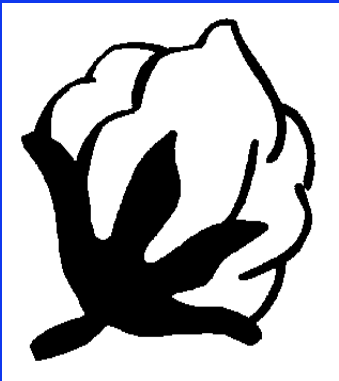
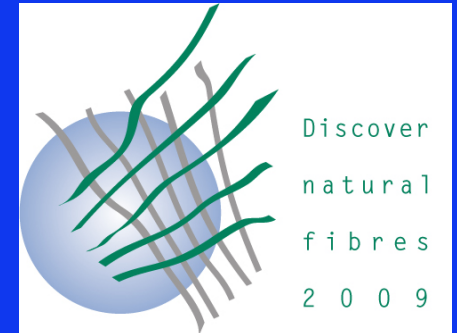


WORLD FIBER PRODUCTION



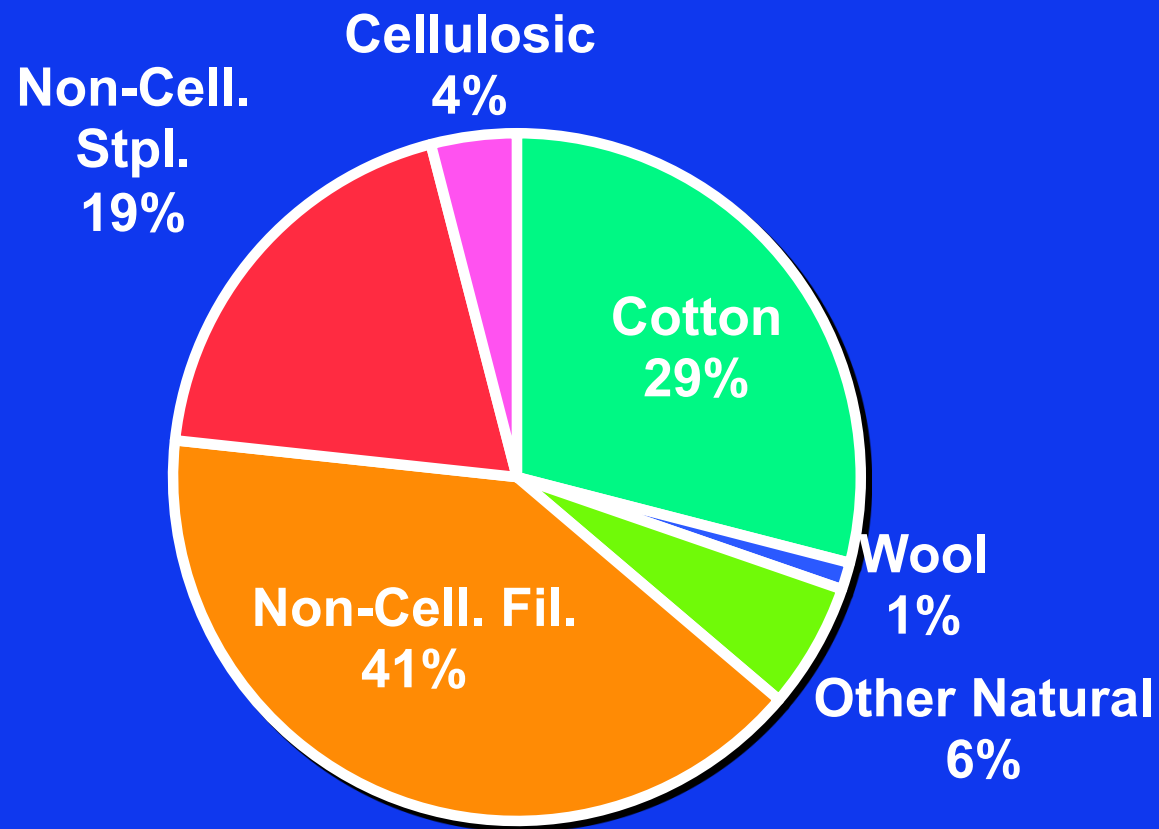
Terry Townsend
Executive Director



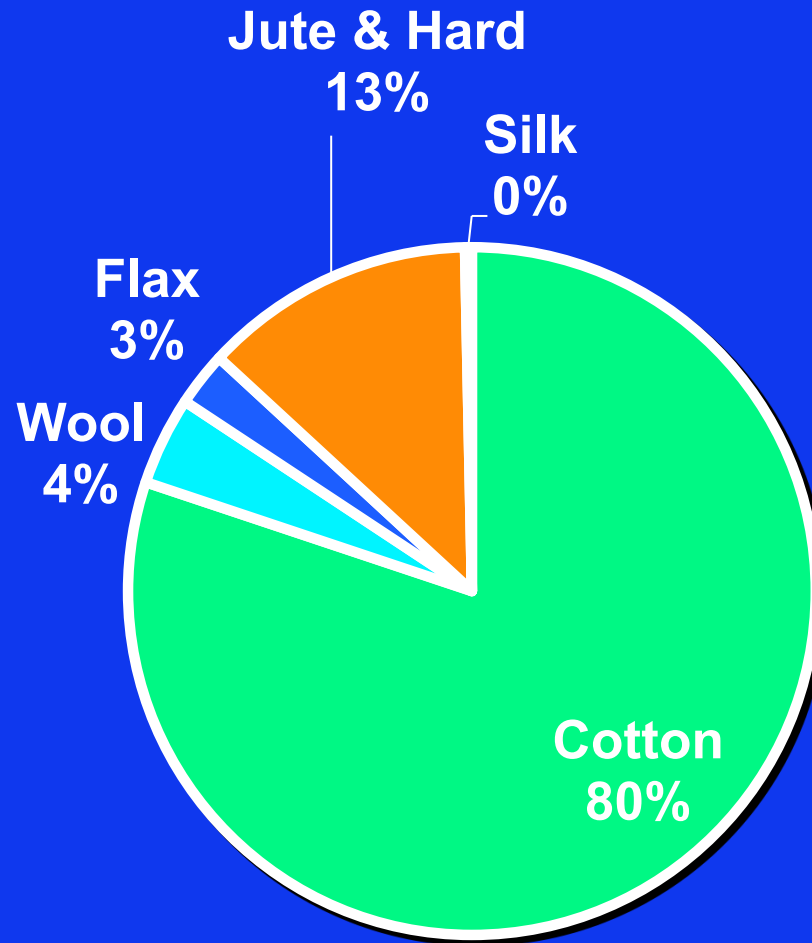
International Cotton Advisory Committee

1st International Natural Fibre Conference
Guimarães, Portugal
9-11 June 2013

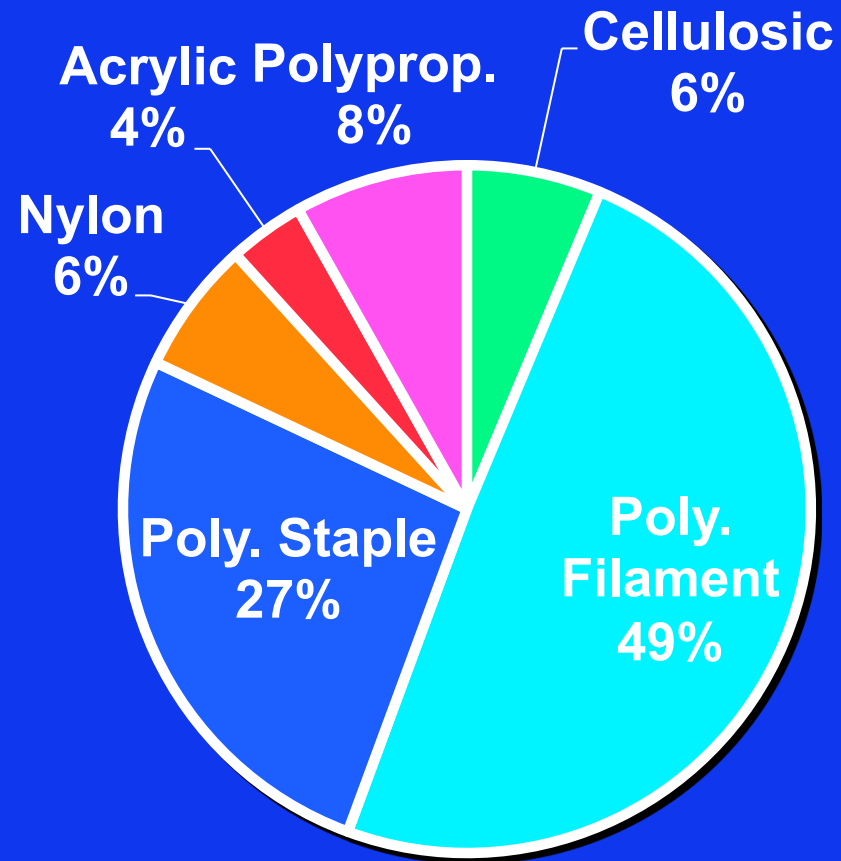
World Fiber Production



World Natural Fiber Production

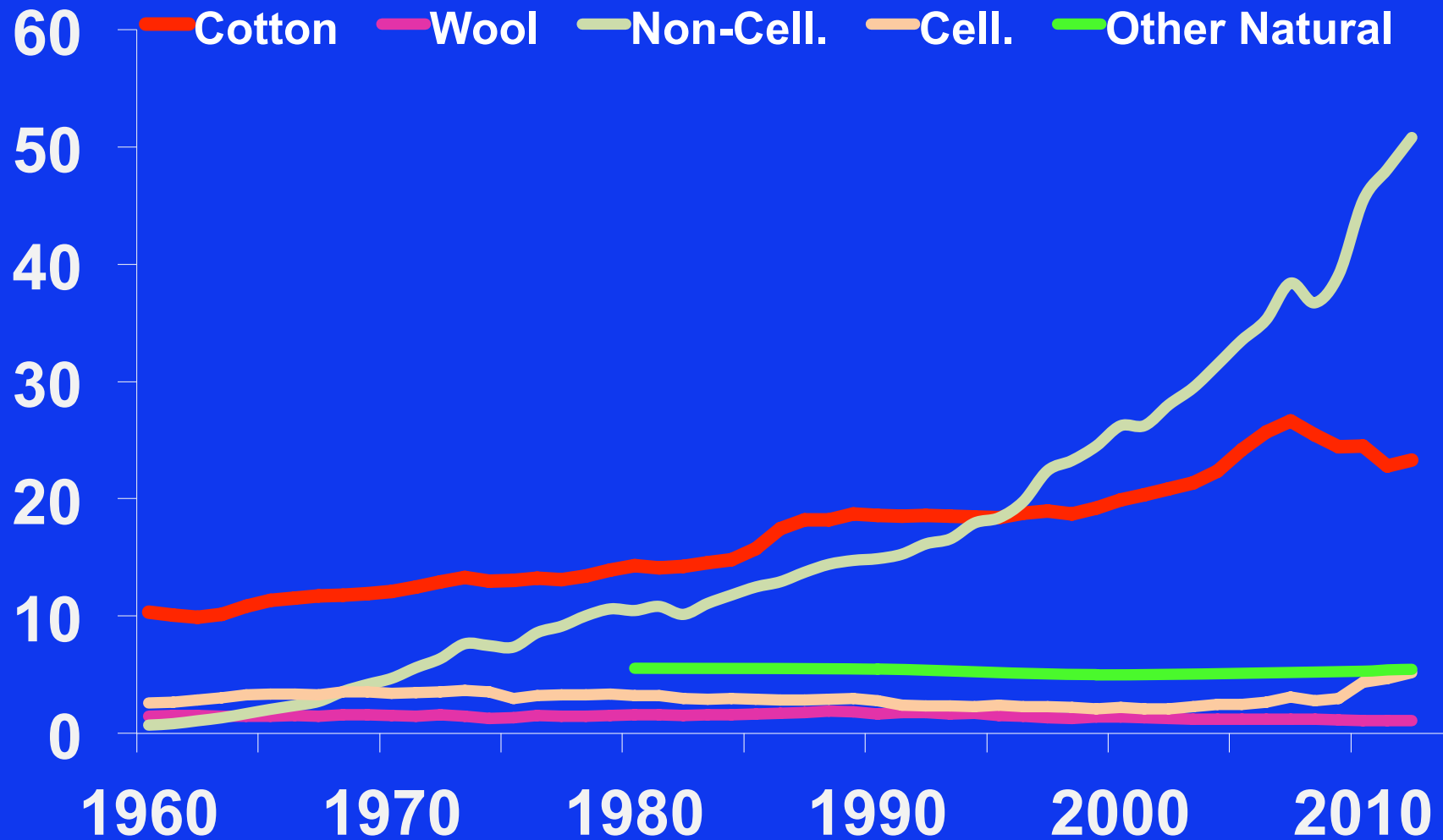


World Chemical Fiber Production



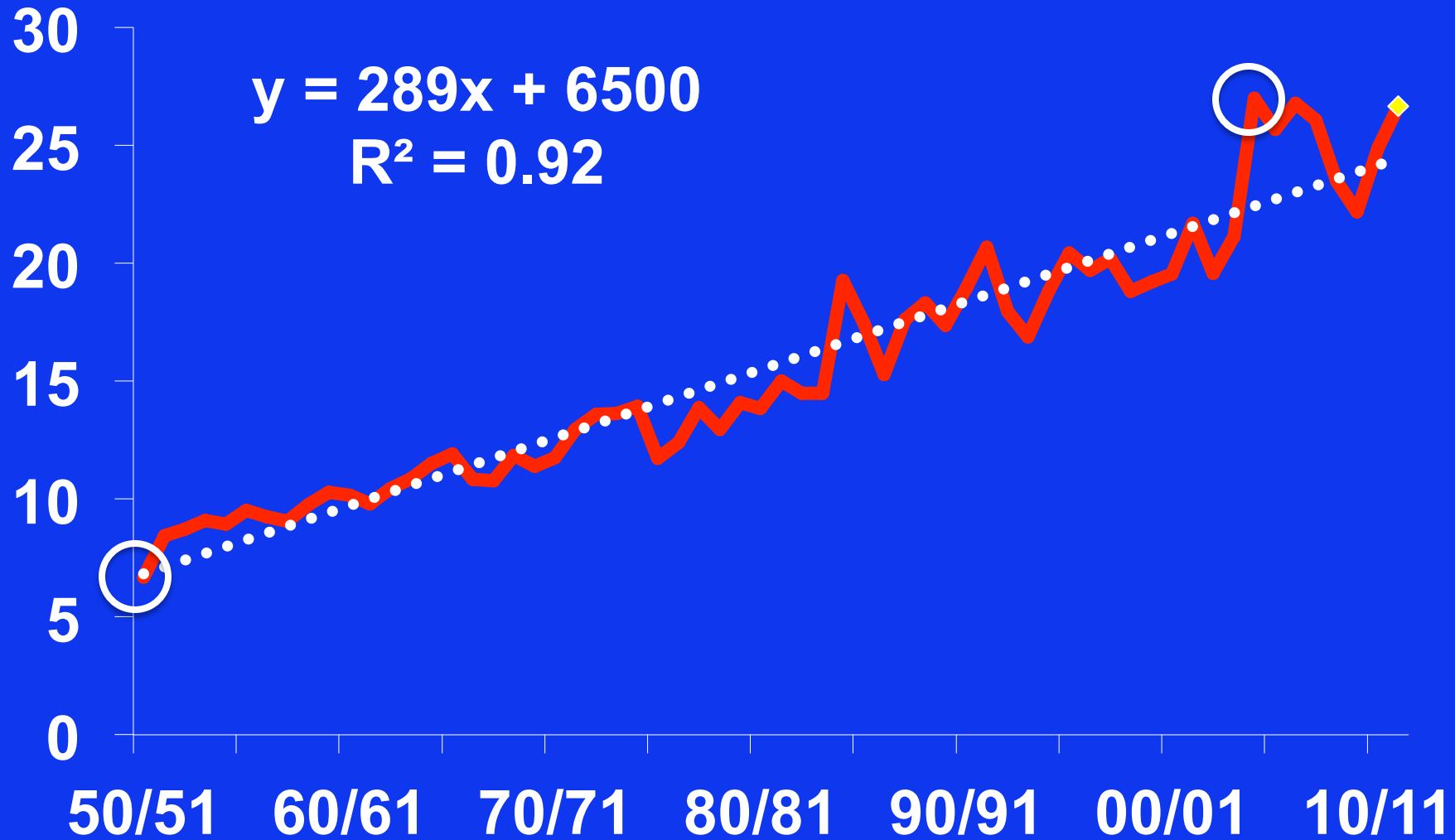
WORLD FIBER PRODUCTION

Million tons



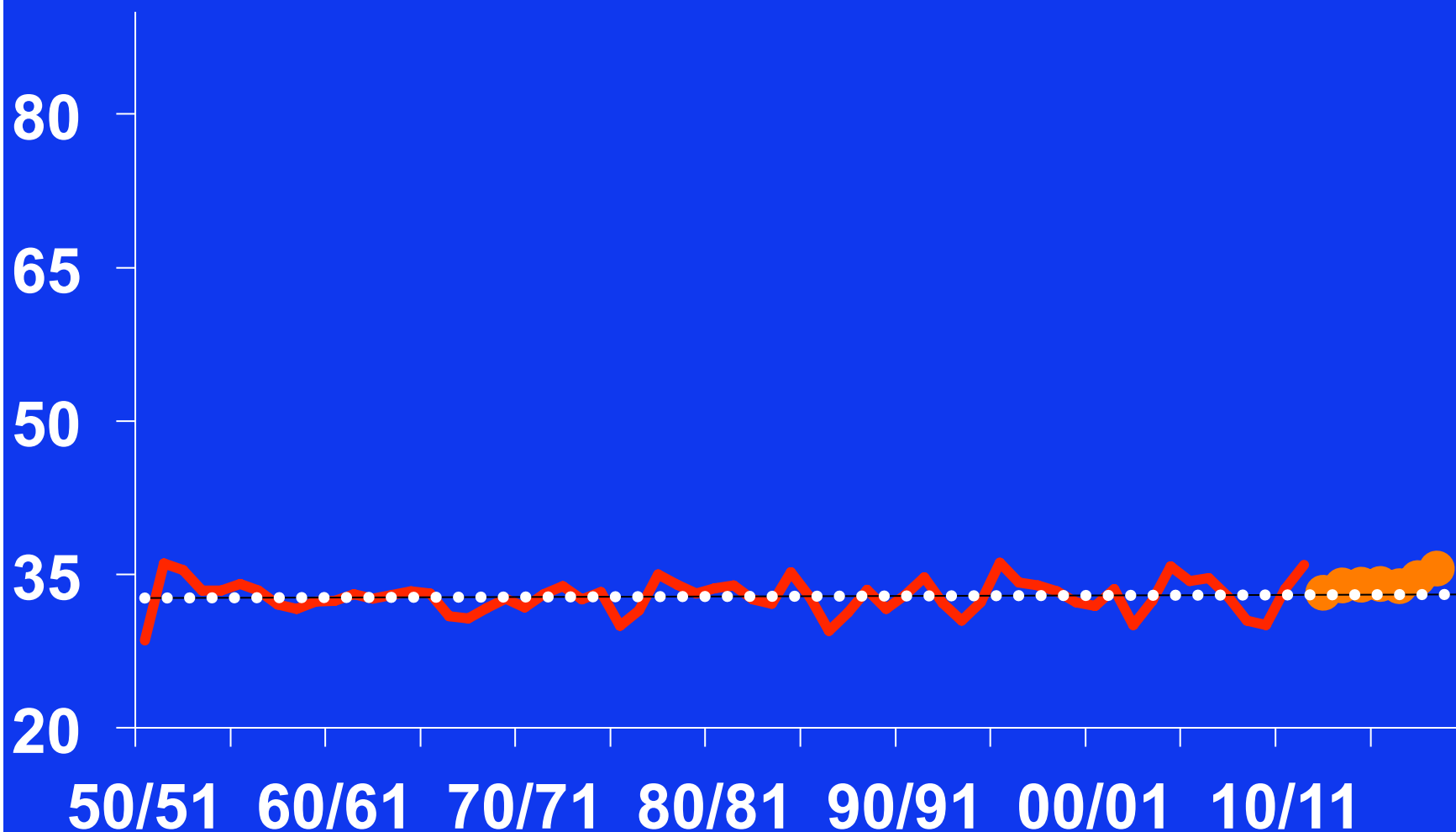
WORLD COTTON PRODUCTION

Million tons



WORLD COTTON AREA

Million Hectares



Major Technical Advances

Mendelian Breeding

Mechanization

Fertilizer

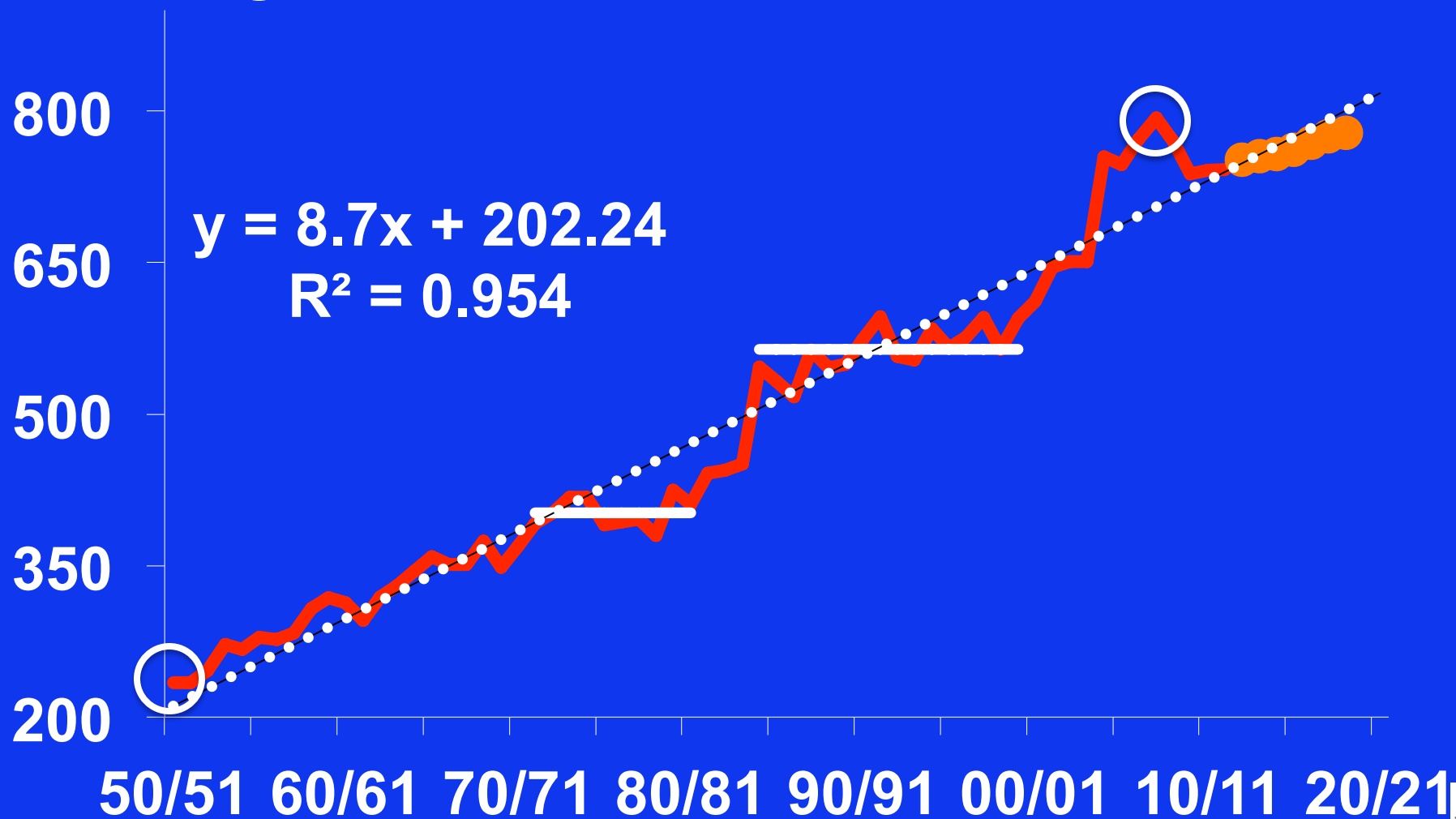
Plant Protection

Biotechnology

?

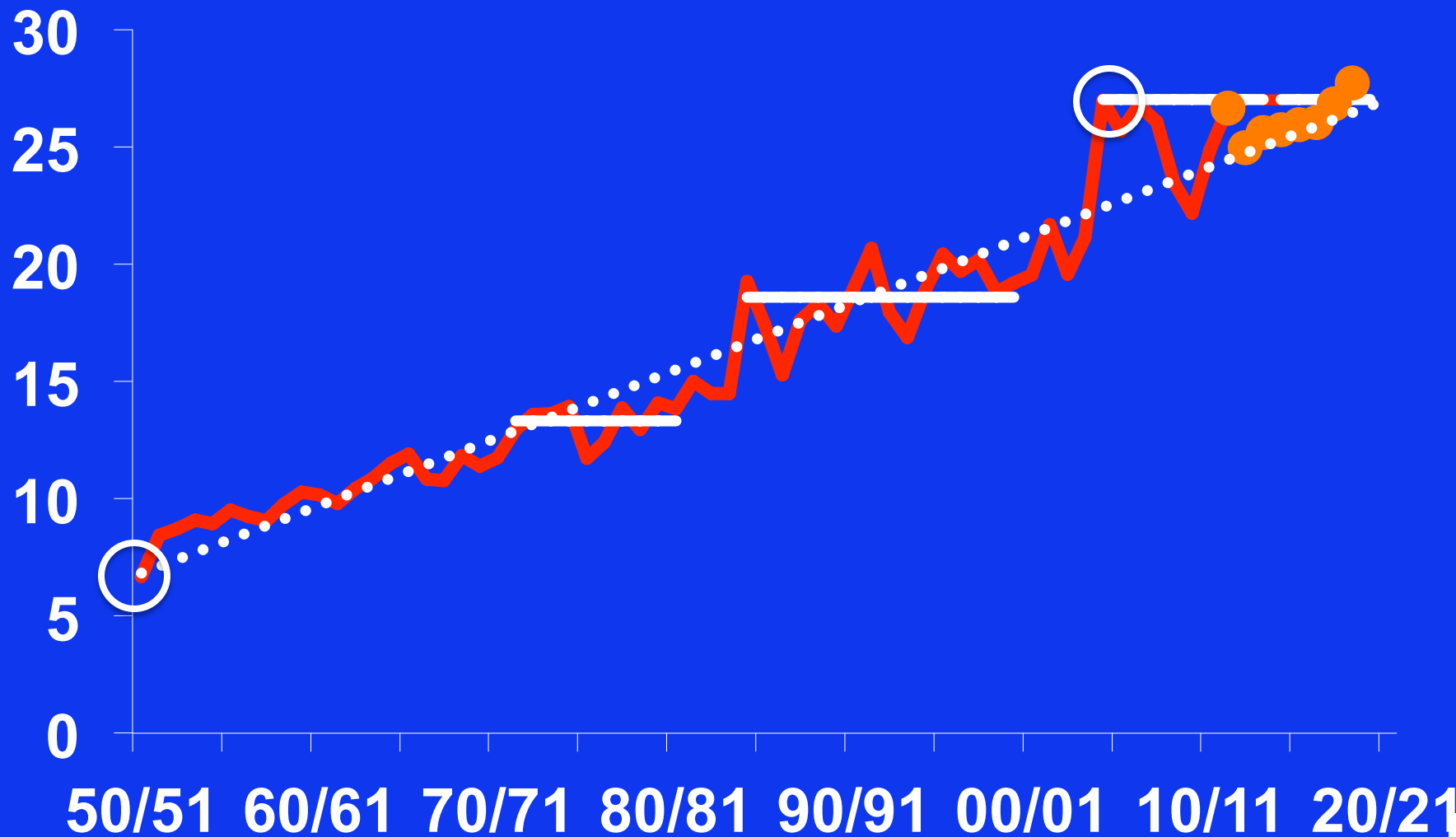
WORLD COTTON YIELDS

Kilograms per Hectare



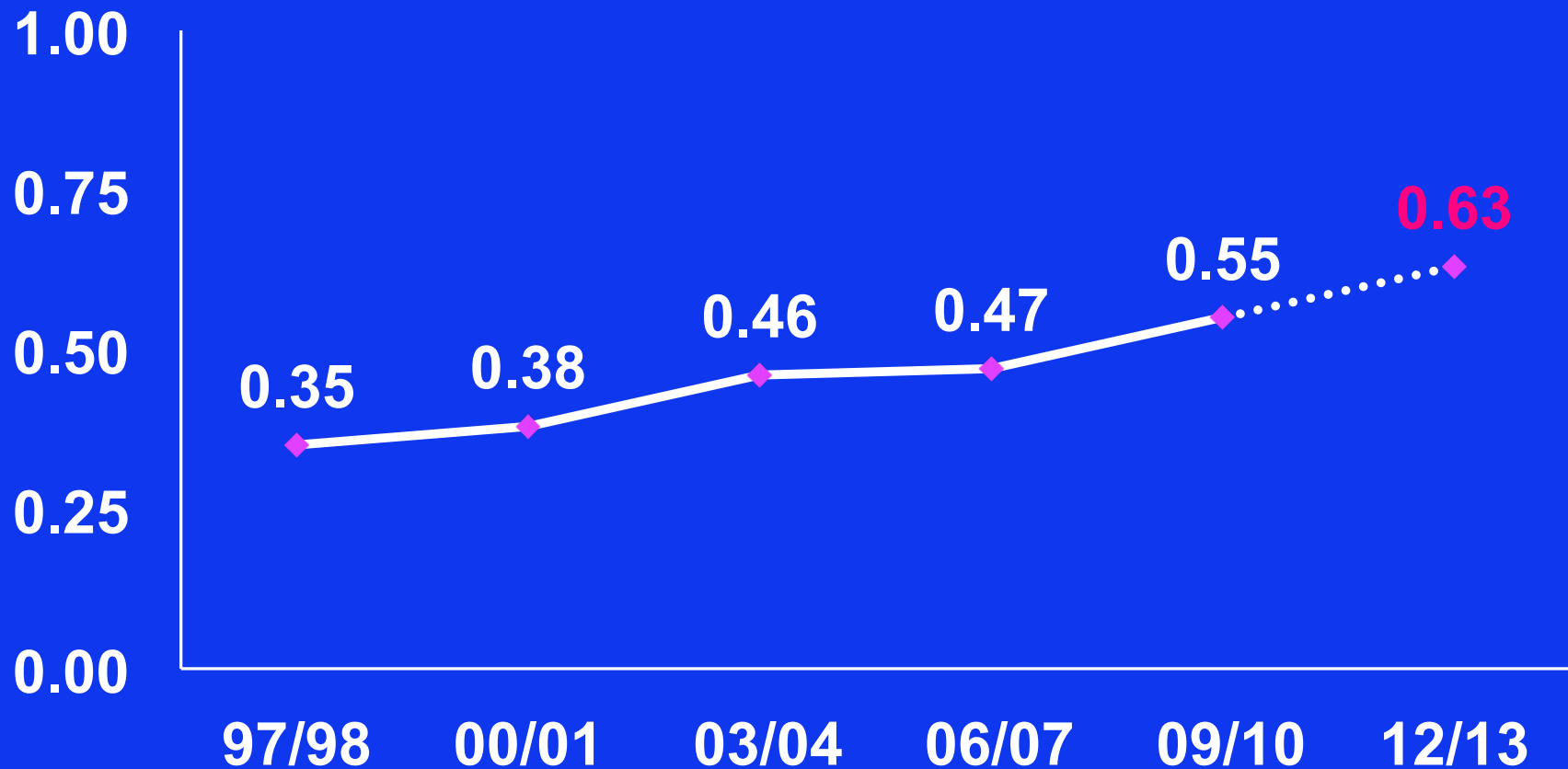
WORLD COTTON PRODUCTION

Million tons



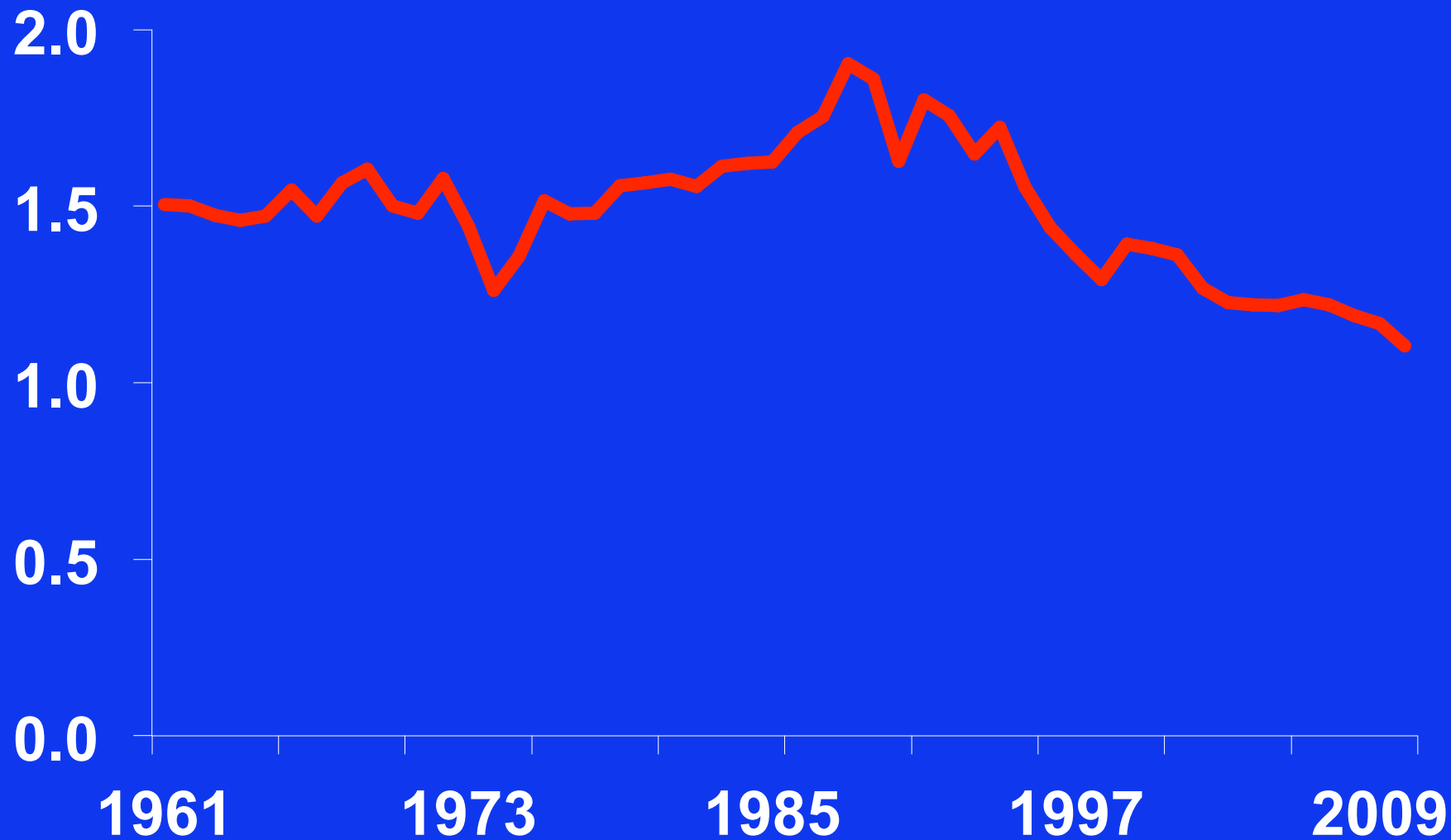
Net Cost of Lint Production - World

US\$/Lb.



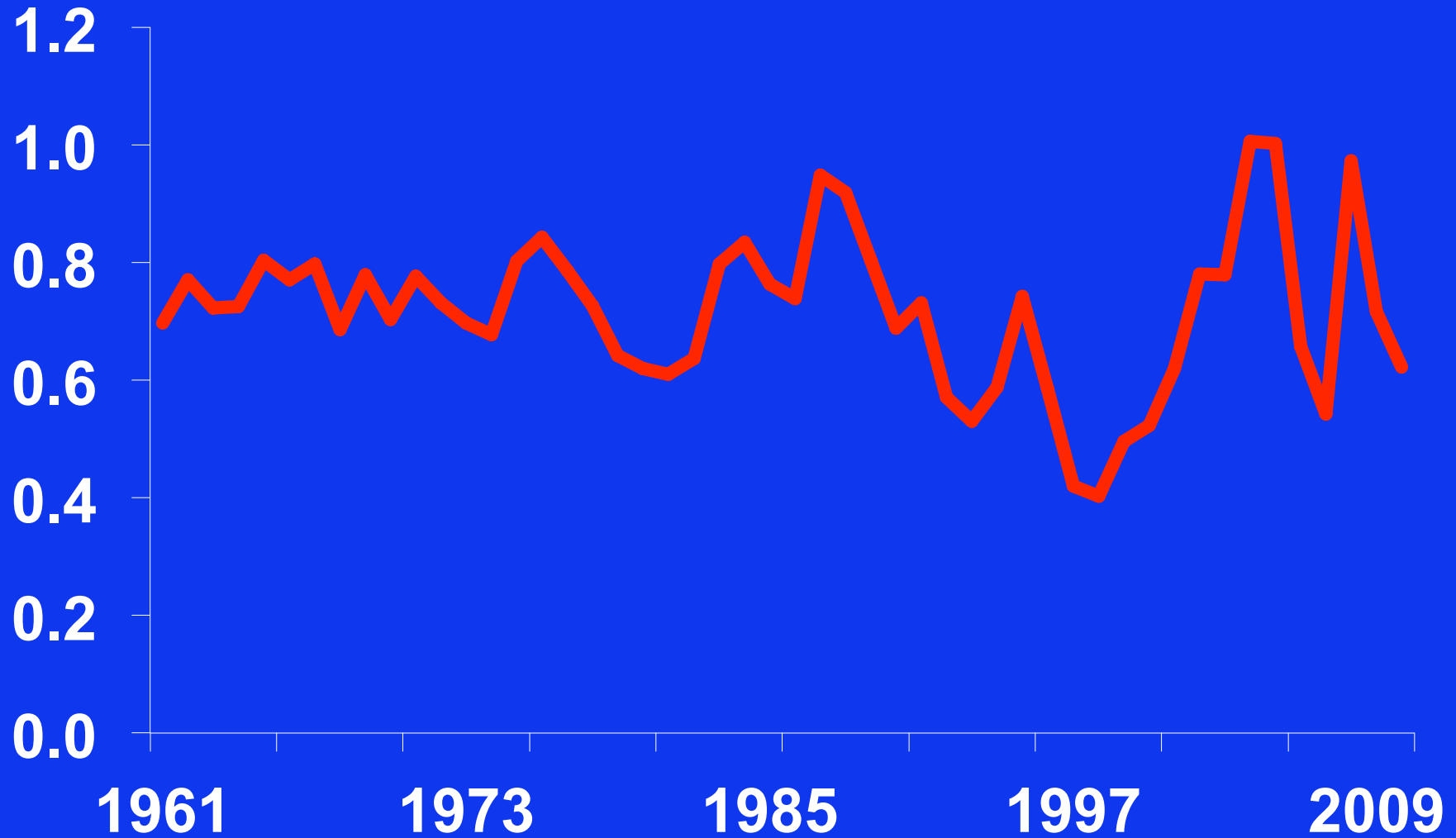
WOOL PRODUCTION

Million Tons

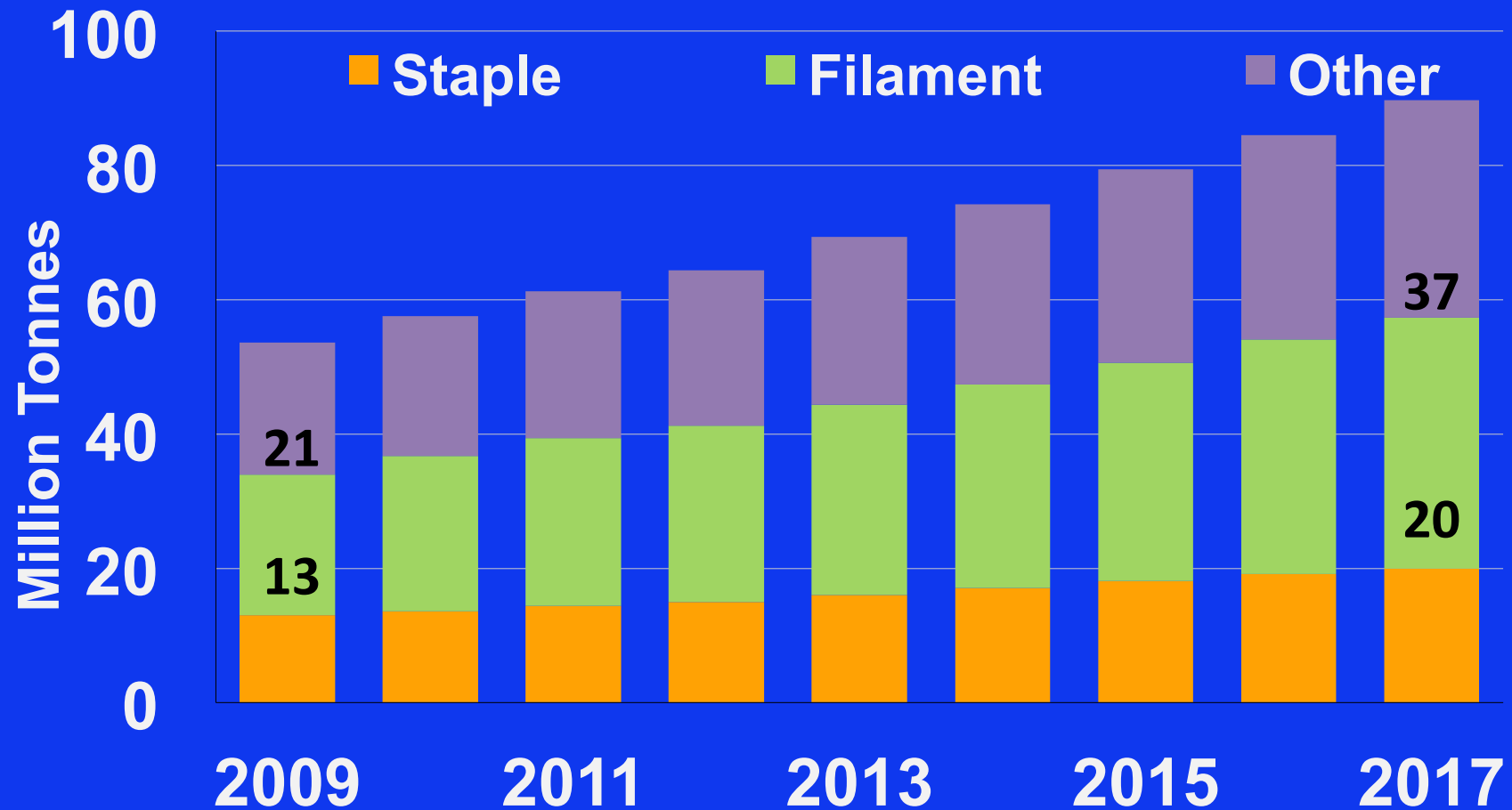


FLAX PRODUCTION

Million Tons



World Polyester Production



Source: PCI - Fibers & Raw Materials

Peak Oil?

Not Likely

**Extraction Costs are
\$85/barrel**

**Long run oil price forecast:
\$100**

Polyester: Capital Intensive

**\$1 billion for a PTA or MEG
Plant**

**\$150 million for a typical
250,000 tons/year polyester
plant**

Polyester: Capital Intensive

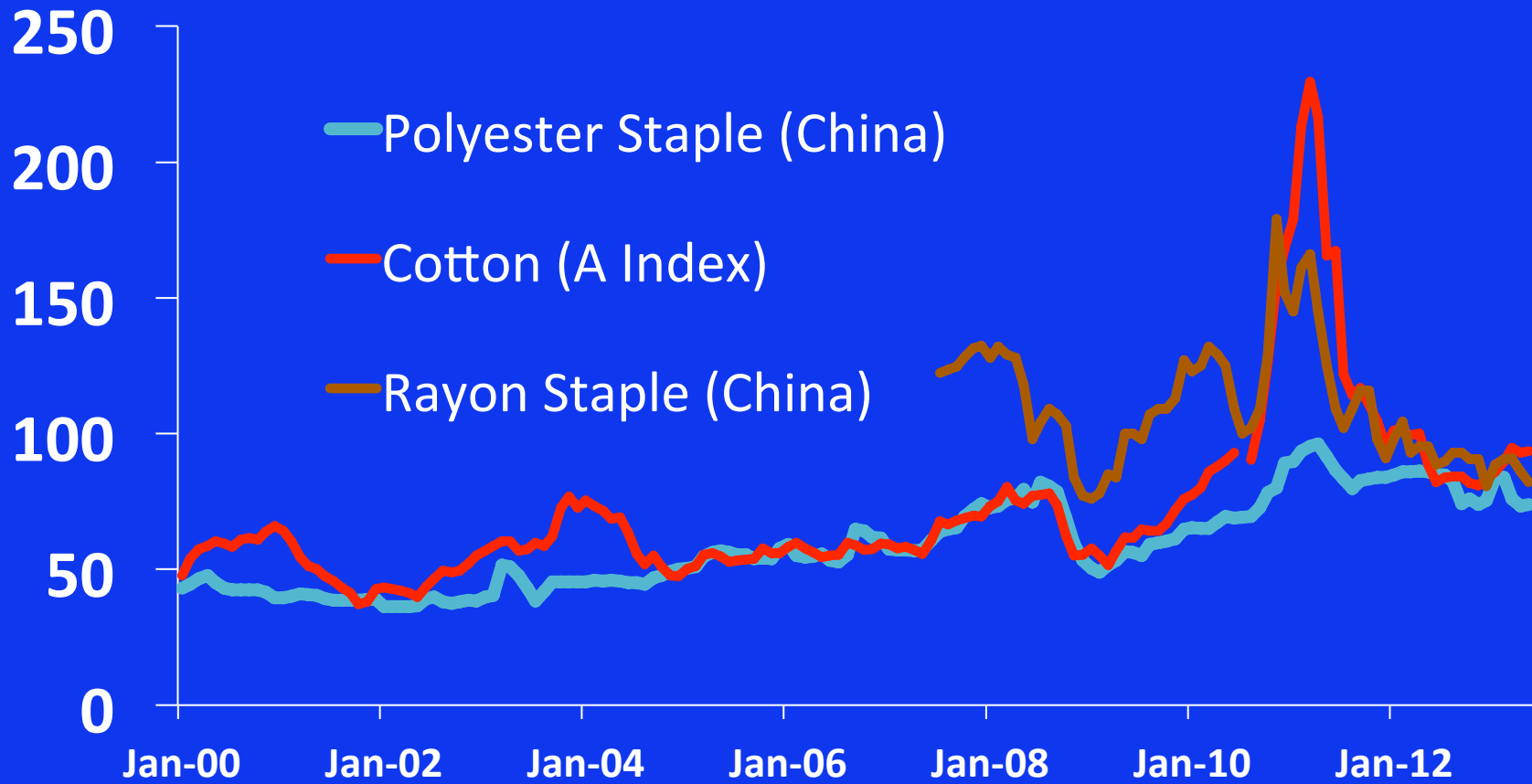
**70 cents per pound raw
material costs**

**15 cents per pound
conversion costs**

85 cents per pound

Fiber Prices

US Cents/Lb.



Sources: Cotlook Ltd for Polyester Staple and A Index; PCI Fibres for Rayon Staple

Minor Non-Cellulosic Fibers:

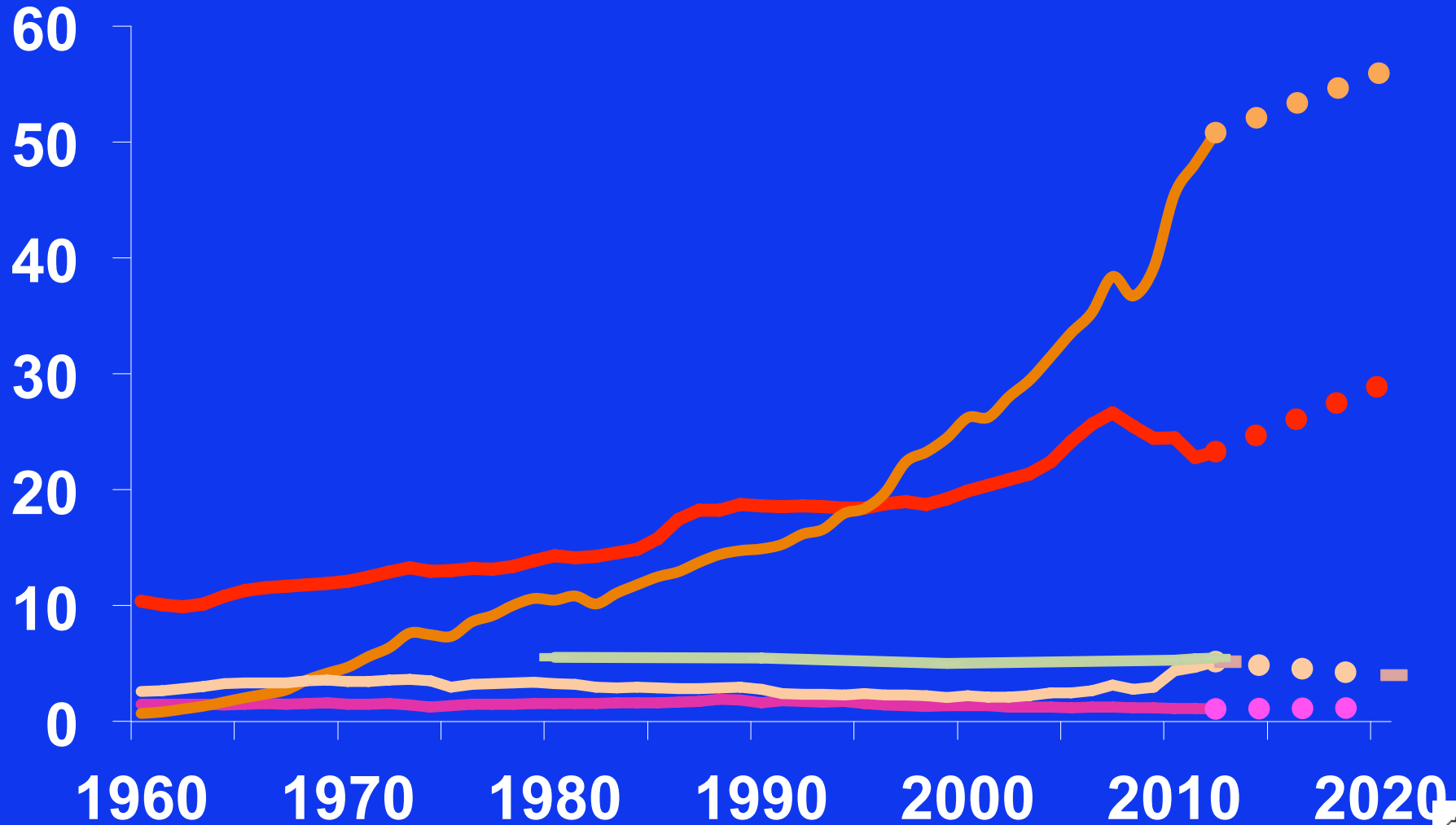
Nylon: Mostly Technical Fiber

Acrylic: Higher cost

Polypropylene: Cheapest

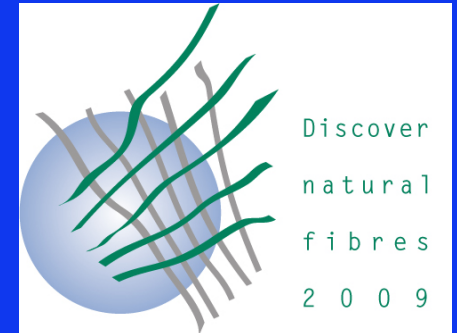
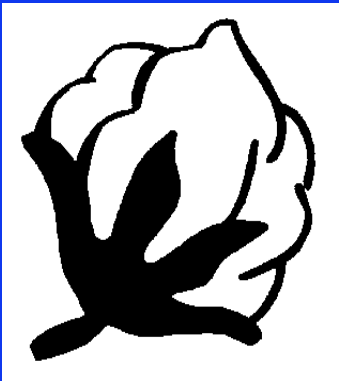
WORLD FIBER PRODUCTION

Million tons



WORLD FIBER PRODUCTION

www.ICAC.org



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