

Is Cotton Losing the Textile Race?

By Roger Tomkins, Australian Cotton Shippers Association

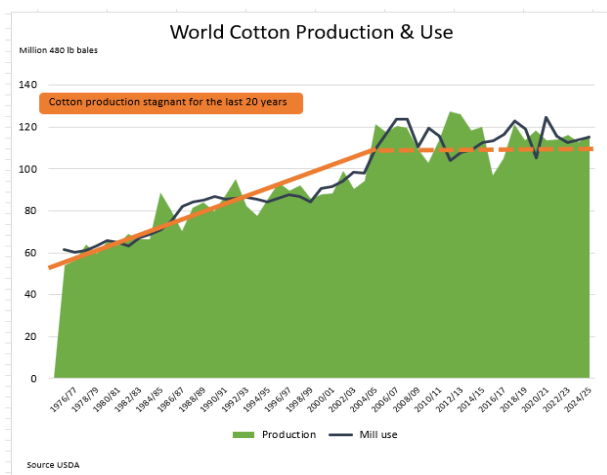
Fast Facts

- Cotton's share of the textile market has fallen below 20%, while wool is under 1%
- Per capita textile consumption has doubled since 1975 to 16.5 kg, while cotton's share has remained stagnant at 3.3 kg
- In developed countries, cotton accounts for 37% of textile use; in developing nations, just 18%
- Global population has now surpassed 8 billion - 83% are living in developing countries
- Synthetics account for 67% of the textile market with polyester making up 85% of this
- Textiles made from manmade fibres are a significant contributor to microplastic pollution (35%)
- Global cotton production has stagnated around an average of 115.5 million (480 lb) bales over the past 20 years
- By 2025, global fibre production will reach 135 million tonnes. It is estimated to grow to 160 million tonnes by 2030

The average consumer ingests a credit card's worth of microplastics weekly - equivalent to 50 plastic bags a year. I first heard this from Joe Nicosia at the Australian Cotton Conference in 2024, where he also noted cotton's market share decline. The numbers don't lie—polyester, with all of its environmental evils, dominates the global textile industry and its share of the market is only increasing.

Cotton Production Levels Remain Stagnant

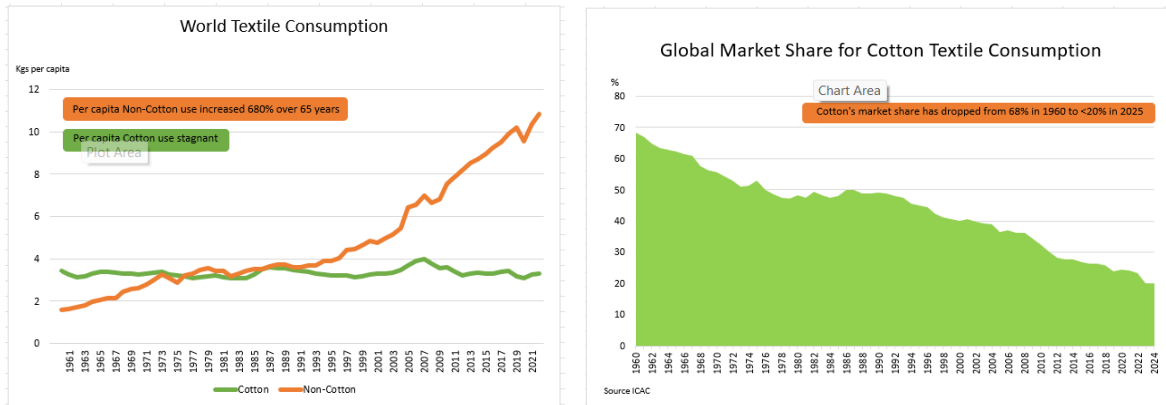
Global cotton production rose steadily until the early 2000s due primarily to yield improvements and access to arable land. It has since stagnated around an average of 115.5 million (480 lb) bales for the last 20 years. This is not due to a lack of textile demand given this has nearly doubled over the same time period. The most obvious restrictor to cotton's growth potential is price. Expanding cotton acreage requires higher relative pricing compared to competing crops. Yet, excessive price hikes will ultimately reduce cotton's competitiveness against other fibres, particularly polyester, decreasing usage.



Over the past 60 years, cotton's per capita consumption has remained steady at 3.3 kg, while total textile consumption has surged from 5 kg to over 16 kg per person. This has resulted in a dramatic decrease of cotton's share in the global textile market, falling from 68% in 1960 to estimated 19.2% this year. While the market share of most other major fibres have remained relatively stable, it is

polyester that is filling the void created by increased consumer demand for textiles. It is cheap and easy-care therefore satisfying both the rapidly expanding population in developing markets, and the globe's growing thirst for fast fashion. In 2023 polyester comprised 57% of total global fibre production, and this share continues to grow.

Textile demand is skyrocketing, while cotton usage has not changed for 50 years



Polyester: A Growing Threat

Polyester is durable, moisture and wrinkle resistant and most importantly can be produced in large volumes, very cheaply. BUT it is non-biodegradable, is fossil fuel dependant, emits toxic pollutants during its processing AND by contributing 35% of the total, is the major source of microplastics contamination in our environment. As synthetic fibres break down, they fragment into microplastics and the smaller nanoplastics. These tiny particles then infiltrate ecosystems and are ingested by humans. Scientists compare the long-term effects of microplastic ingestion to passive smoking or asbestosis—by the time we understand the consequences, it may be too late.

The boxing gloves are off. ACSA join Make the Label Count organisation.

Consumer awareness is crucial to shifting demand toward natural fibres. While governments push for fossil fuel reductions in transport, they overlook the rapid expansion of synthetically based textiles.

The EU's Environmental Footprint Methods policy falsely ranks polyester as more sustainable than cotton and wool, disregarding effects of microplastic pollution and the benefits of biodegradability. This flawed assessment threatens consumer perception and future market share for natural fibres. ACSA has joined the Make the Label Count (MTLC) coalition, which advocates for accurate sustainability labelling. MTLC is challenging the EU's Product Environmental Footprint (PEF) framework, pushing for a fair comparison between natural and synthetic fibres.

ACSA supports the EU's Green Claims Directive but rejects its misleading methodology which favours fossil-fuel-based fibres over natural alternatives. Cotton is biodegradable, renewable and recyclable – critical factors that must be recognised in sustainability assessments.

Choose cotton, wear it well and protect the planet.

Ends