

Jute Market Report for November 2025

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1st December 2025

Bangladesh

Raw Jute: The government's decision to impose export restrictions —introduced in September 2025 upon recommendations from the Ministry of Textiles and Jute— aim to address declining domestic production, rising prices, and shortages of raw jute for local mills. The measures are intended to stabilize the domestic jute market amid growing concerns over price volatility. Under the new policy, exporters must obtain prior government approval before making any shipments.

Since the introduction of the prior-approval requirement, the market has experienced mixed price movements across different grades of raw jute.

Prices for raw jute of higher qualities have increased from approx. Tk 4,100/maund to Tk 4,350–4,500/maund.

Prices for raw jute of medium grades have seen a slight decline from around Tk 3,900/maund to Tk 3,700–3,800/maund.

According to the Department of Agricultural Marketing (DAM) premium grades are currently selling for Tk 100–Tk 300 more than they did before the restriction was imposed. The price differences are mainly due to varying demand: export-oriented yarn mills prefer higher-grade fibre, while domestic packaging producers rely more on medium-grade fibre. Due to a shortage of premium raw jute of high qualities in the market, the supply is significantly lower than the current high demand. In contrast, the availability of raw jute of medium and lower qualities is much higher and more consistent than that of premium grades.

Anticipating a price drop following the export controls, many farmers sold their jute early and consequently missed the opportunity to benefit from the later price increases. Additionally, allegations have been raised regarding the hoarding of raw jute by certain traders or local buyers seeking to sell at higher prices to mills. The government is reviewing these concerns and will take appropriate measures to ensure transparent and fair market practices.

The Bangladesh Jute Association (BJA) has formally requested the removal of raw jute from the list of conditional export products under the Export Policy 2014–2027, citing the need to ensure fair and competitive prices for growers, to prevent financial losses for exporters, and to safeguard Bangladesh's foreign exchange earnings.

After reviewing the BJA's submission, the government has decided to provide immediate relief to exporters with existing commitments.

Local Demand: Throughout the month under review, demand for raw jute remained consistent, driven primarily by solvent local jute yarn and twine spinning mills, composite jute mills, and raw jute processing units. These sectors continued to act as active buyers, making regular purchases

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to meet their requirements in order to maintain uninterrupted production operations. However, toward the end of the month, buying activities slowed due to an increase in fibre prices as well as a limited supply of fibre in the local market.

Local raw jute market situation: Due to stockpiling by traders who purchased significant quantities, raw jute of higher qualities was heavily stocked at the beginning of the peak season. Currently, Tossa and Meshta of higher qualities have already disappeared from the local market.

Local prices of raw jute consequently increased further by about USD 20.00 to 30.00 per mton during the month under review.

Raw jute exports from July 2024 up to June 2025 of the fiscal year 2024–2025 were 862,965 bales against 1,344,835 bales during the same period in 2023/24. This represents a notable decline in export volume, largely attributed to the government's conditional export restrictions and tight domestic availability.

Weather condition: On 21 November 2025 at 10:38 AM, Bangladesh experienced an earthquake measuring around 5.7—an event unprecedented in the country's recent history. Later, four more aftershocks were recorded, each causing further concern and contributing to a growing sense of panic among the population.

Jute Yarn and Twine: Export demand for jute yarns and twines of both higher and lower qualities remained steady throughout the month under review from regular importing countries. Key markets such as Turkey, Uzbekistan, and Iran showed consistent buying interest.

Demand for jute yarns and twines of both higher and lower qualities from other international markets such as India, China, Vietnam, Indonesia, and countries of the Middle East, continued at a regular and stable level.

Local demand for Sacking and Hessian quality jute yarn and twine, primarily for packaging purposes, remained stable during the month under review.

Situation of Local Mills: Even though solvent mills have confirmed advance sales up to December, the escalating raw jute market has strained the operations of small and medium-sized jute mills throughout the month under review.

As a result of the rise of raw jute market prices, export prices for both high and low quality of jute yarn and twine increased further by about USD 30,00-40,00 per mton during the month under review.

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Jute Goods: During the month under review, export demand for both Hessians and Sackings from buyers in Europe, Australia, USA, African countries, China, Vietnam, and other regular importing countries remained stable. India continued as an active buyer, particularly for unstitched Binola and B-Twill fabrics.

Demand for Jute CBC (carpet backing cloth) from major importing markets like Europe, USA, Australia, Japan, and South Korea remained on a regular level during the month under review.

During the month under review, export prices developed as follows:

Hessians:	increased by approx. 3 %
Sacking:	increased by approx. 2-3 %
CBC:	increased by approx. 2 %

Miscellaneous: Jute farmers call for continuation of government incentives, technical support and training for jute and jute seed production. We quote from The Dhaka Tribune dd 27th November, 2025:

“Farmers in this district of Thakurgaon have urged the government to continue providing incentives for them to cultivate jute and its seed as interest in the golden fibre is growing again. Although Bangladesh is known as the land of golden fibre, most of its jute seed still comes from neighboring India, with farmers often incurring losses due to poor-quality imported seed. To make the country self-sufficient in quality jute seed, a daylong “Jute Seed Grower Training 2025” was organized for 100 selected farmers of Thakurgaon Sadar upazila.

The training was jointly arranged by the Sadar upazila administration and the Thakurgaon office of the Department of Jute under the project “Improved Technology-Based Jute and Jute Seed Production and Extension (2nd Revised)”. It was held [...] at the Sadar Upazila hall room. Syed Faruk Ahmed, Deputy Secretary of the Ministry of Textiles and Jute, attended as chief guest and chief trainer, with Thakurgaon Sadar UNO Khairul Islam in the chair. Among others, District Agriculture Training Officer Shamima Nazneen, Sadar Upazila Agriculture Officer Nasirul Isl, Jute Department official and District Jute Development Officer spoke as trainers. At the end of the session, guests handed over jute bags and certificates to selected farmers.

Trainers noted that jute is a high-value cash crop with strong economic potential. However, due to the scarcity of natural water bodies in Thakurgaon, traditional retting for fibre is difficult, making seed-focused jute cultivation particularly suitable for the district. They stressed that jute, being eco-friendly, should be promoted as an alternative to polythene and that both jute cultivation and jute product use must be expanded. Participating farmers called for the continuation of government incentives, technical support and training for jute and jute seed production. They also urged the government to ensure access to modern retting technologies and guarantee fair prices for their produce.”

Source: The Dhaka Tribune dd 27th November, 2025

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India

Raw Jute: Market prices quoted by the Jute Balers Association (JBA) end of last month were fixed as follows: TD-4 IRs 10,300 and TD-5 IRs 9,800 per 100 kgs, representing another increase of raw jute prices. The minimum support price for season 2025-26 remains at IRs 5,650 per 100 kgs.

Quantities available were below demand and any quantities offered were quickly absorbed by the market during the month under review.

Local supplies of raw jute to Indian jute mills were ruling around 617,000 bales during the month of October (compared to 742,000 bales in September). At the end of October, raw jute stock with jute mills were 739,000 bales.

Crop: Latest information continue to indicate that the expected area brought under cultivation in season 2025/26 is ruling around 480,000 hectares.

The carry forward estimates remained around 1.5 Mio. bales including mills and traders. Early information on crop size for 2025/26 are still indicating roughly 5.5 to 6.0 Mio bales in total.

Jute Goods: Situation during the month under review presented itself as follows:

Prices for Hessians presented themselves at IRs 172,000 per mton at the time when this report was published. Selective mills are asking for a premium of 3 % to the prices quoted by "standard mills".

Price of Sackings is prevailing at IRs 133,000 per mton, with selective mills asking for a premium of 7 % for exports to the prices quoted by "standard mills".

Demand for Hessians was reported to be weak in the domestic market, and factories were not competitive for exports at the moment due to high fibre prices.

B-Twills: The Indian government ordered around 396,000 bales of B-twill sacks during the month under review. Order volume for December is expected to be at about 250,000 bales. There is a backlog of supply of about 200,000 bales.

Orders for Jute Carpet Backing Cloth remain slow and irregular, and buyers are pushing for shipments under existing contracts.

Jute goods production of IJMA jute mills and jute mills reporting to IJMA for October 2025 were 89,400 mtons in total of which 2,600 mtons were jute yarns/twines. ■