



Textile Exchange

Textile Exchange launched the first Materials Market Report in 2013 as a comprehensive, annual publication that provides unique data and insights into global fiber and raw materials production.



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The Materials Market Report shares best available data on global fibre and material production volumes alongside program-specific volumes and other insights such as the number of certified sites. For the purpose of this report, leather, rubber, and down are considered non-fibre raw materials and are therefore included separately from the section and charts on 'global fibre'.

It helps inform the textile industry's efforts to reduce emissions associated with raw material production in line with a 1.5-degree temperature rise pathway. The report highlights the urgency to accelerate the transition to fibres from preferred sources, intensify efforts to significantly reduce reliance on virgin fossil-based materials, and invest in strategies that separate value creation from the need for extracting new materials.

It's important to note that the compilation of global market data for fibres and raw materials is challenging and the quality of available data is often limited. The collection of primary data from suppliers is beyond the scope of this report so Textile Exchange relies on secondary data from industry associations, international or-

ganizations, governmental organizations, standard setters, and research institutes.

While Textile Exchange has collected, analysed, and compiled this information in all good conscience and has cross-checked it wherever possible, the report is intended for general guidance and information purposes only. Data gaps and inconsistencies are common in global market data, so modelling has often had to be applied.

Global fibre production reached an all-time high of 124 million tonnes in 2023, according to the latest Materials Market Report– which looks at total volumes used for apparel, home textiles, footwear, or any other application.

The data shows that the market share of virgin fossil-based synthetics continued to increase in 2023, with a decline in that of cotton and recycled fibres. Other key takeaways from the report's data include:



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- **Record fibre production:** Despite industry efforts, global fibre production has more than doubled since 2000. The last year's 124 million tonnes represents a 7% increase from 116 million tonnes in 2022, and is expected to rise to 160 million tonnes in 2030 if current trends continue.
- **Synthetics continue to dominate:** The production of virgin fossil-based synthetic fibres increased from 67 million tonnes in 2022 to 75 million tonnes in 2023. Polyester remained the most produced fibre globally, accounting for 57% of total fibre production.
- **Recycled synthetics face challenges:** Although recycled polyester fibre production slightly increased in 2023, the overall market share of recycled polyester decreased from 13.6% to 12.5%. For polyamide (nylon), the second most used synthetic fibre, recycled fibres constituted only 2% of the total market share. These trends are attributed to the lower prices and continued production of virgin synthetics, as well as current limitations in recycling technologies. Less than 1% of the global fibre market came from pre- and post-consumer recycled textiles.

The combined share of all recycled fibres slightly decreased in 2023, from around 7.9% to 7.7%, mainly due to an increase in the production of fossil-based polyester, which had lower prices than recycled polyester. Fossil based synthetics production increased from 67 million tonnes in 2022 to 75 million tonnes in 2023. Meanwhile, less than 1% of the global fibre market came from pre- and post-consumer recycled textiles.

- **Cotton production** saw a slight decline: Total global cotton volumes fell slightly from 25.1 million tonnes in 2022 to 24.4 million tonnes in 2023. However, the share of cotton produced under sustainability programs remained stable, accounting for 29% of all cotton produced.
- **Certified wool climbs:** Data showed positive trends for wool produced under standards such as the Responsible Wool Standard (RWS), ZQ, SustainaWOOL (GREEN and GOLD), Sustainable Cape Wool Standard (SCWS) and Climate Beneficial programs. This increased from 4.2% in 2022 to 4.8% in 2023. Recycled wool continued to account for around 6% of the global wool market.

- **Certified mohair and cashmere** reached almost half of market share: Certified fibres such as mohair and cashmere saw notable growth, both with market shares of 47%.
- **Manmade cellulosic fibres** production increased: Overall MMCF production increased from 7.4 million tonnes in 2022 to 7.9 million tonnes in 2023, representing 6% of the global fibre market.

The report highlights a continued reliance on new virgin fossil-based synthetic materials, threatening to undermine the industry's commitments to its climate goals. It also shows the current limitations of textile-to-textile recycling and an urgent need for innovative solutions, with most recycled polyester still coming from PET bottles.



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Amid these concerns, one positive trend that stands out is the increased industry demand for responsible animal fibres through programs like the Responsible Mohair Standard (RMS) and Responsible Alpaca Standard (RAS), both contributing to better animal welfare and environmental management. This indicates the potential of farm-level standards of this kind to increase market recognition of more sustainable practices on the ground.

“We hope this data serves as a clear call to action for the industry, highlighting both the successes and the critical areas where we must intensify our focus to meet climate targets,” said Claire Bergkamp, CEO of Textile Exchange.

“Unlocking textile-to-textile recycling pathways will be essential to reducing reliance on virgin synthetics. Equally important is continuing to support those on the ground who are driving the transition from conventional systems to preferred materials. It is more urgent than ever to support those who have already invested in preferred systems, while also enabling the transition away from conventional at scale.”

Source: Textile Exchange

About Textile Exchange

Textile Exchange is a global non-profit driving beneficial impact on climate and nature across the fashion, textile, and apparel industry. It guides a growing community of brands, manufacturers, and farmers towards more purposeful production right from the start of the supply chain.

Its goal is to help the industry achieve a 45% reduction in the emissions that come from producing fibres and raw materials by 2030. To get there, it is keeping its focus holistic and interconnected, accelerating the adoption of practices that improve the state of our water, soil health, and biodiversity too.