



This issue of the ITMF newsletter reflects both the challenges and opportunities shaping our industry. On the one hand, preparations for our Annual Conference in Yogyakarta are well underway, while our webinar series on *"AI in the Textile Value Chain"* highlighted promising applications in design, quality control, and marketing.

Meanwhile, the 34th Global Textile Industry Survey reports continued weakness in business conditions, with sluggish order intake and persistently low capacity utilization rates. These challenges are driven by weak demand and compounded by uncertainty stemming from tariffs and escalating geopolitical tensions.

Despite this, business expectations have edged up slightly – an encouraging sign as we look with hope towards 2026.



Mr. Olivier Zieschank
director, ITMF

Contents

ITMF NEWS

ITMF & IAF 2025 Yogyakarta – Program is Complete
ITMF & ITA Webinar Series on "AI in the Textile Value Chain" explored AI applications in Textiles

PARTNER NEWS

ITMA ASIA + CITME 2025 is taking shape
FICCA White Paper Calls for Collaboration to Decarbonize Fashion Supply Chains
VDMA Webtalk explores survival strategies for textile producers amid rising energy costs
Cotton Inc. presents the latest price movements in cotton textiles

UPCOMING EVENTS

REPORT ON THE 34TH GLOBAL TEXTILE INDUSTRY SURVEY

Article 1: Business situation follows a slow and continuous decline
Article 2: Business expectations turn up again
Article 3: Order intake slides as uncertainty persists
Article 4: Order backlog trending down
Article 5: Capacity utilization rates stay low
Article 6: Weak demand remains THE major concern
Article 7: Global order cancellations stay low
Article 8: Global inventory levels remain stable and low

EXECUTIVE SUMMARIES

Business situation follows a slow and continuous decline



The latest GTIS shows a weak business situation, continuing to deteriorate since January. Ongoing uncertainty around U.S. tariffs — despite partial scaling back — combined with inflation, geopolitical tensions, China's soft consumption, and a fast-growing second-hand market is suppressing demand. Performance diverges sharply: Africa and South America are neutral; brands/retailers are the outlier on the upside.

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

Business expectations turn up again



September reveals a cautious upturn: the 6-month outlook rose to +22pp balance, breaking the slight downward trend since January. Optimism is led by Africa and the Americas, flat in Europe and Asia. Brands/retailers lead while fabrics and technical textiles producers lag, with lean inventories and easing tariff uncertainty seen as demand tailwinds.

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

¹[This Photo](#) by Unknown Author is licensed under [CC BY-SA-NC](#)

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

Order intake slides as uncertainty persists



Order intake weakened again, mirroring the soft business situation. Recovery depends on stronger demand and de-escalating geopolitics. Europe is weakest; Asia is pressured with Southeast Asia relatively firmer; North & Central America is soft while South America and Africa are broadly flat; technical textiles and machinery are most strained.

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

Order backlog trending down



Global order backlogs eased to 2.1 months in Sept 2025 after four months of decline. Europe remains highest due to machinery manufacturers; Asia is mixed; the Americas are weakening. By segment, machinery still leads but is sliding, technical textiles are improving, garments/knitters-weavers are recovering, and fibers, spinners, and chemicals remain low.

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

Capacity utilization rates stay low



Global textile capacity utilization remains at low levels, reflecting prolonged weak demand and limited order intake. Asia continues to lead in utilization, followed by the Americas and Europe. Segment-wise, yarn producers maintain the strongest utilization, whereas machinery and chemical producers face the weakest conditions.

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

Weak demand remains THE major concern



Weak demand remains the dominant and persistent challenge for the global textile industry, outweighing all other risks. Geopolitical tensions and tariffs are rising concerns, while cost-related pressures such as energy, raw materials, and logistics are gradually easing. Slower global economic growth – particularly in China – alongside weaker consumer spending in key markets and the expansion of second-hand apparel have fundamentally altered demand dynamics.

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

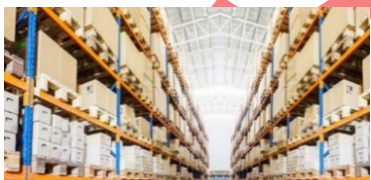
Global order cancellations stay low



Order cancellations remain low but persistent, with small regional and segmental differences. South-East Asia records the highest cancellation levels at 4%, while South America and Africa are least affected (below 3%). By product group, technical textiles, chemicals, finished fabrics, and home textiles face the strongest pressures (above 4%).

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

Global inventory levels remain stable and low



Positive momentum in global inventories stalled mid-2025 amid uncertainty over US tariffs. Regional differences are stark; South America and East Asia hold the strongest positions. Segment-wise, chemical producers, home textiles, and spinners report healthier inventories.

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

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 & IAF 2025 Yogyakarta – Program is Complete




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

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

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

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

Conference Sessions

- Opening Session
- Textile & Apparel Industry in Indonesia
- Fiber Session – Cotton and Man-made Fibers
- World Café – AI in the Textile Value Chain
- Sustainability & Regulation & Tariffs
- Decarbonisation Initiatives
- ITMF Start-up Awards 2025
- Adopting Technology
- Audit Fatigue – Progress and Way Forward
- ITMF Sustainability & Innovation Awards 2025
- ITMF Intl. Collaboration Awards 2025

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

ITMF & ITA Webinar Series on “AI in the Textile Value Chain” explored AI applications in Textiles

On September 26, 2025, ITMF and the International Textile Academy (ITA) hosted the 7th webinar in their series “AI in the Textile Value Chain.” Titled “AI Business Models & Applications in the Textile Industry,” the session highlighted cutting-edge applications of artificial intelligence across design, production, and marketing.

Prof. Zhang Jie (Donghua University, China) presented advances in AI-enabled computational aesthetics for fashion design, emphasizing personalization and **human-machine co-creation**. Doruk Öner (ARTIFEYE Technologies, Türkiye) and Volkan Seyok (Karsu Textile, Türkiye) showcased “Sapphire,” an AI-based yarn **quality control** system that has already improved production outcomes at Karsu. Jaeyoung Jun (OMNIOUS.AI, Korea) introduced “Vela,” a generative AI platform enabling scalable, photorealistic fashion content creation to accelerate **go-to-market strategies**.

The webinar underlined AI’s growing role in reshaping the textile value chain—from defect detection to personalized design and digital content generation.



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

PARTNER NEWS

ITMA ASIA + CITME 2025 is taking shape



ITMA ASIA + CITME Singapore 2025, the exhibition for sourcing cutting-edge technologies and sustainable solutions across the entire textile and garment value chain, will open next month on 28 October at Singapore Expo, days after the ITMF conference in Yogyakarta and only a short two-hour flight away.

ITMF members receive a 20% discount using code **Y358CB7**. The event spans 19 product sectors covering the complete textile production chain.

[> read more](#)

FICCA White Paper Calls for Collaboration to Decarbonize Fashion Supply Chains



United Nations
Climate Change



Fashion
for Climate

ITMF is one of [FICCA](#)'s many Supporting Organisations. FICCA is in a position to substantially contribute to the realization of the Fashion Industry Charter for Climate Action and function as catalysts and multipliers.

The Fashion Industry Charter for Climate Action (FICCA) has published a new white paper, *"Fashion's Supply Chain Challenge: Strengthening Collaboration for Decarbonizing Apparel and Textile Manufacturing."* The report highlights that **80% of the sector's greenhouse gas emissions come from supply chain activities** and warns of the high social and economic stakes in production hubs that are also highly vulnerable to climate change.

Drawing on insights from manufacturers operating nearly 200 facilities in 50 countries, the paper identifies key cost barriers—context-specific challenges in developing countries, the high price of industrial transition at scale, and systemic gaps in current costing models.

To overcome these obstacles, the report outlines three transformative steps: embedding decarbonization into **strategic commercial partnerships**, developing **regional forums** for sharing best practices, and creating robust **industry-wide policies** and incentives. The paper stresses that fair, inclusive, and coordinated action will be essential to achieving climate goals while ensuring a Just Transition for the millions employed in global apparel and textile manufacturing.

[> read more](#)

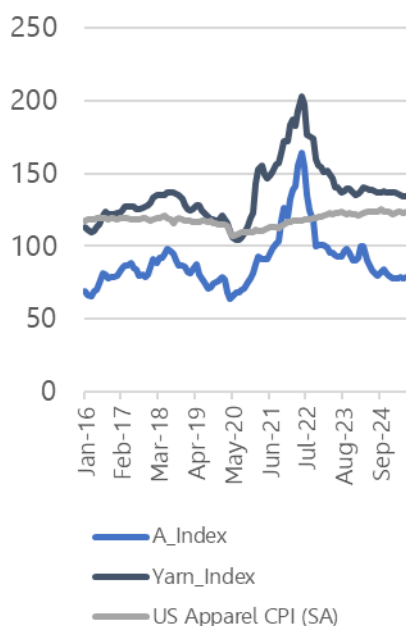
VDMA Webtalk explores survival strategies for textile producers amid rising energy costs



On October 2, 2025, the VDMA Textile Machinery Association will host its latest webtalk on *"Surviving in Textile Markets with Extreme Competition and Increased Energy Costs."* The session will feature insights from Axel Pieper of BRÜCKNER Textile Technologies and Kathrin Pleva of PLEVA Sensors and Controls, who will present how modern drying and finishing systems, paired with intelligent controls and sensor technologies, can optimize production and deliver significant cost savings.

[> read more](#)

Cotton Inc. presents the latest price movements in cotton textiles



Price Movements throughout the Cotton Textile Supply Chain (Sept 2025)

Source: Cotton Inc. | Illustration ITMF

[> download data set](#) | [> download charts](#)

Mr. Jon Devine, [Cotton Incorporated](#), studies price movements in the cotton supply chain every month. Here is his last analysis from retail to fiber:

Retail (latest data point for August): As measured by the CPI for garments, retail apparel prices increased month-over-month in August (+0.8%). Year-over-year, retail apparel prices were flat (0.0% change). Relative to the 12-month average value before COVID (116.2 Mar 2019 to Feb 2020), the figure for August (123.8) is 6.1% higher.

Cotton-Dominant Apparel Import Prices (latest data point for July 2025): The average price per square-meter equivalent of cotton-dominant apparel imports decreased in the latest seasonally-adjusted data for July (from \$3.81/SME in June to \$3.75/SME). Compared to the 12-month average before COVID (Mar 2019 through Feb 2020 average was \$3.44/SME), the latest cost per cotton-dominant SME (\$3.75) is 9% higher.

Yarn (latest data point for August): Cotlook's yarn index increased 0.1% month-over-month in August. Year-over-year, the yarn index was 1.8% lower. Relative to the value before COVID (118.35 in Feb 2020), the latest monthly average for Cotlook's yarn index (134.58 in August 2025) is 13.7% higher.

Fiber (latest data point for August): The A Index decreased -0.3% month-over-month in August (from 78.81 in July to 78.6 cents/lb). Year-over-year, the A Index was essentially unchanged (79.89 cents/lb in August 2024). Relative to the value before COVID (76.6 cents/lb in Feb 2020), the latest monthly average for the A Index (78.6 cents/lb in August 2025) is 2.65% higher.

UPCOMING EVENTS

2025

[ICA Trade Events and Dinner](#)

October 8-9, 2025
Dubai, UAE

[Heimtextil Uzbekistan](#)

October 14-16, 2025
Tashkent, Uzbekistan

[ITMF-IAF 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