



The global textile industry finds itself at a crossroads in 2025, caught between the promise of technological advancement and the reality of persistent market challenges. As revealed in ITMF's 32<sup>nd</sup> Global Textile Industry Survey (May 2025), the sector is experiencing growing regional and segment disparities that are reshaping the competitive landscape.

While the widening gaps between regions tells a story of structural change, companies recognize that demand-side issues remain the primary concern for the next six months, driving more thoughtful approaches to capacity and investment. This measured response, combined with ongoing innovations in AI applications and sustainability breakthroughs, positions the industry for meaningful progress ahead.

As new textile hubs like Uzbekistan emerge and our upcoming conference bring together stakeholders to share knowledge, the industry continues evolving. Today's regional and segmental divergences are evidence of an industry building the foundation for sustainable future growth while navigating its new reality with both patience and strategic vision.



**Mr. Olivier Zieschank**  
director, ITMF

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## EXECUTIVE SUMMARIES

### Business situation stagnates as regional gaps widen



The 32<sup>nd</sup> GTIS in May 2025 showed a business situation balance of -20 pp, reflecting further industry caution. Regional performance varied widely, with East Asia (-48 pp) struggling while Africa (+23 pp) and South America (+6 pp) remained positive. Textile machinery producers faced the greatest challenges at -64 pp, while garment producers performed relatively better at -10 pp.

[> read more](#)

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## Global textile industry shows cautious optimism despite regional disparities



The May 2025 ITMF GTIS shows cautious optimism with a +24 pp balance, though declining from January's level. North America (+65 pp) and Africa (+54 pp) lead regional confidence, while East Asia faces challenges at -18 pp. Home textiles dominate sectoral optimism, contrasting with brands and retailers (-23 pp).

<sup>2</sup> [> read more](#)

## Order intake falls – except in Africa



In May 2025, order intake shows industry-wide challenges with a -21 pp global balance, declining for four months since January 2025. Africa stands alone with positive performance (+18 pp), while Europe (-45 pp) and East Asia (-41 pp) face the greatest struggle. Garment production shows neutral conditions as the top-performing sector, contrasting with textile machinery (-63 pp).

[> read more](#)

## Order backlog shows modest global recovery



The May 2025 ITMF survey shows global order backlogs at 2.3 months, on a slightly growing trend, indicating modest industry recovery. Africa leads regional performance with 4.4 months, while South America lags at 1.1. Textile machinery (3.2) dominates sectoral backlogs despite recent decline.

[> read more](#)

## Textile industry capacity utilization is stable amid regional disparities



Global textile capacity utilization reached 72% in May 2025, recovering from 2023 lows but declining slightly from March. Asian markets lead while Americas, Europe, and Africa lag. Some upstream segments like yarns significantly outperform downstream segments.

<sup>3</sup> [> read more](#)

## Demand continues to dominate as major concern



The May 2025 survey shows 61% of global textile participants worried about weak demand over the next six months, with trade tensions and operational costs as secondary concerns. The concentration of responses around demand and trade issues has shifted attention away from traditional industry concerns.

<sup>4</sup> [> read more](#)

## Order cancellation is stable and low

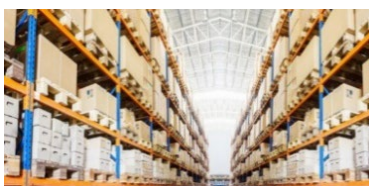


<sup>5</sup>

The May 2025 survey reveals stable and low order cancellation patterns globally. There are differences between regions and segments but overall on a low level.

[> read more](#)

## Global textile inventories show regional divergence with upstream strength



The May 2025 survey reveals mixed inventory conditions globally, with the Americas building substantial stocks while Asia and Europe face shortages. Upstream segments maintain healthy inventory levels while downstream activities experience greater deficits.

<sup>6</sup> [> read more](#)

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<sup>3</sup>[This Photo](#) by Unknown Author is licensed under [CC BY](#)

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## ITMF NEWS

# ITMF & Swiss Textile Machinery Workshop 2025



This year, ITMF in collaboration with [Swiss Textile Machinery](#) successfully hosted the annual workshop and dinner on May 20, 2025, bringing together more than 100 industry leaders from across the global textile and textile machinery industry.

The day-long event began with a technical visit to Rieter's HQ in Winterthur, followed by an intensive workshop at Millers Theater in Zurich's Mühle Tiefenbrunnen venue. The gathering featured short presentations / statements from textile producers representing key markets like Bangladesh, Egypt, India, Indonesia, Korea, Mexico, Pakistan, Türkiye, and Vietnam.

A key highlight included a comprehensive overview of China's textile and apparel industry outlook presented by Mr. Ruizhe Sun, Chairman of the China National Textile & Apparel Council (CNTAC). Furthermore, ITMF presented the preliminary results of the International Textile Machinery Shipment Statistics for 2024.

Representatives from seven major textile machinery manufacturers shared insights across spinning, texturing, weaving, knitting, finishing, and printing technologies, with notable participation from executives at leading companies including Rieter, Barmag, Itama, Groz-Beckert, Benninger, SPGPrints, and Autefa.

The workshop also addressed critical industry topics ranging from regulatory challenges to sustainability initiatives. Mr. Martin Kemmler, COO and Board Member, and Ms. Vera Galarza, Head Sustainability, of Triumph International led an interesting session titled "Regulation – Curse or Blessing?" examining the relationship between regulatory frameworks and industry innovation.

The event concluded with networking opportunities during an evening reception and dinner at Restaurant Blaue Ente, fostering continued dialogue between machinery manufacturers and textile producers on industry challenges and future opportunities.

[Download our article on the key takeaways](#)

## ITMF & IAF Conference 2025 in Indonesia – Registration has started successfully



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**.

To register go to [ITMF & IAF Conference 2025](#).

#### Conference Timeline



October 2025

#### Oct. 22

Factory visits are offered, Golf

#### Oct. 23

Board, Committees, 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

## ITMF at FESPA 2025 where Berlin showcased the latest textile printing innovations



FESPA Global Print Expo 2025 took place from 6-9 May 2025 in Berlin as Europe's leading exhibition for screen and digital, wide format printing and textile printing. Hundreds of exhibitors showcased their latest innovations and product launches across graphics, décor, packaging, industrial and textile applications.

More than 100 new products were launched during the exhibition, while the event featured printing machines, inks, software solutions, textile finishing technologies, and sustainable practices across the entire production chain.

[> read more about the fair](#)

### PARTNER NEWS

## Aachen-Dresden-Denkendorf Conference will be held in November 2025



The Aachen-Dresden-Denkendorf International Textile Conference 2025 will take place on **November 27-28** at Eurogress Aachen, featuring France as partner country.

Early bird tickets are available until June 30, with the program focusing on AI-enabled textile innovation, medical applications, and EU sustainability regulations. Key speakers include Prof. Dr. Kai Liu on biobased fibers and Prof. Dr. Christine Radtke on innovations for the medical and healthcare sectors.

Abstract submissions remain open through June 2 for presentations and July 31 for posters. Exhibition space and sponsorship opportunities are available for industry participants.

[> read more about the conference](#) | [> see call for abstracts](#)

## Bremen Cotton Conference returns in 2026 – Call for papers



The **38th International Cotton Conference Bremen** will take place **March 25-27, 2026** in Bremen, Germany, as part of a complete Bremen Cotton Week featuring additional cotton and textile meetings. The conference offers both in-person and online participation options.

Organizers have opened their **Call for Papers** with submissions welcome on topics including cotton production and breeding, ginning and quality testing, textile processing, sustainability, circular economy, and value chain transparency. The conference seeks original work spanning the entire cotton supply chain from farm to fashion retail.

**Submission deadline is August 31, 2025**, with early submissions receiving faster feedback. Participants can submit proposals and recommend speakers through the conference [platform](#).

[> read more about the cotton conference](#) | [> download call for papers](#)



## Dornbirn GFC 2025's program is now available



**Dornbirn GFC 2025** takes place **September 10-12** in Dornbirn, Austria, with the full program now online featuring 100 lectures across three main topics: Workwear & Protective Textiles, Carbon Stewardship including biomass and recycling solutions, and Fiber Innovations from production to application.

**Dornbirn GFC Asia** will be held **November 18, 2025** under the Techtextil India Symposium, focusing on "Shaping the Future: Sustainable Growth in Fibre Solutions and Innovations."

Call for Papers is open for the Asia conference with **deadline July 15, 2025**.

[> read more about the conference](#) | [> see call for paper](#)

## Knowledge paper by Gherzi: Uzbekistan emerges as "A Shining Star in the Textile Universe"



Uzbekistan is rapidly establishing itself as a major force in global textile manufacturing, leveraging its rich cotton heritage and strategic geographic position. The Central Asian nation has the potential to emerge as a sourcing hub for apparel brands and retailers.

The country benefits from abundant cotton resources, competitive labor costs, and improving infrastructure development. Its location along historic Silk Road trade routes provides natural access to both European and Asian markets, positioning Uzbekistan as an ideal textile manufacturing hub.

Government initiatives are actively promoting textile sector modernization and foreign investment, while the nation's skilled workforce and growing technical capabilities support expansion into value-added textile production beyond raw cotton exports.

[> read more](#)

## Asia-Pacific Textile Industry Gathers in Singapore for Major Supply Chain Summit



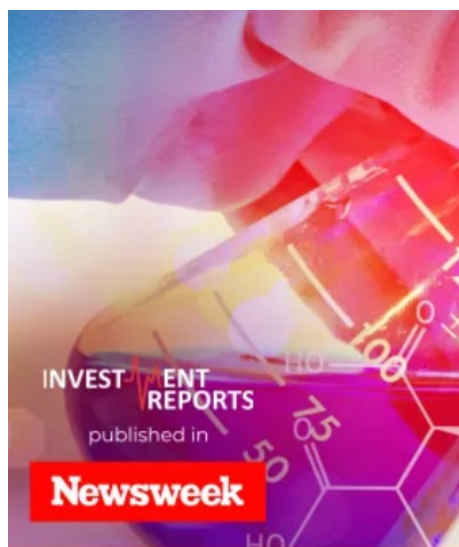
**AP-TEXPO 2025** takes place **November 19-21** in Singapore, focusing on "*Re-engineering towards a Resilient, Adaptive and Sustainable Supply Chain*." The event combines supply chain exhibitions, industry summits, and investment matching platforms.

Building on 2024's success with participants from 48 countries and over 800 attendees, the 2025 edition expands to emphasize AI applications, sustainable practices, and cross-border e-commerce in textile manufacturing. The concurrent hosting of **FUTR Asia** business forum and **BRTC** industrial investment platform adds significant value.

Organized by ASEAN Federation of Textile Industries (AFTEX) and China National Textile and Apparel Council (CNTAC), the event features specialized pavilions, closed-door workshops, and the 7<sup>th</sup> Belt and Road Textile Conference.

[> read more](#)

## Chemical breakthroughs transform textile sustainability



A new investment report "*From Crisis to Catalyst: How Chemicals Are Powering Tomorrow*" by Michaila Byrne (2025) and published in Newsweek reveals how chemical innovations are revolutionizing textile sustainability.

Synthetic fibers now dominate **65% of global textile markets**, but new chemical innovations are making them sustainable. Parkdale Mills' **Ciclo technology** enables polyester and nylon to biodegrade within 4.5 years versus centuries for traditional synthetics.

**Recycling advances** include UNIFI's programs sourcing 50% materials from textile waste, though true garment recycling remains below 1%. New pigment technologies are solving the "dark plastic problem"—allowing 30-35% of black textiles to be detected by recycling systems.

The industry is developing chemical solutions for textile-to-textile recycling, including solvent-based fiber separation and advanced depolymerization catalysts.

[> read more](#)

## The Fibre Year 2025 reveals continued industry challenges



The Fiber Year GmbH has released [The Fibre Year 2025](#), showing that global supply of fiber materials comprising staple fibers, filaments and polymer-based nonwovens is projected to perform again below average in virtually the sixth straight year.

The report, traditionally released at the end of May, provides trends, insights and analyses from fibers and nonwovens to fabrics and demand at retail. Compiled by Andreas W. Engelhardt, the publication offers a holistic approach from fibers to fabrics following the general idea to bridge fiber and filament manufacturing with subsequent processing activities.

The latest edition continues to highlight subdued growth trends across the global textile sector, providing industry stakeholders with critical data for navigating ongoing market challenges.

[> read more](#)

## Tajikistan will host first international textile forum and machinery expo on 8–10 July 2025



Tajikistan will host its first International Textile Forum and Machinery Exhibition on 8–10 July 2025. The event will convene suppliers, brands, manufacturers, and associations from around the world and offer targeted B2B/G2B meetings where current challenges in the global textile industry will be discussed.

The event aligns with Tajikistan's 2024-2030 plan to turn its 400,000 tons of annual cotton production into higher-value exports through 10 new integrated clusters. With incentives on offer and the government's support, the forum aims at providing a fast track to partnerships in a market committed to growth.

[> read more](#) | [contact](#)

## UPCOMING EVENTS

### 2025

#### **IGDS World Department Store Summit**

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

#### **Apparel & Textile Transformation Initiative (ATTI) Launch**

June 26, 2025  
London, UK

#### **Premier Vision**

July 1 -3, 2025  
Paris, France

#### **Milano-UNICA**

July 8-10, 2025  
Fiera Milano, Italy

#### **International Textile Forum & Textile Equipment Exhibition**

July 8-10, 2025  
Dushanbe, Tajikistan

#### **CAITME 2025**

September 9-11, 2025  
Tashkent, Uzbekistan

#### **64rd Dornbirn-GFC**

September 10-12, 2025  
Dornbirn, Austria

#### **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

#### **Asia-Pacific Texpo 2025**

October 28-31, 2025  
Singapore

#### **ICAC 83rd Plenary Meeting**

November 17-20, 2025  
Mwanza, Tanzania

#### **Aachen-Dresden-Denkendorf International Textile Conference**

November 27-28, 2025  
Aachen, Germany

# REPORT: The 32<sup>nd</sup> GLOBAL TEXTILE INDUSTRY SURVEY

## Article 1: Business situation stagnates as regional gaps widen

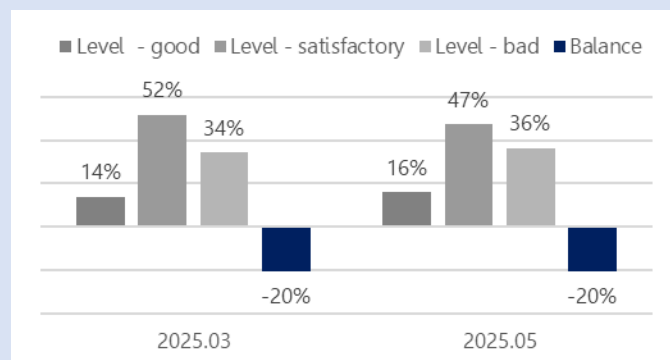
by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

The 32<sup>nd</sup> ITMF Global Textile Industry Survey was conducted in the second half of May 2025, revealing a global business situation balance of -20 percentage points (pp). This indicates a prevailing sentiment of caution among industry participants, with the business situation remaining below January 2025 levels, though showing improvement from the previous low of -46 pp in November 2023 (see Graphs 1 and 5).

One could argue that results are better than expected, especially after a highly turbulent April regarding U.S. tariffs. On April 2, President Trump announced the so-called "Liberation Day," introducing sweeping tariff increases on nearly all countries. This move raised serious concerns that both the U.S. and the global economy were headed toward recession.

However, markets were calmed somewhat when, on April 9, the Trump-administration paused these "reciprocal tariffs" for 90 days for all countries except China. This decision halted the panic at the stock and bond markets. Then, on May 12, President Trump announced also a reduction of tariffs for China. This development helped global stock markets recover their earlier losses and fuelled optimism that trade

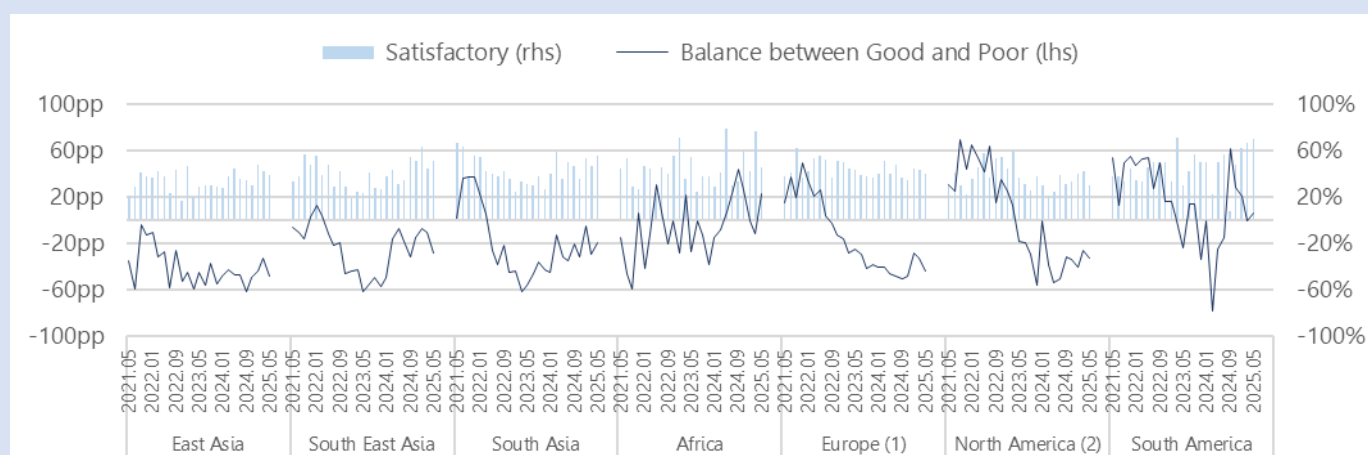
**Graph 1: Business situation** (World balance\*) in May 2025



\*Balance = share of respondents answering good vs. poor Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

agreements with major partners might eventually be reached, leading to broader tariff reductions. Nevertheless, a baseline 10% tariff increase remains in place for most countries. Although this may seem minor compared to the paused additional hikes of 20% to 50%, the impact is significant. Large U.S. retailers are now attempting to pass these increased tariff costs along to brands and their supply chains. In other words, suppliers to the U.S. market are facing even greater price pressure. The ongoing uncertainty— particularly regarding what will

**Graph 2: Business situation by region** since May 21



(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | \*Balance = share of respondents answering good vs. poor Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025



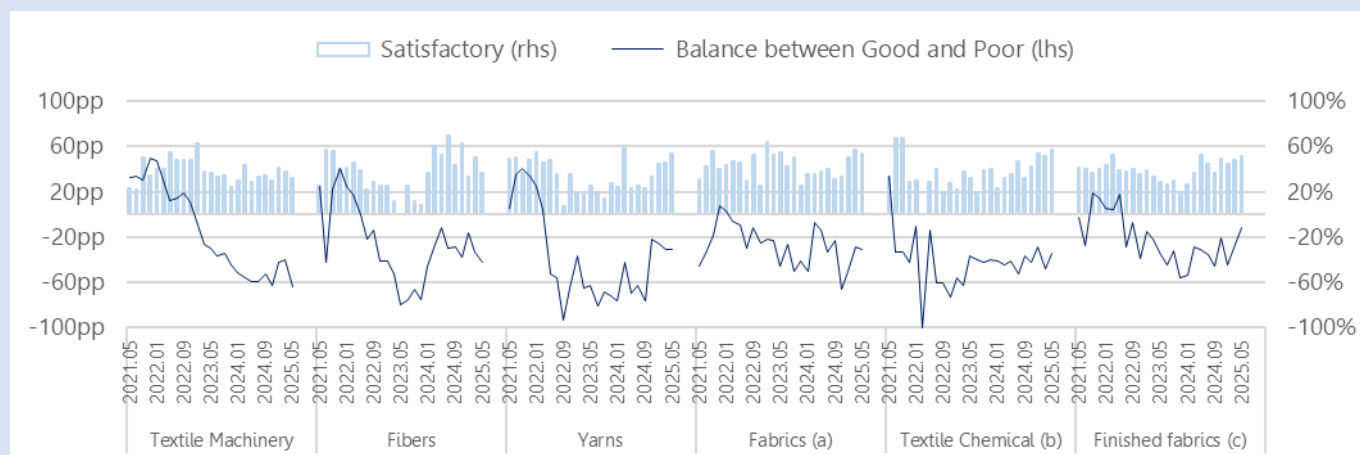
[continues] happen after the 90-day pause—continues to undermine both business and consumer confidence. Investments are being delayed, and consumers are spending more cautiously. Unsurprisingly, “weak demand” remains the top concern in May, cited by 61% of the GTIS participants (see Article 6). “Geopolitics” and “tariffs” follow, each mentioned by 34%.

On the supply side, concerns such as high energy prices, rising raw material costs, and the lack of workers persist. Yet as long as global demand remains subdued—driven by economic and political instability, including the wars in Ukraine and Gaza—many companies are likely to remain in a cautious, wait-and-see mode.

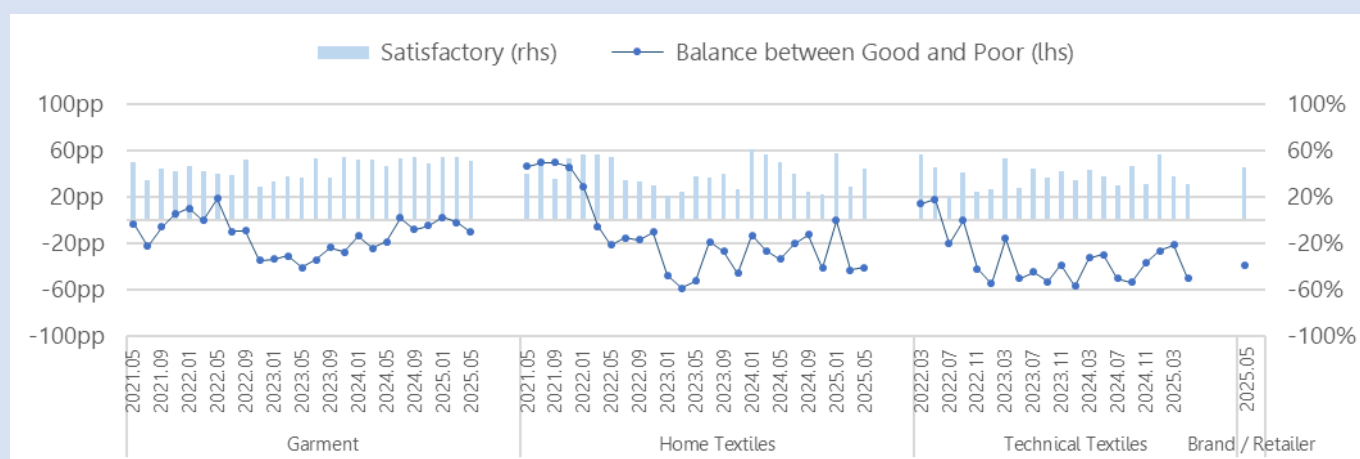
**Regionally**, Asia still faces significant challenges, driven by East Asia’s balance at -48 pp, South-East Asia with -29 pp, and South Asia’s -19 pp (see Graph 2). The Americas show a mixed outlook, with North & Central America’s balance at -32 pp and South America’s at +6 pp. Europe remains under pressure with one of the lowest balances at -44 pp, reflecting ongoing economic difficulties. Africa enjoys a higher score with a business situation measured at +23pp.

In terms of **segments**, garment producers reported the highest balance of -10 pp and dyers / finishers / printers followed with a negative balance of -12 pp (see Graph 3). All other segments reported business situations below -30pp.

**Graph 3: Business situation by segment since May 21 - upstream**



**Graph 3: Business situation by segment since May 21 - downstream**

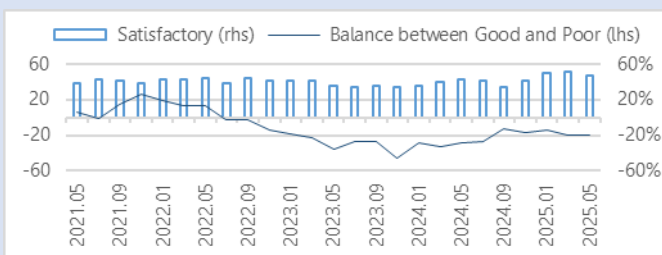


(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | \*Balance = share of respondents answering good vs. poor Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

The most pronounced challenges are seen among textile machinery producers, that register a balance of -64 pp, highlighting significant concerns within this segment of the textile value chain.

For the first time the survey includes also results for **brands/retailers**. Just like their suppliers also they are struggling with the current business environment (see Graph 3 - downstream). With a balance of -38pp brands/retailers find themselves well below the global average of -20pp.

**Graph 5: Business situation** (World balance\*) since May 21



\*Balance = share of respondents who answer good vs. poor |  
Source: 8-32nd ITMF Global Textile Industry Survey (12-22.05.2025)  
| pp : percentage point | last data point = May 2025

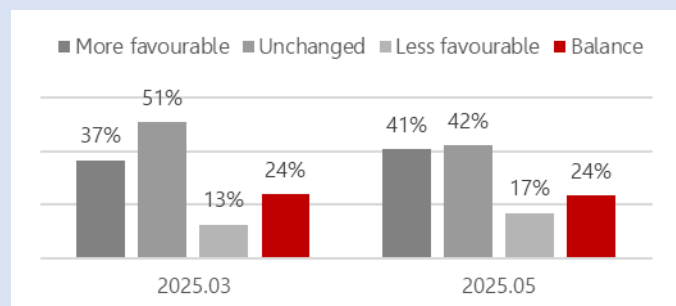
## Article 2: Global textile industry shows cautious optimism despite regional disparities

by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

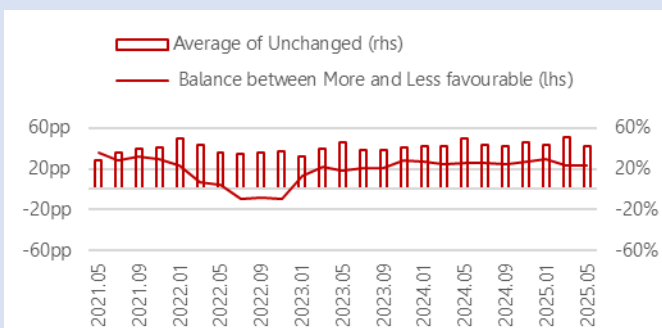
The 32<sup>nd</sup> ITMF Global Textile Industry Survey conducted in May 2025 reveals a mixed but generally positive outlook for the global textile sector. With 41% of participants expecting more favourable conditions and only 17% anticipating a deterioration, the industry achieved a balance of +24 percentage points. However, this level is still lower than it was last January (see Graphs 1 and 2).

The current optimism about the future comes as a surprise. Despite the deterioration in the business environment since January, expectations have remained stable — even though similar optimism has failed to materialize over the past two and a half years. Many market participants report that they have never experienced such a prolonged and pronounced negative

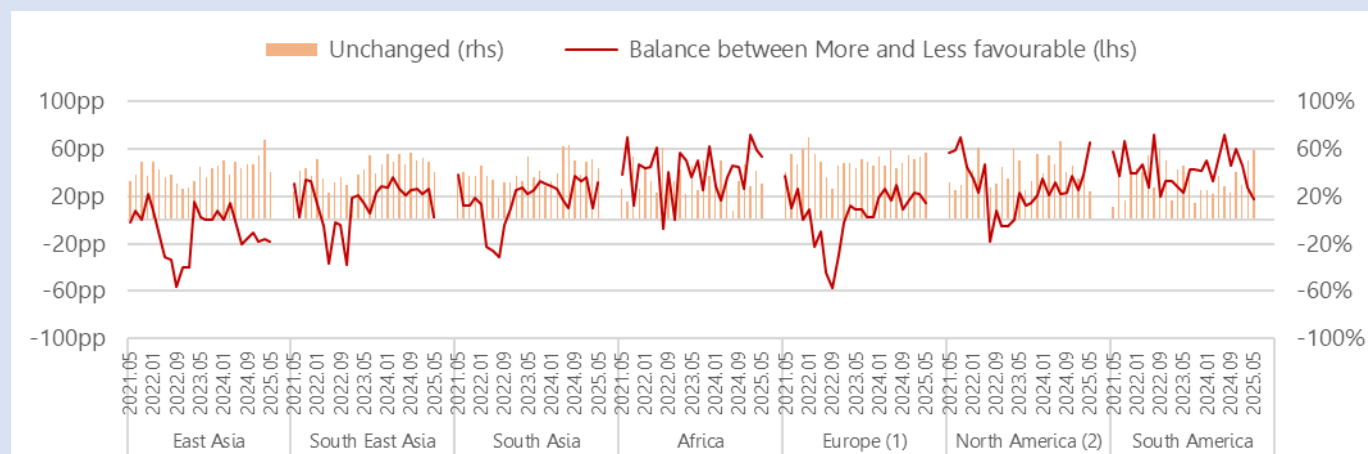
**Graph 1: Business expectations** (World balance\*) in May 2025



**Graph 2: Business expectations** (World balance\*) since May 21



**Graph 3: Business expectations by region** since May 21



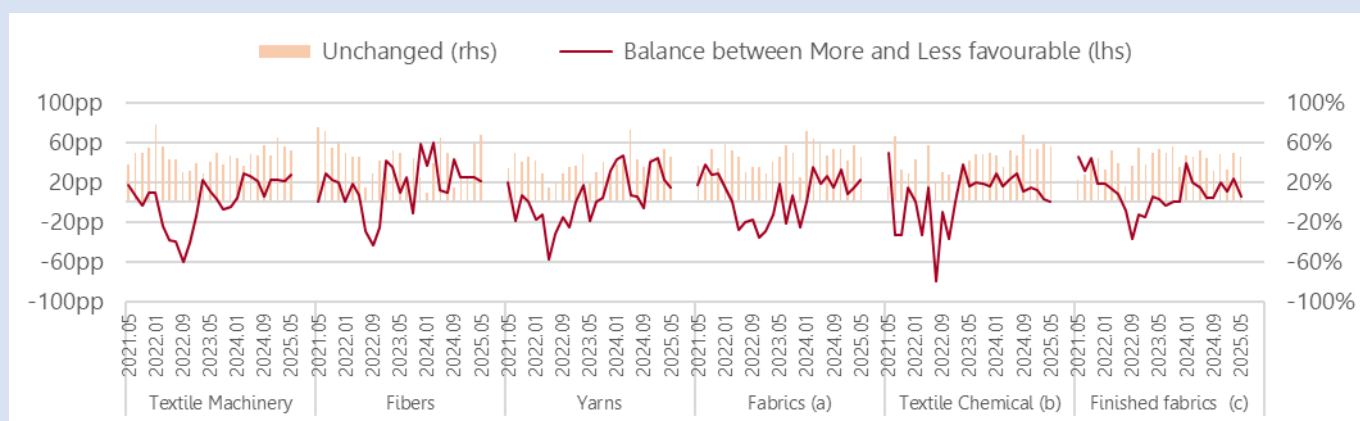
(1) incl. Türkiye and Central Asia | (2) incl. Central America | Balance = share of respondents who answer more or less favourable  
Source: 8-32nd ITMF Global Textile Industry Survey (32nd:12-22.05.2025) | last data point = May 2025

[continues] business cycle. This persistent downturn may be precisely why companies are now anticipating a turning point. There is growing hope that ongoing trade negotiations between the U.S. and key trading partners, as well as other pending trade agreements (such as those between the EU and Mercosur, India, and Indonesia), will soon be concluded or ratified. While global expectations have remained largely unchanged since March, notable regional differences are beginning to emerge.

**Regional** optimism varies dramatically across the globe. North & Central America leads with the strongest confidence at +65 pp, followed by Africa at +54 pp, both

regions showing very optimistic expectations for the months ahead (see Graph 3). South Asia maintains a solid +32 pp balance, while South America (+18 pp) and Europe (+14 pp) demonstrate more modest optimism. The challenges are most pronounced in East and South-East Asia, where it can be assumed that these results partly reflect the anticipated impact of the U.S. tariff increases imposed on its trading partners in April, which were subsequently paused for 90 days. Although it remains unclear how the U.S. administration will ultimately resolve its trade disputes, there is a growing sense that the post-reciprocal tariff landscape will differ significantly from the pre-April status quo.

**Graph 4: Business expectations by segment since May 21 - upstream**

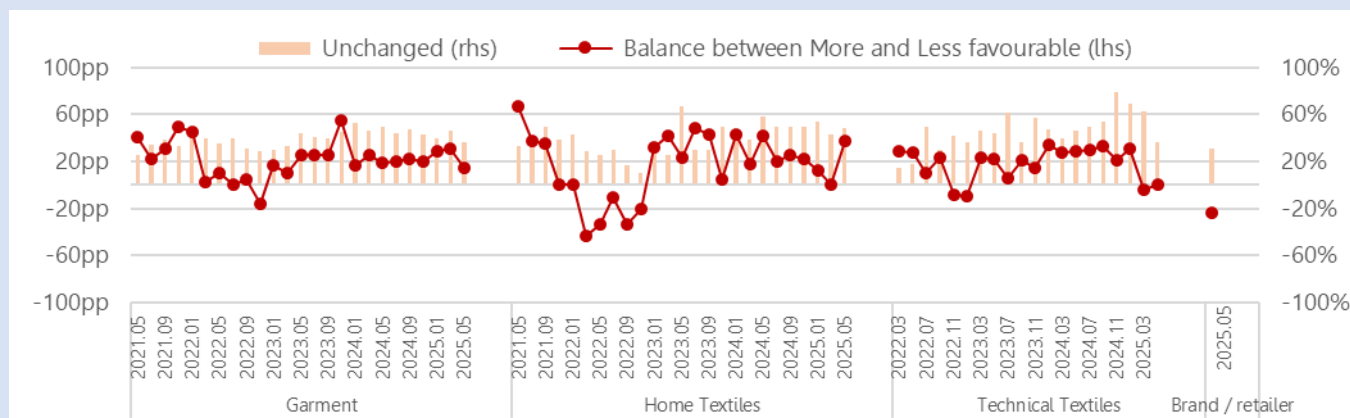


(a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | Balance = share of respondents who answer more or less favourable | Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

One potential consequence is the acceleration of nearshoring in labour-intensive garment production to regions such as Africa (e.g., Egypt, Morocco, Tunisia) and North & Central America (e.g., Mexico and other Central American countries). In contrast, nearshoring textile production is likely to proceed much more slowly, given the higher capital requirements, technological demands, and need for skilled labour.

Retailers and brands supplying the U.S. market—particularly those burdened by high tariffs—are increasingly evaluating how to make their supply chains more resilient to future disruptions. Nearshoring presents one possible solution, despite higher production costs. However, these costs may be offset partially by benefits such as faster time to market, reduced logistics expenses, increased automation, and potentially lower tariffs.

**Graph 4: Business expectations by segment since May 21 - downstream**



(a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | Balance = share of respondents who answer more or less favourable | Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

Among producer **segments**, the outlook differs substantially by specialization (see Graph 4). Home textiles producers show the highest confidence with +37 pp, while textile machinery manufacturers (+28 pp) and fabric producers (+23 pp) maintain strong optimism. Mid-tier segments include fibre (+21 pp), yarn (+15 pp), and garment (+15 pp) producers. The most challenging conditions face brands and retailers, who report a

negative balance of -23 pp, alongside technical textiles and textile chemicals, both at neutral territory (0 pp). For the first time also **brands/retailers** were included in the survey. The result shows that they are not sharing the optimism of the textile value chain about the outlook. With a value of -23pp in May, brands/retailers are not seeing a more favourable business environment in six months' time (see Graph 4 – downstream).

## Article 3: Order intake falls – except in Africa

by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

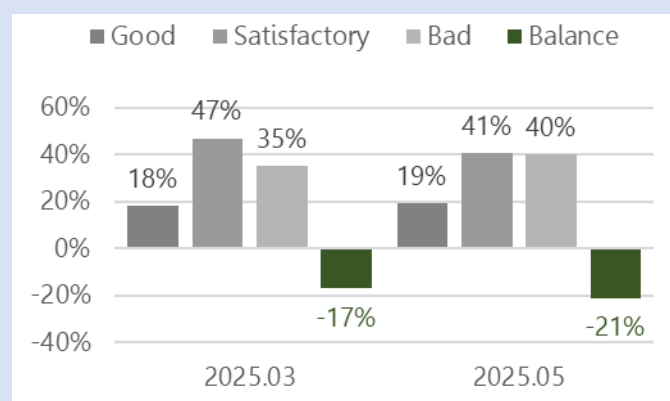
The 32<sup>nd</sup> ITMF Global Textile Industry Survey conducted in May 2025 reveals challenging order intake conditions across the global textile industry (see Graphs 1-3). With 40% of participants reporting poor order intake and only 19% describing it as good, the sector recorded a negative balance of -21 percentage points (pp). This represents a four-month decline since January 2025, though conditions have improved from the November-2023-low of -50 pp, indicating gradual recovery from deeper historical challenges (see Graphs 1 and 2).

Between March and May 2025, order intake fell on a global average from -17pp to -21pp. This reflects the unsatisfactory business situation that remained unchanged in negative territory at -20pp (see Article 1).

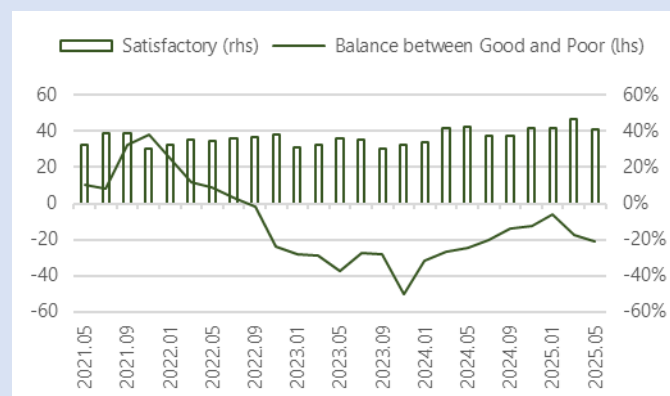
It is interesting to note that both the number of survey participants that report good and bad order intake increased while those with a satisfactory order intake fell. As mentioned in Article 1, the main concern was and is weak demand (see also Article 6). The reasons for weak demand are manifold and changed over time. Order intake peaked at the end of 2021 and started falling since (see Graph 2), reaching a low at the end of 2023. Since then, a very slow and unsatisfactory improvements could be observed. While demand weakened in 2022 due to reduced pent-up demand, the Russian invasion of Ukraine intensified this slowdown by leading to soaring energy prices resulting in high inflation rates. In 2023 and into 2024, such inflation rates reduced disposable income. By the end of 2024, with lower inflation rates and inventory levels, survey participants were also expecting higher order intakes in 2025 (see Graph 3). The trade disputes between the US and their trading partners that emerged after the new US-administration under President Trump took office in January 2025 certainly interrupted the slow but visible recovery process.

Nevertheless, while the overall repercussions of the prevailing global economic and political uncertainties are generally negative, differences between **regions** and segments can be observed (see Graph 4). **Africa** emerges as the standout performer with a positive balance of +18 pp, the only region achieving favorable conditions and demonstrating two months of consecutive improvement (see Graph 4). Asian markets present mixed results, with South Asia (-12 pp) and South-East Asia (-15 pp) showing

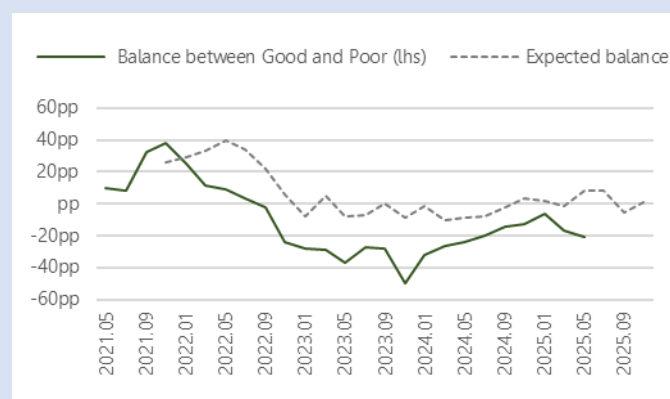
**Graph 1: Order intake (World balance\*) in May 2025**



**Graph 2: Order intake (World balance\*) since May 21**

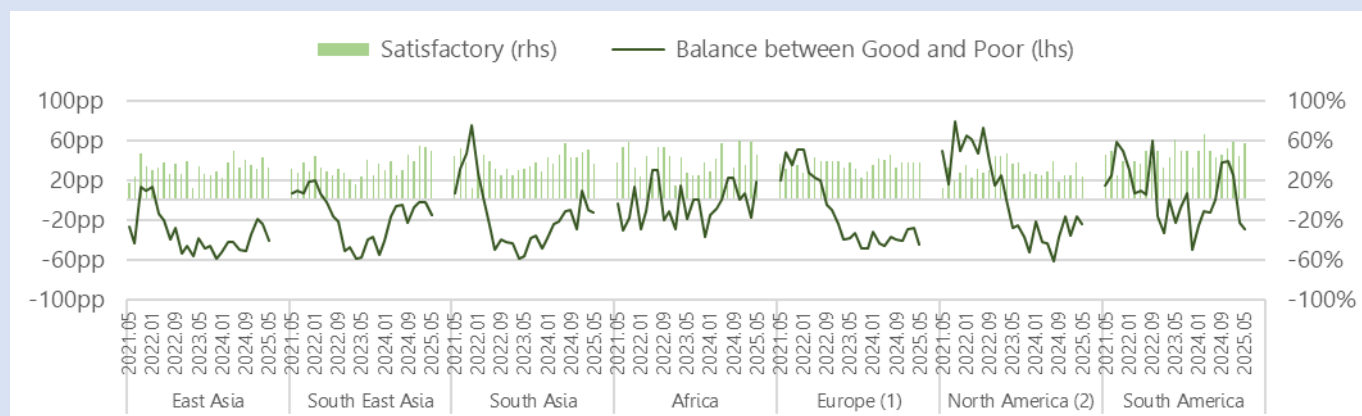


**Graph 3: Order intake (World balance\* and expectations)**

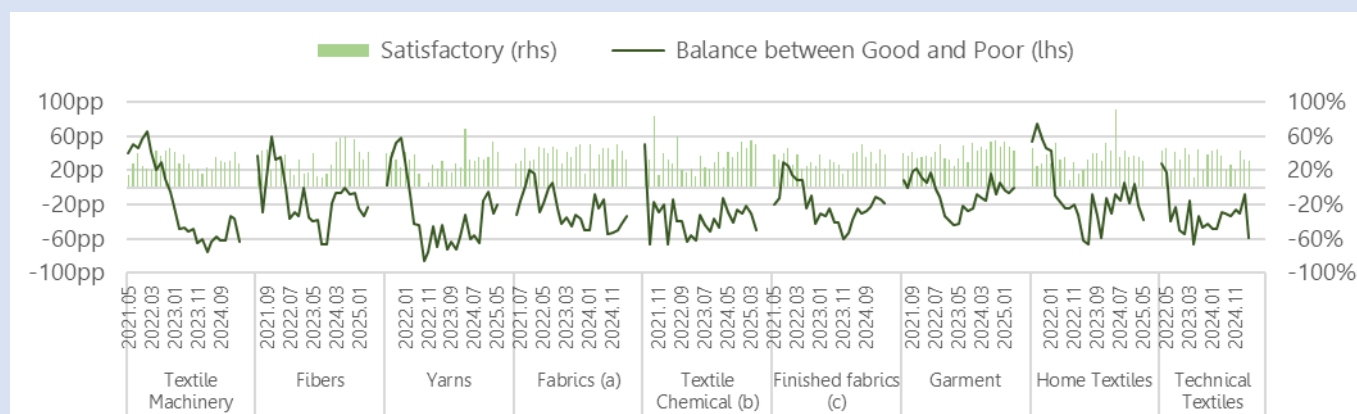


\*Balance = share of respondents who answer good vs. poor | Source: 8-32<sup>nd</sup> ITMF Global Textile Industry Survey (32<sup>nd</sup>: 12-22.05.2025) | last data point = May 2025



**Graph 4: Order intake by region** since May 21

(1) incl. Türkiye and Central Asia | (2) incl. Central America | Balance = share of respondents answering good vs. poor | Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

**Graph 5: Order intake by producer type** since May 21

(a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | Balance = share of respondents answering good vs. poor | Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

[continued] moderate weakness, while East Asia faces more severe challenges at -41 pp. The Americas displays rather poor performance, with North & Central America at -23 pp and South America at -29 pp. Europe records the weakest regional order intake at -45 pp, reflecting ongoing economic pressures across the continent. That Africa's order intake soared from negative (-18pp) to positive territory (+18pp) might be a first consequence of the US trade policy of the past few months. There is anecdotal evidence that companies from different countries, especially from China and Türkiye are looking for investment opportunities in Africa. Especially US retailers and brands are looking for alternative sourcing options given the relative high tariffs in place now that makes it much more expensive to source from China. But, also in the medium- and long-term they are looking for diversification in Asia but also closer to the US market. Africa is certainly one alternative region to source from, especially garments, with the objective to have a more resilient and agile supply chain.

**Segmental** analysis reveals significant disparities in order

intake level across different textile segments (see Graph 5). Garment production leads with a neutral balance (0 pp), showing recent improvement and representing the strongest sector. Mid-tier segments include producers of finished fabric (-18 pp), yarns (-19 pp), and fiber (-24 pp) who face moderate challenges.

The most severe difficulties concentrate in industrial segments, with textile machinery producers experiencing the harshest conditions at -63 pp, followed by technical textiles (-59 pp), textile chemicals (-50 pp). Home textile manufacturers also experience depressed order intake with a balance at -38 pp. On the other range of the spectrum are garment producers with a balance of +/- 0pp. Order intake is – on average – satisfactory. Brands and retailers are ordering as much as possible to keep enough merchandise on the shelves. Given the current trade environment this is especially difficult in the US. Especially brands / retailers in the US that have mainly sourced in China are struggling in the short-term to find alternative suppliers. Garment producers outside China are benefiting from this to a certain extent.

## Article 4: Order backlog shows modest global recovery

by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

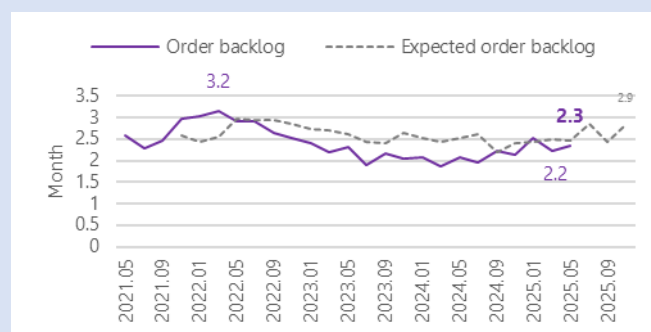
The 32<sup>nd</sup> ITMF Global Textile Industry Survey conducted in May 2025 reveals a global order backlog of 2.3 months, representing a slight increase since March 2025 (see Graph 1). This modest recovery reflects cautious optimism as the industry gradually rebuilds pipeline strength following extended periods of weak demand across most markets and segments.

Given that order intake fell (see Article 3) on a global average, it is somewhat surprising that order backlog rose slightly. There is a statistical reason for this. Africa's order backlog soared between March and May. Since all seven regions are weighted equally, this strong increase in Africa from 2.8 months (in March) to 4.4 months (in May), drives up the global average. The much higher order backlog in Africa reflects the increased interest in the region as an alternative sourcing destination.

**Regional** order backlog performance demonstrates significant variation in market dynamics and recovery pace. Africa dominates with a backlog of 4.4 month, sustained by ten months of continuous growth since July 2024, indicating robust regional demand.

North and Central America (2.4) and South-East Asia (2.3) show recent improvement with two months of increasing backlogs, while Europe reached a 2.3 level on a downward trend. East Asia faces headwinds with a 2.0 backlog declining for four months, and South America records the weakest position at 1.1 months with continued deterioration since January.

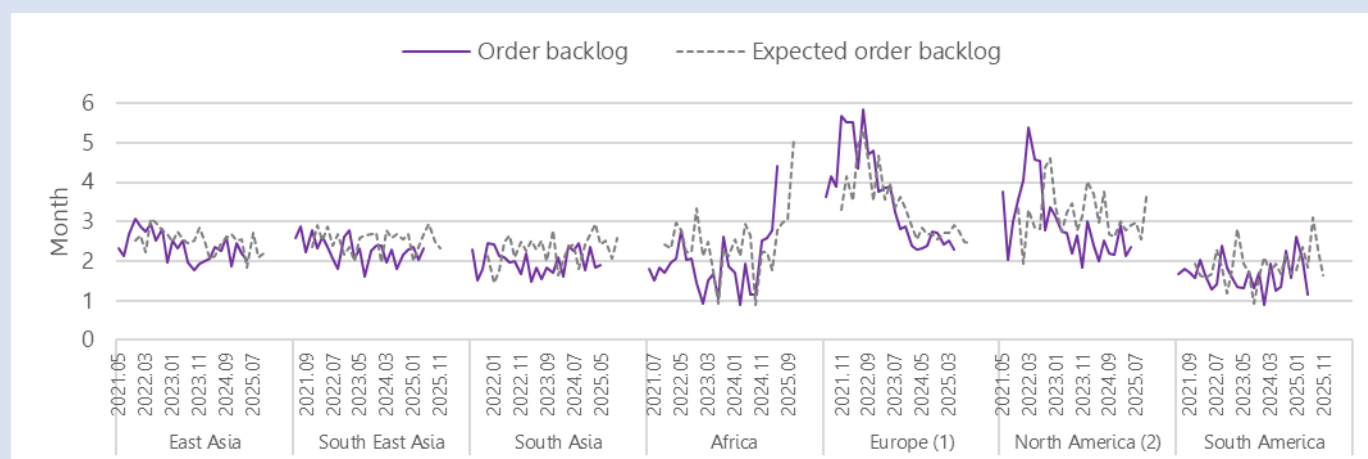
**Graph 1: Order backlog (World average) since May 21**



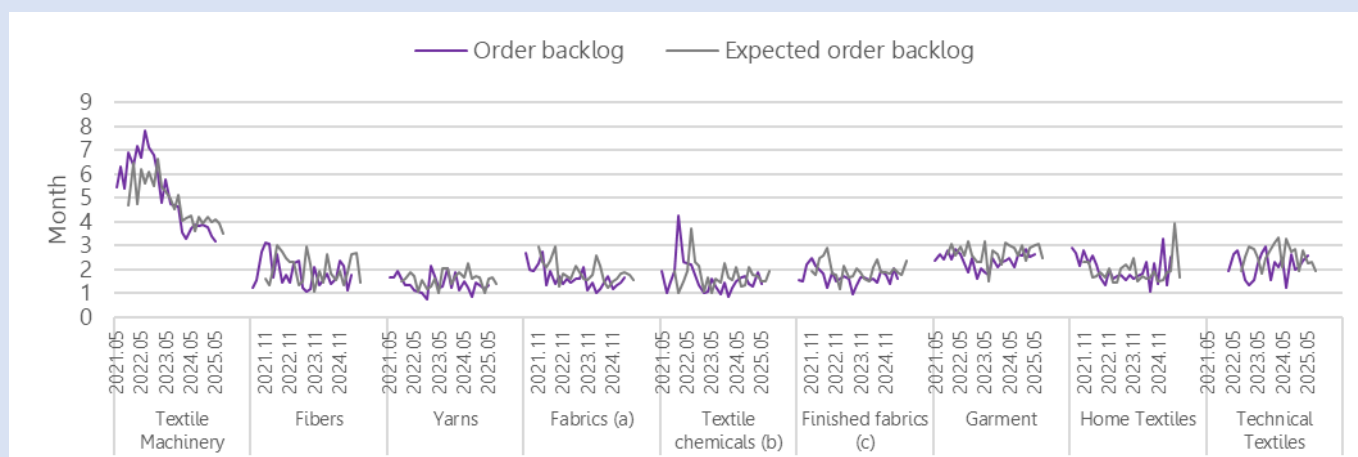
Source: 8<sup>th</sup>-32<sup>nd</sup> ITMF Global Textile Industry Survey (32<sup>nd</sup>: 12-22.05.2025)

**Sectoral** analysis reveals diverse backlog patterns reflecting varying demand conditions across textile value chains (see Graph 3). Textile machinery leads with a 3.2-month backlog, though declining for six months, suggesting cooling equipment investment cycles. Consumer-facing segments show resilience, with garments (2.7) and home textiles (2.5) both experiencing recent growth over two months. Technical textiles (2.6) demonstrate the strongest momentum with six months of continuous improvement. Mid-stream segments including fiber (1.8) and fabric (1.7) producers show recent strengthening, while downstream processing segments like finished fabrics (1.6) and textile chemicals (1.4) face recent declines.

**Graph 2: Order backlog by region\* since May 21 (in Months)**



(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | \*average | Source: 8<sup>th</sup>-32<sup>nd</sup> ITMF Global Textile Industry Survey (32<sup>nd</sup>: 12-22.05.2025) | last data point = May 2025

**Graph 3: Order backlog by producer type\* since May 21 (in Months)**

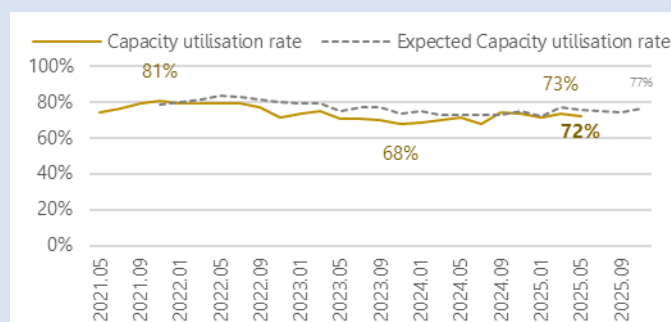
(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | \*average | Source: 8<sup>th</sup>-32<sup>nd</sup> ITMF Global Textile Industry Survey (32<sup>nd</sup>: 12-22.05.2025) | last data point = May 2025

## Article 5: Textile industry capacity utilization is stable amid regional disparities

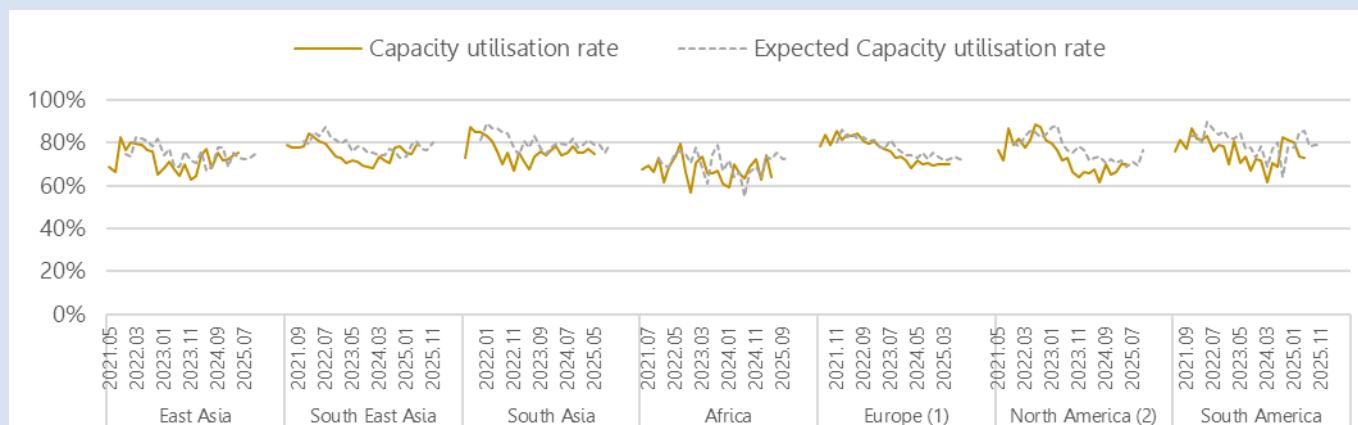
by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

The 32<sup>nd</sup> ITMF Global Textile Industry Survey, conducted in May 2025, shows global capacity utilization at 72%, slightly declining since March 2025 but maintaining recovery from the 68% low in November 2023 (see Graph 1).

With persisting weak demand capacity utilization rates remain relatively low. Many companies have adjusted overtime to this new reality by either reducing existing capacities –either selling or scrapping– or by simply not running installed machinery. If investments took place in the past two to three years, they were on average mostly replacing existing capacities and were not aimed at expanding them. Going forward more investments might be observed in some regions should the current trade

**Graph 1: Capacity utilisation rate** World average, since May 21

\*average | Source: 8-32<sup>nd</sup> ITMF Global Textile Industry Survey (32<sup>nd</sup>: 12-22.05.2025) | last data point = May 2025

**Graph 2: Capacity utilisation rate by region\* since May 21**

(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | \* average | Source: 8-32<sup>nd</sup> ITMF Global Textile Industry Survey (32<sup>nd</sup>: 12-22.05.2025) | last data point = May 2025

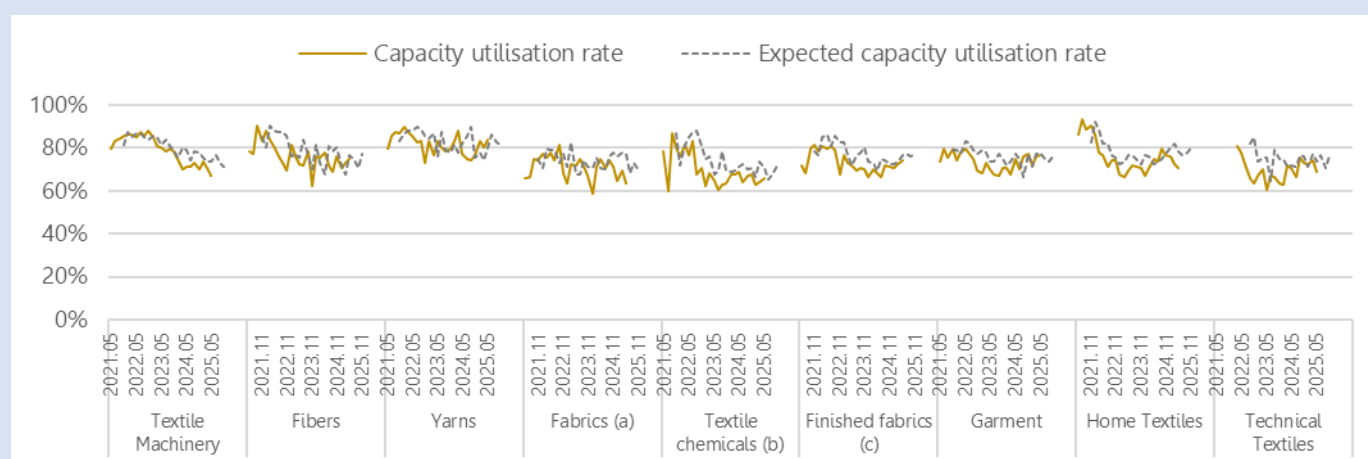
disputes lead to alternative and more resilient supply chains. It can be expected that garment producers' capacity utilization rates are going up first in different regions as demand for new sourcing options is likely to increase.

**Regional** performance demonstrates clear geographical patterns with Asian markets leading utilisation rates see Graph 2). South-East Asia achieves the highest utilization at 79% with growing momentum, while East Asia matches strong performance at 75% with six months of continuous growth. South Asia, despite matching East Asia's 75% rate, faces recent declining trends. The Americas show moderate performance with South America at 73% and North & Central America at 70%, both experiencing recent downturns. European markets, including Türkiye and Central Asia, mirror American performance at 70% with similar declining patterns. Africa significantly lags at 64%, representing the weakest regional performance

despite long-term improvements. This is somewhat contradicting the increased order backlog in May compared to March (see Article 4).

**Segment** analysis reveals distinct value chain dynamics with clear winners and challenges (see Graph 3). At 76% and 84%, upstream segments like fibre producers and spinners are showing positive growth-momentum, albeit from relative low levels. Mid-stream segments like fabric and finished fabrics producers are hovering in a range between 64% and 75%, with finished fabric producers generally recording a positive trend over recent months. Home textiles sit in the lower-middle tier with a 71% utilization rate, continuing a recent eight-month decline. Garment producers are trending upwards whereas technical and home textile producers suffered declines. Specialized segments face challenges, with textile machinery at 67% continuing the downward trend while textile chemical producers at 66% are remaining at an unsatisfactory level.

**Graph 3: Capacity utilisation rate by producer type\*** since May 21



(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | \* average | Source: 8-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025) | last data point = May 2025

## Article 6: Demand continues to dominate as major concern

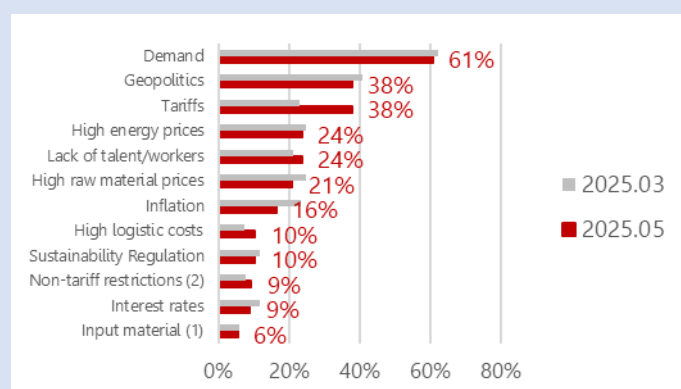
by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

The 32<sup>nd</sup> ITMF Global Textile Industry Survey conducted in May 2025 reveals a comprehensive view of industry concerns for the upcoming six months (see Graphs 1 and 2). Demand remains the predominant global worry at 61% of participants, though this figure has been declining for two months since March 2025.

Once more with **weak demand** remains the predominant global worry at 61% of participants, though this figure has been declining for two months since March 2025 and it is well below the peak of 77% reached in November 2023.

For most companies such a long period of weak demand in unprecedented. While companies had experienced multiple times severe drops of demand – during the global financial crisis in 2008/09 or during the pandemic in 2020

**Graph 1: Major concerns**



Source: 32nd ITMF Global Textile Industry Survey (12-22.05.2025)

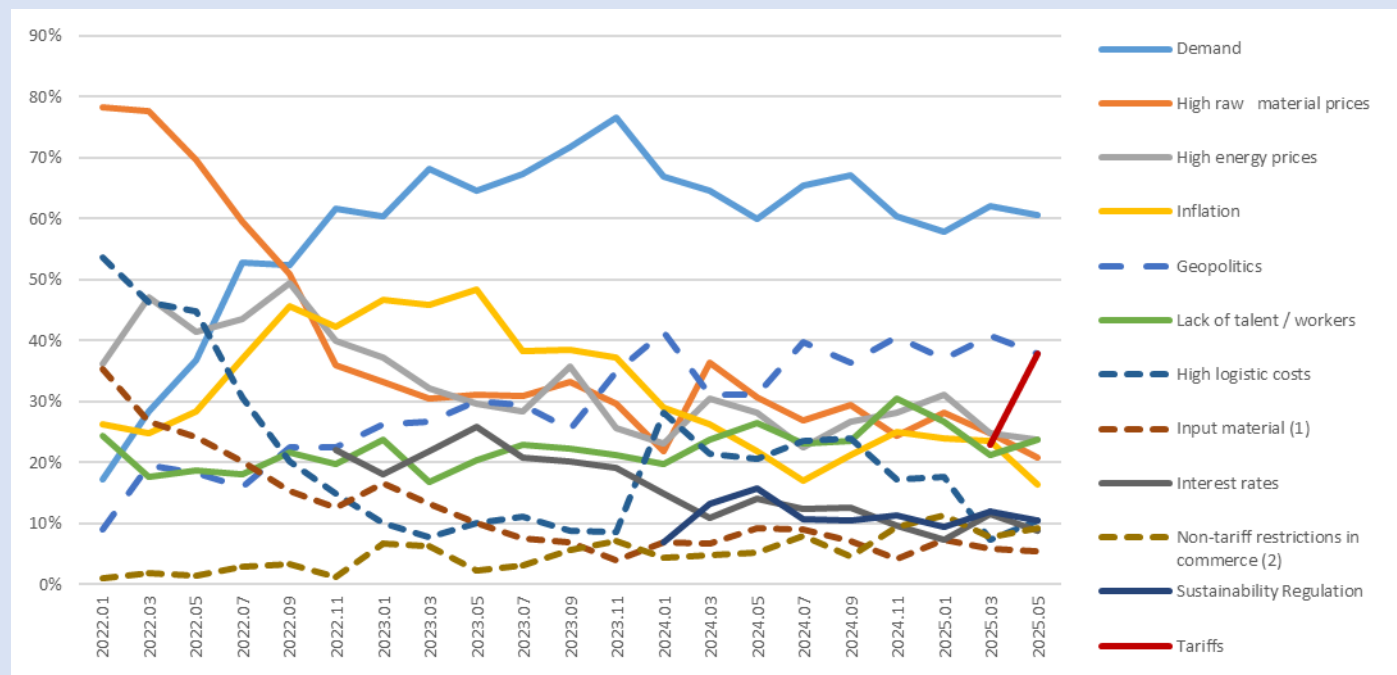


– the time until the start of the recovery was much shorter and the recovery itself much faster. Since the end of the post-pandemic boom driven by strong pent-up demand the industry is struggling. The Russian-invasion of Ukraine disrupted energy markets, resulted in surging energy prices, led to high inflation rates and reduced disposable incomes.

Just when an accelerated recovery was in sight, new trade conflicts between the US and the rest of the world emerged resulting in significant drops of consumer and business sentiments. Trade and geopolitical tensions constitute the second tier of global concerns, with both

**geopolitics** and **tariffs** each capturing 38% of participant attention. Geopolitics concerns have been decreasing for two months since March 2025, while tariffs jumped from 23% in March 2025. These trade-related concerns reflect ongoing international tensions and policy uncertainties affecting global textile commerce. Operational and cost pressures form the third category of concerns, with **energy prices** at 24% showing four months of decline since January 2025, and **workforce shortages** matching this level at 24% but with recent two-month increases since March 2025. **Raw material prices** concern 21% of participants with four months of declining worry.

**Graph 2: Major concerns** since January 2022



(1) Lack of or delayed receipt of | (2) Adoption of non-tariff restrictions in commerce | Source: 8- 32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025)

At 16%, **inflation** reaches the lowest level since the start of the survey. Since November 2024 inflation was decreasing. **Logistics costs** worry 10% with recent increases, **interest rates** concern 9% with declining

trends, and **sustainability issues** affect 10% with recent decreases. **Supply chain disruptions** register lowest at 6% with declining concern levels, suggesting improved global supply chain stability compared to previous disruptions.

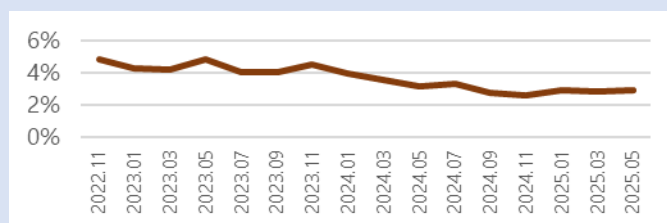
## Article 7: Order cancellation is stable and low

by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

The 32<sup>nd</sup> ITMF Global Textile Industry Survey conducted in May 2025 reveals an absence of concerns around order cancellations across the textile industry, with global cancellation rates remaining at 3% overall (see Graph 1).

**Regional** analysis demonstrates significant variation in cancellation patterns, with developing markets experiencing higher disruption rates (see Graph 2). South-East Asia leads with the highest cancellation rate at 5.3%, followed by Africa at 4.5% and South America at 4.3%, all showing increasing trends over recent months.

**Graph 1: Order cancellation in the past 4 months**



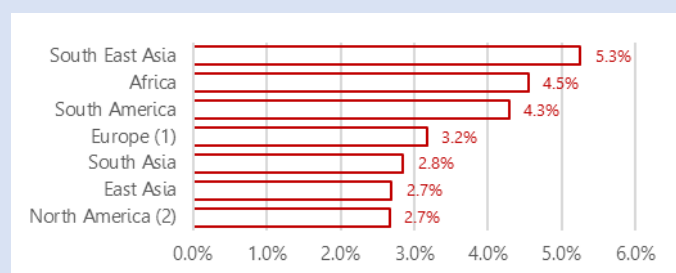
Source: 31st-32nd ITMF Global Textile Industry Survey (32nd: 12-22.05.2025)

In contrast, traditional markets show greater stability, with Europe at 3.2% and both South Asia and East Asia performing better at 2.8% and 2.7% respectively. Notably, East Asia stands out as the only region showing improving trends with decreasing cancellations over the past two months. North and Central America matches East Asia's rate at 2.7% but faces increasing pressure over four months.

**Segment** performance reveals stark contrasts across the textile value chain (see Graph 3). Spinners report the lowest level of cancellations (2.1%), whereas textile

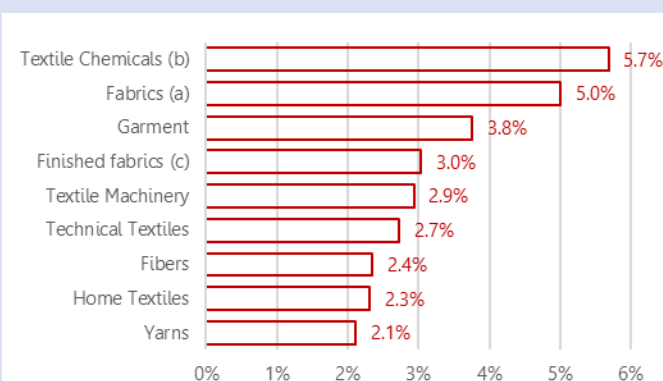
chemical producers show the highest level (5.7%). It is good news that cancellations of garments (3.8%), technical textiles (2.7%) and home textiles (2.3%) remain low. This is indicating that brands and retailers have adapted to the new business environment of lacklustre demand and therefore continue placing orders cautiously in order to keep inventory levels as low as possible. Textile machinery companies also experience a low cancellation rate. Investments in new machinery are below the long-term average and many existing orders are pushed forward rather than cancelled.

**Graph 2: Order cancellation by region in May 2025**



(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabrics | Source: 32nd ITMF Global Textile Industry Survey (12-22.05.2025)

**Graph 3: Order cancellation by segment in May 2025**



## Article 8: Global textile inventories show regional divergence with upstream strength

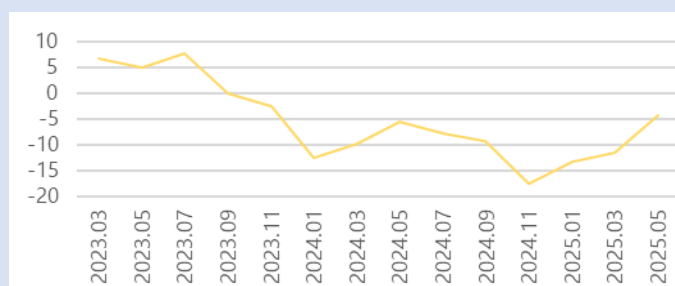
by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF

The 32<sup>nd</sup> ITMF Global Textile Industry Survey conducted in May 2025 examines inventory levels across the global textile value chain, revealing an overall global inventory level of -4%, indicating slightly below-normal stock position. This measurement reflects ongoing supply chain adjustments and demand balancing across international markets (see Graph 1).

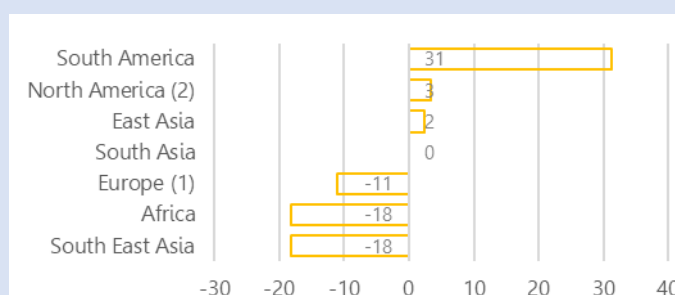
**Regional** inventory patterns show significant divergence between the Americas and other regional markets (see Graph 2). South America dominates with a rather high inventory index at 31, representing the highest regional stockpiling with six months of continuous increases since November 2024. North & Central America follows with a positive index of 3, also showing six months of growth, indicating robust market across the Americas. Asian markets present mixed conditions, with East Asia maintaining modest positive inventory at 2 and South Asia at neutral levels of 0, both showing recent two-month improvements. Europe, including Türkiye and Central Asia, operates with a negative index at -11 despite six months of improvement trends. Africa and South-East Asia face the most challenging inventory positions with -18 each.

**Segment** analysis reveals clear upstream strength contrasting with downstream challenges across the textile value chain (see Graph 3). **Upstream** segments demonstrate robust inventory management, led by fiber

**Graph 1: Inventory level index\*** How would you rate your current inventory level?



**Graph 2: Inventory level index by regions\*** in May 2025, How would you rate your current inventory level?



(1) incl. Türkiye and Central Asia | (2) incl. Central America | (a) incl. woven and knits | \* (high = 100, average = 0, low = -100) | Source: 32nd ITMF Global Textile Industry Survey (12-22.05.2025)

producers with an index of 24 with exceptional ten-month growth since July 2024.

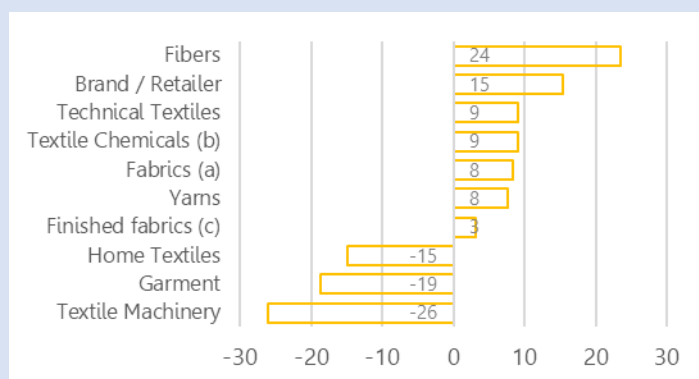
**Mid-stream** segments show healthy inventory levels, with producers of technical textiles and textile chemicals both at 9, fabric producers and spinners both at 8, and finished fabric producers at 3, most experiencing positive trends over recent months.

**Downstream** segments face greater inventory pressures, with home textiles producers at -15, garment manufacturers at -19.

**Textile machinery producers** have reduced their inventory levels markedly and stand at -26 with continuing deterioration over two months. **Brands and retailers** reported an inventory index at 15. This shows that inventory pressure remains high and that it is difficult to balance it out.

With weak demand persisting and the outlook being uncertain there is the need to keep stocks low. But a certain stock level is required to meet existing demand and limit the out-of-stock ratio. Looking at the US inventory levels (see Graph 4) it stands out that retailers reduced their

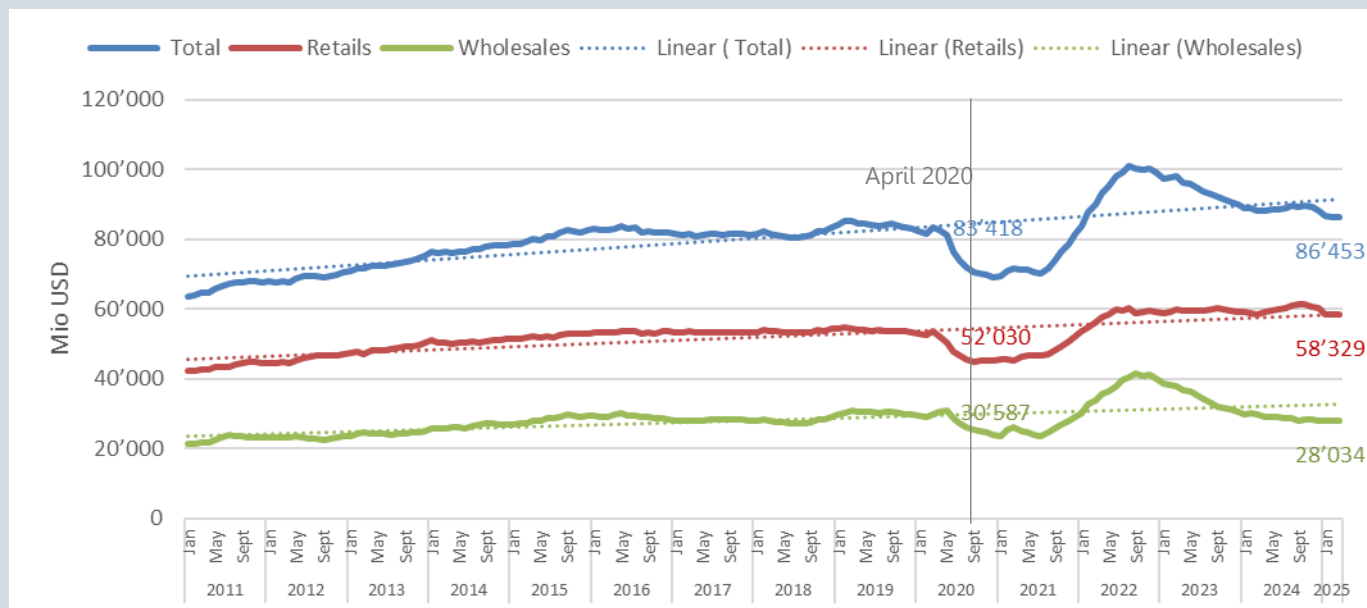
**Graph 3: Inventory level index by segment\*** in May 2025, How would you rate your current inventory level?



(a) incl. woven and knits | (b) incl. auxiliary and dyes, (c) incl. dyed, finished and printed fabric | \*(high = 100, average = 0, low = -100)| Source: 32nd ITMF Global Textile Industry Survey (12-22.05.2025)

inventory levels visibly in March 2025 compared to October 2024. Wholesalers continued reducing their inventories. This very cautious managing of inventory levels reflects the weak order intake in the entire textile value chain.

**Graph 4: Evolution of apparel inventory levels in the USA** [last data point = March 2025] \*



\* Retail Estimates of End-of-Month Retail Inventories, Clothing and clothing accessories stores, US census | Wholesales: Adjusted estimates of Monthly Sales of Merchant Wholesalers, Except Manufacturers' Sales Branches and Offices, Apparel, Piece Goods, & Notions, US census | Source: US Census, illustration: ITMF