



Taiwan Man-Made Fiber  
Industries Association

台灣人纖產業的現況及未來發展方向

# The Current Status & Development of Taiwan's Man-Made Fiber Industry

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1. 台灣人造纖維產業現況  
**Overview of Taiwan Man-Made Fiber Industry**
2. 台灣化纖原料供需分析  
**Supply and Demand of Raw Materials for Taiwan Chemical Fiber**
3. 台灣人造纖維產業發展方向  
**The Development Strategy of Taiwan Man-Made Fiber Industry**



# 1. 台灣人造纖維產業現況

## Overview of Taiwan Man-Made Fiber Industry



# 台灣紡織產業產值變化

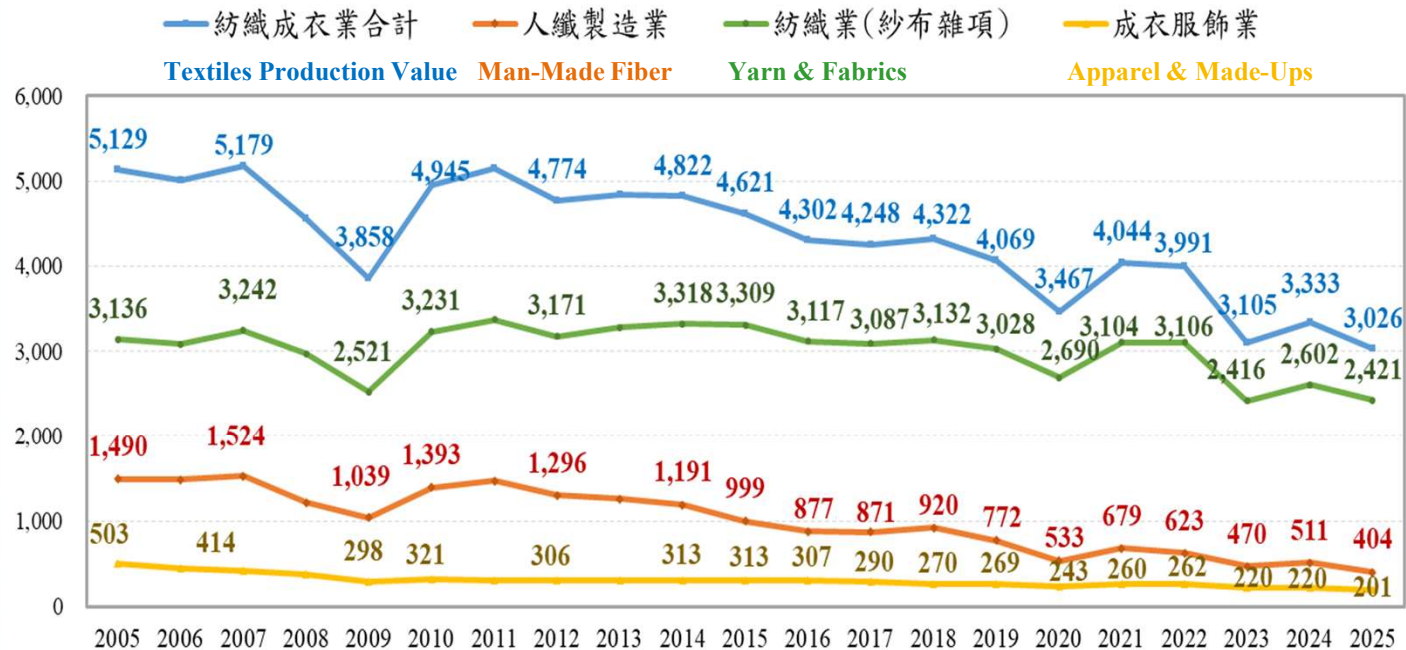
## The Production Value of Taiwan Textile Industry

2005~2025年台灣紡織業產值為新台幣 3,026億~5,179 億元之間。

From 2005 to 2025, the production value of Taiwan's textile industry was NT\$ 302.6~517.9 billion.

2025年人造纖維製造業產值達新台幣 404 億元，占整體紡織產業新台幣 3,026 億元的 13%。

In 2025, the production value of man-made fiber industry was NT\$ 40.4 billion, accounting for 13% of the overall textile industry's NT\$ 302.6 billion.



Source : Taiwan Textile Federation (紡織業拓展會)



## 2025 台灣人造纖維產業產值

## 2025 The Production Value of Taiwan Man-Made Fiber Industry

聚合體業 新台幣 751 億元  
Polymerization Industry  
NT\$ 75.1 Billion

聚酯粒  
PE Chips

聚胺粒  
Nylon Chips

人造纖維業 新台幣 404 億\*元以上  
Man-Made Fiber Industry  
More Than NT\$ 40.4 Billion\*

聚酯纖維  
PE Fiber

聚胺纖維  
Nylon Fiber

聚丙烯纖維  
PP Fiber

碳纖維  
Carbon Fiber

彈性纖維  
Spandex

加工絲業 新台幣 360 億元  
Textured Yarn Industry  
NT\$ 36.0 Billion

聚酯加工絲  
PE Textured Yarn

聚胺加工絲  
Nylon Textured  
Yarn

備註：\* 404 億元 = 聚酯纖維 + 聚胺絲

Remark：\* 40.4 billion = PE Fiber + Nylon Filament



## 台灣人造纖維產銷統計

## Production & Shipment of Taiwan Man-Made Fiber

Unit : 1,000 tons

年度 Year	生產 Production	銷售 Shipment		
		內銷 Domestic	出口 Export	合計 Total
2023	1,264	682	394	1,076
2024	1,276	719	361	1,080
2025	1,050	620	270	890
2025/2024 +/-%	-18%	-14%	-25%	-18%

備註：包括聚酯絲、聚酯棉、聚胺絲、聚酯加工絲、聚胺加工絲

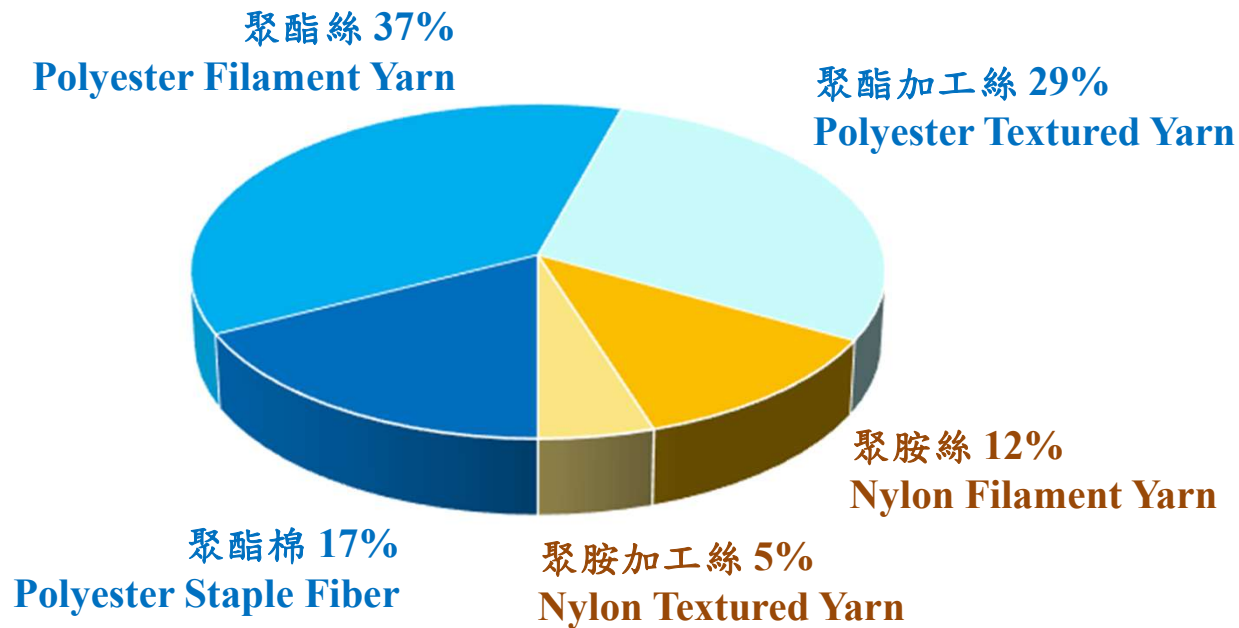
Remark : Including polyester filament & textured yarn, polyester staple fiber, nylon 6 filament & textured yarn



## 台灣人造纖維生產量

## Production of Taiwan Man-Made Fiber Industry

2025年台灣人造纖維生產量為1.05百萬公噸  
Production of Taiwan Man-Made Fiber is  
1.05 million tons in 2025





## 台灣紡織纖維需求結構比 Fiber Demand Structure of Taiwan

\* 台灣化纖產品發生結構性的變化，朝向高值化、差異化的方向發展  
Structural Shifts in MMF Products: Moving toward High-Value & Differentiation

Unit : 10,000 tons

年度 Year	天然纖維 Nature Fiber				人造纖維 Man-Made Fiber		合計 Total
	棉花 Cotton		毛、麻、絲 Wool, Linen, Silk		用量 Volume	比重 %	
	用量 Volume	比重 %	用量 Volume	比重 %			
2021	9.7	9.2	0.4	0.4	95.7	90.4	105.8
2022	7.5	9.1	0.3	0.3	75.0	90.6	82.8
2023	7.7	11.5	0.3	0.5	58.7	88.0	66.7
2024	4.3	6.4	0.3	0.5	62.4	93.1	67.0
2025	3.5	6.1	0.3	0.5	52.7	93.4	56.4
	6.6%				93.4%		100%

需求=生產+進口-出口  
Demand=Production+Import-Export



## 2. 台灣化纖原料供需分析

# Supply and Demand of Raw Materials for Taiwan Chemical Fiber



## 台灣化纖原料生產廠商

### Producers of Raw Materials for Taiwan Chemical Fiber

PTA	EG
<p>中美和石化公司 China American Petrochemical Co., Ltd.</p> <p>台化公司 Formosa Chemicals &amp; Fibre Corp.</p> <p>東展興業公司 Tuntex Petrochemicals Inc.</p> <p>亞東石化公司 Oriental Petrochemical (Taiwan) Co. Ltd.</p>	<p>中國人纖公司 China Man-Made Fiber Corp.</p> <p>東聯公司 Oriental Union Chemical Corp.</p> <p>南亞公司 Nan Ya Plastics Corp.</p> <p>南中石化公司 Nan-Chung Petrochemical Corp.</p>
CPL	AN
<p>中石化公司 China Petrochemical Development Corp.</p>	<p>中石化公司 China Petrochemical Development Corp.</p> <p>台塑公司 Formosa Plastics Corporation</p>

Source : Petrochemical Industry Association of Taiwan



## 台灣化纖原料2025年供給及需求統計

### Supply and Demand of Raw Materials for Taiwan Chemical Fiber in 2025

Unit : 1,000 tons

化纖原料  
Raw Materials

PTA

EG

CPL

AN

產品 Product	生產 Production	進口 Import	出口 Export	需求 Demand
PTA	2,140.0	1.2	760.3	1,381.0
EG	1,032.5	69.4	628.7	473.1
CPL	102.5	85.4	-	187.9
AN	483.0	21.5	306.2	198.3

需求=生產+進口-出口

Demand=Production+Import-Export

Source : Petrochemical Industry Association of Taiwan



## 關鍵變數與轉型契機

### Key Uncertainties & Transformation Drivers

- 地緣政治與能源限制：影響 PTA、EG、CPL 供應的關鍵變數  
**Geopolitical Tensions & Energy Constraints :**  
**Key variables impacting PTA, EG, and CPL supply**
- 高度依賴石油體系：顯著提升經營與市場不確定性  
**Heavy Reliance on Petroleum Systems :**  
**Significantly increasing operational and market uncertainty**
- 風險成為轉型催化劑：原料波動正驅動產業轉型  
**Risk as a Catalyst for Transformation :**  
**Raw material volatility is driving industry transformation**
- 加速台灣化纖產業朝向回收技術與循環經濟發展  
**Accelerating the Shift toward Recycling Technologies & Circular Economy**  
**in Taiwan's MMF industry**



### 3. 台灣人造纖維產業發展方向

## The Development Strategy of Taiwan Man-Made Fiber Industry



- (1) 全球環境變化：台灣人纖產業的轉型  
**Global Landscape Shifts : Taiwan's MMF Industry Transformation**
- (2) 循環經濟：T2T織物回收成為發展主軸  
**Circular Economy : Focus on T2T**
- (3) 單一材質與綠色設計：紡織循環經濟關鍵  
**Mono-Material & Green Design : Key to Textile Circularity**
- (4) 極致差異化：高機能與健康應用  
**Differentiation : High Performance & Wellness Applications**
- (5) 全球布局與供應鏈整合  
**Global Presence & Supply Chain Integration**
- (6) 數位轉型與ESG合規：邁向永續與智慧製造  
**Digital Transformation & ESG Compliance :  
Toward Sustainable & Smart Manufacturing**



## (1) 全球環境變化：台灣人纖產業的轉型

### **Global Landscape Shifts : Taiwan's MMF Industry Transformation**

規模成本競爭 → 價值競爭

**Scale & Cost Competition → Value Competition**

- 全球經濟震盪與供應鏈重組加劇產業競爭  
**Global Economic Instability & Supply Chain Changes**
- 產能過剩導致價格競逐壓力  
**Price Pressure from Overcapacity**
- 大量生產 & 成本優勢模式逐漸失效  
**Fading Advantages of Mass Production & Cost**
- 台灣業者轉向高良率、差異化能力、獨家技術  
**Moving toward High Yield, Differentiation, and Unique Tech**



## (2) 循環經濟：T2T織物回收成為發展主軸 Circular Economy : Focus on T2T

### 寶特瓶回收 → 織物回收 Bottle Recycling → Textile-to-Textile (T2T)

- 國際綠色供應鏈的重大轉型：  
歐盟ESPR讓回收超越末端管理，驅動循環設計與永續價值核心  
Global Green Supply Chain Shift :  
EU ESPR Moves from "End-of-Pipe" to "Circular Design"
- 台灣廠商積極發展織物回收 (T2T)  
Active T2T Development in Taiwan
- 物理 & 化學回收技術雙軌發展  
Dual-Track : Physical & Chemical Recycling
- 擴展回收來源：  
廢布、漁網、電子廢棄物、農業廢棄物  
Expanding Diverse Sources :  
Waste Fabric, Fishing Nets, E-waste, Agri-waste

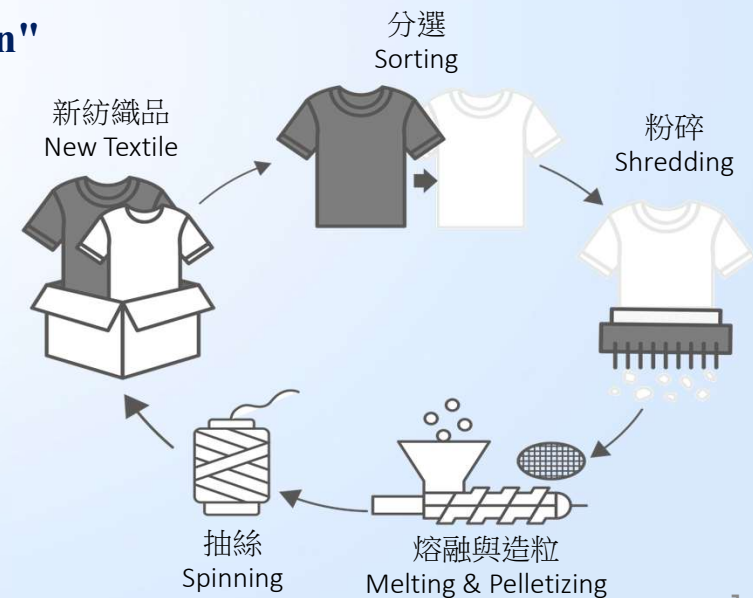


Image Source : 紡織產業綜合研究所 (Taiwan Textile Research Institute, TTRI)



### (3) 單一材質與綠色設計：紡織循環經濟關鍵 Mono-Material & Green Design : Key to Textile Circularity

- 解決回收難題：  
混紡與彈性纖維難以回收、解決異材質分離  
**Solving Recycling Challenges :  
Blended Fabrics, Spandex, and Material Separation**
- 發展方向：  
聚酯系彈性體、透過紗線與組織設計的優化  
**Key Developments :  
TPEE & Optimized Yarn and Fabric Construction**
- 應用延伸：  
布料、鞋材、輔料 (鈕扣、縫線、標籤、塗層...)  
**Applications :  
Fabrics, Footwear, and Accessories (Buttons, Thread,  
Labels, Coatings, etc.)**



單一材質牛仔衣  
Mono-Material Denim Garments

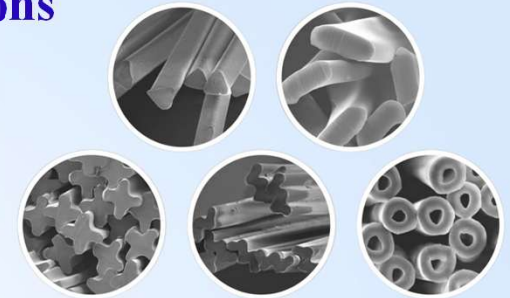


#### (4) 極致差異化：高機能與健康應用

### Differentiation : High Performance & Wellness Applications

原料供應 → 功能解決方案

Material Supply → Functional Solutions



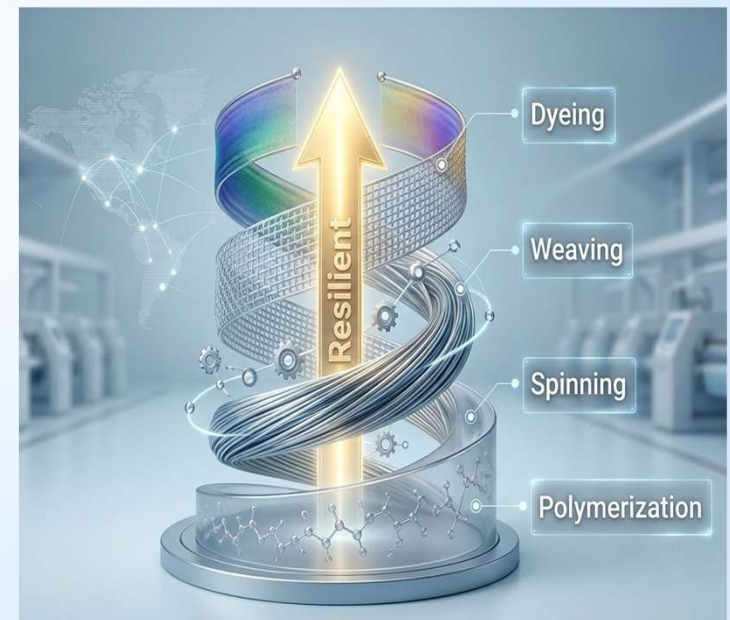
- 解決生活痛點：隱汗紗、抗菌消臭纖維  
Solving Pain Points : Anti-Sweat Stain Yarn, Antimicrobial & Odor-Control Fibers
- 高規格材料：低殘留BPA、阻燃材料  
High-Spec Materials : Low-BPA Residue & Flame-Retardant Materials
- 舒適性：低溫染色、異形斷面紗、吸濕伸長纖維、隔熱涼爽纖維  
Enhanced Comfort : Low-Temperature Dyeing, Special Cross-Section Yarn, Moisture-Responsive Expansion Fibers, and Thermal-Insulating & Cooling Fibers
- 跨域應用：生物技術、健康應用  
Applications : Biotechnology & Wellness Solutions



## (5) 全球布局與供應鏈整合 Global Presence & Supply Chain Integration

製造商 → 共同開發夥伴  
Manufacturers → Co-Development Partners

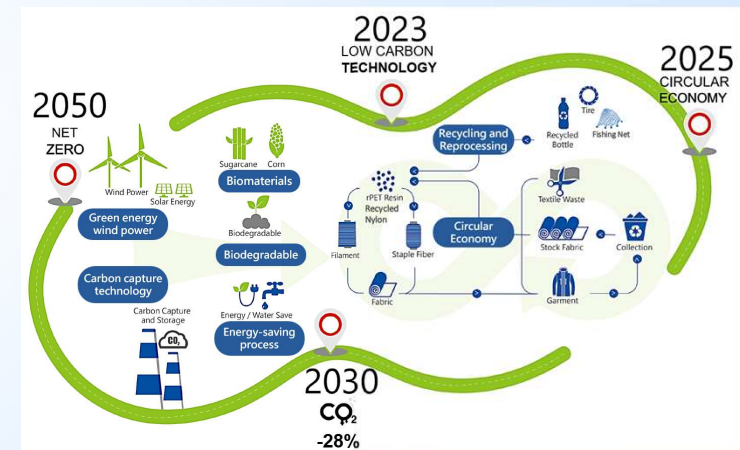
- 品牌商直接與紗線廠合作開發材料  
Material Innovation :  
Brands & Yarn Manufacturers Collaborate Directly
- 台灣：研發 & 高階差異化  
Taiwan : R&D & HIGH-END Differentiation
- 海外：量產 & 供應鏈整合  
Overseas :  
Mass Production & Supply Chain Integration
- 建立聚合、紡絲、織布、染整的韌性供應鏈  
Building Resilient Supply Chains :  
From Polymerization, Spinning, Weaving, to Dyeing





## (6) 數位轉型與ESG合規：邁向永續與智慧製造 Digital Transformation & ESG Compliance : Toward Sustainable & Smart Manufacturing

- ESG與法規因應：  
數位產品護照 (DPP)、碳排資訊揭露  
ESG & Regulatory Compliance :  
Digital Product Passport (DPP) & Carbon Disclosure
- 智慧製造：  
自動化生產、彈性製造  
Smart Manufacturing :  
Automated & Flexible Production
- 綠色能源：  
太陽能與儲能系統、低碳製程  
Green Energy :  
Solar Power, Energy Storage, and Low-Carbon Processes



台灣碳中和路徑圖  
Taiwan's Carbon Neutrality Roadmap



引領潮流的韌性之島

The Resilient Island

Leading Global Trends

A dramatic landscape photograph featuring a sunset or sunrise over a mountain range. The sky is a mix of deep blues, purples, and oranges, with a bright sun partially obscured by clouds. The mountains in the foreground are silhouetted against the bright light of the sun. The text "The Resilient Island Leading Global Trends" is overlaid in the center in a white, bold, sans-serif font.

# The Resilient Island Leading Global Trends



Taiwan Man-Made Fiber  
Industries Association

**THANK YOU**

**FOR YOUR ATTENTION**