



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 32nd 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

Contents

ITMF NEWS

ITMF & Swiss Textile Machinery Workshop 2025

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

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

PARTNER NEWS

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

Bremen Cotton Conference returns in 2026 – Call for papers Dornbirn GFC 2025's program is now available

Knowledge paper by Gherzi: Uzbekistan emerges as rising star

APTEXPO 2024 – a major supply chain summit in Singapore

Chemical breakthroughs transform textile sustainability

The Fibre Year 2025 reveals continued industry challenges

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

UPCOMING EVENTS

REPORT: THE 32ND GLOBAL TEXTILE INDUSTRY SURVEY

Article 1: Business situation stagnates as regional gaps widen

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

Article 3: Order intake falls – except in Africa

Article 4: Order backlog shows modest global recovery

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

Article 6: Demand continues to dominate as major concern

Article 7: Order cancellation is stable and low

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

EXECUTIVE SUMMARIES

Business situation stagnates as regional gaps widen



The 32nd 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 \(members only\)](#)

¹This Photo by Unknown Author is licensed under [CC BY-SA-NC](https://creativecommons.org/licenses/by-sa/4.0/)

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).

² [> read more \(members only\)](#)

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 \(members only\)](#)

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 \(members only\)](#)

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.

³ [> read more \(members only\)](#)

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.

⁴ [> read more \(members only\)](#)

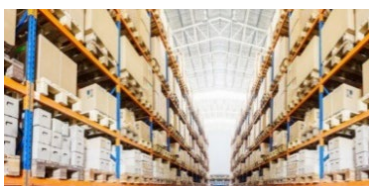
Order cancellation is stable and low



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.

⁵ [> read more \(members only\)](#)

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.

⁶ [> read more \(members only\)](#)

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

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

⁴[This Photo](#) by Unknown Author is licensed under [CC BY-NC-ND](#)

⁵[This Photo](#) by Unknown Author is licensed under [CC BY](#)

⁶[This Photo](#) by Unknown Author is licensed under [CC BY-NC](#)

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, Iteima, 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*."

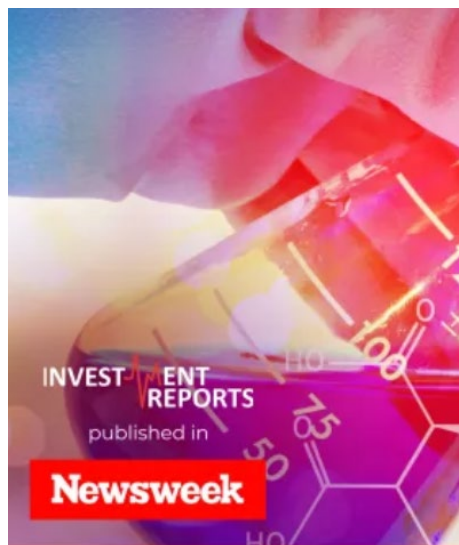
The event combines supply chain exhibitions, industry summits, and investment matching platforms.

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 7th 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