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.
# Table of contents

1. **Foreword and Summary** .................................................................................................................. 8  
   1.1 Foreword ........................................................................................................................................... 8  
   1.2 Executive Summary ......................................................................................................................... 11  
   1.3 List of Sources ................................................................................................................................. 12  
   1.4 Contributions from Industry Experts .............................................................................................. 13  

2. **World Fiber Market** ....................................................................................................................... 14  
   2.1 Revisions for 2015 ............................................................................................................................ 14  
   2.2 World Fiber Market 2016 ................................................................................................................. 15  
   2.3 Staple Fibers ..................................................................................................................................... 16  
   2.4 Filament and Spun Yarns .................................................................................................................. 18  
   2.5 Nonwovens ...................................................................................................................................... 20  
   2.6 Manmade Fibers .............................................................................................................................. 21  
   2.7 Textile and Apparel Trade .............................................................................................................. 22  

3. **Upstream Feedstock Industry** ....................................................................................................... 23  
   3.1 Cotton Cultivation ............................................................................................................................ 23  
   3.2 Sheep Farming ................................................................................................................................. 32  
   3.3 Dissolving Pulp 2005 - 2020 ........................................................................................................... 35  
   3.4 Petrochemicals ............................................................................................................................... 38  
   3.4.1 Paraxylene (PX) 2005 - 2020 ........................................................................................................ 39  
   3.4.2 Purified Terephthalic Acid (PTA) 2005 - 2020 .......................................................................... 41  
   3.4.3 Dimethyl Terephthalate (DMT) 2005 - 2020 ............................................................................ 43  
   3.4.4 Mono Ethylene Glycol (MEG) 2005 - 2020 ............................................................................. 44  
   3.4.5 Caprolactam (CPL) 2005 - 2020 ............................................................................................... 46
4. Staple Fibers ........................................................................................................ 47
  4.1 Natural Fibers .................................................................................................. 49
    4.1.1 Cotton ....................................................................................................... 50
    4.1.2 Wool ........................................................................................................ 54
    4.1.3 Other Fibers .............................................................................................. 56
  4.2 Cellulosic Fibers ............................................................................................. 57
    4.2.1 Viscose Staple Fibers ................................................................................. 57
    4.2.2 Acetate Tow ............................................................................................. 60
  4.3 Synthetic Staple Fibers .................................................................................... 63
    4.3.1 Polyester Staple Fibers ............................................................................ 64
    4.3.2 Acrylic Staple Fibers .............................................................................. 66
    4.3.3 Polypropylene Staple Fibers ................................................................... 67
    4.3.4 Polyamide Staple Fibers ......................................................................... 68

5. Yarns .................................................................................................................. 69
  5.1 Filament Yarn .................................................................................................. 71
    5.1.1 Polyester Filament ................................................................................... 73
    5.1.2 Polyamide Filament ................................................................................ 78
    5.1.3 Polypropylene Filament ......................................................................... 82
    5.1.4 Cellulosic Filament ................................................................................ 83
  5.2 Spun and Cotton Yarn .................................................................................... 84

6. Other Manmade Fibers .................................................................................... 86
  6.1 Carbon Fibers ................................................................................................ 86
  6.2 Aramid Fibers ................................................................................................ 89
  6.3 Spandex Fibers ................................................................................................ 90
7. Nonwovens and Unspun Applications
   7.1 Polymer-based
   7.2 Carded
   7.3 Airlaid
   7.4 Wetlaid

8. Major Countries and Regions in Textiles and Clothing Business
   8.1 Bangladesh
   8.2 Brazil
   8.3 Cambodia
   8.4 PR China
   8.5 European Union EU(28)
   8.6 India
   8.7 Indonesia
   8.8 Japan
   8.9 Korea
   8.10 Malaysia
   8.11 Mexico
   8.12 Myanmar
   8.13 Pakistan
   8.14 Russia
   8.15 Sri Lanka
   8.16 Taiwan
   8.17 Thailand
   8.18 Turkey
   8.19 United States
   8.20 Vietnam
## 9. Statistical Appendix

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.1</td>
<td>World Fiber Market I.</td>
<td>179</td>
</tr>
<tr>
<td>9.2</td>
<td>World Fiber Market II.</td>
<td>180</td>
</tr>
<tr>
<td>9.3</td>
<td>World Fiber Use</td>
<td>181</td>
</tr>
<tr>
<td>9.4</td>
<td>Natural Fibers Consumption</td>
<td>182</td>
</tr>
<tr>
<td>9.5</td>
<td>Cotton Production and Use</td>
<td>183</td>
</tr>
<tr>
<td>9.6</td>
<td>Staple Fibers Consumption</td>
<td>184</td>
</tr>
<tr>
<td>9.7</td>
<td>Production of Manmade Fibers</td>
<td>185</td>
</tr>
<tr>
<td>9.8</td>
<td>Production of Synthetic Fibers</td>
<td>186</td>
</tr>
<tr>
<td>9.9</td>
<td>Production of Cellulosic Fibers</td>
<td>187</td>
</tr>
<tr>
<td>9.10</td>
<td>Major Fiber Types' Market Share</td>
<td>188</td>
</tr>
<tr>
<td>9.11</td>
<td>Staple Fiber Competition</td>
<td>189</td>
</tr>
<tr>
<td>9.12</td>
<td>Main Staple Fiber Production</td>
<td>190</td>
</tr>
<tr>
<td>9.13</td>
<td>Production of Manmade Fibers by Major Country</td>
<td>191</td>
</tr>
<tr>
<td>9.14</td>
<td>Production of Manmade Fibers by Material</td>
<td>192</td>
</tr>
<tr>
<td>9.15</td>
<td>Top 3 Producing Countries in Main Manmade Fibers</td>
<td>193</td>
</tr>
<tr>
<td>9.16</td>
<td>Polyester Fiber Industry 2015/16</td>
<td>194</td>
</tr>
<tr>
<td>9.17</td>
<td>Polyamide Filament Industry 2015/16</td>
<td>195</td>
</tr>
<tr>
<td>9.18</td>
<td>Manmade Staple Fiber Industry 2015/16</td>
<td>196</td>
</tr>
<tr>
<td>9.19</td>
<td>Global Yarn Production</td>
<td>197</td>
</tr>
<tr>
<td>9.20</td>
<td>Dynamics in Yarn Production</td>
<td>197</td>
</tr>
<tr>
<td>9.21</td>
<td>History of Yarn Production</td>
<td>198</td>
</tr>
<tr>
<td>9.22</td>
<td>Filament Yarn Production by End-Use</td>
<td>199</td>
</tr>
<tr>
<td>9.23</td>
<td>Major Textile &amp; Clothing Trading Countries - Americas</td>
<td>200</td>
</tr>
<tr>
<td>9.24</td>
<td>Major Textile &amp; Clothing Trading Countries - Europe</td>
<td>201</td>
</tr>
<tr>
<td>9.25</td>
<td>Major Textile &amp; Clothing Trading Countries - Asia &amp; ROW</td>
<td>202</td>
</tr>
<tr>
<td>9.26</td>
<td>Major Exporters in Textiles &amp; Clothing</td>
<td>203</td>
</tr>
<tr>
<td>9.27</td>
<td>Major Importers in Textiles &amp; Clothing</td>
<td>204</td>
</tr>
<tr>
<td>9.28</td>
<td>Trade Balances in Textiles &amp; Clothing</td>
<td>205</td>
</tr>
<tr>
<td>9.29</td>
<td>Tire Projects</td>
<td>206</td>
</tr>
</tbody>
</table>