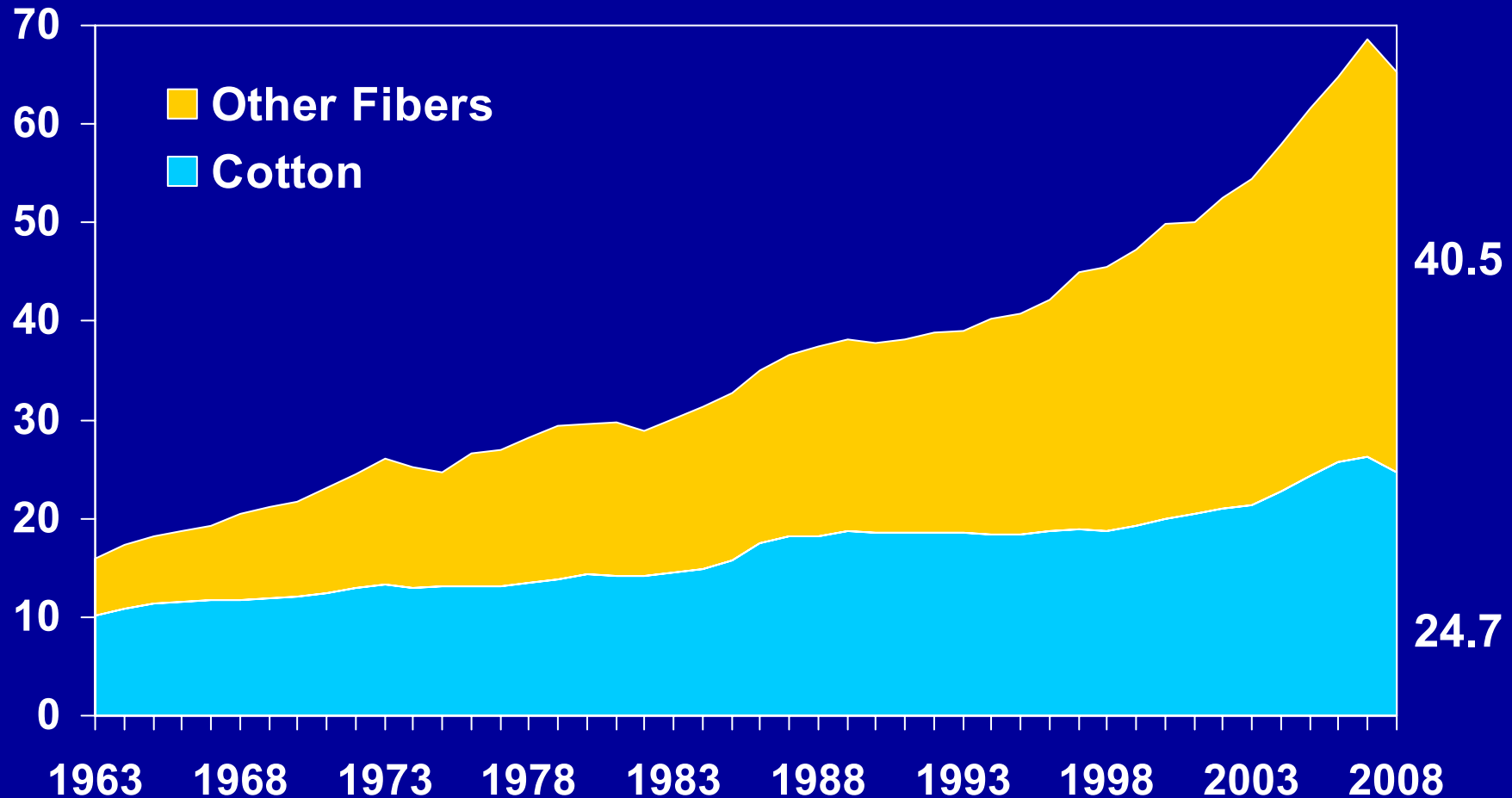


End-Use Textile Fiber Consumption by Region - 2008



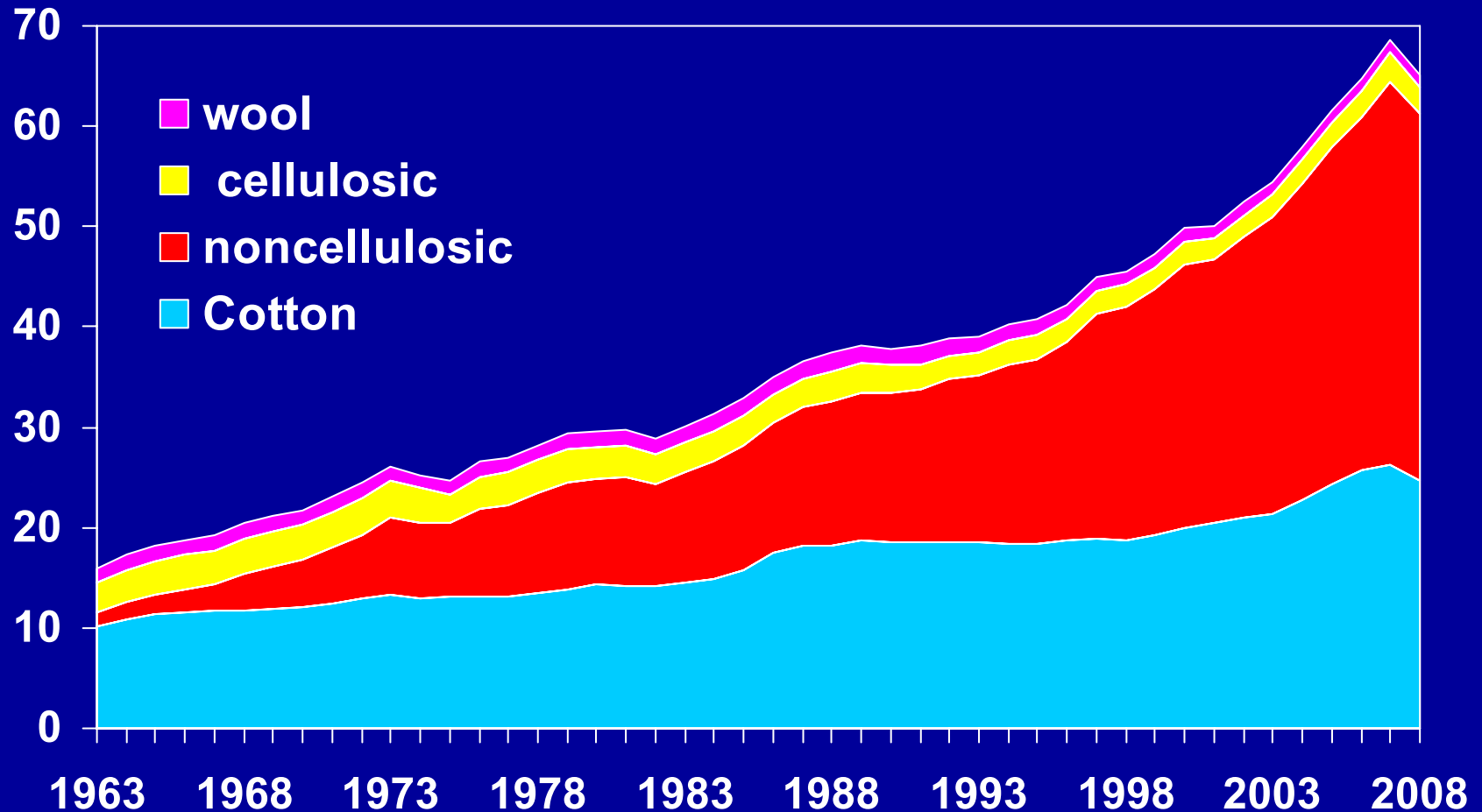
World End-Use Textile Fiber Consumption by Fibers

Million tons



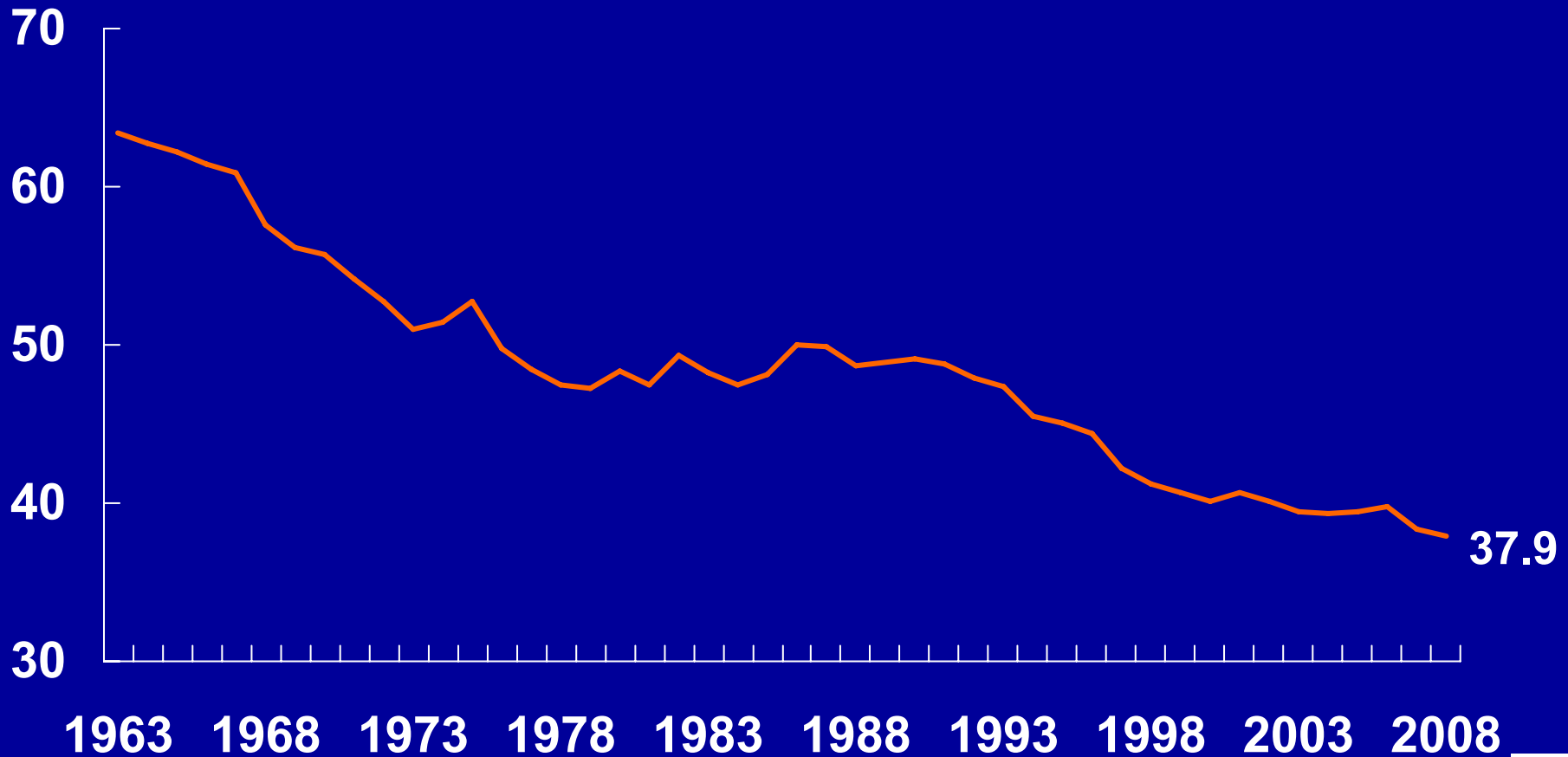
World End-Use Textile Fiber Consumption by Fibers

Million tons



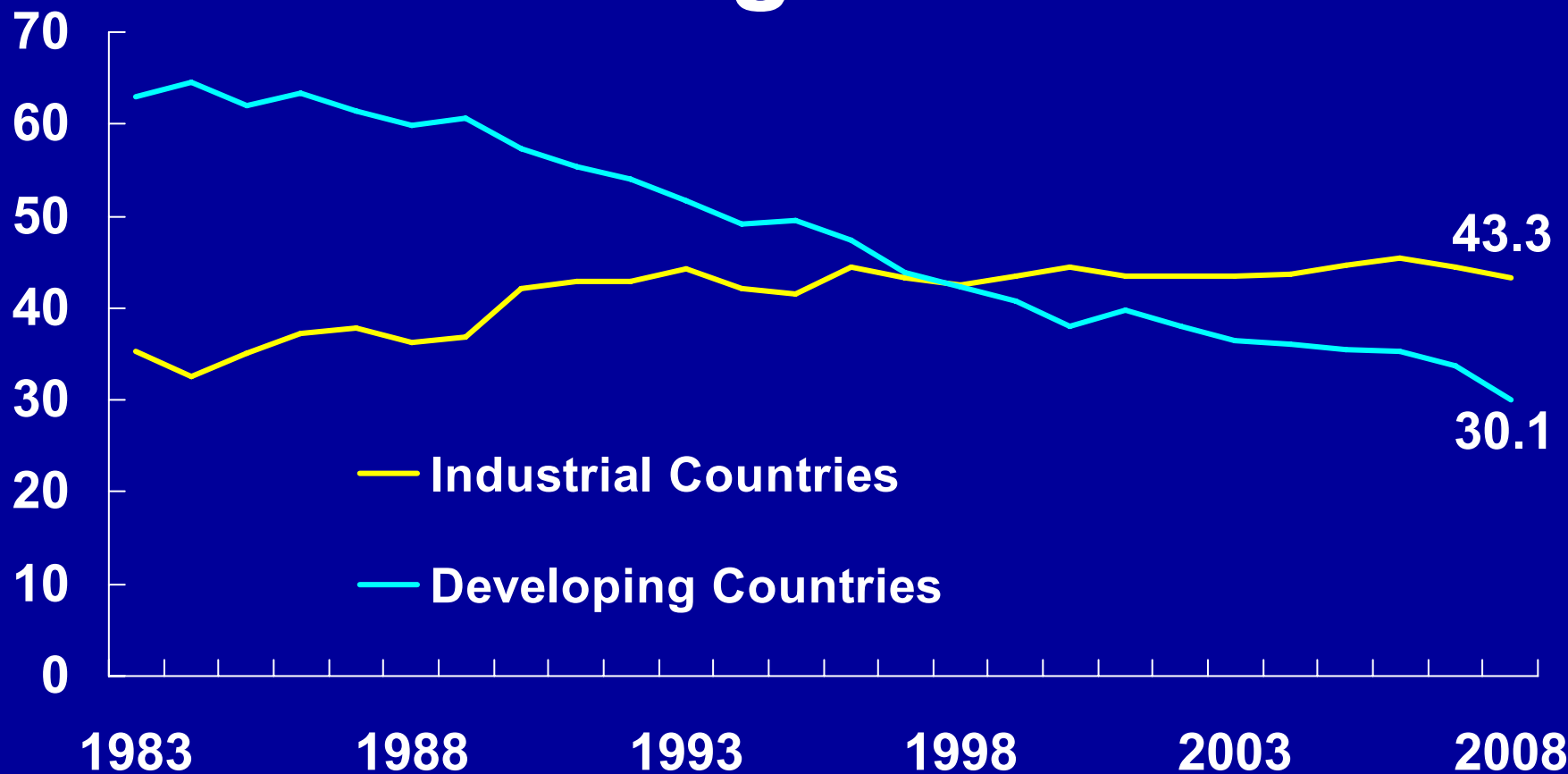
Cotton's Share of World End-Use Textile Fiber Consumption

Percent



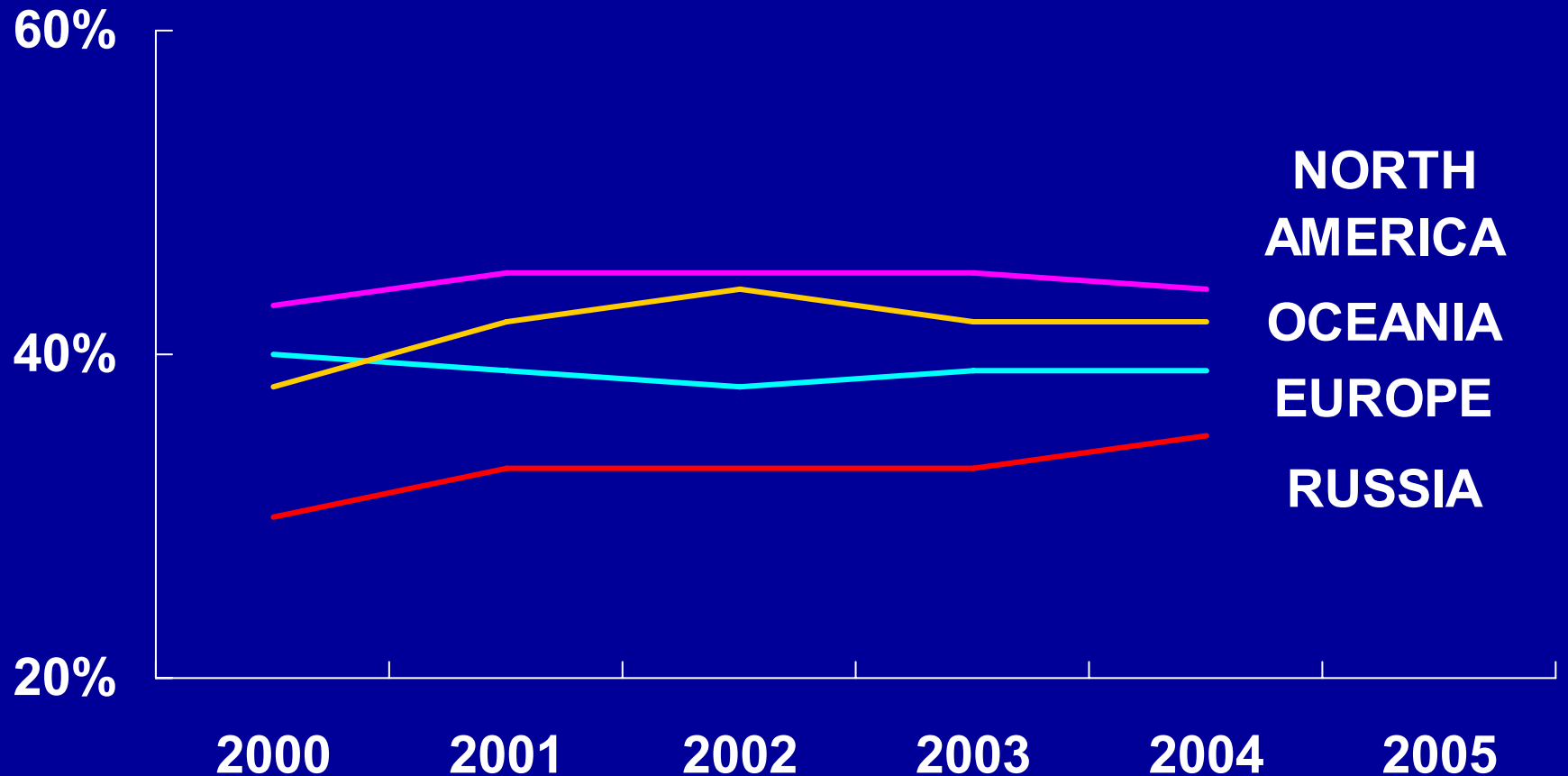
Cotton's Share of End-Use Textile Fiber Consumption by Regions

Percent



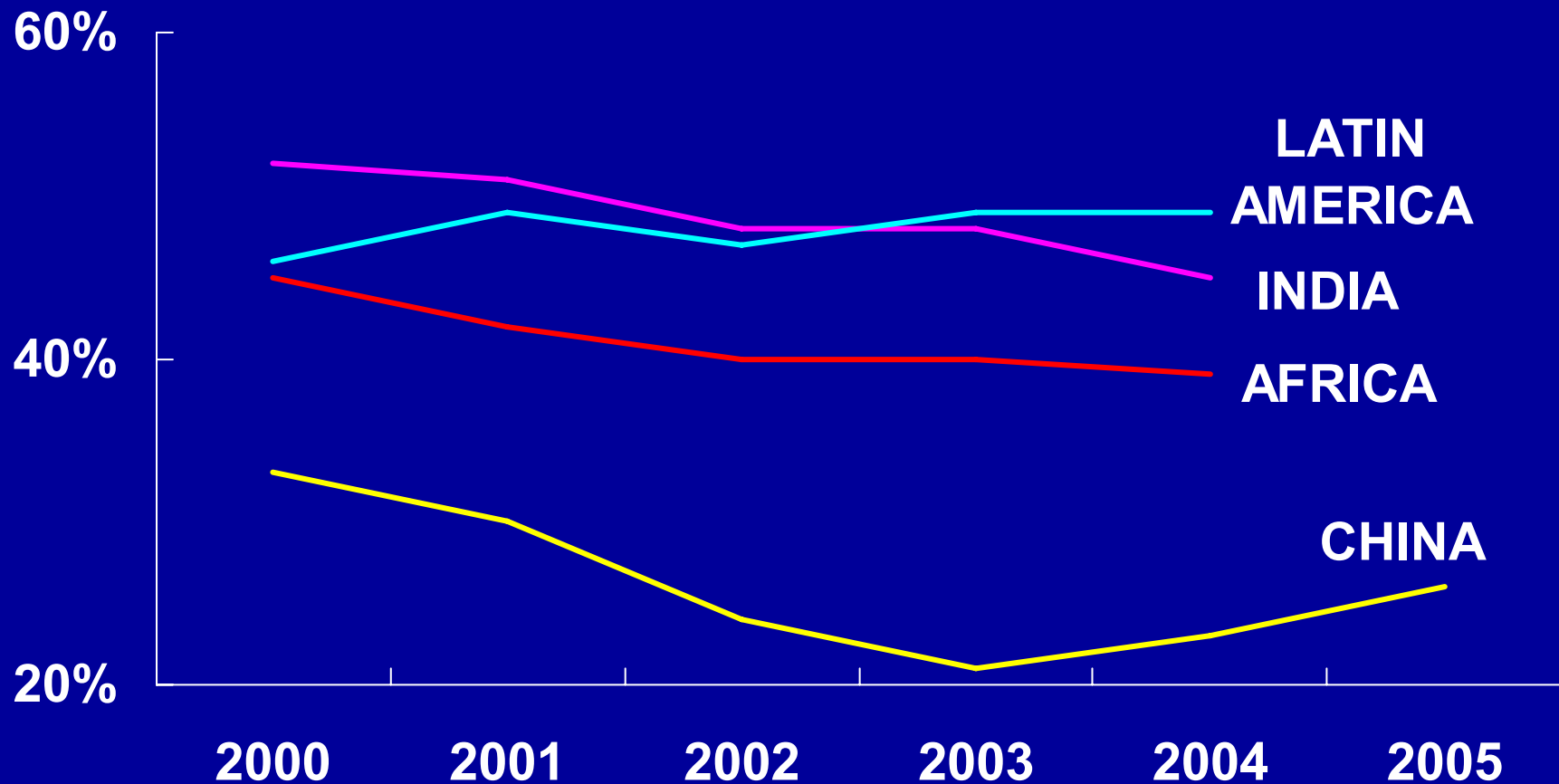
Cotton's Share in Selected Regions

Percent



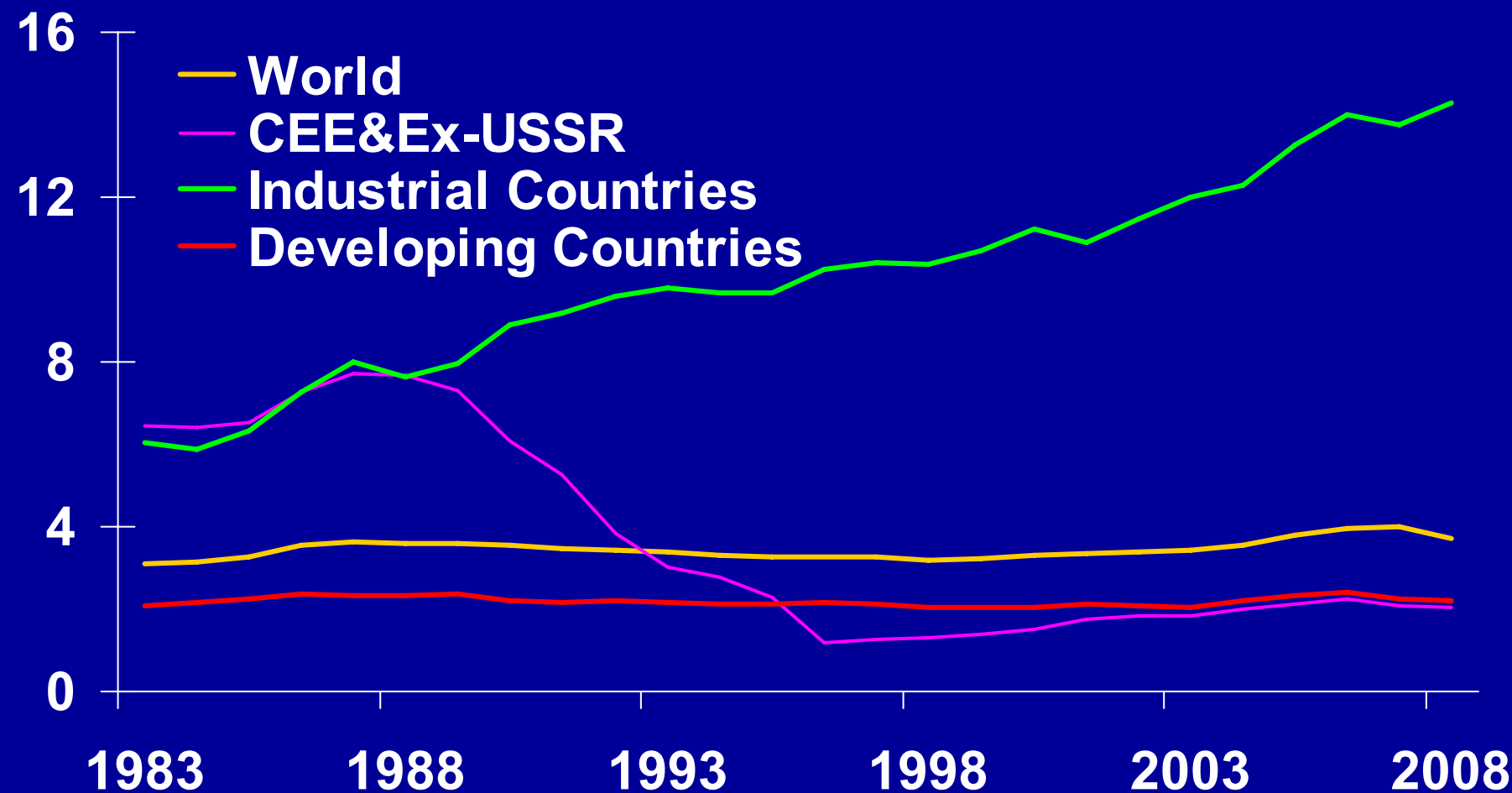
Cotton's Share in End-Use Textile Fiber - Selected Regions

Percent



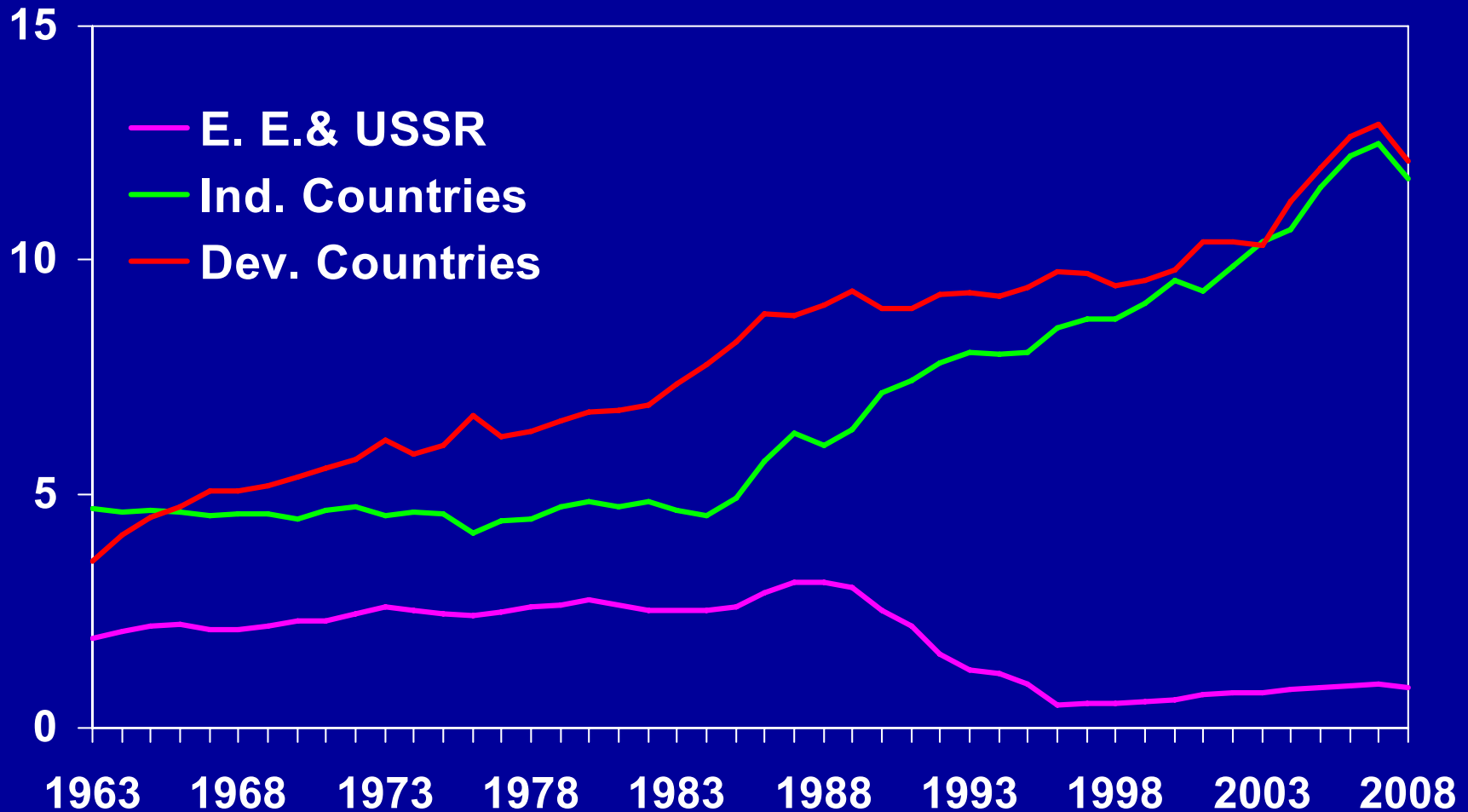
End-Use Cotton Consumption per Capita

Kilograms per capita



World End-Use Cotton Consumption by Region

Million tons



Summary of Facts

- **World End-Use Textile Fiber Consumption:**
 - Increasing LT trend
 - Role of Developing Asia
- **World End-Use Cotton Consumption:**
 - Increasing LT trend
 - Role of Industrial Countries
- **Cotton's Share in Textile Consumption:**
 - Declining LT trend
 - Increased textile consumption in China (M)



ICAC Textile Model



World Textile Demand

Total, Cotton and Other Fibers (TCO)

Industrial Countries

TCO

Developing Countries

TCO

CEE &
Ex-
USSR
C'tries

TCO

Western
Europe

TCO

North
America

TCO

Asia/
Oceania

TCO

Africa

Total
Only

Asia

Total
Only

Latin
America
& Carib.

Total
Only

Middle
East &
Europe

Total
Only



ICAC Textile Model

Textile Fiber Demand as a function of:

- GDP
- Population
- Prices of cotton and other fibers
- Inflation



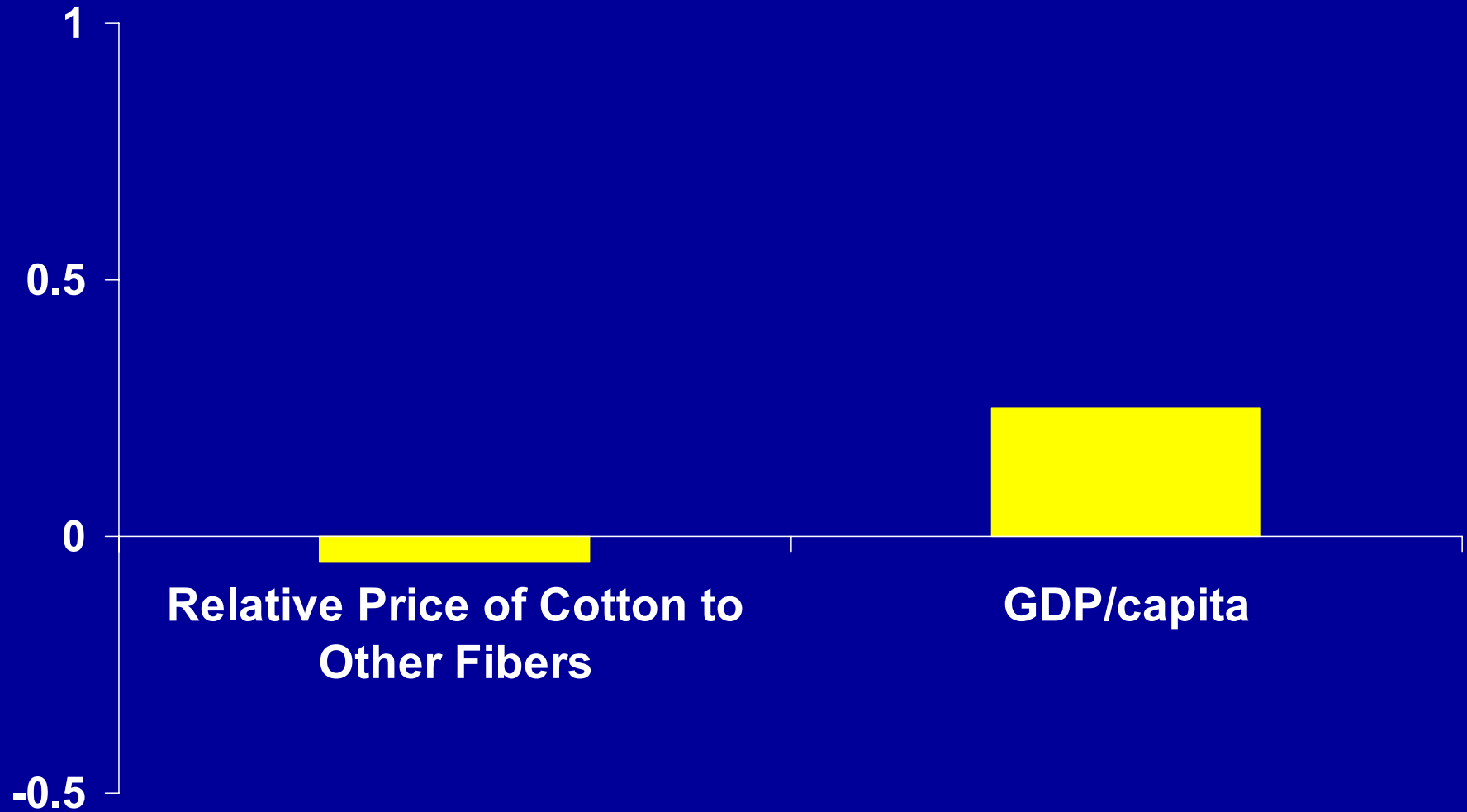
ICAC Textile Model

Variable	Total Textile Fiber Consumption	Cotton Consumption	Other Fiber Consumption
Real GDP/capita Index	+	+	+
Population	+	+	+
Real Price of Textile Fibers Index	-		
Relative Price of Cotton to Other Fibers		-	Almost null



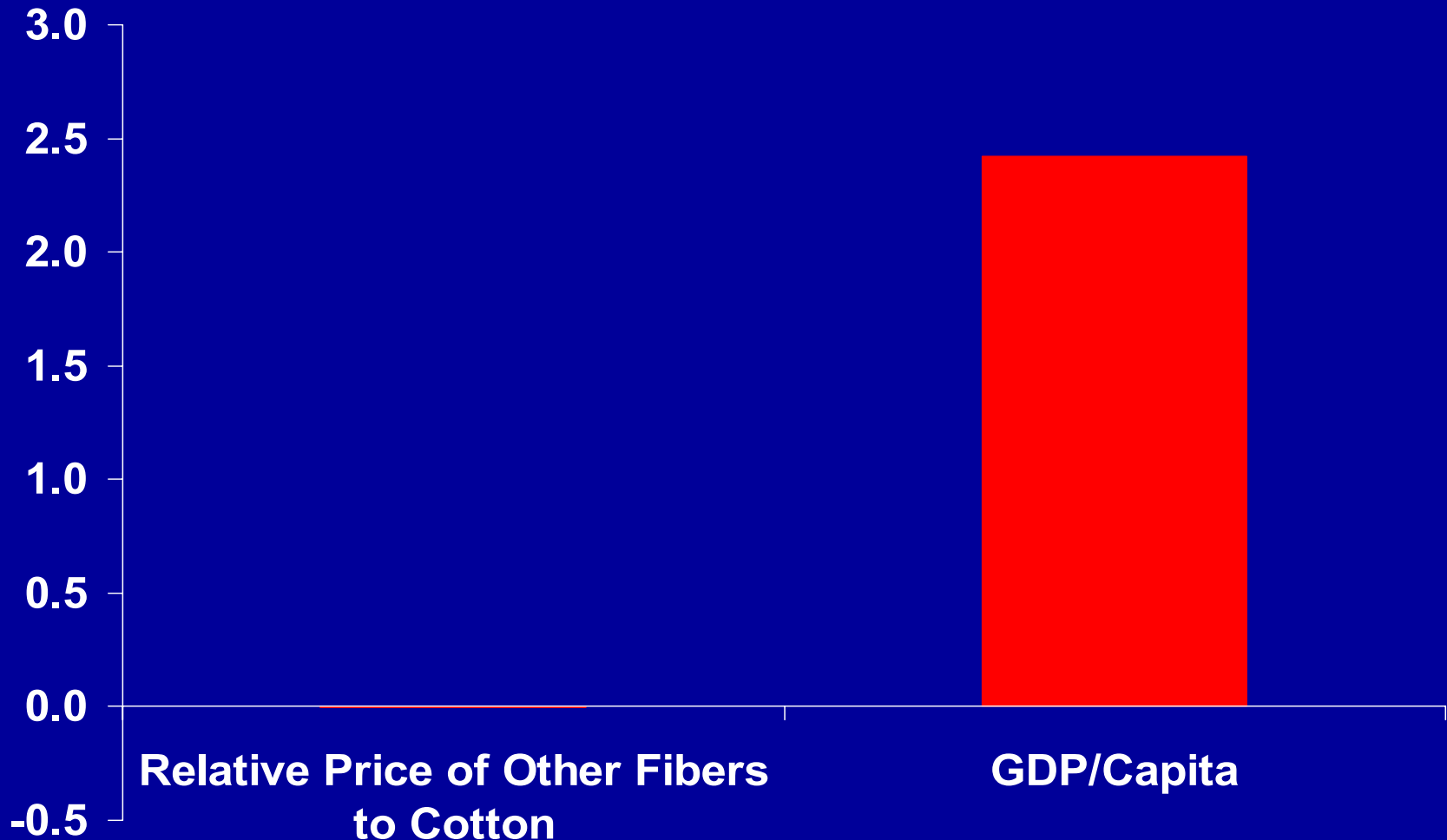
Sensitivity of World Cotton End-Use Consumption to Income and Prices

Percentage



Sensitivity of World Consumption of Other Fibers to Income and Prices

Percentage



ICAC Textile Model: Result 1

- **↑ GDP/capita:**

↑ Cotton Use < ↑ Use of Other fibers

↓ Market Share of Cotton



ICAC Textile Model: Result 2

- **↓ Relative Price of Cotton to Other Fibers:**

↑ Cotton Use and ↓ Use of Other fibers

↑ Market Share of Cotton

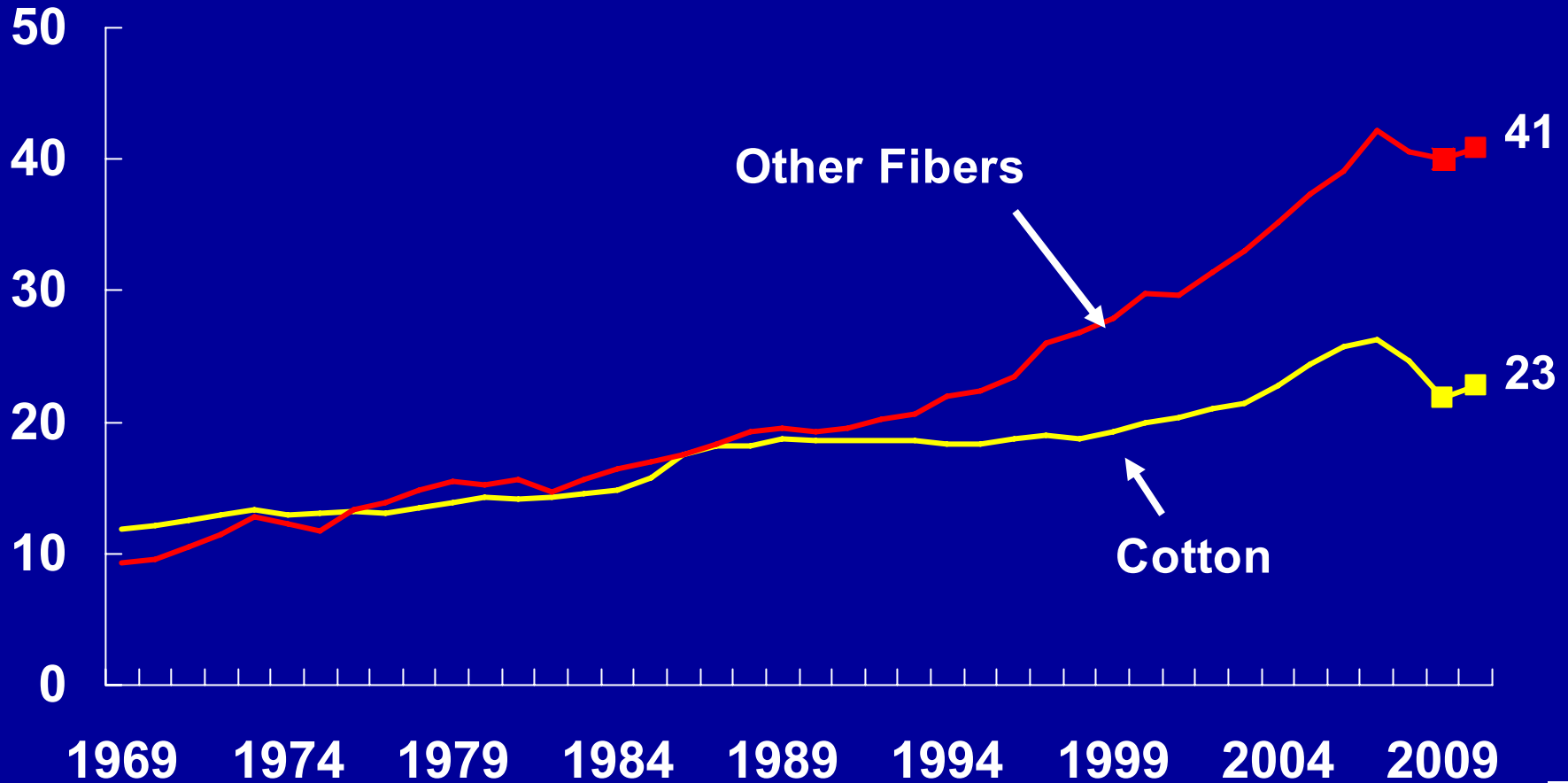


Forecasts



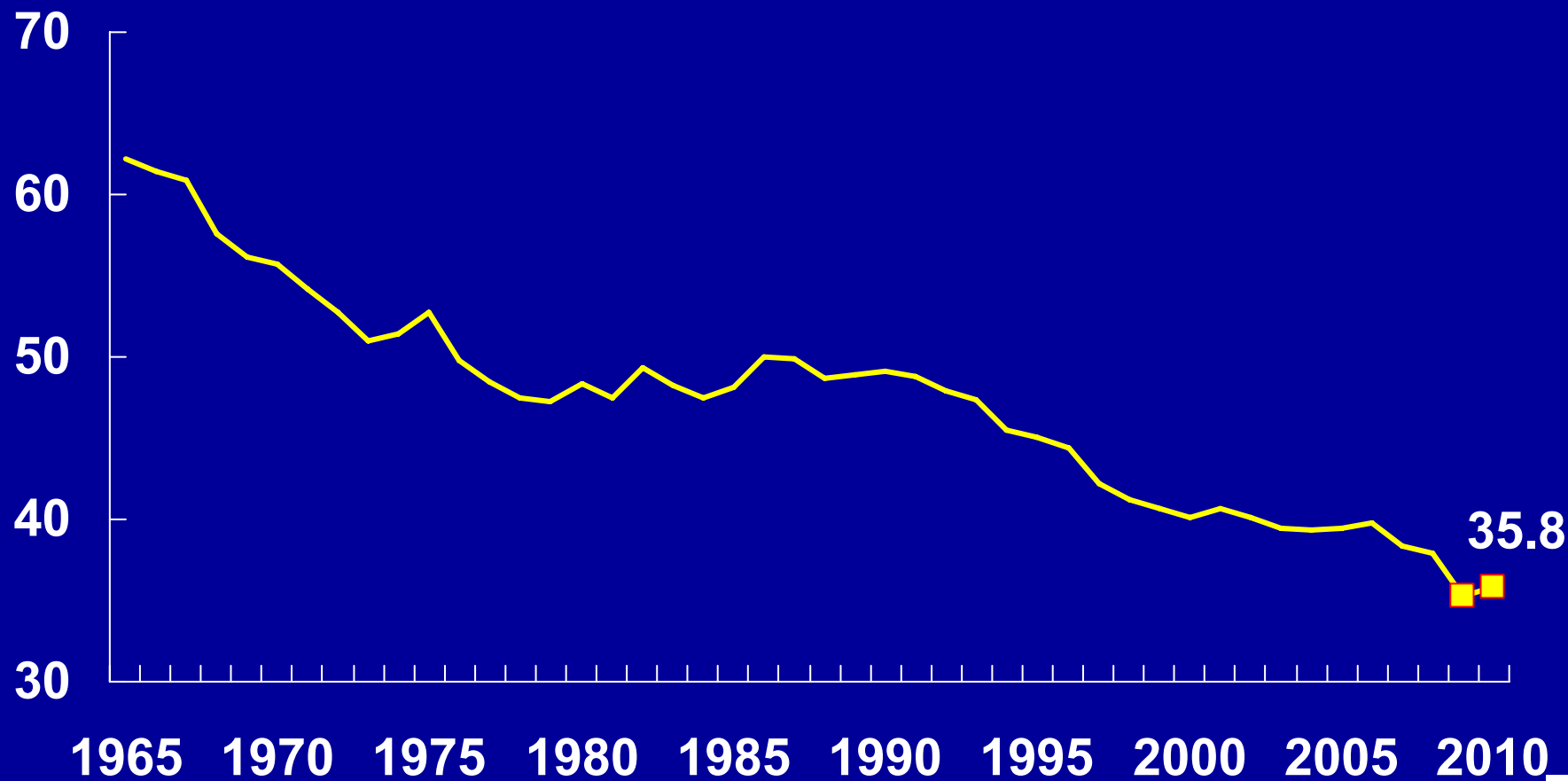
World End-Use Textile Fiber Consumption

Million Tons



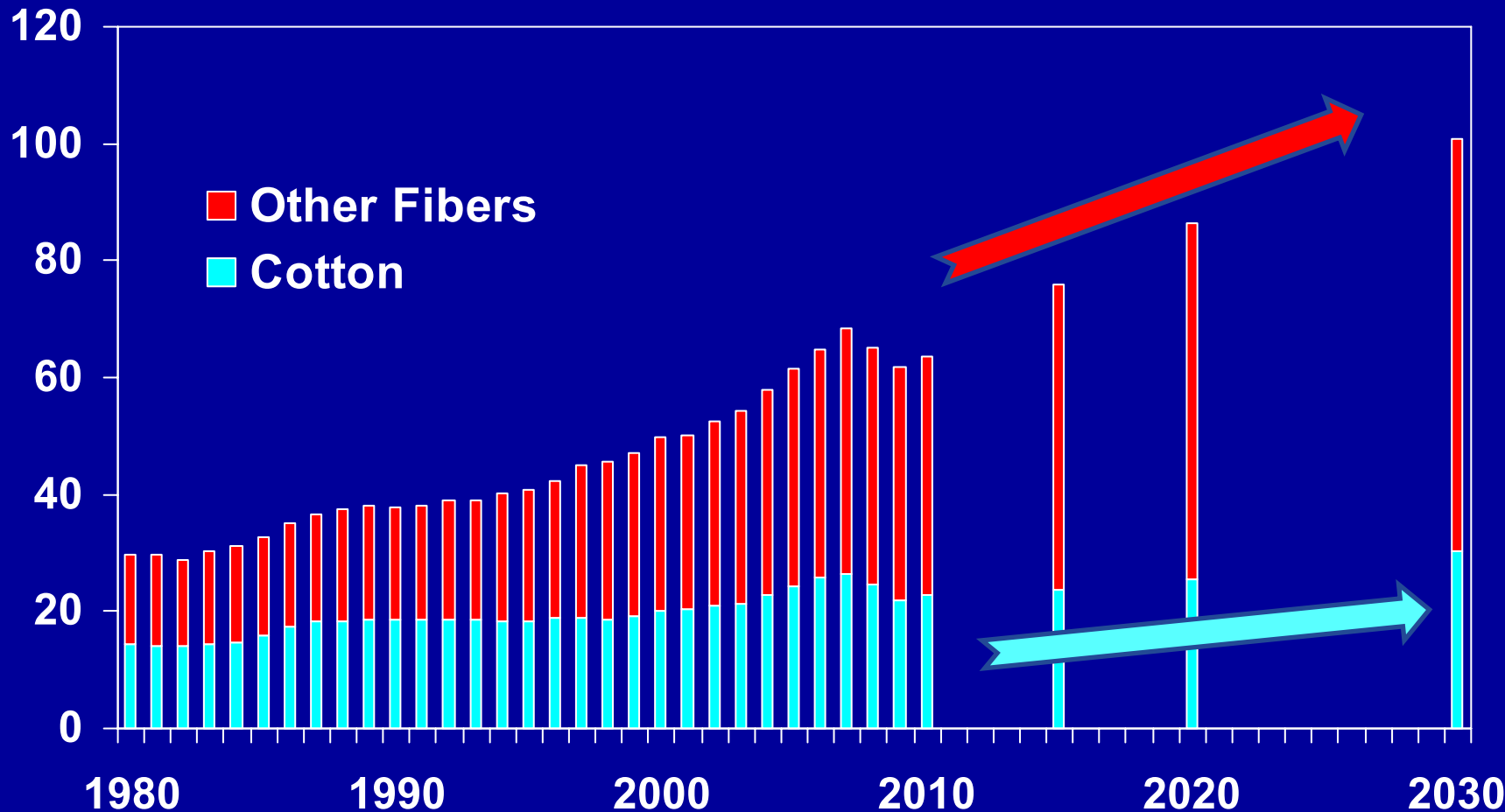
Cotton's Share of World End-Use Textile Fiber Consumption

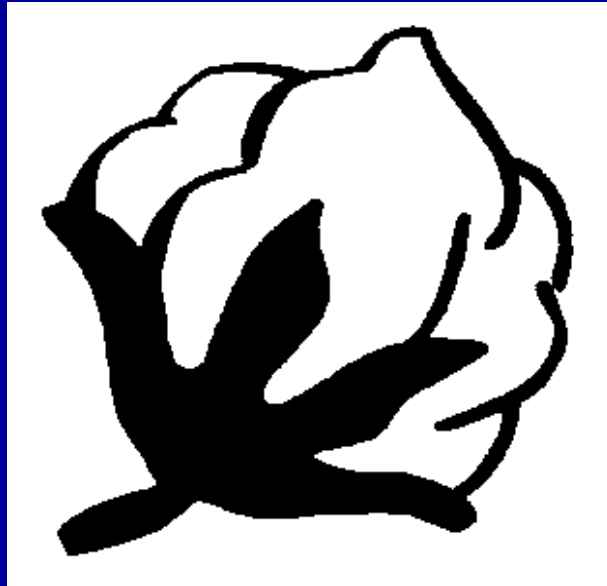
Percent



World End-Use Textile Fiber Consumption by Fibers

Million tons





International Cotton Advisory Committee