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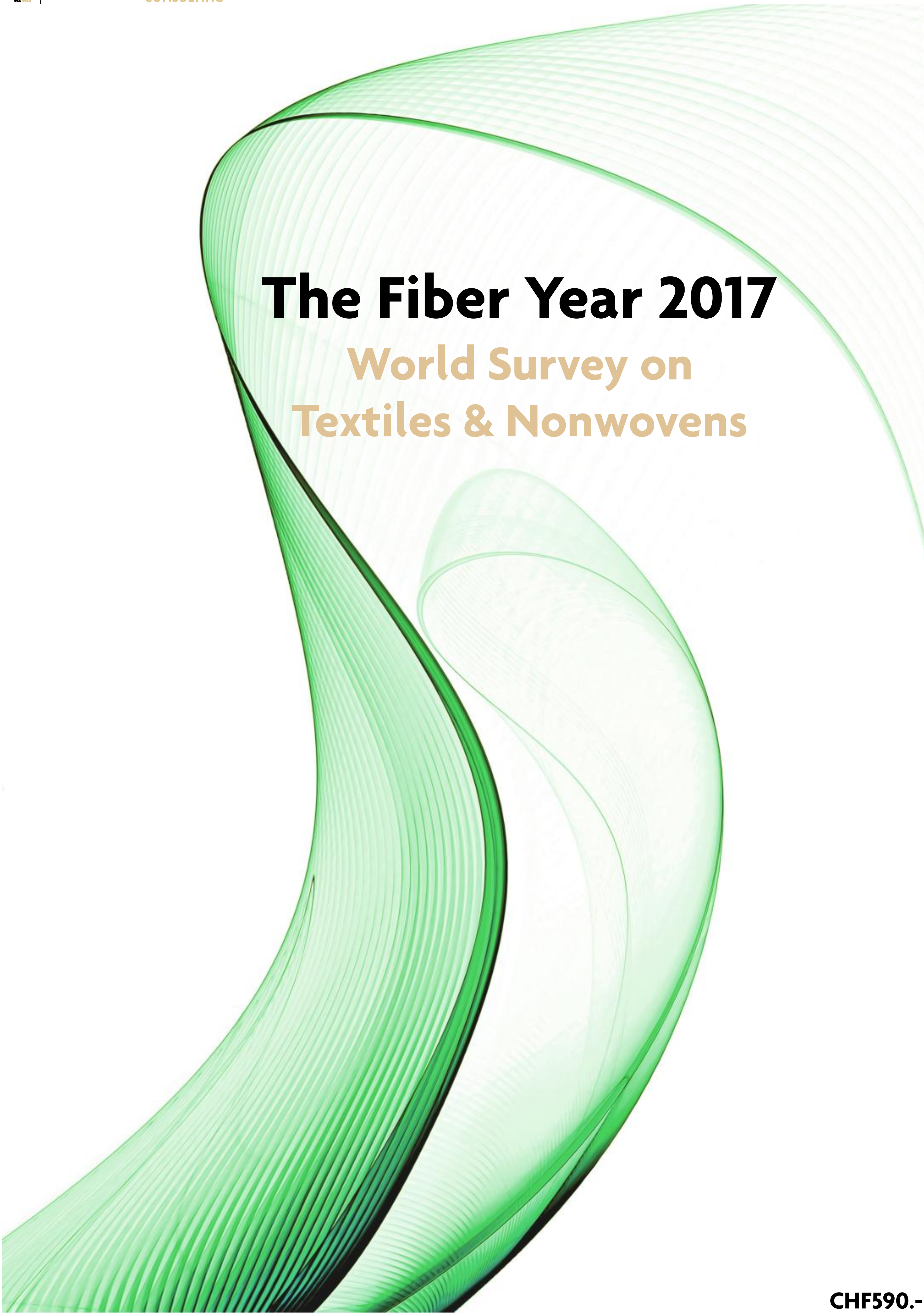
The Fiber Year 2017

World Survey on Textiles & Nonwovens



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Executive Summary

World Fiber Production and Use

The year 2016 will always be remembered from textile perspective as historic milestone. The world market size has surpassed the incredible volume of 100 million tonnes.

Fiber production on global stage has grown 3% to 100 million tonnes due to 8% rebound in cotton production after disastrous contraction in the 2015/16 season.

The world market has even arrived at 101 million tonnes when taking into account the cotton consumption which was fairly unchanged to the preceding year. However, the new all-time high was result of a further deceleration in demand at retail stage. Final end-use slowed in the fourth consecutive year to a little over 1%.

Manmade fibers now occupy 70% of the global market. While the synthetic fibers have suffered from their slowest growth in eight years at below 2% cellulosic fibers have expanded at a rate above 3%.

Nonwovens

The revision of world nonwovens production was aftereffect of minor upratings in the Americas and Europe. An additional volume of around two millions was added to the market due to the revision of the Chinese nonwovens industry after the use of official data from China Nonwovens & Industrial Textiles Association. World nonwovens output has gained 7% to 13 million tonnes.

Trading Activities

The joint textile and apparel exports of the twenty countries and regions in this report diminished almost 4% to USD548 billion.

Bangladesh, up 2%, and Vietnam lifting deliveries 6% were the only countries within the group of top ten exporters to produce growth. The most spectacular surge of 30%, however, has been noticed for Myanmar, expanding its exports in the seventh year in a row to a new all-time high.

Fiber and Yarn Production Profile

Staple fibers subdivided into cotton, other natural and manmade fibers as well as yarn production from 2005 is shown on national basis. A further breakdown into cotton yarn output has been made in cooperation with ICAC, the association of governments of cotton producing, consuming and trading countries.

Staple Fibers

The staple fiber market was up 1% following modest increases of synthetics and a 4% gain of cellulosics. Natural fibers, still occupying 55% of the market, stagnated once again. Hence, their dominant position is at risk when considering the long-term performance with a 80% share in the year 1970.

The development in the three largest producing nations with a joint share exceeding 60% was completely different in the previous year. PR China experienced a growth in manmade fibers only. The Indian output advanced due to increases in all segments while the U.S. production surged as result of a rebound in cotton only.

Yarns

The world filament production modestly grew 2% and has experienced the slowest growth in polyester since 2008 while polyamide surged at almost double-digit rate. Industrial yarn succeeded in the third straight year to grow faster than textile filament.

Spun yarn production stagnated with cotton yarn output expanding slightly faster, especially in Bangladesh, Indonesia, Mexico and Vietnam.

The first-time comparison of filament and cotton yarn output for a period from 2005 reveals quite different developments and strategies on national basis. Turkey has a stable share of two thirds in favor of cotton yarn, while the ratio of cotton yarn in Mexico has steadily grown to three quarters and the Korean industry has been relying on 80% filament yarn while this ratio even rose to 90% for filaments in Malaysia.

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