2000, it had reached 19.2 million tons. In 2014, demand is put at 46.1 million tons. Looking at the period from 1980-2014, total fiber demand growth has been 55.7 million tons — 73.4 percent of which is down to polyester. The message is clear that polyester has gained significant share from all other fibers, both man-made and natural, and that anyone in the fiber business has to be aware that polyester producers are constantly looking at other fibers and their markets to determine if polyester can take further market share.

A very large part of the growth in polyester has come from China with India and Southeast Asia also contributing. In the case of China, both polyester production and apparent domestic demand for the fiber have been very strong. China accounts for 69 percent of all polyester fiber production globally, and if India and Southeast Asia are added, these three regions represent 86 percent of global production.

Polyester is dominant, but nylon, the oldest MMF, still plays an important role in the fiber business with 4 million tons of global production in 2014. Production is more broadly based by regions than for polyester, and the China, India, Southeast Asia group accounts only for 52 percent of total nylon fiber, with the Americas contributing 20 percent. Nylon has developed into a niche fiber, in that it is focused on a limited number of end uses, but some of these are quite large markets. Carpet is a significant application for nylon and accounts for 17.5 percent of total usage globally and 72 percent of North American nylon production. Other applications where nylon is very successful include airbags, heavy-duty tires, intimate apparel, sheer hosiery and swimwear. However, the nylon industry has to be aware that polyester is threatening a number of these markets. There has been remarkable growth in polyester bulk continuous filament (BCF) for carpet in North America. Polyester also is now making inroads into the airbag market — particularly for the larger curtain air bags.

Cellulosics have been a surprising success story over the past 10 years, primarily through gains in usage of viscose rayon staple fiber as both spinning fiber for apparel and in nonwoven end uses. Following a steady decline in market share and volume from 1980 to 2000, cellulosics made a remarkable recovery doubling consumption in the last 10 years to 5.2 million tons. Much of this increased demand has come from China where cellulosic staple mill consumption in 2000 totaled 0.6 million tons, and in 2014 totaled 3.0 million tons. Rayon staple received a significant boost in demand in 2010-11 as a result of the high price of cotton. Rayon provided a lower cost substitute for higher-priced cotton and the fiber has held on to its market share gain.

**Forecasting**

PCI Fibres provides forecasts of production and mill consumption in its annual World Synthetic Fibres Supply/Demand Report (Red Book). In developing these forecasts it is important to look at regional patterns of consumption at the final consumer level. Consumer demand ultimately drives production and mill consumption. In the 2013 Red Book, it was determined that in 2014 the world final consumer demand for all fibers averages 11.4 kilograms per capita (kg/capita) (See Figure 2). Volumes vary from North America with a high of 37 kg/capita; to Africa, the Middle East and India at 5 kg/capita. In taking the data forward as a forecast to 2030, it is necessary to look at global demographics where there is a significant shift taking place in the relatively near future. China has been the most populous country in the world, but following the single child policy introduced in the 1970s the rate of population growth has contracted significantly, and even as China relaxes its policy, it can be seen that the growing middle class generation is not returning to the multi-children family structure of previous generations. As a result, in