

IFY 2025

WORLD SURVEY
ON
TEXTILES & NONWOVENS

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1.1 Foreword



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About The Fiber Year

The Fiber Year GmbH, founded in 2010, aims to provide international expertise, analyses, strategy consulting and customized solutions to the international textile industry after 18 years in textile machinery manufacturing business with companies such as Barmag, Saurer Management and Oerlikon as senior manager for Oerlikon Textile International Business.

Numerous presentations at international conferences and publications prove the company's understanding of textile market forces. Corresponding views appeared in print media such as annabelle, AVR, Bio-based News, Bloomberg, Chemical Fibers International, China Textile Magazine, China Textile Leader, Der Spiegel, Der Standard, eco Institut, Frankfurter Allgemeine Zeitung, Fibre2Fashion, Finanz und Wirtschaft, Forward Textile Technology, ICAC Cotton Review Report, Indian Textile Journal, International Fiber Journal, Knitting Trade Journal, Kohan Journal, Melliand, Nonwovens Industry, Neue Zürcher Zeitung (NZZ), Oerlikon Fibers and Filaments, Schweizerische Umweltstiftung, Sustainable Nonwovens, Technical Textiles, Tecoya Trend, textile network, TEXTILplus, TextilWirtschaft, U.S. Congressional Research Service, WirtschaftsWoche, Zeit Online and others.

TFY celebrates its 25th anniversary with this service that Vereinigte Glanzstoff-Fabriken AG launched early 1950s when informing about the status of the world manmade fiber industry at press conferences. On the occasion of the 1965 review Dr. Ernst Hellmut Vits, chairman of the board between 1940 and 1969, expressed that this industry will enjoy dynamic growth. A truly appropriate evaluation as manmade fibers at that time amounted to 5 million tonnes and have by now reached the twentyfold size.

All issues from 2011 have been produced thanks to support of Lenzing Group in many aspects. All market data, however, are result of the independent research by The Fiber Year GmbH. Hence, statements and conclusions do not necessarily reflect the assessment of the Lenzing Group.

Finally, I want to address sincere thanks to all companies, associations, colleagues and friends in helping and supporting me to make this textile yearbook.

Yours sincerely,



1.2 Executive Summary

The world economy seems to have stabilized and is projected in the April 2025 World Economic Outlook by IMF to remain below pre-pandemic dynamics. Climate-related hazards such as floods, droughts, heat waves, hurricanes or cyclones again impacted crop growing and manufacturing. Commodity prices mostly fell in the second straight year which does not alleviate the trouble of high food prices in developing countries where food-price inflation remained high. Raw cotton and polyester prices further eased and the average apparel import price into EU decreased by 7%. Skyrocketing freight rates until mid-2024 have also played a decisive role. The Shanghai Containerized Freight Index (SCFI) has more than tripled by mid-2024 compared with late 2023. As per year-end, SCFI was down 34% from its 2024 high and dropped another 45% until end of April 2025.

The year 2024 ended with an accelerated growth of fibers and filaments. Export dynamics of 14 major Asian industries analyzed in chapter 8 showed a strong improvement from July. While their cumulative export value in the first half inched up by 0.2%, second half-year witnessed an annual 3.3% gain.

Apparel import quantity between July and December surged into U.S. by 9.4% and into EU by even 13.5%. A downer, however, was demand from the automotive industry with global passenger car production advancing less than 1% with the contribution from both the American and European region tumbling. As consequence of slow manufacturing, 13 tire plants in the both areas were announced to be closed during 2024/25 versus 31 greenfield mills and 29 expansion projects in Asia. Carpet and home textile end-uses remained in shrinking mode as result of U.S. housing affordability crisis and increasing European saving rate.

The world fiber market comprising all natural and manmade types experienced again increased supply from PR China while the remaining world suffered from its third straight contraction. Splitting manmade fiber industry into PR China and remaining industries all together, conclusion is the very same like in previous two years: expansion in mainland China and cumulative decline outside PR China. Chinese growth rates have outperformed world manufacturing during the entire quota-free period. Businesses in India, Vietnam and basically Türkiye, despite current difficulties in polyester, succeeded to expand in the long run. In contrast, formerly large-scale industries in Europe, Japan, Korea, Mexico, Taiwan and USA sustained annual losses between 2.5% and 5.5% since 2005.

The composition of the world fiber market continued its long-term trend with cotton declining to a new low at 19% share in favor of manmade fibers, experiencing persistent improvements with synthetics climbing to 70% and cellulose reaching 7%.

The increasing concentration on just a few industries went on. The top-10 countries, including EU en bloc, were responsible for 98% of filament and 85% of staple fiber supply. The ten leading exporting nations have achieved new highs in both categories as a clear proof that the entire industry is and will continue to be reliant on international division of labor. Textile and chiefly garmenting have been like a traveling circus, moving from one place with low labor costs to another with even lower costs. This race will never come to an end. Tariff and nontariff trade barriers will not return labor-intensive manufacturing to high-income nations. Such measures will just raise uncertainty and disrupt supply chains. Retailers will seek for alternative sourcing options and consumers have to foot the bill by suffering from the consequences of higher priced textile articles.

The textile business certainly has been a growth model. A significant enlargement of the fiber market can be expected given the free evolution of trade flows with almost 1.1 billion new consumers by 2040 and reams of investments in recycling to promote sustainable products and to preserve natural resources.

1.4 Contributions from Industry Experts



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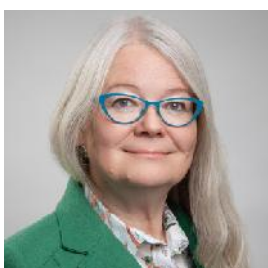
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1.5 Companies in TFY 2025

TFY 2024 bases largely on textile and related associations, a global network of experts and more than 700 company news.

1888 Mills	Atex USA
3M	Audi
Adani Petrochemicals Ltd.	AustroCel Hallein GmbH
ADNOC	Autoliv
Advanced Composites Solutions Srl (ACS)	Autoneum
Aekyung Chemical	Avgol
Aeolus Tyre	B&C Group
Agrobiogel GmbH	B.I.G. Yarns
Ahlstrom	B.I.G. Yarns
Ahlstrom-Munksjö	Badsha Group
Airbus	Baftineh
Akinal Sentetik Tekstil	Balkrishna Industries Ltd.
Akra Filament	Balrampur Chini Mills (BCML)
AKSA	Bandag Europe NV
ALBA Group Asia	Bangladesh BaoRui Textile Co.
Albany International	BASF
Alear Silk Road New Materials Co. Ltd.	BASF Markor Chemical Manufacturing (Xinjiang) Co., Ltd.
Allmed Medical Products	Bast Fibre Technologies
Alpek	BCNonwovens
Alpen Banyan Garments BD Co.	Beekaylon Synthetics Private Ltd.
Altor Equity Partners	Beijing Automotive Industry Corp. (BAIC)
Altri Group	BekaertDeslee
AMANN India	Benji Ltd.
Ambercycle	Berry Global
Ambipar Group	Best Pacific International Holdings Ltd.
American Elite Personal Protective Equipment	Bharat Petroleum Corp Ltd (BPCL)
Andhra Paper Ltd.	Biotrend Energy
Anhui Tianda	BMW
Ansell	Boeing
Aoshen Spandex	Bohai Automotive Systems Co. Ltd
Aoshen Spandex	Bohai Trimet
Aoshengde	Bondex
Apollo Tyres	Borealis
Aquafil S.p.A.	Borouge
Aramco	Boryszew Kunststofftechnik Deutschland GmbH
Arauco	Bossa
Armbrust American	Bracell
Asahi Kasei Cord Co. Ltd.	Brandix
Asahi Kasei Medical	Braskem
Asahi Kasei Spunbond (Thailand)	Brickle Group
ASAIA Holding FZ	Bridgestone Corp.
Ascend Performance Materials	Bridgestone India Private Ltd.
Asten Johnson	British American Tobacco (BAT)
Astha IT	BYD Co. Ltd.

1.5 Companies in TFY 2025

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Canopy	Deltaport Ltd.
Carbios	Denim Rise
Carbon Fibre Grand Challenge	DePoly
Carolina Nonwovens	Deshbandhu Group
Ceat Tyres	Dilek Grup
Century Enka Ltd (CEL)	Don & Low
Cerdia	Dongfang Knitting (BD)
Changzhou National Hi-Tech District	Dow Chemical Co.
Charles Komar & Sons Inc.	DowAksa
Cheng Shin Rubber	Drake Extrusion Inc.
Chery Automobile	Drylock
China National Chemical Engineering (CNCEC)	Dunlop Aircraft Tyres
China National Offshore Oil Corporation (CNOOC)	Durio PPE
China Petrochem. Develop. Corp. (CPDC)	Duytan Plastic Recycling
China Pingmei Shenma Group	Eastman Chemical Co.
Chongqing Changan Automobile	eB Capital
CHTC Jiahua Nonwoven Co. Ltd.	eeden GmbH
Circ	Ekolution
Circulate Capital	Ekoten Textile
Circulose	Elastic Fabrics of America Inc.
Cirklo	Eldorado Brasil
Citroen	Elevated Materials
Citroniq Chemicals	Embraer
CMPC	Empacar
CNC Fitesa	Energia y Celulosa
CNOOC/Shell Petrochemicals	Enka GmbH & Co. KG
Cobes Health Care (Hefei) Co.	EPIC Group
Cobes Industries	EPL Accessories Ltd.
Colony Textile Mills Ltd.	Erdemoglu Holding
Commercial Aircraft Corporation of China (COMAC)	Eroglu Global Holding
Contemporary Amperex Technology Co. Ltd. (CATL)	Eshana Nonwoven Fabrics Ltd.
Continental AG	Esquire
Continental Tyres (Thailand) Co. Ltd.	Essity
Corpus Christi Polymers	Ester Industries Ltd.
Cosmo Specialty Fibers (Cosmo)	Euro Tires Manufacturing SRL
Covation Biomaterials	Evertex Fabrinology Ltd.
Covestro	ExxonMobil
Crystal International Limited Group	Fairmat
Culp Inc.	Fakir Fashion Ltd.
Dairen Chemical Industry Co. Ltd.	Family Yarns
Dalian Hualun Nonwoven Equipment	Far Eastern New Century (FENC)
DBL Group	Far Eastern Polytex Vietnam Co. Ltd.
Debonair Group	Fengqun Composite Material Co. (BD) Ltd.
Decathlon	Fibertex Nonwovens

1.5 Companies in TFY 2025

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Fibertex Personal Care	Hanil Synthetic Fiber
Fiberweb India	Hankook Tire
Filatex India Ltd.	Haohua Tire Vietnam Co.
First Quality	Hascevher Tekstil
First Quality Tissue	Hayat
Fitesa	HeiQ AeonIQ
Flint Hills	Hengan Paper Co.
Ford	Hengda Textiles
Formosa Chemicals & Fibre Corp. (FCFC)	Hengshen Group
Foshan Nanhai Beautiful Nonwoven Co. Ltd. (BTF)	Hengst Filtration
Freudenberg Far Eastern Spunweb	Henkel Ventures
Freudenberg Group	Hexcel Corporation
Freudenberg Performance Materials	Heytex Group
Fujian Haichen Chemical	Highsun Holding Group (HSCC)
Fujian Jinjiang	HIK-91
Fusion Apparel Ltd.	Hirdaramani Group
GAC Aion	Hollingsworth & Vose (H&V)
GAIL Mangalore Petrochemicals Ltd. (GMPL)	Honda Motor
General Motors (GM)	Hozon New Energy Automobile (Neta)
General Nonwovens	Huafon Chemical Co.
Genox Recycling	Huaxiang Premium Fiber
Georgia-Pacific (GP)	Hubei Sanning Chemical
Getriebe- und Antriebstechnik Wernigerode GmbH (GAW)	Hugo Boss
GHC	Huizhou Lituo New Material
GHCL Textiles	Huvis Corp.
Ginni Filaments	Hyosung Advanced Materials
Giti Tire	Hyosung Group
Glatfelter	Hyosung Spandex (Ningxia) Co. Ltd.
Global Nonwovens	Hyosung Vina Core Materials
Global PET	Hyundai Group
Global Sae-A Group	Hyundai Mobility Manufacturing (Thailand) Co. Ltd.
Godavari Biorefineries Ltd. (GBL)	Hyundai Mobis Co.
Goodyear Tire & Rubber	Hyundai Motor Co.
Gr3n	Idemitsu Kosan
Grasim Industries	IKEA
Great Wall Motors	Imperial Tobacco (IMT)
Green PCR	Indian Oil Corporation Ltd. (IOCL)
GS Caltex	Inditex
Guangdong Genox LyondellBasell New Material	Indorama Resources Ltd.
Guangdong Hengan Paper Co.	Indorama Ventures (IVL)
Guizhou Tyre	Indorama Ventures Europe
Gülsan Holding	Indorama Ventures Portugal PTA
H&M	INEOS Aromatics
Haldia Petrochemicals (HPL)	INEOS Olefins

1.5 Companies in TFY 2025

TFY 2024 bases largely on textile and related associations, a global network of experts and more than 700 company news.

Infnited Fiber	Kolon Industries
Inner Mongolia Baofeng Coal-based New Materials	Kordsa
Inner Mongolia New Jinshan Carbon Fiber Co. Ltd.	KP Tissue and Kruger Products
Innovatec	Kruger Products
Intecsa Industrial	KTEX Nonwovens
Interloop	Kucukcalik Tekstil
International Finance Corp. (IFC)	Kumho Tire Co.
International Paper	Kuraray
International Paper LLC Uzbek	Landbell Group
INVISTA	Lanyu Aviation Tyre Development
INVISTA Nylon Chemicals (China) Co.	Lealea Enterprise Co.
Iris Ohyama	Leigh Fibers
Irving Consumer Product	Lenzing AG
Jacob Holm Industries	LG Chem
Japan Tobacco Group of Companies (JTI)	Lihuayi Weiyuan Chemical
Jay Apparel Group	Linglong Tire Co. Ltd
JBF Petrochemicals	Lone Star Funds
Jiangling Motors Co. Ltd. (JMC)	Long Son Petrochemicals Co. (LSP)
Jiangsu Chengtai Vehicle	Loop Industries
Jiangsu General Science Technology Co. Ltd.	Lotte Chemical
Jiangsu Huafon CovationBio Co. Ltd.	Lovetex Industrial Corp.
Jiangsu Kinyonta New Material	LSCS Invest
Jieya Biologic Technology	Lu Xi Petrochemical
Jilin Chemical Fiber Group (JCFG)	Lund University
Jincheng Petrochemical	LYCRA Company
Jindal Advanced Materials	Lydall
Jinnor (Hong Kong) Ltd.	LyondellBasell Industries
Jinyu (Vietnam) Tire Co.	Macias Textil
JK Tyre & Industries	MacroCycle Technologies
JNC Fibers	Magnera Corp.
Jofo Group	Mahmood Group
Jofo Wuxi	Makalot Industrial Co.
Johns Manville	Maliha Poly Tex
Junma Group	Manjushree Spntek
Karesi Polyester & Petrochemistry	Markor Meiou Chemical (Xinjiang) Co., Ltd.
Katia & Bony	Martex Fiber
Kelheim Fibres	Master Plast
Kia Corp.	Mazda Motor Corp.
Kiaksi Lingerie Bangladesh Co. Ltd.	Mega Textile Singapore Pvt. Ltd.
Kiler Holding	Mehler Technologies
Kimberly-Clark (K-C)	Meisheng Group
Kitex Group	MELTBLO
Köksan PET ve Plastik Ambalaj	Merinos Hali
Kolmar Group	Merko Textile

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Metsä Group	Oxxynova
Metsä Tissue	OZ Health Plus
MG	Panda Biotech
Michelin Group	Paper Excellence
Milkay Teknik Tekstil	Pashupati
Mitsubishi Chemical	Patagonia
Mitsubishi Motors	Perlon
Mitsui Chemicals	Petlas
Modern Syntex	PetroChina Guangdong PC
Mogul	PetroVietnam Power
Mohan Spintex India	PetStar
Monadnock Non-Wovens	PF Nonwovens
Mondi	Philip Morris International (PMI)
MRF Ltd.	Pirelli & C. S.p.A.
Mumanu Polyester Industries	Polopiqué S.A.
National Spinning	PPE Solutions
NatureWorks	Praana Group
Nayara Energy Ltd.	Predo Health Products
Neenah	Prevented Ocean Plastic Southeast Asia (POPSEA)
Newsan	PreZero
Nexen Tire	Primark
Nextil Group	Principle Business Enterprises (PBE)
Nice-Pak International	Procter & Gamble
NILIT	Proparco
Ningxia Ningdong Taihe New Materials	PT. Rayon Utama Makur
Nishat Mills Ltd.	PTT Global Chemical
Nissan	PUMA
Nokian Tyres	PureCycle Technologies
Nonwovenn	PVH Corp.
Nonwovens Iberica	Qingdao Doublestar Group
Nordifa	Qingdao Jineng Technology
Nouvelles Fibres Textiles (NFT)	Qinghai Damei Coal Industrial Co.
NOWOtex	Quanzhou Grand Pacific Chemical
NRW.Venture	Quimicolor
Nurel	RadiciGroup
Nyobe Belgotex	Rayonier Advanced Materials
O.R.V. Manufacturing S.p.A.	RE & UP
Obeetee Textiles	Re:Claim
Oji Nepia	RE:FIBRE
OMV	RE:UP
On	Recover
Ontex	Reju
Origin Materials	Reliance Industries Limited (RIL)
Owens Corning	Renault

1.5 Companies in TFY 2025

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Renewcell	Shandong Hualu Hengsheng
Repsol	Shandong Linglong Tire Co. Ltd
Resortecs	Shandong Longhua New Material
Revalyu Resources	Shandong Xingdi New Material Co Ltd
Revelop	Shandong Yongcheng New Materials Co. Ltd. (SYNM)
Rönesans Holding	Shandong Yulong Petrochemical
Rongsheng Petrochemical	Shanghai Huayi (Group) Co.
Rongsheng Shengyuan	SharpCell Oy
Royal Golden Eagle (RGE)	Shaw Industries Group
RSWM Ltd.	Shawmut Corp.
Rubenis Tekstil	SHEIN
RUYI Group	Shell Chemicals
SAB Industrial (Vietnam) Co. Ltd.	Shell Petrochemicals
SABIC	Shenma Industry Co.
Sae-A Group	Shenma Puli
Sae-A Trading	Shinkong Synthetic Fibers Corp.
Safety Garments Bangladesh Co. Ltd.	Shuye
Safilin	Sichuan Youdun Youpin Medical Technology Co.
SAIC Motor	Sigmatex
Sailun Group	SINAATEC Spa
Salomon	Sinochem International
Salvation Army Trading Company (SATCoL)	Sinopec Group
Sanathan Textiles Ltd.	Sinopec Shanghai Petrochemical
Sanbang Co. Ltd.	SINOPEC Yizheng
SANKO	Sinopec/Ineos Tianjin
SASA	Sinowin Chemical Fibers
Sateri	Sioen
Satex Textil	Siteks
Saudi German Company for Nonwoven Products	SK Chemicals
SBS Zipper Bangladesh Co. Ltd.	SK Geo Centric (SKGC)
Scalter	Södra
SCGC Chemicals	Soex Group
Schlote Brandenburg	Softbond Nonwovens
Schlote Gear and Drive Technology	Softys SA
Schlote Group	S-Oil
Schlote Harzgerode	Sojitz
Schlote Technology	Spinnova Plc
Selenis	Spolana
Sentury Tire	Sporda Nonwoven
Sentury Tire (Spain) Co.	Spunchem
Service Long March Tyres (PVT) Ltd.	Spunweb
SGL Carbon SE	Sritex
Shalag U.S. Inc.	Star Garments Group Ltd.
Shandong Haohua Tire	Stavian Quang Yen Petrochemical JSC

1.5 Companies in TFY 2025

TFY 2024 bases largely on textile and related associations, a global network of experts and more than 700 company news.

Stellantis	Toyota Motor Corp.
Stora Enso	TPG Rise Climate
Suez	TreeToTextile AB
Suminoe Textile	Trident Group
Sumitomo Rubber	Trillium
Sunrex Industry (Mitsui)	Trimetro Garments India
Sunwoda Automotive Energy Technology (Thailand) Co. Ltd.	TripleR.io
Suominen	TVS Srichakra
Suzano S.A.	TWE Group
Sylvamo	Tyros BV
Synpet	Ube Corp.
Syre	UFlex Ltd.
Taekwang Industry	Uhde Inventa-Fischer
Tainan Spinning Co.	Unicharm
Taisheng (Bangladesh) Webbing	Unicorn Handbag
Tangshan Sanyou Chemical Fiber	Unifi Inc.
Tearfil	Union Industries
Tegra	Uniquetex LLC
Teijin Frontier	Unitika Ltd.
Teijin Polyester (Thailand)	Universal Fibers
Teknomelt Teknik Mensucat	Uno Minda
Tesla	UPA Healthcare Products
Texhong	Valor Petrochemicals Ltd. (VPL)
Texma International Co.	Van Robaeys
The Lycra Co.	Vargas Holding
Thrace Group	Varun Beverages Ltd.
Tianchen Qixiang	Verde Chemical Singapore
Titan International	VietCycle
Tongkun	Vietnam Oil and Gas Group
Tongxiang Zhonghong New Materials Co. Ltd.	VinFast
Top Textiles Co. Ltd.	Volkswagen (VW)
Toray Advanced Composites	Volvo
Toray Advanced Materials	Walmart
Toray Advanced Materials Korea Inc (TAK)	Wanhua Chemical Group
Toray Carbon Fibers Europe	Wanrong New Materials (Fujian)
Toray Composite Materials America	Weixing Group
Toray Industries (India) Private Ltd.	Wellknown Polyesters Ltd.
Toray Industries Inc.	Welong New Materials
Toray Polytech (Foshan) Co. Ltd. (TPF)	Welspun India
Total Corbion	Wolf PVG
TotalEnergies	WPT Nonwovens Corp.
Toyo Engineering	XDD Textile
Toyo Tire Corp.	Xiamen C&D Paper & Pulp Group Co.
Toyo Tyre Malaysia Sdn. Bhd.	Xinfengming

1.5 Companies in TFY 2025

TFY 2024 bases largely on textile and related associations, a global network of experts and more than 700 company news.

Xingchen Textile Co. Ltd.	ZC Rubber
Xinjiang Korla Zhongtai Petrochemical	ZF Group
Xinwu Textile Co. Ltd.	Zhejiang Baowan Carbon Fiber Co.
Xinxiang Chemical Fiber Co. Ltd.	Zhejiang Baowan Shaoxing Keqiao
Yi Da Denim Mill Co. Ltd.	Zhejiang Huilong New Materials Co. Ltd.
Yibin Grace	Zhejiang Shengyou Chemical Fiber
Yinchuan Binhe	Zhejiang Shengyou Chemical Fiber Co. Ltd.
Yokohama Rubber	Zhejiang Sitong New Material Technology Co. Ltd.
Youdun (Fujian) Care Products Co.,	Zhink Group
Youngone Corp.	Zhongce Rubber Group
Yuen Foong Yu Consumer Products Co.	Zhongfu Shenyong Carbon Fiber
Yuhua New Materials	Zhongjiang Petrochemicals
Yulong Petrochemical	Zhongjing Petrochemicals
Zaber & Zubair Fabrics	Zig Sheng Industrial Co.
Zara	