



This month's newsletter reflects a textile industry continuing to grapple with persistent challenges. Our 33<sup>rd</sup> Global Textile Industry Survey reveals that weak demand remains the dominant concern. Yet amid challenges, we witness resilience and opportunity. From Brazil's cotton sector positioning for global leadership to the surge in AI adoption across the value chain, innovation remains our north star. The enthusiasm for ITMF & IAF Conference 2025 and various textile events demonstrates commitment to collaboration. Our industry's response continues to inspire confidence in our collective future.



**Mr. Olivier  
Zieschank**  
director, ITMF

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## EXECUTIVE SUMMARIES

### Business situation follows a slow but continuous decline



The global textile industry reported a business situation balance of –22 percentage points, showing a slow but continuous decline since January 2025. Regionally, Africa and South America led with positive sentiments. Among producer types, brands and retailers improved, while textile machinery producers recorded again the lowest sentiment.

[> read more \(members only\)](#)

### Business expectations continue declining



Worldwide, 34% of participants to the GTIS expect improved business conditions in six months with a declining balance trend over the past six months. Regionally, Africa and North & Central America lead with the highest positive outlook. Among producer types, brand and retailers are the most optimistic; textile chemical producers record the lowest balance.

[> read more \(members only\)](#)

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### Order intake maintains its level



The 33rd GTIS reported a global order intake balance of -19 pp, marking decline from a high of -6 pp in January 2025 despite slight progress since last May. Regionally, Europe and East Asia still faced the greatest challenges. Among the value chain, fabric producers were the only segment recording a positive balance of +18 pp.

[> read more \(members only\)](#)

### Order backlog slightly declined



The global order backlog of 2.3 months marked a slight decline over the past two months but remains higher than its lowest point reached in March 2024. Regionally, North & Central America recorded the highest backlog at 3.4 months. In terms of producer types, textile machinery manufacturers still have the longest with 3.6 months.

[> read more \(members only\)](#)

### Capacity utilization rates hold steady



Worldwide, the textile industry's capacity utilisation stood at 72% in July 2025, with a minor decline over the past four months. Regionally, East Asia and South America led with 78% utilisation rates. In the value chain, spinners achieved the highest rate (84%), textile chemicals producers the lowest (65%).

[> read more \(members only\)](#)

### Demand remains the major concern, followed by geopolitics and tariffs



The 33rd GTIS maintains weak demand as the top concern for 62% of participants over the next six months. Geopolitics (39%) and tariffs (37%) follow as major concerns, while secondary challenges include talent shortages, high energy prices, and elevated raw material costs.

[> read more \(members only\)](#)

### Global order cancellations stabilized



The 33rd GTIS reports worldwide order cancellations stabilizing at 3%. Regionally, South Asia had the highest cancellation rate at 5.4%, followed by North & Central America (4.5%). In production sectors, home textiles led with a 9.0% cancellation rate, while textile machinery producers recorded the lowest at 1.6%.

[> read more \(members only\)](#)

### Inventory levels remain below average



The global textile inventory index fell to -9 in July 2025, breaking with the former positive trend recorded since November 2024. Regionally, South America led with a positive inventory of 25, followed by East Asia at 20, where inventories are above average. In the textile value chain, producers of fabrics and finished fabrics reported the lowest inventory levels.

[> read more \(members only\)](#)

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## OBITUARY

### Mr. Tiankai Wang (1946-2025)



Colleagues and Friends of CNTAC.

It is with deep sadness that we have learned of the passing of Mr. Tiankai Wang.

On behalf of the Board and Secretariat of the International Textile Manufacturers Federation (ITMF), we extend our heartfelt condolences to Mr. Wang's family and to the entire China National Textile & Apparel Council (CNTAC), which he led with great dedication and foresight for many years.

Mr. Wang was not only a prominent leader of CNTAC but also played a pivotal role within the ITMF. He served as Vice President from 2010 to 2014 and was elected President from 2014 to 2016—the first President from Mainland of China following CNTAC's accession to the ITMF in 2008.

During his ITMF-presidency, Mr. Wang significantly strengthened the role of the Federation as the leading international platform for the global textile value chain. Under his leadership, the number of Corporate Members, particularly from China, grew substantially. He also introduced vital reforms to the governance of the

On July 28<sup>th</sup> Mr. Tiankai WANG, former President of China National Textile & Apparel Council (CNTAC (2011-2016) and former President of ITMF (2014-2016) passed way after a courageous battle against illness. He was 79 years old.

The following condolence letter was sent to the China National Textile & Apparel Council (CNTAC) on July 30<sup>th</sup>, 2025.

Federation, including expanding the Board and implementing term limits that allowed for both renewal and continuity.

Mr. Wang also played a key role in the success of the ITMF Annual Conference in 2014, when CNTAC hosted a memorable event in Beijing, culminating in an unforgettable Gala Dinner at the State Guest House—an occasion still fondly remembered by many delegates.

Above all, Mr. Wang will be remembered as a visionary leader who guided the Federation with a commitment to fostering collaboration and mutual understanding among textile-producing nations and regions around the world.

Our deepest sympathies are with his family and with everyone at CNTAC during this time of mourning.

With deepest sympathy,

Mr. K. V. Srinivasan  
President

Mr. Christian Schindler  
Director General

For the Board & Past Presidents For the Secretariat

## ITMF NEWS

### ITMF & ITA Webinar Series on "AI in the Textile Value Chain" concludes with the 7<sup>th</sup> Webinar



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

On September 26, 2025 (12:00-13:15hrs. (CET)) the 7<sup>th</sup> webinar in the ITMF & ITA's Series on "*AI in the Textile Value Chain*" will take place. Titled "*AI Business Models & Applications in the Textile Industry*", the event will feature the following speakers:

**Prof. Jie Zhang**, Executive Dean, Institute of Artificial Intelligence, Donghua University, China | **Mr. Jaeyoung Jun**, Co-founder & CEO, [OMNIOUS.AI](#), Korea | **Dr. Doruk Öner**, CEO, ARTIFEYE Technologies, Türkiye | **Mr. Volkan Seyok**, Vice General Manager, Karsu Textile, Türkiye

**Next webinar on September 26<sup>th</sup>, 2025**, from 12:00 to 13:15hrs (CET = Zurich-time)  
[Register here](#) (After registration, you will receive an individual Zoom-link to participate in this webinar)



# ITMF & IAF Conference 2025 – Registration is in full swing!




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**. The conference programme is taking shape. For more information, please visit the [conference website](#).

**Since the rooms are limited in the conference hotel, it is recommended to register and book hotel rooms as soon as possible.**

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

Conference Timeline		October 2025					
		Oct. 22	Oct. 23	Oct. 24	Oct. 25	Oct. 26	Oct. 27
		Factory visits are offered, Golf	Board, Committees, and other Meetings	Conference Day 1	Conference Day 2	Excursion to Borobudur Temple is offered	Factory visits are offered

## ITMF Spinners Committee visited Brazil's cotton growing regions



At the invitation of ABRAPA (Brazilian Cotton Growers Association), the ITMF Spinners Committee led by ITMF President, Mr. K. V. Srinivasan, visited Brazil's cotton growing regions from July 20-25, 2025. Together with representatives from Better Cotton, brands representatives (Lacoste, IKEA), and a few other participants, the group of around 20 visitors had the unique opportunity to get a comprehensive overview of Brazil's cotton industry in the three major cotton growing states of Mato Grosso, Goiás, and Bahia. The itinerary included the following visits:

**Daltrozo Farm** & Ginning Plant in Primavera do Leste, Mato Grosso | **UniCotton Laboratory** in Primavera do Leste, Mato Grosso | **AMPA** Headquarter in Cuiaba, Mato Grosso | **Franciosi Farm** at Riachao das Neves, Bahia | **ABAPA** Laboratory & Headquarter, Luís Eduardo Magalhães, Bahia | **SLC Group Farm** and Ginning Plant, Pamplona, Goiás | **ABRAPA** Headquarter & CBRA, Brasília

The visit revealed a cotton industry well positioned for the future. As the world's largest cotton exporter and third-largest producer, Brazil demonstrated exceptional operational excellence through industrial-scale farming with sophisticated monitoring systems, innovative double-cropping that produces in most areas two full crops annually on mostly rain-fed land, and remarkable land use efficiency utilizing only 0.1% of Brazil's territory. The industry pays close attention to sustainability with 90% family-owned farms maintaining genuine regenerative practices (cover crops, bio-based pesticides, etc.), 81% certified cotton production, and 100% traceability. Furthermore, farmers demonstrate continuous efforts to improve the seed quality by testing 5-10 new varieties annually. Practically all cotton grown in Brazil is genetically modified using the latest technology. A more detailed report about the visit of the ITMF Spinners Committee to Brazil will be published in late August or early September.

## PARTNER NEWS

### CITI celebrates World Cotton Day during 4<sup>th</sup> Global Cotton Conference



The Confederation of Indian Textile Industry (CITI) will host its 4<sup>th</sup> Global Cotton Conference on October 7, 2025, in New Delhi, themed "*Cotton 2040: Technology, Climate & Competitiveness*." The event coincides with World Cotton Day celebrations and aims to address critical issues facing the cotton textile value chain.

The conference will convene experts, policymakers, and industry leaders to share insights on sustainable development and economic impact in the cotton industry. Participation is free but requires mandatory prior registration through the provided Google form link.

The event focuses on fostering collaboration and developing strategies for a sustainable future in cotton textiles amid dynamic global trends.

[> read more](#)

### ITMA ASIA + CITME 2025 announces over 770 Exhibitors



ITMA ASIA + CITME Singapore 2025 released its exhibitor list featuring 770 manufacturers from 31 countries, running October 27-30, 2025 at Singapore Expo, days after the ITMF conference in Yogyakarta and only a short two-hour flight away.

Early bird passes are available at S\$25 (1-day) and S\$50 (4-day) until September 28, with ITMF members receiving an extra 20% off using code **Y358CB7**. The event spans 19 product sectors covering the complete textile production chain.

[> read more](#)

### UN Fashion Charter – Collaboration for Decarbonizing the Textile Value Chain



The UN Fashion Charter's July 2025 update highlights the publication of a new white paper from its Manufacturers Peer Action Group titled "[\*Fashion's Supply Chain Challenge: Strengthening Collaboration for Decarbonizing Apparel and Textile Manufacturing\*](#)". Based on insights from 15 manufacturing companies operating 192 production units across 50 countries, the report addresses decarbonization challenges in textile manufacturing.

The Charter is also advancing its Road to COP30 policy project, drafting a public communiqué focused on renewable energy transition, transparency, climate finance, and adaptation with equity considerations. A webinar presenting the white paper is scheduled for September 4, while the Fashion Charter Annual Meeting 2025 will take place October 21-22.

# Heimtextil Uzbekistan set in October 2025

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UZBEKISTAN

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Tashkent will host Heimtextil Uzbekistan from October 14-16, 2025, bringing together leading manufacturers, designers, and suppliers in Central Asia's key textile industry event. The show will be held jointly with the Texworld Tashkent and Apparel Sourcing Tashkent, serving as a platform for exploring business opportunities in this fast-growing textile market.

[> read more](#)

## UPCOMING EVENTS

2025

### [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

### [Heimtextil Uzbekistan](#)

October 14-16, 2025  
Tashkent, Uzbekistan

### [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