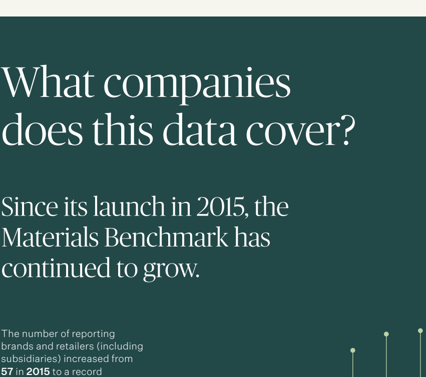
Textile Exchange

Materials Benchmark Insights and Trends

October 2024

About the Materials Benchmark



The Materials Benchmark is the largest peer-to-peer comparison initiative in the fashion, textile, and apparel industry.

Every year, it tracks the uptake of fibers and raw materials from recognized programs, as well as how companies are addressing areas like circularity, biodiversity, land, freshwater, and forests.

The Materials Benchmark is open to all companies that want to measure and report their fiber and raw material-related progress. However, it is important to note that the data in this factsheet refer to companies that report into the Materials Benchmark only, which far outperform the industry as a whole in terms of their sustainability progress.

What companies does this data cover?

Since its launch in 2015, the Materials Benchmark has continued to grow.

The number of reporting brands and retailers (including subsidiaries) increased from **57** in **2015** to a record

418 in **2024.**

Companies in almost every continent report into the Materials Benchmark. **56%** of the reporting companies are in Europe, **34%** are in North America, **6%** are in Oceania, **3%** are in Asia, **2%** are in South America, and **1%** are in Africa. Reporting companies have headquarters in countries all around the world.

71% of the companies have more than **250** employees, but many medium, small, and micro-size companies also reported via the Materials Benchmark (around **29%**).

Materials sourced with sustainability in mind

Materials under sustainability programs are gaining popularity among reporting brands.

The share of raw materials under sustainability programs used by the reporting brands increased from **53%** in **2022** to

57% in **2023.**[1]

COTTON	POLYESTER	POLYAMIDE (NYLON)	VISCOSE	WOOL
The share of cotton under sustainability programs (farm and recycled) used by the reporting brands increased from **79%** in **2022** to	The share of recycled polyester used by the reporting brands increased from **43%** in **2022** to	The share of recycled polyamide (nylon) used by the reporting brands increased from **15%** in **2022** to	The share of recycled viscose used by the reporting brands was still low at	The share of wool covered by sustainability programs (on the farm or recycled) used by the reporting brands decreased from **38%** in **2022** to
80% in **2023**.	55%[3] in **2023**.	20% in **2023**.	<1% (**0.3%**) in **2023**.	37% in **2023**.
The programs and sustainability attributes most popular in 2023 were Better Cotton (**64%**), organic (**7%**), recycled (**4%**), and others (**3%**).[2]				**16%** of wool used by the reporting brands was certified under the Responsible Wool Standard, and **17%** was recycled. **5%** of wool was covered under other sustainability programs.[4]

However, the share of recycled materials from textile-to-textile feedstocks remains very low.

<1% of all fibers used by the brands and retailers were from textile-to-textile feedstocks from post-consumer textiles in **2023**.[5]

1 This data refers to the 53 brands that reported the complete data for the key fibers (cotton, polyester, nylon, viscose, sheep wool) for both 2022 and 2023. The share of raw materials under sustainability programs used in 2023 includes 20 different programs, covering Better Cotton, recycled polyester, recycled polyamide, Responsible Wool Standard, and PEFC.

2 This data refers to the 137 brands that reported the complete data for cotton (total and programs) for both 2022 and 2023.

3 This data refers to the 128 brands that reported the complete data for polyester (total and recycled) for both 2022 and 2023.

4 This data refers to the 91 brands that reported the complete data for wool for both 2022 and 2023.The majority of the reporting companies (60) reported an increase in wool covered by sustainability programs, one had no change, and 30 reported a decline. As the volume of the 30 companies was higher than the volume of the 60 companies, the overall volume reported by the companies that reported for both years declined. However, on a global level, the volumes of wool produced under sustainability programs increased (see Materials Market Report 2024).

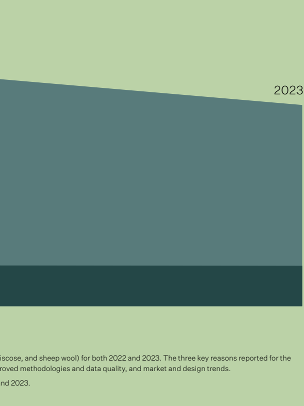
5 This data covers the 53 brands that reported the complete data for the primary raw material fibers (cotton, polyester, nylon, viscose, sheep wool) for 2023.

Volumes of raw materials used

Overall raw material usage by the reporting companies declined.

The total fiber and raw material usage as shared by the reporting brands decreased from around **2.3 million tonnes** in **2022** to

2.1 **million tonnes** in **2023.**[6]



The use of fossil-based synthetic fibers also decreased among reporting brands.

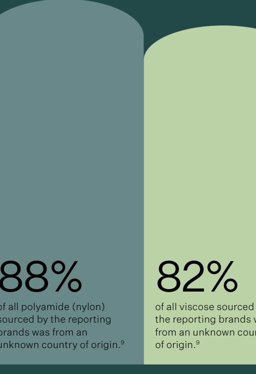
6 This data only refers to the 53 brands that reported complete volumes for the key fibers (cotton, polyester, nylon, viscose, and sheep wool) for both 2022 and 2023. The three key reasons reported for the decline include the production and sourcing of less products, the use of products in stock from previous years, improved methodologies and data quality, and market and design trends.

7 This data refers to the 128 brands that reported the complete data for polyester (total and recycled) for both 2022 and 2023.

8 This data refers to the 128 brands that reported the complete data for polyamide (nylon) for both 2022 and 2023.

Traceability of materials to country of origin

Brands and retailers still struggle to identify the country of origin of their raw materials.



80% of all cotton sourced by the reporting brands was from an unknown country of origin.[9]

80% of all wool sourced by the reporting brands was from an unknown country of origin.[9]

75% of all polyester sourced by the reporting brands was from an unknown country of origin.[9]

88% of all polyamide (nylon) sourced by the reporting brands was from an unknown country of origin.[9]

82% of all viscose sourced by the reporting brands was from an unknown country of origin.[9]

9 Since tracking synthetic materials back to the source of the crude oil used is impossible, brands were asked to report the country of origin of the polymer production or the country where the recycled feedstock was collected. For biobased polyester, they were asked to report the country where the feedstock was produced. However, we assume that in many cases brands reported the country where the fiber was produced.

For manmade cellulosics, brands were asked to report the country of origin of the raw materials, but we also believe that the country where the fiber was produced was reported. This is because we would expect a higher share of unknown sources for the forest and recycled feedstock origin.

While this has been accepted for this year, we will ask companies to ensure that they report the country of origin as specified above in the future.

Progress on material commitments

The reporting companies are making progress towards their commitments, but not fast enough.

Textile Exchange has called on the industry to achieve ambitious targets for cotton and polyester sourcing through its "2025 Sustainable Cotton Challenge" and the "2025 Recycled Polyester Challenge," developed together with the UNFCCC.

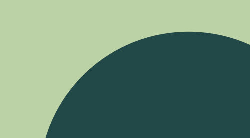
While the industry made progress, reporting brands are not moving fast enough to meet these targets. Some companies also dropped out as signatories of the challenges now that the target year is around the corner.

The Deforestation-Free Call to Action for Leather was published as a new challenge in 2023, and new industry commitments beyond 2025 are in development. For more details, visit the Textile Exchange Challenges dashboard.

2025 Sustainable Cotton Challenge

The number of signatories was 150 in **2024**.

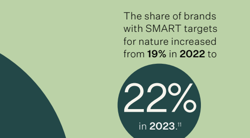
31 signatories (**21%**) used **100%** sustainable cotton in **2023**.



2025 Recycled Polyester Challenge

The number of signatories was 121 in **2024**.

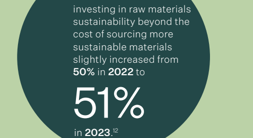
14 signatories (**12%**) used **100%** recycled polyester in **2023**.



The Deforestation-Free Call to Action for Leather

18 signatories signed up to the Deforestation-Free Call to Action for Leather in **2023**, the year of its release.

56% of the signatories reported that their deforestation and conversion-free bovine leather sourcing policy was developed, and their commitments were published and aligned with the Deforestation-Free Call to Action for Leather requirements.



Climate and nature initiatives

Reporting brands are starting to implement their climate and nature strategies.

The share of brands with SMART targets for nature increased from **19%** in **2022** to 22% in **2023**.[11]

The share of brands investing in raw materials sustainability beyond the cost of sourcing more sustainable materials slightly increased from **50%** in **2022** to 51% in **2023**.[12]

The share of brands with formal climate targets increased from **66%** in **2022** to 79% in **2023**.[10]

The share of brands with sourcing restrictions due to climate and nature-related risks increased from **68%** in **2022** to 74% in **2023**.[13]

The share of brands that implemented measures to reduce impacts on climate and nature during raw materials production increased from **79%** in **2022** to 86% in **2023**.[14]

The share of brands that implemented measures to restore and/or regenerate nature increased from **49%** in **2022** to 61% in **2023**.[15]

For more details on climate, water, and biodiversity impacts, visit the Textile Exchange Climate+ dashboard.

10 This data refers to the 105 brands that answered this question for both 2022 and 2023.

11 This data refers to the 105 brands that answered this question for both 2022 and 2023.

12 This data refers to the 120 brands that answered this question for both 2022 and 2023.

13 This data refers to the 105 brands that answered this question for both 2022 and 2023.

14 This data refers to the 105 brands that answered this question for both 2022 and 2023.

15 This data refers to the 105 brands that answered this question for both 2022 and 2023.

About Textile Exchange

Textile Exchange is a global non-profit driving beneficial outcomes for climate and nature across the fashion, textile, and apparel industry, right from the start of the supply chain.

To learn more, visit textileexchange.org.