



Our 35th Global Textile Industry Survey paints a complex picture: business conditions remain unsatisfactory, demand is soft, and capacity utilization stays low. Yet beneath these challenges lies a notable shift as business expectations have risen across all regions. Our industry is weathering the storm with eyes fixed on the horizon.

This resilience is reflected in ITMF's recent engagements from Singapore to Cairo to Mexico City, and in inspiring developments like Syria's announcement to host NasTex 2026—a powerful symbol of renewal.

As we prepare to release our joint publication on the Circular Textile Economy with ITA, we remain committed to equipping our members for the challenges and opportunities ahead.



Mr. Olivier Zieschank
director, ITMF

Contents

ITMF NEWS

ITMF's newest members

ITMF in Singapore at Asia-Pacific-Texpo 2025

Destination Africa 2025 Concludes Successfully in Cairo

Maroc in Mode 2025 reinforces Morocco's position as strategic textile hub

ITMF at CANAINTEX' Annual Convention 2025 in Mexico

ITMF-ITA Publication "Circular Textile Economy" available soon

PARTNER NEWS

Syria to host NasTex 2026, signaling textile industry revival

UPCOMING EVENTS

REPORT ON THE 35TH GLOBAL TEXTILE INDUSTRY SURVEY

Article 1: Business situation remains unsatisfactory

Article 2: Business expectations rose in all regions

Article 3: Order intake remains weak

Article 4: Order backlog is slightly up

Article 5: Capacity utilization rates are low but stable

Article 6: Soft Demand by far THE major concern

Article 7: Order cancellations are low and stable

Article 8: Inventory levels slowly on the rise

EXECUTIVE SUMMARIES

Business situation stays unsatisfactory



The November 2025 ITMF Global Textile Industry Survey shows persistent challenges, with 43% of respondents rating business conditions as "Bad" and the balance indicator at -27pp, staying in unsatisfactory territory. Soft demand remains the primary concern, driven by modest global growth, overcapacity from heavy 2021-2022 investments, and significant uncertainty. Regionally, South America leads while Europe lags behind.

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

Business expectations rose in all regions



The survey shows rising optimism about the 6-month business outlook, with 44% of respondents expecting "more favorable" conditions and the balance indicator at +32pp—up consistently over four months. Regionally, Africa leads expectations (+73pp) while East Asia is the only region with negative sentiment (-9pp). By segment, fiber and yarn producers are most.

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

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Order intake remains weak



Order intake remained weak, with 43% of respondents rating it "Bad" and a balance of -25pp, unchanged since September. Africa and South America were the only regions with positive order intake. Africa (especially North Africa) is benefiting from US tariff uncertainty and investment shifts from Türkiye, while Brazil's complete domestic textile value chain insulates it from global trade disruptions.

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

Order backlog is slightly up



Global order backlog reached 2.3 months, slightly improving over the past two months and up from its March 2024 low of 1.9 months. This increase amid weak order intake is puzzling likely reflecting capacity reductions rather than genuine demand recovery. Amongst segments, textile machinery and garment producers share the highest backlog (3.1 months), though their trajectories differ dramatically.

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

Capacity utilization rates are low but stable



The survey shows global textile capacity utilization at 71%, on a slow decline. Current utilization remains well below the 81% peak recorded in late 2021. A higher utilization rate would require either a significant demand acceleration or a painful industry consolidation. A prolonged underutilization increases the likelihood of capacity reductions or business exits.

³ [> read more \(members only\)](#)

Soft demand by far THE biggest concern



The survey identifies "Demand" as the dominant concern for 71% of global textile industry participants—rising continuously since January 2025 followed by "Tariffs" and "Geopolitics". Soft demand is linked to the war in Ukraine and US tariff policies. Notably, "Lack of talent/workers" ranks fourth (20%), signaling that automation challenges extend beyond Europe and North America as the industry faces pressure to adopt digitalization.

⁴ [> read more \(members only\)](#)

Order cancellations are low and stable



Global order cancellations are stable at 3% since January 2025, down from the 5% in 2023. This low cancellation rate reflects cautious ordering practices by brands and retailers rather than strong demand. Companies are placing smaller, more careful orders to mitigate risks from geopolitical disruptions and avoid excess inventory.

⁵ [> read more \(members only\)](#)

Inventory levels slowly on the rise



The survey shows a global textile inventory index at -4, improving from -18 a year ago. Companies remain reluctant to build inventory amid uncertain geopolitics and tariff policies, with only around 3% global economic growth forecast. By segment, fabric and finished fabrics producers hold the highest inventory levels (+10 or above), while technical textiles and textile machinery manufacturers remain deeply negative (below -20).

⁶ [> read more \(members only\)](#)

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ITMF NEWS

ITMF's newest members

ITMF has welcome one new associate member in the last few months. This illustrates how important our unique platform is for companies and organisations in different regions and segments of the global textile value chain.



PT Golden Tekstil Indonesia is an Indonesian premium woven fabric manufacturer established in 2019 in Kendal Industrial Park, Central Java. With a \$190 million investment and 2,200+ employees, the company produces 66 million meters annually of cotton woven fabrics for international fashion brands, handling yarn dyeing, weaving, and finishing in-house. They emphasize sustainability through ZDHC-compliant practices and eco-friendly materials, exporting primarily to the global high-end apparel market

[> read more](#)



SIMTA Group is an Indian machinery manufacturer serving the textile and construction industries, with a focus on green innovation and sustainability. The company has partnered with German firm Jacobi for high-quality machine automation technology. With over 400 skilled employees and decades of industry presence, SIMTA operates an in-house R&D department and emphasizes stringent quality control throughout its production processes.

[> read more](#)

ITMF in Singapore at Asia-Pacific-Texpo 2025

Mr. Christian Schindler, Director General of ITMF, was invited to speak at the 2nd edition of Asia-Pacific Texpo which took place from November 19-21, 2025, in Singapore. The event was sponsored by the China National Textile & Apparel Council (CNTAC) and the ASEAN Federation of Textile Industries (AFTEX).

During the **Asia Pacific Texpo Summit** Mr. Schindler shared his perspective on important trends that are shaping the global textile industry like changing sourcing patterns (diversification, nearshoring), new consumption trends (secondhand markets, more sustainable conscious consumers), more regulation requirements, automation trends, or AI applications. He also

In addition to the Asia Pacific Texpo Summit also the **Belt & Road Textile Conference 2025** was held in Singapore. The keynote address was delivered by the President of CNTAC and Past President of ITMF, **Mr. Ruizhe Sun**. The presentation "*Advancing High-Quality Belt & Road Cooperation for a New Era of Global Industrial Integration*" emphasized the continued need for international cooperation which will create win-win results.

Mr. Jemmy Kartiwa, President of API (Indonesia) and AFTEX, emphasized in his opening speech at Asia Pacific Texpo Summit that the members of AFTEX have to deepen their economic integration as well as their cooperation with China. Based on each other's strengths this would create additional opportunities for all parties involved.

Two more conferences completed the event, namely the **Asia-Pacific Sports & Outdoor Fashion Forum** and the **FUTR Asia**.

For more information go to: <https://ap-texpo.com/>



Destination Africa 2025 Concludes Successfully in Cairo



The ninth edition of Destination Africa wrapped up in mid-November 2025 in Cairo, reinforcing Egypt's growing position as a key textile sourcing hub for international buyers.

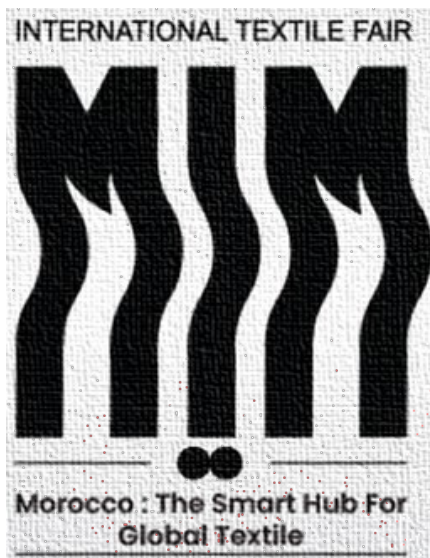
The two-day B2B event, inaugurated by Egypt's Minister of Investment and Foreign Trade Hassan El-Khatib, brought together Egyptian and African exhibitors showcasing fabrics, apparel, and home textiles alongside international visitors from the US, Europe, the Middle East, and Asia.

Major global fashion brands and retailers attended, with particularly strong interest from Turkish companies seeking alternative manufacturing bases amid challenges in their domestic industry.

Organizers hailed the event as a success, noting record international engagement and growing recognition of Africa—led by Egypt—as an increasingly competitive player in global textile and apparel sourcing.

[> read more](#)

Maroc in Mode 2025 reinforces Morocco's position as strategic textile hub



The 22nd edition of Maroc in Mode (MIM) wrapped up in early November 2025 in Casablanca, reinforcing Morocco's ambitions as a strategic textile sourcing hub for European and international markets.

Held under the High Patronage of King Mohammed VI with the theme "Morocco, the Smart Hub for Global Textile," the three-day event organized by AMITH brought together Moroccan and international exhibitors from over 20 countries. Delegations from major industry organizations including EURATEX, ITMF, and ITC attended, alongside Spanish brands and North African manufacturers from Egypt and Tunisia.

Key conferences addressed EU Green Deal compliance and financing solutions for the textile sector, as Moroccan manufacturers seek to align with evolving sustainability standards. With expected global supply chains shift toward nearshoring, Morocco is positioning itself as a competitive gateway between Europe, Africa, and the Americas for brands prioritizing agility and proximity.

[> read more](#)

ITMF at CANAINTEX' Annual Convention 2025 in Mexico



From November 6-8, 2025, CANAINTEX, the National Chamber of the Textile Industry in Mexico, which comprises the segments fiber, textile, confection, and footwear production, held their annual convention in Puerto Vallarta. Mr. Christian Schindler, Director General of ITMF, was invited to deliver a keynote address with the theme "*Global Trends in the Textile Value Chain*".

The presentation was based on data of various ITMF-publications. The results of ITMF's Global Textile Industry Survey (GTIS) provided information about the current business situation and business expectations across all regions and segments including an analysis of factors influencing these results.



With data from ITMF's Intl. Textile Machinery Shipment Statistics (ITMSS) an analysis of textile machinery investments in the last 20 years – mainly in Asia and Türkiye – was presented. Furthermore, it was discussed with data from ITMF's Intl Production Cost Comparison (IPCC) how production costs and the respective carbon emissions vary between countries.

One main take-away from the convention was that **Mexico** was struggling in 2025 with reduced exports to the US even though Mexico is the only country with zero tariffs for all qualified goods which include also textiles and apparel. Whether this drop in exports is the result of increased imports by brands and retailers from their Asian suppliers ahead of the new US-tariffs which came into effect only in September, is not clear. A second main take-away of the event was the analysis by NCTO (National Committee of Textile Organization) from the **USA** that US textile companies have suffered from US tariffs as well. Many companies are dependent on imports of raw material, intermediate products or machines which have become significantly more expensive.

Time will show whether and how US tariffs will impact the regional supply chain and whether and to what extent re- or nearshoring will happen.

For more information please go to: <https://www.canaintex.com/national-convention-fiber-textile-clothing-footwear-2025/>

ITMF-ITA Publication "Circular Textile Economy" available soon



ITMF is pleased to announce the upcoming publication of "**Circular Textile Economy**," a comprehensive book based on our successful webinar series developed in partnership with the Institute for Textile Technology (ITA) at RWTH Aachen University.

The publication distills insights from six webinars held throughout 2023, covering the full spectrum of textile circularity—from political frameworks and ecological ratings to recycling strategies and new business models.

Featuring contributions from leading experts across industry, academia, and policy institutions including Euratex, CNTAC, Indorama, Lululemon, Texaid, and the European Commission, the book offers practical guidance for companies navigating the transition to a circular textile economy.

The book will be published on **December 12, 2025**. More information to come.

PARTNER NEWS

Syria to host NasTex 2026, signaling textile industry revival



معرض سوريا الدولي للنسيج
Syria International Textile Expo

Syria is set to host NasTex 2026 from **April 1-4, 2026**, at the Damascus International Fairgrounds under the patronage of President Ahmad al-Sharaa.

Organized by Growfast in collaboration with Al-Nassaj Factory, the event aims to revitalize Syria's historic textile sector and reposition the country as a regional hub for trade and industry. The exhibition will showcase fabrics, furnishings, ready-made garments, textile machinery, yarns, and raw materials, alongside digital transformation solutions and advanced manufacturing technologies.



Minister of Economy and Industry Mohammad Nidal al-Shaar emphasized the sector's importance to Syria's national identity and economic heritage, noting that the exhibition will foster partnerships between East and West. The Damascus Chamber of Industry has highlighted NasTex as a platform to connect manufacturers and traders, promote modern production technologies, and expand domestic and foreign markets while creating jobs for Syrian professionals.

The event marks a significant step in Syria's efforts to restore its centuries-old textile tradition and reclaim its place on the global industrial map.

[> read more](#)

UPCOMING EVENTS

2026

[Heimtextil 2026](#)

January 13-16, 2026
Frankfurt, Germany

[Milano Unica](#)

January 20-22, 2026
Milano, Italy

[VIATT](#)

February 26-28, 2026
Ho Chi Minh City, Vietnam

[International Cotton Conference 2026](#)

March 25-27, 2026
Bremen, Germany

[Indo Intertex 2026](#)

April 15-18, 2026
Jakarta, Indonesia

[Textiles Recycling Expo USA](#)

April 29-30, 2026
Charlotte, North Carolina, USA

[Proposte](#)

May 5-7, 2026
Cernobbio (Como), Italy

[Textiles Recycling Expo](#)

June 24-25, 2026
Brussels, Belgium

[TITA 2026](#)

October 6-8, 2026
Taipei, Chinese Taipei

[ITMF&IAF Conference 2026](#)

October 14-15, 2026
Fortaleza, Brazil

[Venice Sustainability Forum](#)

November 5-6, 2026
Venice, Italy

[US Sourcing Summit 2026](#)

November 16-18, 2026
Phoenix, Arizona, USA

[12th ITME](#)

December 4-9, 2026
Greater Noida, Uttar Pradesh, India