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Trade and market access in natural fibres

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UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

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UN trade & development UNCTAD

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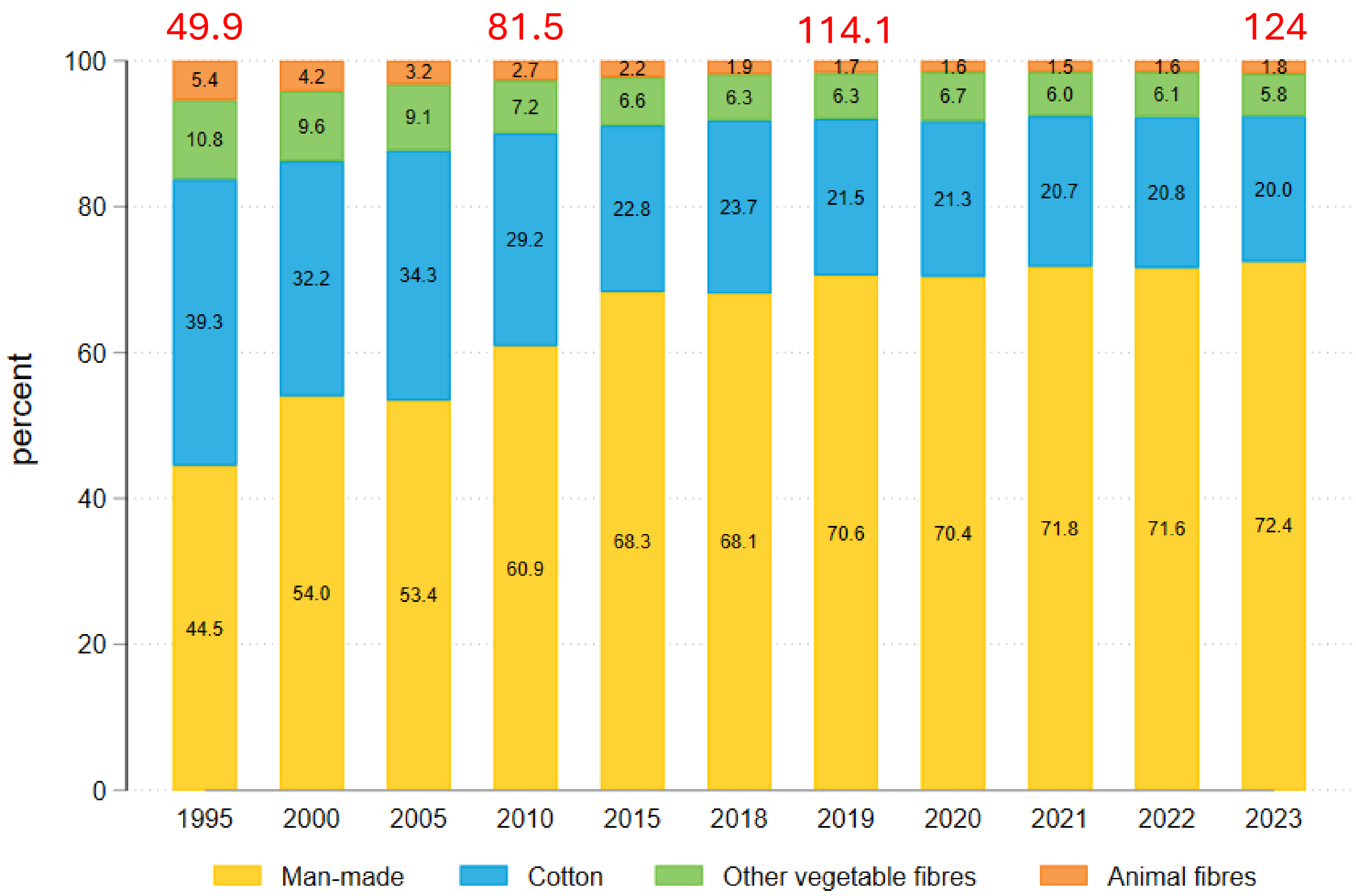
1. Introduction

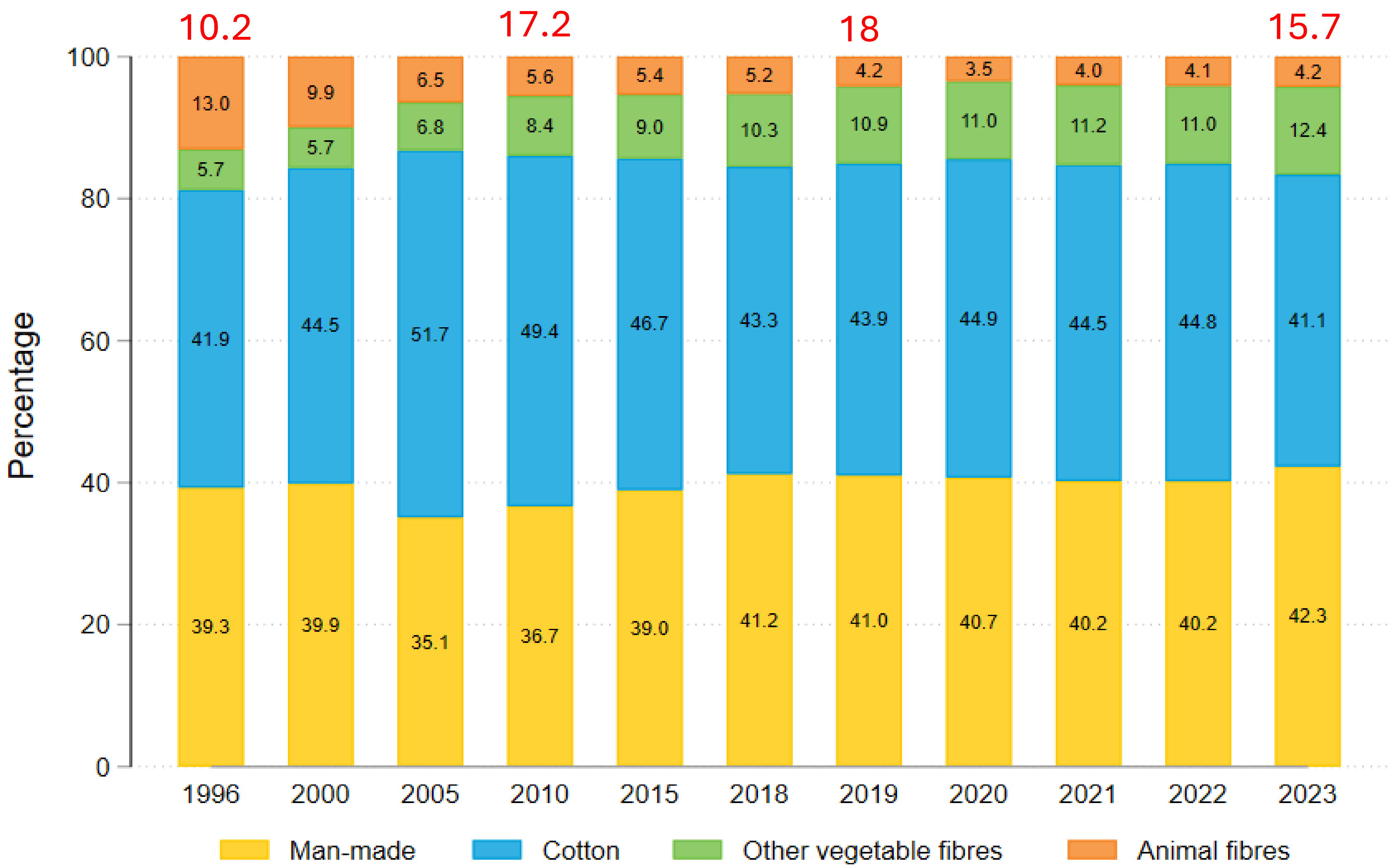
Predominance of man-made fibres in world production



Source: Industrievereinigung Chemiefaser e. V. / IVC, FAO, DFNI, Textiles exchange

2. Trade trends

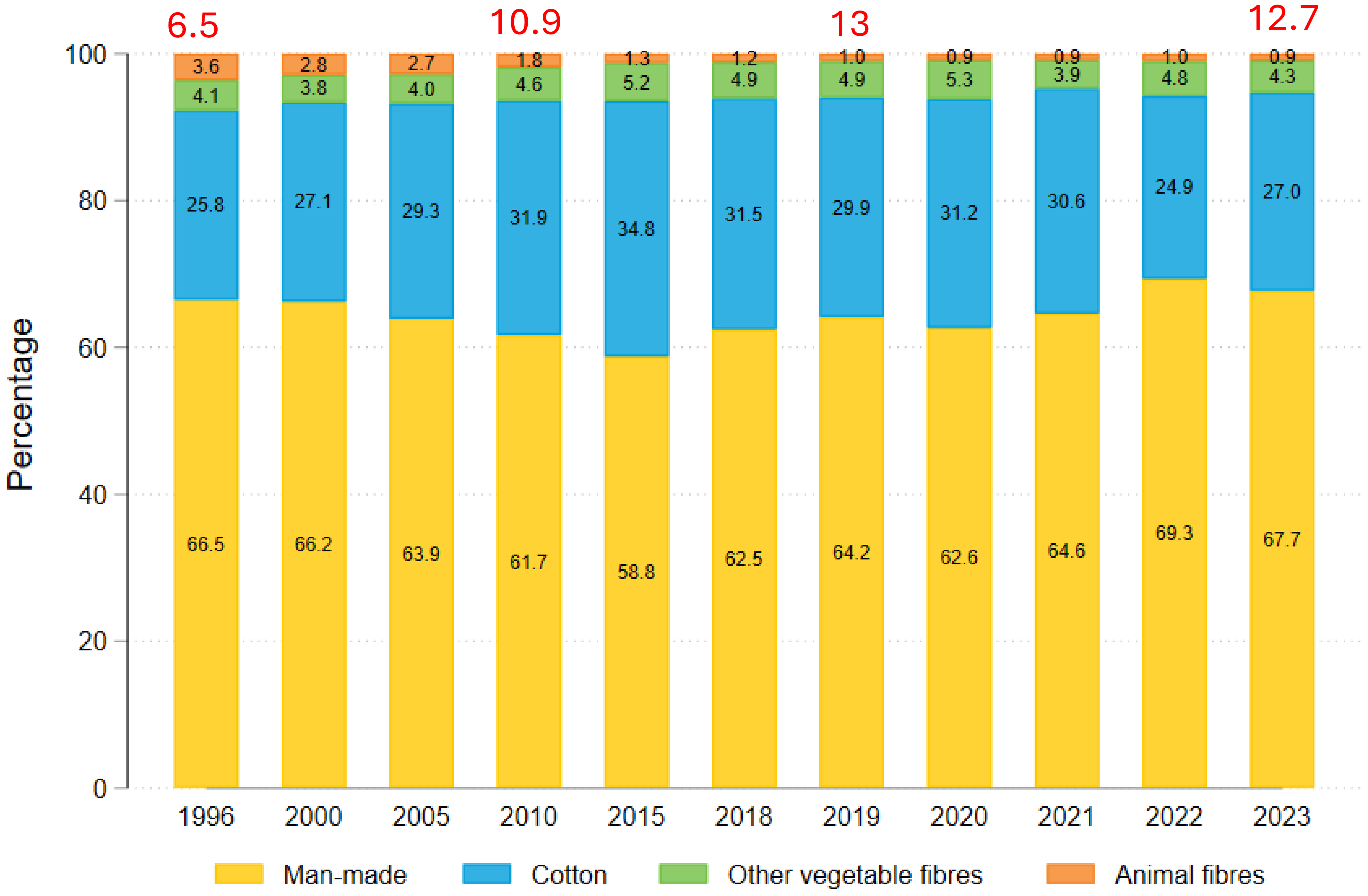
Raw: higher trade shares for natural fibres



	Total Value ($US billions)
1996	22.2
2010	38.8
2019	37.8
2023	37.9

Source: COMTRADE in WITS

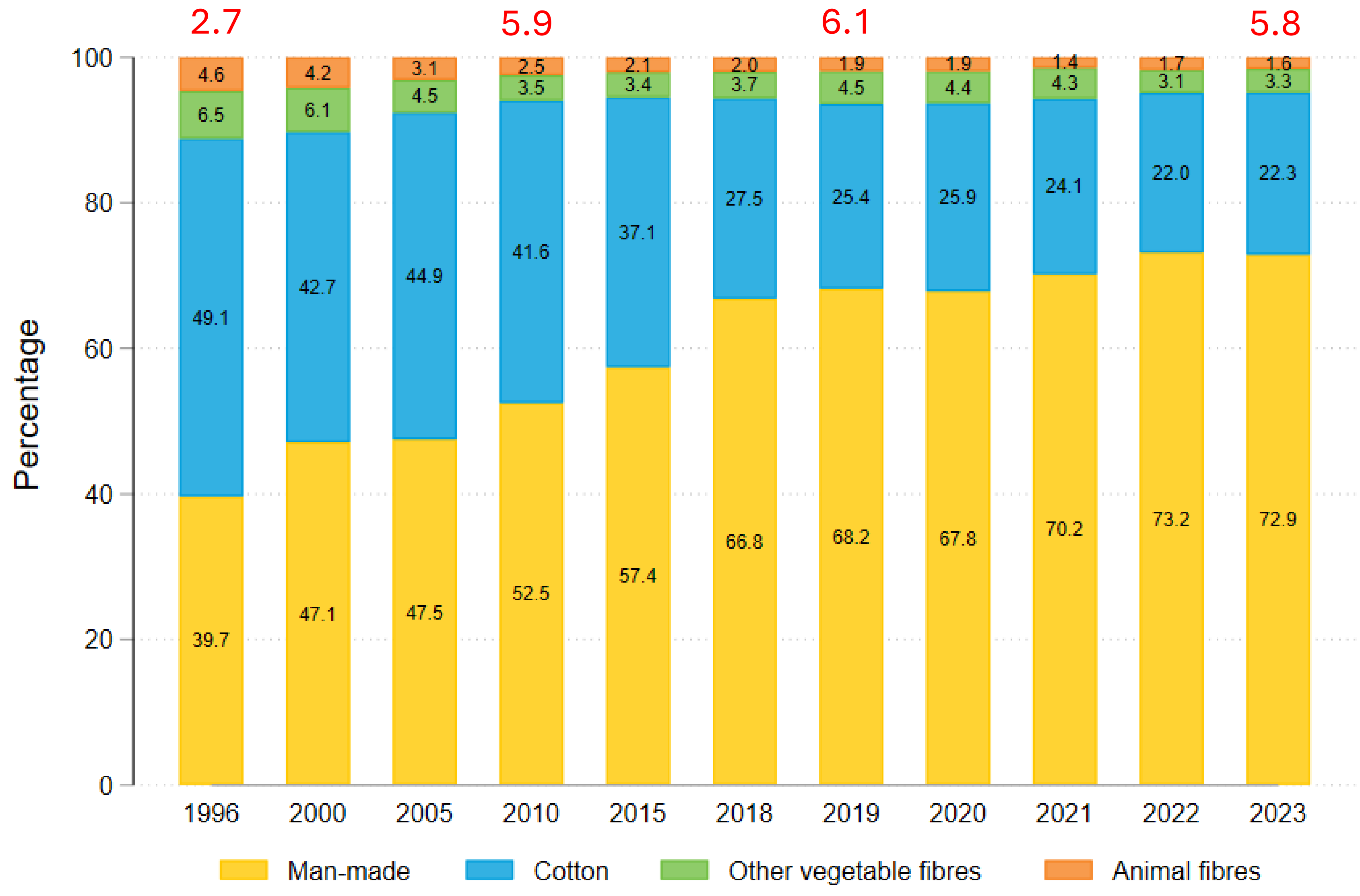
Yarn: historical dominance of man-made products



	Total Value ($US billions)
1996	26.1
2010	40.3
2019	40.9
2023	40.5

Source: COMTRADE in WITS

Fabrics: increasing prevalence of man-made materials

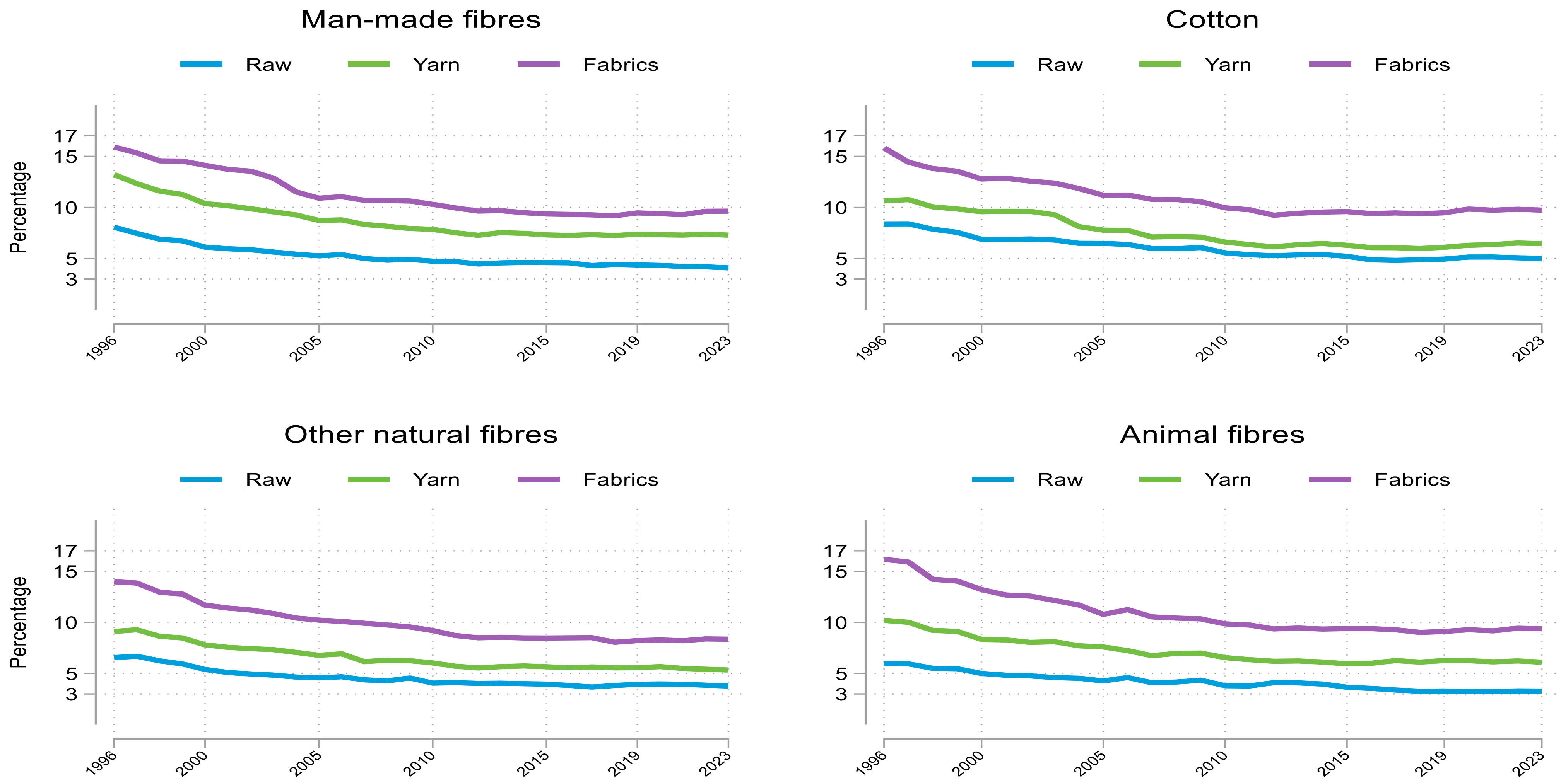


	Total Value ($US billions)
1996	37.5
2010	43.5
2019	42.5
2023	40.8

Source: COMTRADE in WITS

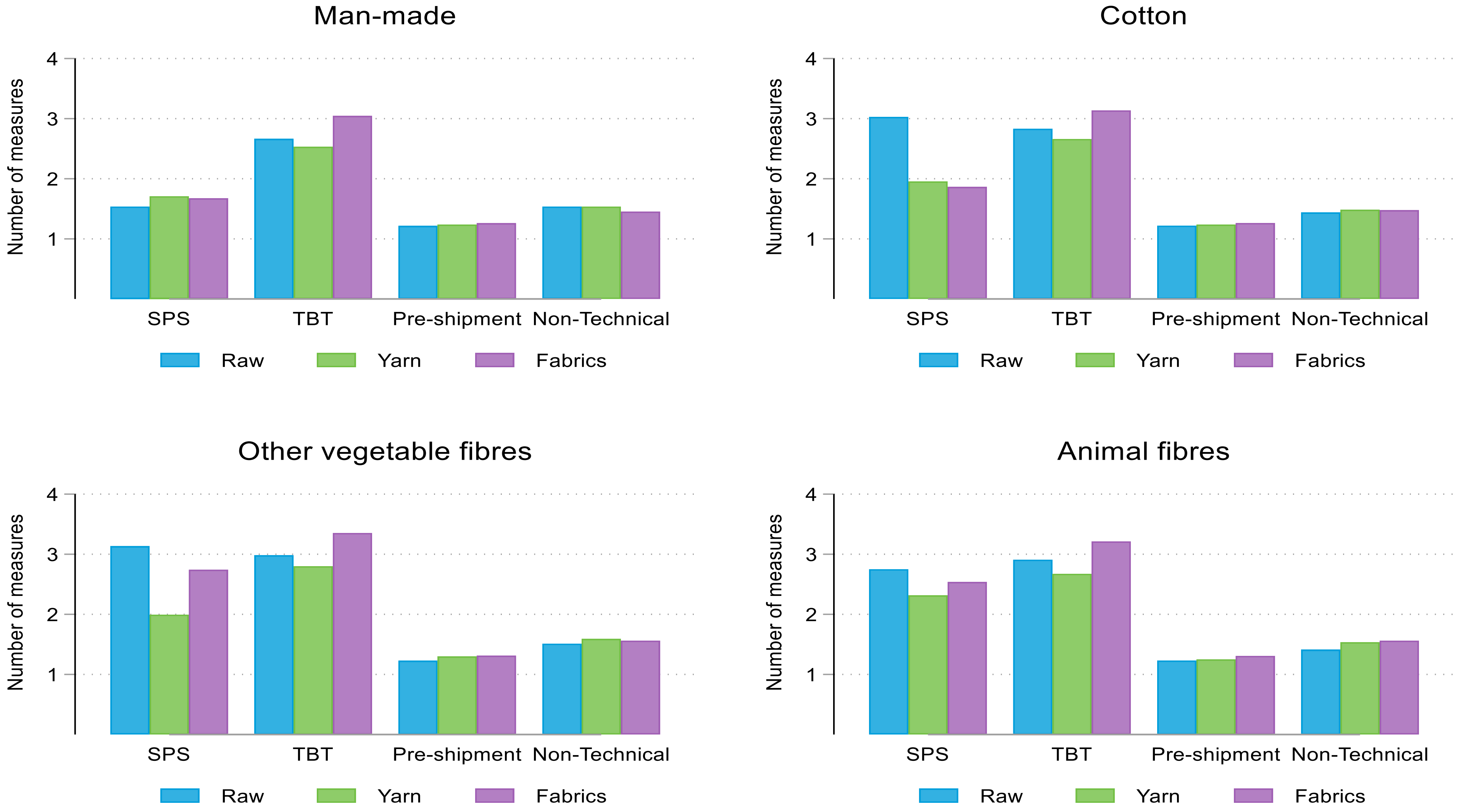
3. Tariffs and NTMs

Decreasing tariff rates but persistent tariff escalation



Source: TRAINS, IDB

Higher incidence of NTMs in raw natural fibres trade



Source: TRAINS, IDB

4. Value Chains

Different models of production integration

- **Complete integration** : presence maintained at all value chain stages and use of imports to supplement domestic production and foster scale economies across the value chain
  - Export orientation (e.g. China)
  - Balance between domestic and international orientation (e.g. India)
- **Processing-focused integration** : concentration on processing stages with a heavy reliance on imported raw materials and export-oriented manufacturing (e.g. Türkiye, Vietnam)
- **Specialty integration :** focus on high-value segments. Traditional producer of processed products but with limited raw and intermediate material production and relatively high labor costs (e.g. Italy)

Thank you for your attention