

# THE GLOBAL MARKET OF NATURAL FIBRES



**38<sup>TH</sup> INTERNATIONAL Cotton CONFERENCE**  
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## THE WORLD NATURAL FIBRE PRODUCTION IN 2025 IS ESTIMATED AT 32.8 MILLION TONNES.

The estimate of world cotton production issued by USDA in February 2026 was 26.1 million tonnes.

The estimate by DNFI of world production of jute is 2.4 million tonnes. Jute production fell to a two-decade low because of adverse weather during the harvest period, and world wool production fell to the lowest mark in a century as farmers shifted to meat breeds.

Wool and coir production are estimated at around one million tonnes each, and all other natural fibres combined are estimated at two million tonnes.

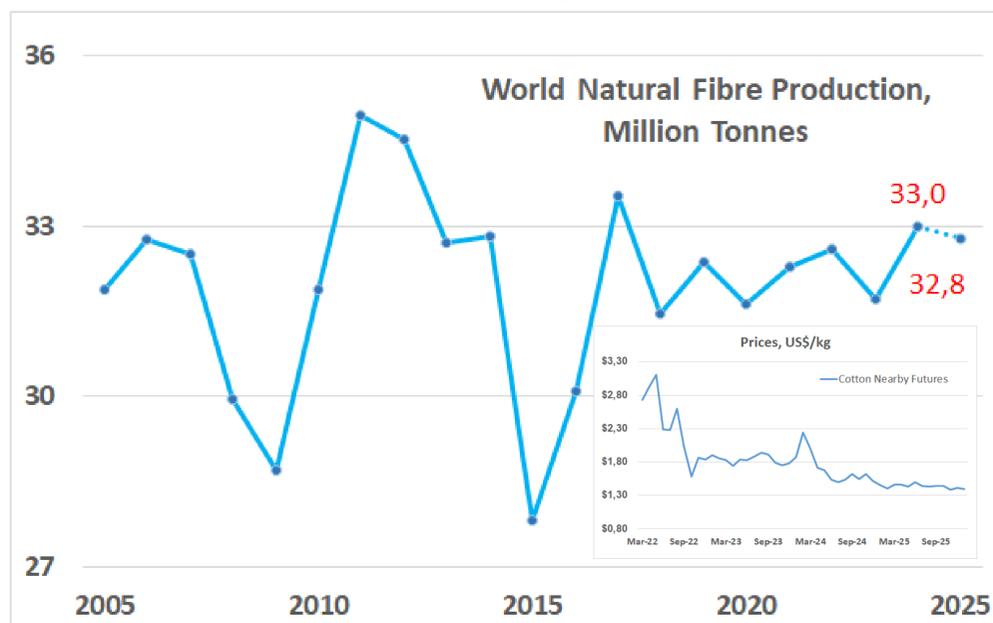
Approximately 40 million households were involved in natural fibre production in 2025. When family labor and hired seasonal labor are included, total employment is between 150 million and 200 million people.

March 2026	2021	2022	2023	Pct of total fibres in 2023	Pct of natural fibres in 2023	2024, est.	2025, pre.
	Metric Tonnes						
Abaca	83,700	76,900	58,800	0.05%	0.2%	56,000	52,000
Coir, without pith	1,099,000	1,084,000	1,112,500	0.98%	3.5%	1,113,000	1,113,000
Cotton Lint	24,893,316	25,238,189	24,435,010	21.61%	77.3%	25,808,840	26,096,233
Fibral Fibres (banana, pineapple, palm)	-	1,697	2,455	0.00%	0.0%	3,802	2,149
Other Fibre Crops, raw, n.e.c.	670,330	639,173	655,036	0.58%	2.1%	659,967	689,967
Flax Fibre, long fibres only until 2010	328,000	346,000	302,000	0.27%	1.0%	448,000	537,600
True Hemp, raw or retted	357,256	332,689	329,061	0.29%	1.0%	368,502	398,502
Jute, Kenaf & Allied Fibres	3,265,200	3,278,200	3,104,600	2.75%	9.8%	3,000,000	2,400,000
Kapok fibre	76,693	79,023	78,844	0.07%	0.2%	78,000	78,000
Ramie, raw or retted	58,012	58,495	57,790	0.05%	0.2%	58,099	58,099
Sisal, Henequen and similar hard fibers	297,300	277,600	294,800	0.26%	0.9%	275,000	290,000
Silk, raw	86,311	91,319	93,986	0.08%	0.3%	97,351	101,000
Wool, clean	1,036,000	1,050,616	1,046,426	0.93%	3.3%	1,020,768	968,110
Other animal fibres, dehaired	23,000	24,000	23,000	0.02%	0.1%	23,000	23,000
<b>Total Natural Fibers</b>	<b>32,274,118</b>	<b>32,600,000</b>	<b>31,800,000</b>	<b>27.95%</b>	<b>100.0%</b>	<b>33,000,000</b>	<b>32,800,000</b>
Cellulosic	7,155,000	7,195,000	7,576,000	6.7%			
Synthetics:	73,079,000	72,444,000	73,888,000	65.4%			
Polyester	60,369,000	59,769,000	60,845,000	53.8%			
Polyamide (Includes Nylon)	6,035,000	6,065,000	6,368,000	5.6%			
Acrylic	1,345,000	1,325,000	1,259,000	1.1%			
Polypropylene	3,885,000	3,850,000	3,966,000	3.5%			
Other Synthetic	1,445,000	1,435,000	1,450,000	1.3%			
Synthetic Filament	53,029,000	52,684,000	53,787,000	47.6%			
Synthetic Staple	20,050,000	19,760,000	20,101,000	17.8%			
<b>Total Manmade Fibers</b>	<b>80,234,000</b>	<b>79,639,000</b>	<b>81,464,000</b>	<b>72.1%</b>			
<b>Total Fiber Production</b>	<b>112,508,118</b>	<b>112,239,000</b>	<b>113,064,000</b>	<b>100.0%</b>			

## USA TARIFF POLICIES REMAIN UNSETTLED AND INFLUENCES THE GLOBAL TRADE OF FIBRES

The United States Supreme Court ruled against the current US Government Administration's use of the International Emergency Economic Powers Act (IEEPA) to impose sweeping reciprocal tariffs on most of the world's countries in February 2026.

Nevertheless, the administration is reimposing broad-ranging tariffs using an alternative legal authority to IEEPA, namely Section 122 of the Trade Act of 1974. Several lawsuits have already been filed challenging the legality of using Section 122. In the interim, it is not clear how the Supreme Court's decision will impact revenue already collected under the IEEPA framework. As of March 9, tariffs were 10% across the board on all countries, but additional announcements are anticipated in the weeks ahead, and importers are bracing for more disruptions. The level of uncertainty remains severe.



## NATURAL FIBRES ARE

**Sustainable and Biodegradable, Comfortable and Responsible, Healthy, Responsible, High-Tech and Fashionable**



The DNFI facilitates the exchange of information and experiences, and works to advance the common interests of all natural fibres in the face of competition from oil- and wood-based man-made fibres.

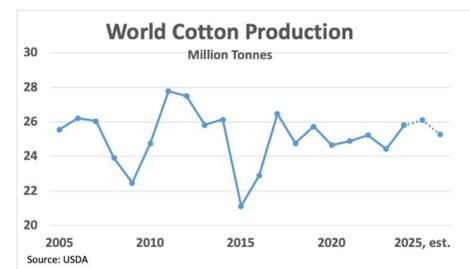
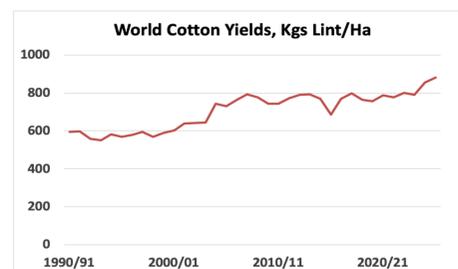
Representatives of natural fibre industries as diverse as Abaca, Alpaca, Angora, Camel, Cashmere, Coir, Cotton, Flax, Hemp, Jute, Mohair, Ramie, Silk, Sisal and Wool participate in DNFI.org

## WORLD COTTON YIELDS RECORD HIGH IN 2025

After nearly two decades of no growth, the world cotton yield is finally climbing and reached an estimated 880 kgs of lint per hectare in 2025. The world yield first nearly touched 800 kgs per hectare in 2007 and was still below 800 kgs in 2023.

Cotton yields are rising in countries using the tools of modern agricultural science, including biotechnology (GMO), synthetic fertilizers, synthetic pesticides and mechanization. Notably, cotton yields are lagging in countries implementing such technologies less effectively, particularly in sub-Saharan Africa and India.

International cotton prices have fallen by more than half since rising to a Covid-era peak in 2022. In response to declining prices, area devoted to cotton around the world has shrunk, and harvested area in 2025 is estimated by USDA at 29.5 million ha, the lowest since the 1940s. Cotton production is consolidating in China, India, Brazil, United States, Pakistan, Australia, and Turkey. In most other countries, including those in Africa, Latin America and Asia, production is trending lower. World cotton production in 2026/27 (August-July) is forecast by USDA at 25.3 million tonnes, 3% lower than production in 2025/26.



## DNFI.org – Who we are:

The General Assembly of the United Nations declared 2009 to be the International Year of Natural Fibres (IYNF) in recognition of the benefits of natural fibre industries to the world economy, the environment, consumers and to producers around the world.



The Discover Natural Fibres Initiative is composed of individuals and organizations from around the world who voluntarily and independently share information about natural fibres. There are no membership dues, DNFI has no offices, no budget and does not conduct projects.

DNFI has observer status to the FAO Intergovernmental Group (IGG) on Hard Fibres and the IGG on Jute, Kenaf and Allied Fibres, which represents a forum for intergovernmental consultation and exchange on trends in production, consumption, trade and prices of jute, kenaf and allied fibres, including regular appraisal of the global market situation and short term outlook.