

ALTERNATIVE PLANT FIBRE LANDSCAPE ANALYSIS REPORT

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[The Discover Natural Fibres Initiative DNFI published an article](#) informing that [FIBRAL Global Plant Fibre Association](#) has produced the extraordinary Report [The Alternative Plant Fibre Landscape Analysis, between tradition and innovation](#), the first comprehensive view of the alternative plant fibre landscape across major industries, providing stakeholders with the insight needed to navigate the sector, evaluate opportunities, and prioritise investment and strategic support.

The Report traces the current landscape of plant fibre systems, from their cultural and ecological foundations to their production pathways, market dynamics, and future potential. It examines how different fibre systems operate, where they are produced, and the social, environmental, and economic impacts associated with them. It is intended for producers; industry partners in the textile, automotive, construction, and pulp & paper sectors; as well as researchers, and investors.

The Report covers 36 plant fibres, excluding cotton, that are cultivated and harvested worldwide for industrial and artisanal use. We also list the largest producers of these fibres within and outside of our member network. This list is by no means exhaustive, and the report does not aim to rank fibre types, make value judgments, or recommend specific producers. The Report also gives an overview of associated social and environmental impacts of fibres but does not attempt to provide comprehensive life cycle assessment; instead, it points to available knowledge and highlights key data gaps.

[The Executive Summary of the Report highlights that](#) “Across the globe, thousands of plant species can provide natural fibres, many used for millennia in textiles, tools, construction, and art—deeply embedded in cultural heritage and linked to sustainable livelihoods. While their ecological availability and functional diversity are high, commercial production remains largely concentrated in cotton and, to a lesser extent, jute, flax, and coconut fibres. Yet, this landscape is beginning to shift. As governments and companies adopt bioeconomy strategies and ambitious sustainability targets, industries from textiles and construction to automotive and pulp & paper are seeking biobased, low-impact feedstock alternatives. This presents a significant opportunity for the plant fibre sector to scale, innovate, and advance sustainable industrial practices.



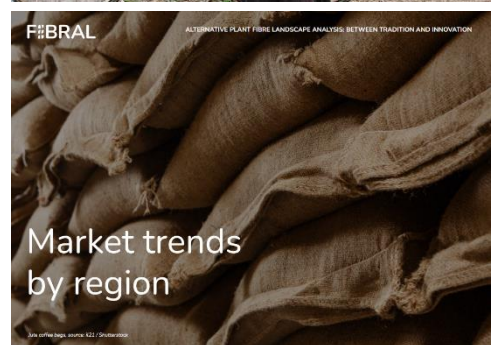
Plant fibres hold significant potential to contribute to climate resilience, circular material systems, and rural livelihoods. Recognised by the UN General Assembly in 2023 as drivers of sustainable development, they support land restoration, enhance ecosystem resilience, and create rural employment when integrated into regenerative agricultural systems. Strategic investment can therefore advance climate and development objectives while fostering long-term rural economic resilience. To fully realise this potential, however, several interrelated structural, operational, and environmental challenges must be addressed. Decades of limited investment have left processing infrastructure underdeveloped, slowed innovation, and resulted in limited data and transparency. This has created a difficult starting point for emerging companies, which now face persistent challenges in reaching economies of scale. As a result, production costs remain high, demand is constrained, and the sector struggles to attract the level of investment needed for growth. At the same time, climate change is placing growing pressure on yields and fibre quality, underscoring the need for resilient production systems.

FIBRAL was created to help address these systemic challenges by strengthening pre-competitive collaboration across the plant fibre ecosystem. By convening stakeholders, supporting joint research, generating open-access data, and promoting best practices, we aim to reduce fragmentation, improve transparency, and build the evidence needed to unlock investment and sustainably scale the sector.

The Report underlines the following key takeaways:

- Global policies and climate goals demand a shift to renewable materials and circular approaches, requiring large amounts of sustainable biomaterials. Responsibly produced plant fibres offer a scalable, nature-based solution that can strengthen rural livelihoods and climate resilience.
- To date, the sector remains relatively small at 5.9 million MT and USD 3.8 billion (excluding cotton), but is expected to grow to 8 million MT by 2035. The strongest opportunities are in applications where plant fibres have clear technical advantages (e.g. filtration) and sectors with low entry barriers such as insulation, packaging, composites, and heavier textiles.
- Industry growth is less limited by the potential of alternative plant fibres than by environmental challenges and structural barriers, such as outdated machinery, low market demand, and regulations built for conventional materials.
- Reimagining traditional plant fibres requires connecting Traditional Ecological Knowledge with modern innovation to unlock their full value as nature-based solutions and contributors to rural development. Small producer and industrial systems have complementary strengths; when intentionally connected, they can deliver scale, quality, and regenerative outcomes together.
- What is needed is a collective voice across natural fibre systems, with alignment and collaboration among producers, innovators, and markets. Joint R&D, open technology transfer, shared best practices, and transparent data will be critical to enable sustainable scaling and long-term competitiveness."

[FIBRAL was founded in 2022 under the name Fibril Material Alliance.](#) The initiative began when Carmen Hijosa and Riikka Juva from Ananas Anam, Hannes Schoenegger and Stephanie Walter from Bananatex®, Ricardo Garay from Regenerate Fashion and Sandra Bohne joined forces with a shared vision: to create a collective voice for plant fibres in the rapidly growing field of biomaterials. Over the past years, FIBRAL has connected more than 150 organisations and individuals across 25 countries, creating



space for exchange, collaboration and mutual support within the plant fibre community. FIBRAL brings together producers, processors, manufacturers, buyers and academia to strengthen collaboration, build evidence on fibre production and impacts, and develop best practices. By improving coordination, transparency and capacity across the value chain, it can help de-risk investment, empower producers to scale sustainable practices, and enable buyers to source plant fibres with greater confidence.

[Reimagining plant fibres as modern bio-based materials](#) requires stronger sector coordination and collaborative action to improve production capacity, quality consistency, and processing capabilities. In the near term, building reliable supply systems and technical alignment is essential, while long-term scaling will depend on mobilising investment, strengthening market integration, and enabling supportive policy frameworks. FIBRAL aims to contribute to this transition by fostering pre-competitive collaboration, facilitating knowledge exchange, and aligning stakeholders across the plant fibre ecosystem.

To know more

[Article in DNFI website](#)

[Report presentation in Fibral.org website](#)

[Report *The Alternative Plant Fibre Landscape Analysis.pdf*](#)

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