

News Release



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New Textile Exchange report shows latest trends in the preferred fiber and materials market – growth in most areas but not at the speed and scale required.

Lubbock, Texas, USA | June 29, 2020 at 10 a.m. CDT - Textile Exchange's 2020 Preferred Fiber and Materials Market Report (PFMR) shows the latest trends in the fiber and materials market including those with improved social and environmental impacts, which are referred to as Preferred. This in-depth report not only provides the latest facts and figures but also provides inspiring insights into the work of leading companies and organizations, including the people who are creating material change.

The 2020 Preferred Fiber and Materials Market Report reveals that the global fiber production has doubled in the last 20 years, reaching an all-time high of 111 million metric tons in 2019 and pre-COVID-19 results indicated potential growth to 146 million metric tons by 2030. The market for preferred fiber and materials (included as part of the overall fiber and material market) is growing but not at the speed and scale required.

“The continued growth of global fiber production will have significant impacts on people and the planet. As each person has personally experienced in the last few months with the COVID-19 pandemic, business-as-usual is no longer an option – we *must* do better than that! Now is the time to adopt a preferred fiber and materials strategy, which is a critical step to reducing the footprint on the planet that is being left by conventional fiber and material production,” said La Rhea Pepper, Managing Director for Textile Exchange.

The Preferred Fiber and Materials Market Report includes latest trends in various fiber categories, including Plant-based Natural Fibers, Animal-based Fibers and Materials, Manmade Cellulosic Fibers, Synthetic Fibers, as well as takes a look at sustainability standards, initiatives, and overall trends.

This year, Textile Exchange has, for the second time, made more detailed supplier mapping information available as an accompaniment to the PFMR. This resource is accessible only by Supporter and Partner level members of Textile Exchange, who can access it via the organization's Member Hub.

Key Findings by Fiber

Cotton: With a market share of 25 percent in 2019 (i.e. the 2018/19 ICAC harvest year), the market for preferred cotton is more advanced than for most other materials. Key drivers are the existence of several well-established preferred cotton programs, and that cotton as a large volume material has been on the industry's sustainability radar for many years. Yet, further increasing the share of preferred cotton and continuous improvement in terms of sustainability are urgently needed. Preferred cotton programs include: ABRAPA, BASF e3, Better Cotton Initiative (BCI), Cleaner Cotton, Cotton made in Africa (CmiA), Fairtrade, Fairtrade Organic, Field to Market, In-Conversion Cotton (Transitional in the USA), ISCC, myBMP, Organic, REEL Cotton, Regenerative Cotton, and the United States Cotton Trust Protocol.

Down: Awareness of animal welfare issues has led to successful growth in the use of standards, such as the Responsible Down Standard. While influencing at farm level is challenging, the use of preferred down standards helps to reduce the risks along the supply chain.

Leather: Until recently, leather processing risks (tanning, chemical use) have been the primary focus, but there is a growing interest in animal welfare, deforestation, land use (and associated biodiversity loss), and climate change issues. Textile Exchange has developed the Leather Impact Accelerator (LIA) to speed up positive actions along the full beef/leather value chain.

Manmade Cellulosic Fibers: Despite a high market share of Forest Stewardship Council (FSC) and Programme for the Endorsement of Forest Certification (PEFC) certified Manmade Cellulosic Fibers (MMCFs) that is estimated at around 40-50 percent, the risk of sourcing MMCFs from ancient or endangered forests remains high. Canopy estimates that around half of all MMCFs come from ancient and endangered forests. The market share of "recycled MMCFs" is estimated at below 1 percent but a lot of research and development is ongoing, so it is expected to increase significantly in the coming years. With new standards introduced for the pulp and fiber level, action on this level is also likely to increase.

Polyamide: Due to technical challenges and less attention due to lower volumes, the market share of preferred polyamide is still low compared to polyester. As the second-highest used synthetic fiber, polyamide offers significant impact potentials by transitioning to recycled and biobased polyamide. Most recycled polyamide is currently made from pre-consumer waste, some also from discarded fishing nets. Increasing the use of post-consumer textiles is needed.

Polyester: While the share of recycled polyester is increasing and reached 14 percent in 2019, it is not yet advancing at the speed and scale required. Low prices of fossil-based polyester create a challenging market environment for recycled and biobased polyester. As the fiber with the largest market share, the impact scale of polyester is enormous. While using plastic bottles as feedstock is a good start - and most recycled polyester is currently based on plastic bottles - we need to move towards textile-to-textile recycling and urgently improve social conditions in waste collection and recycling.

Wool: Conventional wool dominates the wool market but the adoption of non-mulesing and preferred wool programs, such as the Responsible Wool Standard, is increasing. Transitioning to wool programs with both animal welfare and responsible land use criteria in place offers the potential to create positive impacts in terms of animal welfare, land use, and biodiversity. The

use of recycled wool can be another key lever. While it has a long tradition, the market share is still low, but the impact potentials are very high.

Other fibers and materials: Other fibers and materials from hemp to elastane, are often not in the focus of the industry's attention despite significant sustainability potentials as well as challenges. The report highlights a few innovative examples.

The continued growth of global fiber production will have significant impacts on people and planet.

Now is the time to accelerate a transition to preferred fiber and materials to sustain life for people and planet. Textile Exchange aims to be the driving force for urgent climate action with a goal of 35-45% reduced CO2 emissions from textile fiber and material production by 2030. Find out more about our [2030 Strategy: Climate+](#).

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About Textile Exchange

Textile Exchange is a global nonprofit that creates leaders in the sustainable fiber and materials industry. The organization develops, manages, and promotes a suite of leading industry standards as well as collects and publishes vital industry data and insights that enable brands and retailers to measure, manage, and track their use of preferred fiber and materials.

With a membership that represents leading brands, retailers, and suppliers, Textile Exchange has, for years, been positively impacting climate through accelerating the use of preferred fibers across the global textile industry and is now making it an imperative goal through its **2030 Strategy: Climate+**. Under the Climate+ strategic direction, Textile Exchange will be the driving force for urgent climate action with a goal of 35-45% reduced CO2 emissions from textile fiber and material production by 2030.

To learn more about Textile Exchange, visit [TextileExchange.org](https://www.TextileExchange.org). Follow us on Twitter at @TextileExchange.