

Textile Chemicals

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Abstract

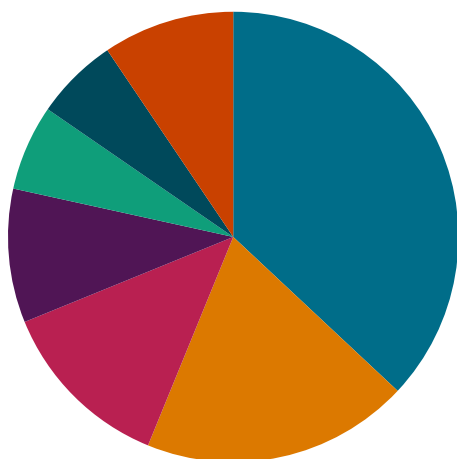
In Asia, particularly in mainland China and India, textile production remains dominant due to their vast labor force, established supply chains and technological advancements. While mainland China continues to lead as the world's largest producer, its growth rate has slowed in recent years compared with India, which now boasts the fastest growth in the sector. India's diverse textile offerings and expanding export capabilities position it as a significant player in the global market. South-eastern Asia is also emerging as a key contributor, and countries like Vietnam and Bangladesh are capitalizing on competitive labor costs and favorable trade agreements.

Textile chemical products range from highly specialized chemicals (biocides, flame retardants, water repellents and warp sizes, for example) to relatively simple commodity chemicals (such as bleaches) or mixtures thereof (such as emulsified oils and greases, starch, sulfonated oils, waxes, and some surfactants). Several thousand textile chemical specialties are sold; many of them are quite similar and differ from one supplier to another merely in trade names and prices. Because of the nature of the chemicals involved, assessment of market sizes is very difficult and, at best, gives estimates based on published statistics on fibers and textile production and typical application levels required for specific process steps.

The following chart shows world consumption of textile chemicals on a value basis:

World consumption of specialty textile chemicals by region —

■ Mainland China ■ Southern Asia ■ Europe ■ North America
■ South-eastern Asia ■ Other Eastern Asia ■ Rest of world



Data compiled April 3, 2025.
Source: S&P Global Commodity Insights.
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Mainland China has remained the largest consumer of textile chemicals, accounting for nearly half of the global market value in 2024. However, the pace of growth in mainland China is beginning to slow, with India now experiencing higher growth rates in the textile sector. Mainland China had established itself as a leader in global apparel and home textile production — particularly in towels and sheets — primarily due to its low-cost labor compared with other countries. However, rising labor costs are becoming a significant concern for manufacturers, threatening the competitive advantage that has long characterized the mainland Chinese textile industry. Additionally, increasing production costs, coupled with stringent government regulations, are influencing the volumes and types of chemicals permitted for use in mainland China's textile sector, further complicating the landscape for producers.

In response, India is diligently working to close the gap with mainland China in textile production and consumption. The success of India's textile industry will largely depend on its ability to effectively connect marketing strategies in export markets with the advantages of low-cost labor in production. By enhancing its export capabilities and ensuring quality, India aims to position itself as a viable alternative to mainland China in the global textile market.

In contrast, the textile industries in developed regions such as the United States, Europe and Japan face distinct challenges. For these markets, survival and growth hinge on the production of high-fashion apparel, sophisticated interior textiles, carpets and technical fibers. These segments require innovation, superior quality and a commitment to sustainability, which are essential for maintaining competitiveness in a global market increasingly driven by consumer preferences for unique, eco-friendly products.

In terms of product types, dyes and pigments are the largest chemical category consumed in textile processing. Dyes are typically used to color fabrics in a uniform manner, while pigments are often employed for their ability to provide vibrant colors and opacity. In 2024, dyes and pigments accounted for close to 35% of the total global value of chemicals, followed by specialty textile lubricants.

For more detailed information, see the table of contents, shown below.

S&P Global's Specialty Chemicals Update Program – Textile Chemicals is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Industry structure,
operating characteristics
and regulatory
environment



Products, functions
and markets



Cost structure/
profitability



Technology changes
and emerging
substitution practices



Quantitative market
analysis and forecasts

Key benefits

S&P Global's Specialty Chemicals Update Program – Textile Chemicals has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with S&P Global's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade, and economics.

This report can help you

- Identify the competitive environment and key players
- Assess key issues facing both suppliers and their end-use customers
- Understand industry integration strategies
- Keep abreast of industry structure changes, regulatory requirements and other factors affecting profitability
- Identify new business opportunities and threats
- Follow important commercial developments
- Recognize trends and driving forces influencing specialty chemical markets

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