

If there is one thread running through this issue, it is that collaboration remains the industry's best response to uncertain times.

Nothing embodies this better than our upcoming annual conference: for the first time, the ITMF & IAF Conference 2026 will be held together with Abit's International Congress in Fortaleza, Brazil, on October 14–15. Registration is now open. Cooperation is also advancing elsewhere - from ITMF's newest member and the Home Textile Producers' Committee's new partnership with the China Home Textiles Association to major industry events in Morocco, Singapore, and India.

Meanwhile, a new study on U.S. fashion companies' response to tariffs and shifting sourcing, our article on the state of textile machinery, and SLCP's 2025 Impact Report all show an industry navigating headwinds while continuing to move forward.



Mr. Olivier Zieschank
director, ITMF

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ITMF NEWS

ITMF's newest member

ITMF has welcome Meadow Grove Research as a new corporate member. This illustrates how important ITMF's unique platform is for companies and organisations in different regions and segments of the global textile value chain.



Meadow Grove Research is a commodity research firm specializing in supply, demand, and trade analysis in cotton and other soft commodities. Providing clarity to the complex nature of the global fiber supply chain is key. Meadow Grove Research focuses on close customer engagement thus providing a comprehensive and customer-centric approach for critical decisions.

To contact Meadow Grove Research click [here](#) or reach out to via [LinkedIn](#).

New ITMF office in Zurich, Switzerland

ITMF

📍 Kanzleistrasse 120

📮 8004 Zurich

🌐 Switzerland

On May 1st, 2026, the ITMF Secretariat moved into its new office. Due to extensive renovations of the former building in which ITMF's Secretariat had its office since 2007, new office rooms became necessary.

They were found in relative proximity of the old office in a quiet quarter with very good access to public transportation to both the airport and to the main train station. We kindly ask all members to update their database with the new address details.

The telephone number and the email address remain unchanged.

ITMF & IAF 2026 in Brazil co-hosted by ABIT – Registration is Open!

**BRAZIL 2026
INTERNATIONAL
CONFERENCE**
OCTOBER 14 - 15 | FORTALEZA

Hosted by:
ABIT **ITMF** **IAF**

Register [here](#)

This year's ITMF & IAF Conference 2026 will be held in the city of Fortaleza, Brazil, from October 14-15, 2026. The conference will be co-hosted by ABIT, the Brazilian Textile & Apparel Industry Association.

The conference will be held under the theme "*Future in Motion – Transformation, Innovation and New Realities*".

The prelim. program features a 2-day conference as well as a golf tournament, committee meetings, and factory visits (see below timeline). For more information and future updates, please click [here](#).

**Preliminary
Conference
Timeline**



October 2026

Oct. 12

Golf tournament

Oct. 13

Internal
Meetings

Oct. 14

Conference
Day 1

Oct. 15

Conference
Day 2

Oct. 16

Factory visit

New Study Examines How U.S. Fashion Companies Are Navigating Tariffs, Sourcing Shifts, and Cautious Consumers



A new study by Prof. Sheng Lu (University of Delaware) analyzed the latest earnings call transcripts (February–April 2026) of some 30 leading publicly traded U.S. fashion companies to assess their current sourcing and business practices. Companies cited shifting consumer demand, macroeconomic volatility, tariff hikes, and policy uncertainty as their main concerns, with tariffs reducing gross profit margins by 20 to 460 basis points in FY2025 — equivalent to annual costs of roughly \$30–195 million per company. To mitigate these pressures, companies are systematically raising retail prices — mostly on trend-driven and premium items while shielding price-sensitive basic categories — and reporting little consumer resistance so far. On the sourcing side, four strategies stand out: continued diversification away from China, expanded sourcing from lower-cost Asian hubs such as Bangladesh and Vietnam, near-shoring to Mexico and Central America, and close monitoring of newly negotiated U.S. trade agreements with textile-specific provisions. The full article is available on the [ITC Global Textile Academy website](#). Read an summary for ITMF members [here](#).

ITMF & IAF Congress 2026 - A look at what awaits delegates in Fortaleza



This year's **ITMF & IAF Conference 2026** in Fortaleza, Brazil (October 14–15), co-hosted by **ABIT, the Brazilian Textile and Apparel Industry Association**, will be held together with ABIT's own well-established International Congress, which reaches its 11th edition in 2026. For the first time, the strength of three major entities of the global textile and apparel industry thus converges in a single event. Organized annually since 2016, ABIT's International Congress has become Brazil's main gatherings for information, networking, and insights in the sector, attracting on average 450 participants per edition with a 99% approval rating - more than half of the attendees being presidents and directors, with apparel and retail (48%) and textiles (27%) as the leading company segments. This strong local participation will offer international delegates ample opportunities to engage with key representatives of the Brazilian textile and apparel value chain. All confirmed speakers and their bios are available on the website

[> read more](#)

ITMF's Home Textiles Producers Committee (HTP) partners with China Home Textiles Association (CHTA)



If interested in participating,
contact the ITMF-Secretariat at
secretariat@itmf.org.

Back-to-back with the Intertextile Shanghai Homes Textiles 2026 in Shanghai, China (August 18-20, 2026) the China Home Textiles Association (CHTA) in cooperation with the ITMF Home Textiles Producers (HTP) Committee will organize the **"Binzhou International Home Textiles Cooperation Conference 2026"** on August 21st in Binzhou, Shandong, China.

The theme of the conference is *"Globe, Links, Smart Future – Building a Shared, Green, and Intelligent Home Textile Ecosystem"*.

Binzhou, Shandong is one of China's most important home textiles clusters, officially recognized as a "Pilot Zone for World-Class Home Textiles Industrial Cluster" and a "National Textile Industry Base City." The cluster spans seven sub-sectors from spinning, weaving, and dyeing to home textiles, apparel, and technical textiles forming a complete industrial chain from fiber to finished product. It is home to industry leaders including WEIQIAO Group (Fortune Global 500), YUYUE Home Textile (Top 10 in China), LOFTEX (national leader in towels), and HUAFANG (China's largest woven printing and dyeing enterprise).

CHTA takes care of the transportation by offering stress-free and seamless transportation from Shanghai to Binzhou (VIP Service with high-speed train (3h from Shanghai) + VIP shuttle (1h 20min)). For more information about the updated prelim. program, please click [HERE](#).

ITMF's Spinners Committee visited recycling plans in Türkiye



From June 3-5, 2026, the **ITMF Spinners Committee** travelled to Türkiye with the objective to visit several fibre and integrated textile companies and to see how they are pursuing their recycling, circularity, and sustainability efforts. The trip was co-hosted and -organised by **TTEA, the Turkish Textile Employers' Association**.

A delegation of around 20 persons from Türkiye and around the world (Brazil, India, Germany, Italy, Pakistan, Switzerland, and the UK) travelled to the region of Adana, Kahramanmaras, and Gaziantep to visit the following companies: **SASA**, the largest polyester producer in Europe, the Middle East, and Africa | **Meltem Kimya**, a leading chemical recycler of pre- and post-consumer polyester feedstock | **KIPAS TEXTILES**, one of Europe largest integrated textile producers with integrated chemical and mechanical recycling capabilities | **Sanko Textile**, one of the largest spun-yarn producers in Europe, Middle East and Africa | **Kara Fibre**, a pioneer in Türkiye's Lyocell production.

A detailed report will be published in the next few weeks.

PARTNER NEWS

AP-TEXPO 2026 returns to Singapore Spotlighting the future fashion supply chain



[Read more](#)

APTEXPO will return for its third edition on 11–13 November 2026 at the Sands Expo & Convention Centre in Singapore, under the theme "*The Next Era of Fashion: AI-Driven, Adaptive, Resilient, Sustainable*". The event will bring together global brands, retailers, distributors, and buyers, offering a platform for targeted matchmaking and high-value business connections across the Asia-Pacific - the hub of the global textile and apparel industry. The 2026 edition will showcase how AI is reshaping sourcing, production, and decision-making, complemented by an exhibition showcase, industry forums, the APTEXPO Summit, and networking opportunities. ITMF is among the supporting associations of the event.

23rd Maroc in Mode Show 2026: Morocco strengthens its nearshoring position



The 23rd Maroc in Mode (MIM) Show 2026 will take place from 3–5 November 2026 in Casablanca, Morocco, organized jointly by two ITMF members, AMITH (Moroccan Association of Textile and Clothing Industries) and CEMS-Global USA. The event will be held alongside the 4th Moroccan Edition of the Textile Series of Exhibitions. At a time of profound shifts in global supply chains and growing demand for sourcing diversification, Morocco has emerged as an attractive nearshoring destination offering access to European, North American, and African markets, manufacturing capabilities, competitive production economics, growing sustainability readiness, and a broad network of free trade agreements. The exhibition will showcase Morocco's finest textile and apparel manufacturers, presenting apparel collections, premium fabrics, technical and value-added products, and full-package sourcing services.

[> read more](#)

SLCP's 2025 impact report marks a decade of driving decent working conditions



2025
SLCP Impact Report:
A decade of driving decent working conditions



The [Social & Labor Convergence Program \(SLCP\)](#) has published its 2025 Impact Report, marking ten years of work to improve working conditions in global supply chains. The report tracks a year of steady growth, with 10,700 assessments covering 7.5 million workers worldwide, and exceptionally strong retention: 80% of facilities returned for multiple assessments, and nearly a quarter completed their fifth consecutive assessment. In 2025, SLCP added new climate data points to its Converged Assessment Framework (CAF), aligning with Human Rights Due Diligence requirements and recognizing that climate change directly affects worker wellbeing - with data revealing dangerously high heat levels in some facilities. Further insights include a 14% increase in Tier 2 facilities conducting assessments, the emergence of India and Vietnam as the fastest-growing countries by assessment volume, and evidence that facilities using the CAF for five years show around 20% fewer legal non-compliances. With assessments shared an average of 2.7 times, SLCP has unlocked a potential \$35 million USD that can be redirected from redundant audits into improving working conditions.

[> read more](#)

Bharat Tex 2026: India's global textile mega-event invites international buyers and delegates



Bharat Tex 2026, India's largest integrated textile events, will bring together the entire textile and apparel value chain - from fibres, yarns, fabrics, apparel and technical textiles to machinery, chemicals, sustainability solutions, fashion, retail and sourcing - at Bharat Mandapam in New Delhi. As knowledge and industry partner, the Confederation of Indian Textile Industry (CITI) will organize several high-impact initiatives, including the "Future Factories: Industry 5.0 & Smart Manufacturing Summit" (July 14), the "Textile Sustainability & Innovation Awards 2026" (July 15), and the panel "Brands for Billions: Scaling Fashion for India & the World" (July 15).

International participants can also benefit from a dedicated Hosted Buyer Programme offering curated B2B meetings with leading Indian manufacturers and exporters, tailored matchmaking support, and local logistics assistance.

Juan Parés, ITMF President, as well as Christian Schindler, ITMF Director General, will be speaking in various sessions.

For more information and registration, visit: bharat-tex.com | [Hosted Buyer Programme](#) | [Overseas Buyer Registration](#)

UPCOMING EVENTS

2026

[Milano Unica](#)

July 7-9, 2026
Milano, Italy

[Bharat-Tex 2026](#)

July 14-17, 2026
New Delhi, India

[Nastex Fair](#)

July 18-21, 2026
Damascus, Syria

[Intertextile SHANGHAI home textiles](#)

August 18-20, 2026
Shanghai, China

[Intertextile SHANGHAI apparel fabrics](#)

August 25-27, 2026
Shanghai, China

[CAITME 2026](#)

September 08-10, 2026
Tashkent, Uzbekistan

**Dornbirn Global Fiber
Congress 2026**

September 16-18, 2026
Dornbirn, Austria

International Textile Forum

September 23, 2026
Dushanbe, Tajikistan

TITAS 2026

October 6-8, 2026
Taipei, Chinese Taipei

ITMF&IAF Conference 2026

October 14-15, 2026
Fortaleza, Brazil

ICAC Trade Event

October 14-15, 2026
Istanbul, Türkiye

Maroc In Mode

November 3-5, 2026
Casablanca, Morocco

Venice Sustainability Forum

November 5-6, 2026
Venice, Italy

APTEXPO 2026

November 11-13, 2026
Singapore

Destination Africa

November 14-15, 2026
Cairo, Egypt

Cotton USA Summit 2026

November 16-18, 2026
Scottsdale, Arizona, USA

ITMA Asia & CITME 2026

November 20-24, 2026
Shanghai, China

INDIA ITME 2026

December 4-9, 2026
New Delhi, India

**7th Sustainability Talks
Istanbul**

December 8, 2026
Istanbul, Türkiye

ITMF ARTICLES

The state of textile machinery in 2025–2026

by Olivier Zieschank, director of ITMF

The state of textile machinery in 2025–2026



Smarter
Systems



Sustainable
Solutions



Stronger
Tomorrow

The 2025 ITMF shipment data shows Asia continuing to absorb 86–97% of deliveries across every segment, with China still the largest buyer. Most segments cooled from 2024 but stayed close to or above long-term averages, and despite the public reshoring narrative, the centre of gravity of textile machinery investment has not moved

The ITMF & ACIMIT Textile Machinery Workshop in Como, Italy (12 May 2026) combined ITMF Director General Christian Schindler's preliminary presentation of ITMF's International Textile Machinery Shipment Statistics 2025 with segment-by-segment commentary from leading European and Chinese machinery manufacturers, producing a consolidated value-chain view of where the industry stood at year-end 2025 and how it is positioned going forward.

Spinning: replacement mode, with Asia anchoring the floor

Short-staple spindle shipments reached 6.2 million in 2025, marginally above 2024 but well below the 9–10 million long-term average, with Asia taking 95% and China a record 71% (see Graph 1). Shipments of open-end rotors followed the same pattern (94% Asia, 73% China) and stayed above the 20-year average, though most projects were replacement rather than expansion and Vietnam is emerging as a potential next growth market. Customer demand is converging on operating-cost reduction, automation, flexibility, new fibres and circularity, with some suppliers shifting toward high-end niches where differentiation matters more than throughput.

Texturing: China still in the driver's seat

Texturing shipments fell 23% to 809,000 units in 2025 but remained respectable historically, with China absorbing 92% of global shipments amid sharp geopolitical disruption. Investment remains anchored in China (driven

by the 15th Five-Year Plan's manmade fiber expansion), with India as a second pole, Türkiye insulated by a 10% import duty, and Egypt emerging via Chinese projects; longer-term, the segment expects regionalized globalization, with the drive of technological innovation and constraints of demographic ageing.

Weaving: India's surge meets a polarizing market

Shuttle less loom shipments fell from 2024 but stayed strong historically, with water-jet at 88,000 (down from a record 142,000 but still the second-highest in twenty years) and Asia taking 98% of all deliveries. India strengthened its position as weaving destination with shipments reaching 52 thousand units while China – still by far the largest investor – weakened. China, India, Pakistan, Vietnam together account for over 94% of the market, prompting relocation closer to these buyers.

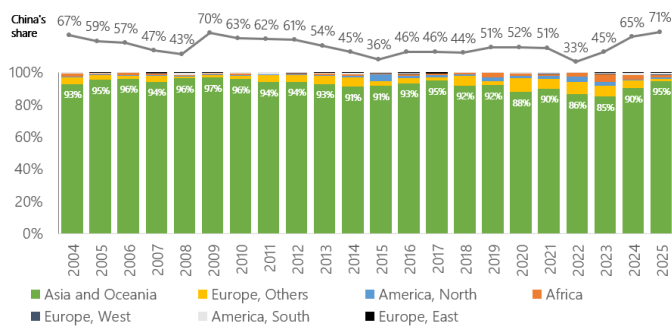
The market is polarizing between a cost-driven commodity segment (mainly water-jet and air-jet) and a performance-driven value-added segment. Managing this split — against eroded perceived value for what are high-technology products — is now the industry's central strategic challenge.

Knitting: a structural shift in who builds the machines

Large circular knitting deliveries fell 13% (Asia 86%, China 48%) and flat knitting dropped 21% to around 107,000 units (Asia 93%, China 61%), reverting to five-year

Graph 1: shipped Short-Staple Spindles

By Regions (Share to World Total)



[continues] averages with India, Bangladesh, Cambodia, Vietnam, Egypt, Indonesia, and Türkiye, rounding out demand. The deeper story is structural: Chinese manufacturers have caught up in capacity, competence, quality and global ambition — underlined by a Chinese acquisition of a major German circular-knitting builder and the closure of an iconic German flat-knitting brand — and are now exporting into Türkiye, Egypt, and South America, while customer expectations shift from machines alone toward efficiency, flexibility, sustainability, software integration and partnership-based ecosystems.

Nonwovens: the bright spot

Nonwovens is growing at roughly 6.7% per year with about USD 3 billion of annual investment and a USD 6 billion accessible market, stabilizing in 2026 after a difficult 2025, with China (8.5 million tons) dominating versus India's fast-growing 0.8 million tons, and growth concentrated in filtration, hygiene, recycling, sustainability and geotextiles. Competitive pressure from China has intensified dramatically — dozens of competitors now cluster in niches that once held four or five — while customer priorities center on 3–5 year ROI windows and small in-house recycling lines of EUR 300,000–400,000, pointing European manufacturers toward differentiation via premium positioning, outcome-based selling and AI-supported service models.

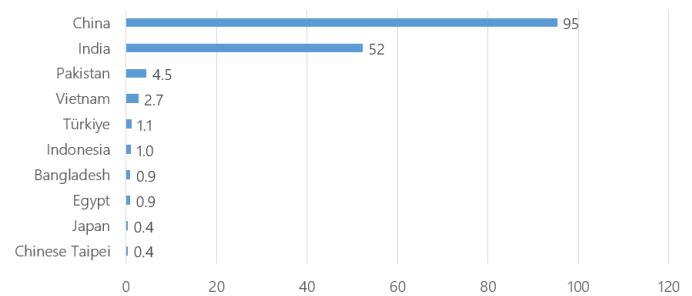
Printing: three tough years, value taking over from volume

After weak years in 2023, 2024 and 2025, European printing machinery is starting 2026 slightly better, with analogue printing picking up on army and technical-textile demand linked to global conflicts while digital growth has slowed as designer trends shift toward dyed cloth, and end-use demand favoring sportswear and technical textiles over weak fashion prints. Pakistan, Bangladesh and India continue developing as printing hub, Türkiye is losing share to Asia and Egypt, the US shows near-

Graph 2: Shipped Shuttle-Less Looms

10 Biggest Investors (2025)

(thousand units)



Shoring promise and South America is growing in pigment, while external research projects growth through 2028–2029 — with cost leadership giving way to value creation through shorter processes, energy savings and efficiency.

Finishing: fragmented, energy-bound, and gradually turning

Finishing is the broadest, most fragmented and most energy-intensive segment, tracked mainly via stenters (2,300 units in 2025, slightly up from 2,230 in 2024), and caught in an enduring tension where customers want sustainability but won't pay a premium for it, while shop-floor conservatism slows adoption of efficiency-enhancing digital tools. Builders are responding with hybrid energy configurations (oil + electric, steam + gas, steam + electric) tailored to local energy availability, and the clearest growth direction is technical textiles, where added value is high and recent industry fairs showed visibly strong demand.

Conclusion and outlook

Across every tracked segment, Asia accounts for 86–97% of shipments with China the largest buyer in nearly all — reshoring and nearshoring narratives are not visible in upstream machinery flows, even if garmenting may be relocating. Three forces will shape the next phase: the structural rise of Chinese machinery manufacturers now exporting credibly into Turkey, Egypt and South America; geographic reshuffling within Asia, with India's durable repositioning (helped by UK and EU FTAs expected by 2027), Egypt's Chinese-backed fibre investments, and Vietnam emerging across segments; and convergence of customer requirements around operating-cost reduction, automation, flexibility, sustainability, circularity, software integration and value-added applications — meaning competitive position will depend less on where machines are built than on how clearly manufacturers can articulate and deliver the value they create.

PARTNER ARTICLE

From Reporting to Reliance: Why Sustainability Data Trust Now Matters for Textile Manufacturers

by Andrew Martin, [Business at its Best](#)



A prosecution in Vietnam that barely registered across the apparel and textile sector may turn out to be a more consequential data integrity story than the industry has yet absorbed.

The case concerns the alleged manipulation of mandatory environmental monitoring systems across multiple provinces — with claims that software was used to falsify readings before transmission to regulators. No textile or apparel companies have been publicly identified as being involved. Yet the case raises a wider question that should matter deeply to textile manufacturers: what happens when environmental data systems become more important than the environmental improvements they are meant to support?

This was the starting point for a recent feature I wrote for EcoTextile News, exploring whether fashion's sustainability data systems can be trusted — and what that means as brands, regulators, investors and customers increasingly rely on that data for sourcing, disclosure, due diligence and public claims.

For manufacturers, this discussion is not abstract. Across the textile and apparel industry, environmental data now flows through a growing number of platforms, assessments, certification systems, chemical compliance frameworks, traceability tools and emerging regulatory requirements — including systems that will be familiar to most manufacturers, such as the Higg FEM, ZDHC chemical compliance frameworks and amfori BEPI evaluations, alongside ESG disclosures, Digital Product Passport pilots and a growing body of regulatory reporting obligations. Data that was once used mainly for benchmarking or voluntary improvement is increasingly being used to inform commercial, operational and potentially legal decisions.

The issue is no longer simply whether data exists — it is whether the systems collecting, verifying and using that data are trusted enough to support the decisions now being made from it.

In interviews for the EcoTextile News article, several themes emerged consistently. Sustainability data systems remain highly fragmented, with manufacturers often asked to provide similar information in different formats across multiple platforms and customer requirements — creating duplication, inefficiency and reporting fatigue. Trust, meanwhile, is not purely a technical problem: better platforms and AI tools can improve visibility, but they cannot by themselves resolve issues of incentives, governance or commercial pressure. And critically, environmental data must create value for manufacturers, not only compliance assurance for brands. Where suppliers are asked to provide increasingly granular data but see little operational benefit in return, the system risks becoming a one-way flow — and suppliers notice.

The legal context is also shifting. As sustainability reporting becomes more closely linked to regulation, disclosure and due diligence, companies relying on environmental data face growing expectations around accuracy, evidence and accountability. This increases pressure not only on brands making public claims, but on the systems through which supplier data is collected and interpreted — and on the manufacturers whose data underpins those systems.

For textile manufacturers, the opportunity is to help shape what comes next. Manufacturers generate much of the industry's operational sustainability data.

² [This Photo](#) by Unknown Author is licensed under [CC BY-NC](#)

They understand where data collection reflects operational reality, where it creates burden, and where systems could be designed more effectively. Their voice will be essential if the industry is to move from sustainability reporting towards assurance systems that are credible, practical and trusted by all sides.

For those able to build robust, well-evidenced data systems, the ability to provide evidence, not just declarations, may also become a source of differentiation.

The questions worth asking openly are these: where are current sustainability data and verification systems creating genuine operational value for manufacturers?

Where are they primarily creating reporting burden? What would manufacturers need to see in order to trust these systems? And what would a more balanced sustainability assurance ecosystem look like from the supplier side?

Because the apparel and textile sector is no longer simply collecting sustainability data. Increasingly, it is relying on it. And that changes everything.

The full EcoTextile News article, which draws on interviews with Cascale, Worldly, LRQA, Eurofins Assurance and Slaughter and May, can be accessed here: [Legal jeopardy around fashion's environmental data](#).