

Welcome to the ITMF newsletter, where we begin with remembering a proud moment as Mr. B. K. Patodia received the ITMF Award last month, in recognition of his extraordinary services as ITMF Board Member and contribution to the global cotton and textile industry at large. Our recent trip to India was equally remarkable with a visit to Reliance in Navi Mumbai and a series of insightful panel discussions on “Future Factories” and “Mega Trends Reshaping the Textile Industry” at Bharat-Tex 2025.

In addition, our ongoing activities are paving the way for a future defined by technology and collaboration. Read about the ITMF & ITA webinar series on AI Applications in the Textile Industry, the ITMF Awards 2025 (deadline for application on April 30th) and the upcoming ITMF & IAF Conference 2025, scheduled for October 24/25 in Yogyakarta, Indonesia.



Mr. Olivier Zieschank
director, ITMF

Contents

ITMF NEWS

Mr. B. K. Patodia receives ITMF Award

ITMF is invited by ABRAPA to explore Brazil's transforming cotton industry on July 20-25

Application for the ITMF Awards 2025 is open – Deadline is April 30th

ITMF visits Reliance in Navi Mumbai

ITMF & ITA webinar series on AI Applications in the Textile Industry and future business models

ITMF & CITI jointly hosted a panel discussion on *Future Factories* at Bharat-Tex 2025

ITMF in discussion about *mega trends* reshaping the textile industry at Bharat-Tex 2025

ITMF & IAF Conference 2025 will be held on Oct 24/25, 2025, in Yogyakarta, Indonesia

Stay Connected: Follow us on LinkedIn!

PARTNER NEWS

Aachen-Dresden-Denkendorf International Textile Conference 2025: Call for Abstracts
World Petrochemical Conference 2025

UPCOMING EVENTS

WE HAVE READ FOR YOU

hpo-forecasting's economic expectations for 2025

Tariff tantrums – Lessons from history, politics and economics

ITMF NEWS

Mr. B. K. Patodia receives ITMF Award



On his trip to Bharat-Tex 2025 in India, ITMF Director General, Mr. Christian Schindler, handed over the ITMF Award to Mr. B. K. Patodia, Chairman of GTN Textiles, in recognition of his outstanding services to ITMF as a member of the ITMF Advisory Board.

The handover of the ITMF Award should have taken place several years back but was delayed due to Mr. Patodia's reduced ability to travel internationally and the pandemic. It was a great pleasure that Mr. Patodia received the ITMF Award in Mumbai in the presence of his dear colleagues and friends (photo from left to right), Mr. Bharat Desai, Mr. Prem Malik, and Mr. Suresh Kotak, all of which have been and are supporters of ITMF for decades.

Please see **full article** by Mr. Christian Schindler, **about Mr. B. K. Patodia**, Chairman of GTN Textiles, in recognition of his services for ITMF as well as the cotton and textile industry at large by clicking [here](#).

ITMF is invited by ABRAPA to explore Brazil's transforming cotton industry on July 20-25



ITMF has been invited by the Brazilian Cotton Growers Association (ABRAPA) for a unique country visit to Brazil's cotton regions and institutions from **July 20-25, 2025**. This marks the first visit of the ITMF Spinners Committee to Brazil since 2006, at a time when the country has emerged as the world's largest cotton exporter.

During the week-long tour, participants will explore modern cotton farms, gins, and classing laboratories, attend a workshop on sustainable cotton production in Brasília, and meet with local industry leaders, including the Mato Grosso State Cotton Growers Association. Optional visits to spinning mills may also be arranged.

ABRAPA will cover ground transportation and meal expenses, while participants are responsible for air travel and accommodation. With limited spaces available, interested parties are encouraged to confirm their participation promptly on a first-come, first-served basis.

For registration or additional information, please write to secretariat@itmfm.org

Application for the ITMF Awards 2025 is open – Deadline is April 30th



ITMF is launching another edition of the ITMF Award in 3 different categories:

- **ITMF Sustainability & Innovation Award 2025**
- **ITMF International Cooperation Award 2025**
- **ITMF Start-up Award 2025**

The winners will be able to present their project during the **ITMF Annual Conference 2025** which will be held in Yogyakarta, Indonesia from 24-25 October 2025.

All relevant information about applying for the ITMF Awards 2025 can be found [here](#)

The deadline for applications: **April 30th, 2025**

ITMF visits Reliance in Navi Mumbai



During his trip to India, Mr. Christian Schindler had the opportunity to meet with **Mr. Hemant Sharma**, Head of Polyester Sector at Reliance at their headquarters in Navi Mumbai. It was impressive to see that more than 25'000 people work at the campus-like estate for different divisions.

Since many years, Reliance is a Corporate Member of ITMF. The company's business activities comprise among other ones everything from refinery down to polyester fibers, but also spinning, weaving and processing. In addition, Reliance has also successfully developed a retail business.

[> read more](#)

ITMF & ITA webinar series on AI Applications in the Textile Industry and future business models



Access all previous webinars:
[Virtual Forum](#) / "Webinar Series".

Next webinar

April 2nd, 2025, from 12:00 to
 13:15hrs (Zurich-time)

[Register here](#)

AI application in the textile industry – part 2 (February 27th)

On February 27th, 2025, the 4th webinar in the series "AI in the Textile Value Chain" took place. This was the second webinar in which practical applications of AI in the textile industry were demonstrated. [Dr. Wolfgang Ernst of Oerlikon Man-made Fibres](#) in Germany explored how AI can create enhanced value for companies and customers through innovative sales strategies. Meanwhile, [Mr. Gilberto Loureiro from Smartex](#), Portugal, detailed the strides being made in fabrics production and tracking, charting a course toward zero delays and zero waste. The webinar underscored AI's potential to revolutionize efficiency and sustainability within the textile sector.

The Impact of AI on Business Models in the Textile Industry (April 2nd)

ITMF continues the webinar series with its fifth session featuring expert insights from Mr. Maximilian Bock (EEKUAL, Belgium), Mr. Bjol Frenkenberger (MYR Insight, Norway), and Ms. Jelle Demeulemeester (Mynd, Belgium). The session will provide an in-depth look at ways artificial intelligence is reshaping business models in the textile sector, highlighting innovative strategies to boost efficiency and competitiveness.

ITMF & CITI jointly hosted a panel discussion on Future Factories at Bharat-Tex 2025



Bharat-Tex 2025 was organized by a consortium of Textile Export Promotion Councils (EPCs) and supported by the Ministry of Textiles, Government of India. It took place from 14th to 17th of February 2025 in New Delhi under the general theme "*Innovation meets Responsibility*". With over 6,000 foreign buyers and 5,000 exhibitors, the event highlights India's growing role in global textiles, focusing on trade, sustainability, and innovation.

As a side program, the organisers offered high-level panel-discussions and round tables. ITMF, in cooperation with CITI, hosted a panel discussion on the topic "*Future Factories - Fuelled by Smart Manufacturing and Innovation*" which was moderated by ITMF Director General, **Mr. Christian Schindler**. In his opening statement the Chairman of CITI, **Mr. Rakesh Mehra**, stressed the importance of making use of new technologies to become more efficient and sustainable.

In his presentation, **Mr. Akhil Sivanandan**, CEO of [Green Story](#), advocated for data-driven transparency to empower clothing companies in building a sustainable future. Their (smart) solution leverages real-time environmental impact tracking to help brands and manufacturers reduce costs, manage risks, and stay compliant. **Mr. Yves Gloy**, founder of [ADOTC](#) ("Another Dimension Of Textile Configuration") demonstrated how garment manufacturing can be complemented by (smartly) combining automation, AI, and digitalization, to tackle labour shortages and sustainability challenges. Their 'Robo Sewing Cells' could pave the way for a more cost-effective, flexible, and eco-friendly future. **Mr. Max Easton**, VP of Partnerships of [Smartex](#), demonstrated the

commercial advantages of Smartex-inspected fabrics. By leveraging AI-driven inspection technology, Smartex ensures higher fabric quality, fewer defects, and reduced waste, leading to cost savings and increased efficiency. Finally, **Mr. Joachim Hensch**, founder and owner of [Hensch Consulting](#), emphasised that companies must adapt by (smartly) leveraging automation, AI-driven decision-making, and digital twins while also ensuring human adaptability to remain competitive. Sustainability and efficiency will be key differentiators, as businesses navigate an era of rapid change, consumer-driven production, and increasing automation.

Download presentations here:

Mr. Sivanandan: Green Story utilizing dynamic facility data to supercharge accurate LCAs and DPP adoption (download [here](#))

Mr. Gloy: Smart stitches – A ADOTC's innovative approach to automated sewing (download [here](#))

Mr. Easton: The commercial advantage of Smartex Inspected Fabrics (download [here](#))

Mr. Hensch: Digital Lean Factory: Carbon or Silicon... or both (download [here](#))

ITMF in discussion about *mega trends* reshaping the textile industry at Bharat-Tex 2025



Global Textile Expo
New Delhi | Feb 14-17

TEXTILES
FASHION
SUSTAINABILITY

At Bharat-text 2025, industry leaders converged in a high-profile panel discussion titled "Global Mega Trends Are Reshaping the Textile Ecosystem: How Smart Organisations Can Stay Ahead of the Curve." Moderated by Mr. Giuseppe Gherzi, the session explored a step-change in the global textile and apparel sector driven by sourcing shifts, sustainability imperatives, and digitalisation.

Key speakers including **Mr. Dirk Vantuyghem** (Euratex), **Dr. Olivier Zieschank** (ITMF), **Mr. Eric Dorchies** (CIEL), **Mr. Mark Jarvis** (Textile IQ Accelerating Circularity), **Mr. Narendra Makwana** (Greenstitch), **Ms. Marci Zaroff** (Eco Fashion Corp), and **Ms. Tricia Carey** (Accelerating Circularity) delved into trends such as the rise of recommerce, the surge in circular fashion driven by advanced recycling technologies, and the evolving regulatory landscape in developed markets.

This insightful session mapped the transformative shifts in the global textile landscape and set the stage for future investments and policy reforms aimed at lifting India's

textile sector in a rapidly changing world. Mr. Olivier Zieschank highlighted the current imbalance in the distribution of Indian textile industry across the value chain by noting that India bought 23% of global new spinning equipment in 2023, compared to 18% of new looms, 11% of new knitting equipment, and only 3% of new finishing machinery. Dr. Zieschank emphasized that significant opportunities lie ahead for India amid global shifts in demographics and production trends despite substantial efforts being required to secure Indian's future advantages in the global textile value chain.

[> read more](#)

ITMF & IAF Conference 2025 will be held on Oct 24/25, 2025, in Yogyakarta, Indonesia



In 2025, ITMF and IAF will jointly organise their conferences on **October 24-25, 2025**, in Yogyakarta, Indonesia. This year the general theme will be:

Navigating Uncertainty & Adopting Technology - Pathways to Sustainable Strength in the Textile & Apparel Industry

These dates will allow both textile machinery exhibitors and exhibition visitors to travel to **ITMA Asia+CITME 2025 Singapore** which will be held from **October 28-31, 2025**.

Find out more about the [joint ITMF Annual Conference 2025 and IAF Fashion Convention 2025](#).

Preliminary
Conference
Agenda



October 2025

Oct. 22

Factory visits
are offered
(tbc)
Golf (tbc)

Oct. 23

Board,
Committee,
and other
Meetings

Oct. 24

Conference
Day 1

Oct. 25

Conference
Day 2

Oct. 26

Excursion to
Borobudur
Temple is
offered

Oct. 27

Factory visits
are offered

Stay Connected: Follow us on LinkedIn!



ITMF invites all members and their affiliates to join our [LinkedIn](#) community. By following our page, you'll receive updates on our activities, industry events, and engage in discussions on current trends and expert insights. Members still enjoy exclusive reports and event invitations through the ITMF Secretariat.

[Join us!](#)

PARTNER NEWS

Aachen-Dresden-Denkendorf International Textile Conference 2025: Call for Abstracts



The Aachen-Dresden-Denkendorf International Textile Conference 2025 will be held on November 27–28 at Eurogress Aachen, Germany.

The event invites experts to submit abstracts for talks by **May 5, 2025**, and posters by **June 31, 2025**.

Topics include sustainable textiles, bio-based and synthetic fibers, AI in the textile sector, smart textiles, and more.

For additional details and submission guidelines, visit the conference [website](#) or contact add-itc@dwirwth-aachen.de

World Petrochemical Conference 2025



The upcoming World Petrochemical Conference 2025, organized by ITMF-member [S&P Global](#), is expected to gather senior executives, policymakers, and technical experts from across the global petrochemical value chain. Held from March 17-21, 2025, in Huston, Texas, the event's program will address critical issues ranging from market volatility and regulatory shifts to emerging technologies and sustainable energy practices. The organizers emphasize that the platform will facilitate interactive sessions and panel discussions designed to foster robust debate and strategic insights.

The conference aims to streamline engagement and promote collaboration among participants at a time when the industry is undergoing significant transformation. Industry leaders regard this event as an opportunity to bridge gaps between diverse stakeholders, encouraging informed discussions on the challenges and opportunities facing the petroleum sector.

While the discussions will mainly be around the upstream petrochemical industry, the conference will also shed light on the downstream fiber sector. For example, **Mr. Nikhil Meswani**, Executive Director and Member of the Board of Reliance Industries, will feature as a speaker as will **Mr. Peter Huntsman**, Chairman and CEO of Huntsman. **Mr. Uday Gill**, Board Member of ITMF, will also be a part of the lineup.

[> read more](#)

Register [here](#)
10% Discount for ITMF Members who use the code: **ITMFMember10%**

UPCOMING EVENTS

2025**Cellulose Fibres Conference 2025**

March 12-13, 2025
Cologne, Germany

Market Week

March 17-20, 2025
New-York, USA

World Petrochemical Conference

March 17-21, 2025
Houston, USA

Proposte

May 6-8, 2025
Cernobbio (Como), Italy

TextileExpo Uzbekistan 2025

May 14-16, 2025
Uzexpocentre NEC, Uzbekistan

IGDS World Department Store Summit

June 11-12, 2025
Seoul, Korea, Rep.

Premier Vision

July 1 -3, 2025
Paris, France

Milano-UNICA

July 8-10, 2025
Fiera Milano, Italy

CAITME 2025

September 9-11, 2025
Tashkent, Uzbekistan

Texworld and Apparel Sourcing

September 15-17, 2025
Paris, France

Market Week

September 15-18, 2025
New-York, USA

ICA Trade Events and Dinner

October 8-9, 2025
Dubai, UAE

ITMF-IAF Annual Conference 2025

October 24-25, 2025
Yogyakarta, Indonesia

ITMA Asia + CITME Singapore 2025

October 28-31, 2025
Singapore

Aachen-Dresden-Denkendorf International Textile Conference

November 27-18, 2025
Aachen, Germany

WE HAVE READ FOR YOU

hpo-forecasting's economic expectations for 2025

by Olivier Zieschank, director, ITMF

On February 19, 2025, Mr. Josua Burkart and Mr. Benjamin Boksberger of hpo forecasting conducted the hpo-webinar "Economic Update 1Q2025". The following article presents some interesting facts and arguments about the global industrial production outlook presented during the webinar and described in hpo's quarterly economic commentary (see [here](#) for details).

US Policy and Industrial Shifts

The commentary highlights how President Trump's second-term actions—such as targeted tariffs, deregulation, government cutbacks, and migration deterrence—are reshaping industrial strategies. Despite controversial methods (including legal uncertainties), these policies have boosted business confidence in the USA, leading many companies to consider shifting production to the country to avoid tariff-related risks.

With Trump's tariff strategy and "America First" agenda, industrial production may move domestically to avoid tariff-related risks, at least partially. This could drive demand for domestically produced machinery and equipment as well as companies to set up new or expanded plants in the US. This may well create an opportunity for EU manufacturers, as the necessary capital goods are typically beyond America's production capacity, while Europe is well-equipped to meet that demand. Nevertheless, questions remain over whether the US can generate a sufficient pool of skilled specialists to support its re-industrialization efforts.

Stagnation in the German Mechanical Engineering Sector

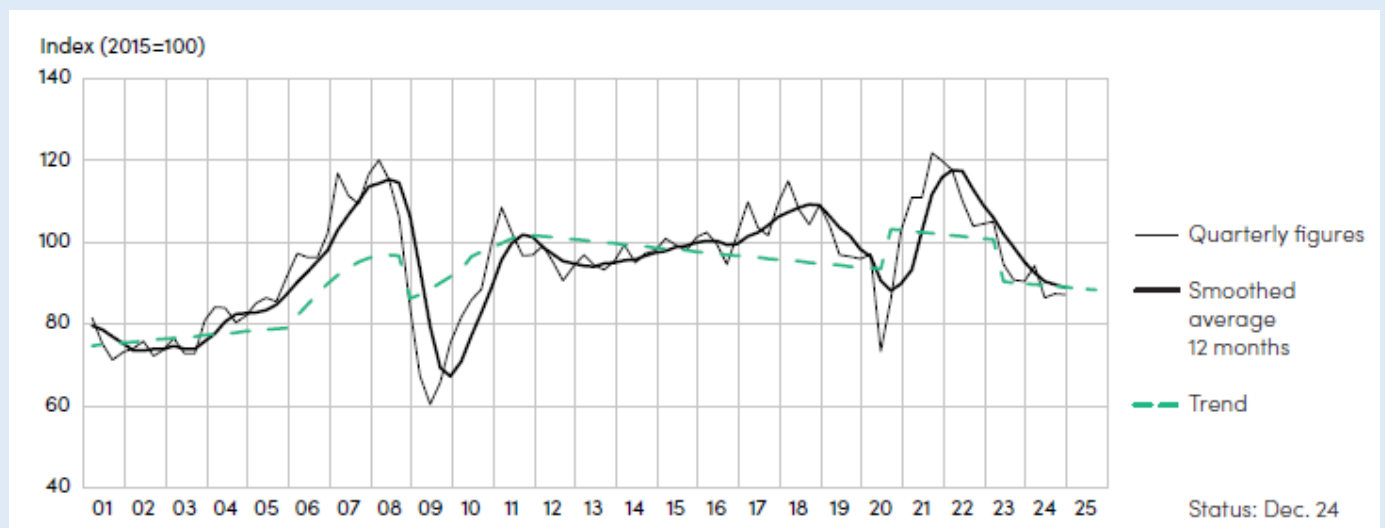
German mechanical engineering is facing a long-term negative trend. New orders and overall industry performance have been declining for years—with the temporary pandemic boom now seen as a "bubble" that has burst (see green dashed line in Graph 1). This trend, combined with weak demand from key sectors like automotive, points to the need for a more stable and business-friendly environment to reverse the downturn.

“ For years, we have also measured a negative real trend growth of –1.1 percent among German **textile machinery** manufacturers. One exception is the industrial segment of **robotics and automation**, which is characterised by a positive long-term growth trend.

Hpo forecasting

A prolonged decline in new orders for machinery in the EU suggests that machine manufacturers in Germany may face lower demand for high-value capital goods. This trend could lead to more conservative production planning and a search for cost efficiencies. With traditional sectors like automotive showing weakness, machine manufacturers might shift their focus toward sectors with higher growth potential (e.g., robotics and automation) or specialized applications where demand remains robust.

Graph1: Real new orders received by the German mechanical engineering industry compared to long-term trend growth



Source: Raw data by Destatis, illustration and trend calculation by hpo forecasting

Divergent Global Industrial Production Trends

At the onset of the global pandemic, consumer demand surged dramatically. In the West, government stimulus and a shift from services to goods drove this spike in demand, which China's manufacturing sector promptly addressed. As a result, a notable disparity has emerged between consumption and production across OECD countries (see Graph 2).

While OECD countries generally face a widening gap between consumption and production (with significant declines in places like Germany and Great Britain), some countries such as Poland (until recent stagnation), China, and Mexico show more robust production or growth due to different market dynamics and policy support. This divergence poses challenges for international supply chains and global trade balances, but also creates

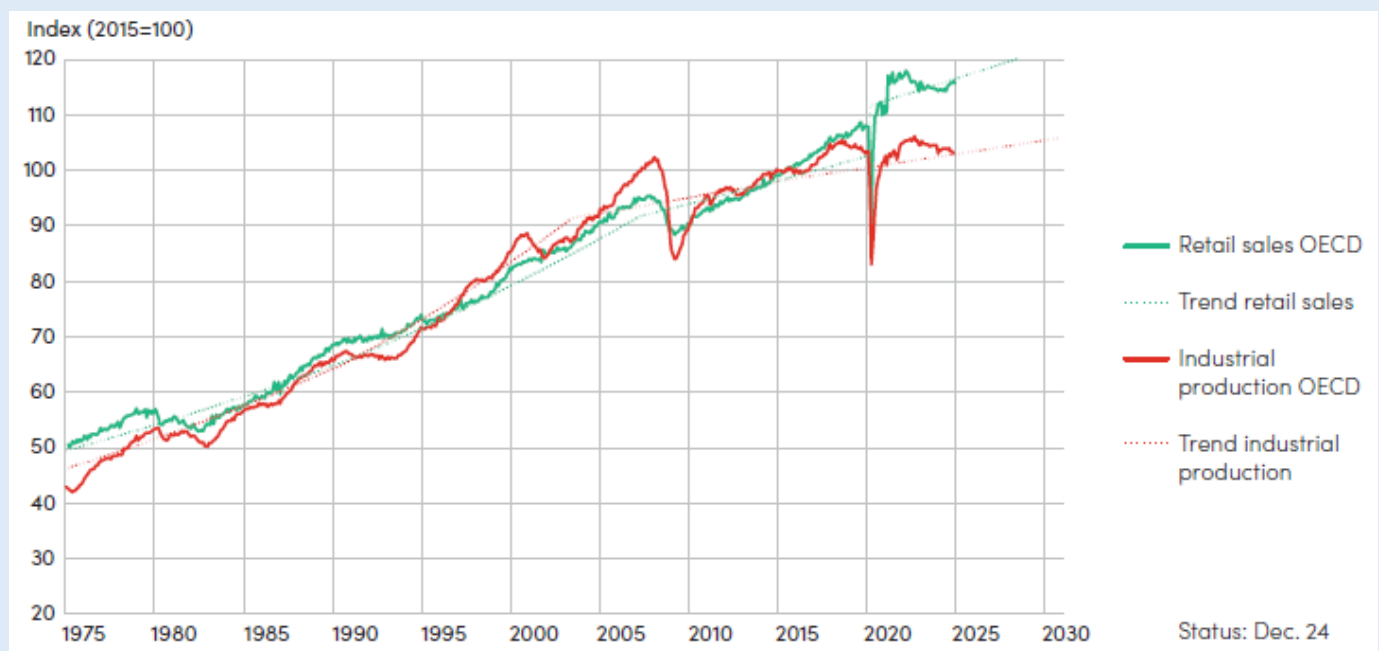
opportunities.

Varying growth rates across countries may lead machine manufacturers to adopt more localized production and distribution strategies, tailoring offerings to the specific needs and conditions of each market.

As industrial production contracts in some regions while booming in others (e.g., China and Mexico), machine manufacturers must navigate increasingly complex global supply chains, possibly investing in flexible manufacturing systems that can adapt to regional differences.

For machine manufacturers in stable or growth regions (like Switzerland with resilient chemical or pharmaceutical sectors), there is an opportunity to capture export business from countries facing industrial production challenges.

Graph2: Retail sales and industrial production in the OECD



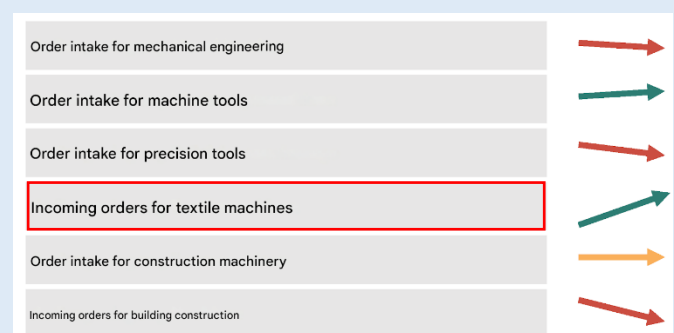
Source: Raw data by OECD, illustration and trend calculation by hpo forecasting

Conclusion

Although uncertainties persist, the hpo model forecasts that order income will soon recover from the cycle's low point, especially for textile machinery (see Graph 3). However, it also predicts that recovery won't occur automatically; growth will partly stem from previously minor market segments, so preparation is key.

As stated in the document, disruptive changes inherently create both winners and losers, and only those who act entrepreneurially, decisively, and swiftly with clear strategic vision will thrive. In effect, the winners will emerge while others fall behind.

Graph 3: hpo Outlook 2025 for selected industries in Germany (as of February 2025)



Source: hpo webinar, hpo Konjunkturupdate Q1 2025, 02.19.2025

Tariff tantrums – Lessons from history, politics and economics

by Olivier Zieschank, director, ITMF

In his insightful article published in [Tecoya Trend](#) (India, 07 Feb 2025), Mr. Navdeep Singh Sodhi from ITMF member Gherzi Textil Organisation examines the long-term evolution of the global textile and apparel industry. Sodhi emphasizes that centuries of dynamic trade practices and evolving market access regimes offer invaluable lessons on the importance of specialization and the exploitation of comparative advantages. His analysis highlights that a resilient industry is built on the adaptive strength of its participants and the strategic support of policymakers.

Historical Evolution and the Post-MFA Transformation

The global textile and apparel industry has experienced a long historical evolution marked by cycles of protectionism, technological advances, and regulatory reforms. From early tariff wars in the 17th and 18th centuries to dramatic protectionist policies in the 19th century, governments have long used tariffs and trade restrictions as strategic economic tools. The post-MFA era (ca 1995-2005) represents a pivotal moment in this evolution. During this period, the elimination of quotas and a steady decline in tariffs spurred significant restructuring and consolidation. Investments surged along the entire textile value chain, restructuring the global industry. To illustrate this point, Sodhi cites an increase in global ring spinning capacity from 167 million spindles in 1995 to 243 million by 2010, with Asia's share rising from 67% to 86%. This transformation underscores the industry's robust capacity to adapt to changing trade policies and evolving market dynamics.

Global Expansion and the Power of Comparative Advantage

World trade in textiles and apparel more than doubled from US\$354 billion in 2005 to US\$872 billion in 2023. Asia has emerged as a central hub, capturing 45% of the market share, while over 137 countries now participate in apparel exports. This impressive growth demonstrates a crucial lesson: specialization based on comparative advantage fuels economic progress. Nations that leverage unique strengths—be it through low-cost production or efficient supply chains—secure competitive edges, affirming the pivotal role of targeted specialization in driving industry expansion.

Shifts in Sourcing and Market Dynamics

In recent years, the US—the largest apparel consumer—has experienced dramatic changes in its import landscape. While overall imports rose from US\$93 billion in 2010 to US\$105 billion in 2023, China's market share significantly declined from 41% to 24%. This trend is influenced by factors such as escalating production costs in China, intensified Sino-American trade tensions, and regulatory measures like the Uyghur Forced Labour Prevention Act. Consequently, countries such as India, Vietnam, Bangladesh, and Pakistan have successfully capitalized on their comparative advantages, witnessing notable increases in their market shares.

The Challenge of Non-Tariff Measures and Market Access

Parallel to these shifts, the global textile industry faces rising non-tariff measures. Even though average global tariffs have fallen from over 12% in the 1990s to below 9% today, measures like anti-dumping duties and safeguard policies have surged to roughly four times their previous levels, thereby increasing compliance costs. Moreover, the evolution of global market access regimes—from bilateral free trade agreements and preferential trade programs like AGOA to mechanisms such as the US de minimis rule—illustrates how strategic policy choices can further enhance / impede competitiveness.

Conclusion

Sodhi's comprehensive analysis reinforces his central message: the historical resilience of the textile and apparel industry provides critical insights for policymakers. By creating conditions that encourage specialization and the exploitation of comparative advantages, nations and firms can foster a sustainable and dynamic future in an increasingly complex global trade landscape.



Mr. Navdeep Sodhi is a thought leader. He is a Partner at Gherzi Textil Organisation, Zurich and a regular contributor to the ITMF Newsletters. Mr. Sodhi is a Fellow of the Textile Institute, Manchester (C. Text. FTI)