



This edition of the ITMF Newsletter reflects both the energy of a busy spring season and the weight of a challenging business environment against the backdrop of the war in the Middle-East.

March saw an exceptional concentration of industry activity in Bremen, where the International Cotton Conference, the ICAC Plenary Meeting, and the International Textile Seminar Bremen all took place within days of one another. ITMF was actively present across all three events - a reminder of the ITMF's role as a connector across the full textile value chain. In addition, ITMF also held its ICCTM and ITSB meetings (see news items).

The theme of AI and digitalisation continues to gain momentum. The latest edition once again demonstrated the breadth of practical applications emerging across the industry - from energy management to carbon fiber production to product development.

At the same time, the results of our 37th Global Textile Industry Survey paint a sobering picture. Business expectations have dropped, capacity utilization is near historic lows, and geopolitical uncertainty has overtaken weak demand as the industry's primary concern. These findings deserve careful attention from decision-makers across the value chain.

Looking ahead, the ITMF & IAF Conference 2026 will take place in Fortaleza, Brazil, co-hosted by ABIT. With the EU-Mercosur FTA coming into effect this is an important signal for the strengthening of global trade.



Mr. Olivier Zieschank
director, ITMF

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EXECUTIVE SUMMARIES

Business situation declines amid Middle East war and energy price surge



The 37th GTIS shows a deteriorating global business climate, with the business situation balance falling to -25 percentage points as the US-Israel-Iran war disrupted energy markets. Africa was the only region posting a positive indicator and North & Central America recorded the steepest decline, while garment producers fared best among segments and textile machinery manufacturers remained deeply negative

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

Business expectations plunge to three-year low as Middle East conflict fuels stagflation fears



The global business expectations balance collapsed to +5pp - the lowest since November 2022 - as stagflation risks comparable to the post-Ukraine invasion shock of 2022 are reviving. South America led regional optimism while South-East Asia was the most pessimistic. Brands & retailers were the most upbeat segment against a deeply negative outlook for weavers/knitters.

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

Order intake declines in lockstep with business situation



Order intake balance edged down to -25pp, mirroring the business situation decline and underscoring how closely the two indicators move together. Africa and South-East Asia were the least affected regions at 0pp, while North & Central America plunged to -80pp on an accelerating downward trend. Garment producers stood out with a positive balance of +14pp, while textile machinery manufacturers remained deeply negative at -62pp.

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

Order backlog stabilizes but short-term outlook remains cautious



The global order backlog held steady at 2 months, pausing a year-long decline, but expectations point to a further dip by September amid war-driven uncertainty. Africa and South-East Asia led regionally at 2.7 months, while the Americas lagged below 1.2 months. Textile machinery manufacturers reported the highest segment backlog at 2.9 months, despite a continuous decline.

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

Capacity utilization near historic lows with bleak short-term outlook



At 70%, global capacity utilization is approaching its all-time low of 68%. Asian regions and South America led at 73–75%, while North & Central America recorded the lowest rate for the third consecutive time at 64%. Spinners were the most active segment at 80%, while textile machinery and chemical producers languished at the bottom at 61%.

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

Geopolitics overtakes weak demand as the industry's top concern



For the first time, geopolitics topped industry concerns at 50%, edging out weak demand at 49%, driven by the Iran war and surging energy prices, higher raw material costs, and logistics disruptions from the Strait of Hormuz blockade. Notably, tariffs dropped sharply as a concern from 31% to 13%. In response, firms are consolidating around market diversification away from the US and internal cost absorption, while stepping back from relocation and other capital-intensive strategies.

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

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Order cancellations remain low but risks are rising



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At 2%, global order cancellation rates remain low and stable, reflecting a market where companies are ordering minimally and keeping inventories lean rather than cancelling. East Asia and South-East Asia posted the highest regional rates at 3.6%, while South America was the calmest at 1.9%. Textile chemical/dyes/auxiliary producers stood out with a striking 8.1% cancellation rate, well above all other segments.

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

Inventories stay lean as uncertainty keeps companies cautious



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Global inventory levels continue to fall, with the index at -13, as companies deliberately keep stocks low to limit risk amid mounting geopolitical and economic uncertainty. South America and East Asia reported the highest regional inventory levels, while Africa and South Asia were the leanest. Brands and retailers bucked the trend with the highest segment index at 30 and six months of growth, while garment manufacturers recorded the lowest at -40.

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

ITMF NEWS

ITMF & IAF Conference 2026 to take place in Brazil co-hosted by ABIT



Hosted by:



This year's ITMF & IAF Conference 2026 will be held in Fortaleza, Brazil 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](#).

	Oct. 12	Oct. 13	Oct. 14	Oct. 15	Oct. 16
Preliminary Conference Timeline					
	Golf tournament	Internal Meetings	Conference Day 1	Conference Day 2	Factory visits

ITMF Awards 2026 – Deadline – April 30, 2026



Following the success of previous years, ITMF will once again present the **ITMF Awards 2026** at the ITMF & IAF Conference, taking place on October 14-15, 2026, in Fortaleza, Brazil.

The awards will recognize excellence in the categories of [Sustainability & Innovation, International Cooperation](#), and outstanding contributions from [start-ups](#). A high-level international jury of industry experts will evaluate all applications and select the winners. Interested candidates can find detailed information and application forms on the **ITMF website** under "Awards." The **deadline for applications is April 30, 2026**. Associations are encouraged to nominate candidates or invite them to apply directly. Companies can nominate themselves.

Deadline: **April 30, 2026**
 Apply here:
[ITMF Awards 2026](#)

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ITMF's Cotton Testing Committee held full meeting in Bremen



ITMF's International Committee on Cotton Testing Methods (ICCTM) met for its Full Meeting on March 23/24, 2026, on the sidelines of the International Cotton Conference Bremen 2026.

The Committee convenes experts from cotton institutes, cotton organizations, testing instruments producers and textile organizations related to cotton from around the world. Its objective is to critically examine and discuss existing and new cotton testing methods and instrumentation as well as provide guidelines and recommendations to the global cotton textile industry. In addition to the traditional testing areas such as length, strength, color, uniformity or stickiness, the Committee is also looking at new research areas like spinnability, traceability or recycled fibers.

The event was opened by ITMF's Director General, Mr Christian Schindler, who thanked everyone for attending the meeting either in-person or virtually. He expressed his gratitude to the Bremen Cotton Exchange that provided once more the meeting room in the iconic Bremen Cotton Exchange. The Chairman of the Committee, Mr. Axel Drieling (Bremen Fiber Institute) assisted by the Vice Chairperson, Ms. Mona Qaud, (Uster Technologies) chaired the session during which various persons presented their latest research results in the different areas.

The presentations will be made available in the Progress Report 2026.

For previous reports and additional information, please consult the [ITMF-website](#)

International Textile Seminar Bremen 2026 explored AI and digitalisation



4. International Textile Seminar Bremen
24. March 2026, 14:00-17:00, Room 406
AI and Digitalisation - Opportunities for the Textile Industry



The International Textile Seminar Bremen (ITSB) 2026, co-organized by ITMF, the Bremer Baumwollbörse, Faserinstitut Bremen, and IVGT, took place on 24 March 2026 under the theme *"AI and Digitalisation – Opportunities for the Textile Industry."*

The afternoon programme opened with the presentation of ITMF's **white paper on AI in the extended textile value chain**, delivered by Olivier Zieschank. A series of industry speakers then showcased concrete applications of AI and digital technologies across the textile manufacturing process, covering topics such as **material qualification** and customer approval, AI-driven **manufacturing optimization**, cotton blending methodology, energy and process management in **smart factories**, **defect detection** in yarn production, AI-based quality control for textile seams, and the use of **chatbots in production** and product development.

The seminar brought together representatives from textile manufacturers, technology providers, and research institutes, reflecting the industry's growing interest in translating AI from concept into operational practice.

ITMF at the 83rd ICAC Plenary Meeting in Bremen



The 83rd Plenary Meeting of the International Cotton Advisory Committee (ICAC) took place on 23–24 March 2026 at the Parliament House in Bremen, Germany, under the theme *"Uniting the Cotton and Textiles Value Chain for a Sustainable Future."*

ITMF was represented through an active role in the programme: Dr. Olivier Zieschank, ITMF Director, chaired the First Open Session on the facilitation of investment in the textiles and apparel value chain in emerging markets. The session brought together high-level speakers from India's Ministry of Textiles, the Gherzi Textil Organisation, the Confederation of Indian Textile Industry, Saurer Group, and the Tanzanian Ambassador to the United States.

The two-day programme also featured a technical seminar on deep learning and sensor technologies for the detection of cotton diseases and insect pests, as well as a fourth open session addressing national textiles policies and global competitiveness.

[> read more](#)

9th webinar in the ITMF & ITA Series on AI applications in the textile value chain



On March 31st, 2026, ITMF and ITA held the 9th edition of their joint webinar series "AI in the Textile Value Chain." Three presentations were delivered: Musa Akdere of Carboscreen presented on AI-powered monitoring for industrial carbon fiber and composite production; Florian Pohlmeier of ITA Aachen spoke on digital twins and data spaces for a sustainable process industry; and ITMF's Olivier Zieschank introduced the preliminary ITMF & ITA white paper on AI in the textile industry based on the outcome of the current webinar series.

The recordings and the white paper are available on the ITMF website. Readers who missed the live session are encouraged to visit our website to access all materials from the series.

Access the webinar series, click [HERE](#) and select "Webinar Series/AI in the Textile Value Chain"

Save the date for the next ITMF & ITA webinar on AI in the Textile Industry - May 5th, 2026



The ITMF and ITA are pleased to invite you to the 10th edition of their joint webinar series "AI in the Textile Value Chain," taking place on **May 5th, 2026, from 12:00 to 13:15 hrs. CET**. Since its launch in July 2024, the series has brought together leading experts, researchers, and innovators from across the global textile industry to explore the transformative potential of artificial intelligence — from production and quality control to fashion design, supply chain management, and sustainability. Speaker announcements will follow shortly. In the meantime, we encourage you to revisit the recordings and materials from previous editions.

Register [HERE](#).

PARTNER NEWS

38th International Cotton Conference Bremen brought the global cotton community together



The 38th International Cotton Conference Bremen took place from 25 to 27 March 2026 at the Parliament House in Bremen, organised by the Bremen Cotton Exchange and the Fibre Institute Bremen. The conference was held as a hybrid event, combining an on-site gathering with online presentations and a remote audience, and brought together nearly 100 speakers from across the globe.

Following the official opening by representatives of the Free Hanseatic City of Bremen, the Bremen Cotton Exchange, and the Fibre Institute Bremen, the three-day programme covered a broad range of topics across the cotton value chain. Sessions addressed cotton quality and testing, cotton production in key growing regions, and cotton processing, alongside forward-looking themes such as traceable and transparent supply chains, circular economy and recycling, and recycled fibres and quality. The market perspective was covered through sessions on topics including "Beyond the Bale" and "Plant Not Plastics," while the final day focused on sustainability in fibre and textile production, natural fibres, African cotton developments, genetic engineering and cotton breeding, and innovative technical and textile cotton-based products.

[> read more](#)

Destination Africa 2026 Returns to Cairo for 10th Edition



The 10th edition of Destination Africa will take place in November 2026 in Cairo, Egypt, bringing together global buyers and African textile and apparel manufacturers. Positioned as a leading B2B sourcing platform for the region, the event aims to highlight Africa's growing role in global supply chains and unlock new sourcing opportunities.

With a focus on apparel and textile exports, Destination Africa provides a platform for direct business engagement, connecting international brands with suppliers across the continent. The event continues to strengthen Africa's positioning as an emerging sourcing hub, supported by competitive manufacturing capabilities and expanding trade partnerships.

[> read more](#)

Upcoming VDMA Webtalk: success factors for technical textiles production in Europe



On April 16, 2026 (14:00–15:00 CEST), the VDMA Textile Machinery Association will host a webtalk on the success factors for the production of technical textiles in Europe. Axel Pieper, CTO of Brückner, and Prof. Dr.-Ing. Holger Erth, CEO of Textilausrüstung Pfand, will discuss current challenges facing the European textile industry — including rising costs, sustainability pressures, and global competition — and present practical solutions for manufacturers. Registration is available via the VDMA website.

[> read more](#)

Frankfurt to host Techtexsil 2026 international textile innovation fair



The international trade fair Techtexsil 2026 will take place from **21 to 24 April 2026** at Messe Frankfurt in Frankfurt, bringing together companies and professionals from the global technical textiles and nonwovens industry.

Organised by **Messe Frankfurt**, the event will showcase innovations in high-performance textiles used in sectors such as construction, mobility, medicine and protective clothing. It will run alongside **Texprocess**, a trade fair focused on textile and apparel processing technologies.

The fair is expected to attract exhibitors and visitors from around the world, offering a platform for networking, product launches and discussions on emerging trends such as sustainability, advanced materials and digitalisation in the textile sector.

[> read more](#)

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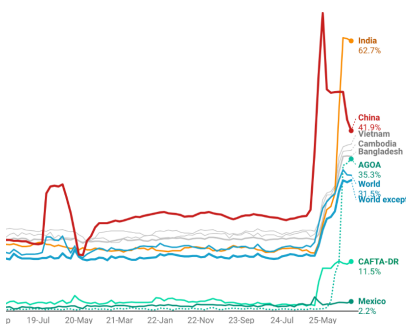
PARTNER ARTICLES

US Apparel Imports in 2025: Tariffs Reshape Sourcing Patterns

Growth of US Apparel Imports, Retail Sales and Economy

Items	2025
Value of US apparel imports	-1.7%
Quantity of US apparel imports	-3.6%
Total value of US goods imports	4.3%
US GDP	2.2%

Applied Tariff Rates of U.S. Apparel Imports: 2017-2025



A new analysis by Prof. Sheng Lu of the University of Delaware, published through the Global Textile Academy of the International Trade Centre (ITC), identifies twelve key patterns in US apparel imports in 2025. Overall imports declined 1.7% in value and 3.6% in quantity, as unprecedented tariff increases — the average rate more than doubled to 35.1% by December — weighed on demand alongside weakening consumer spending.

Sourcing diversification accelerated, with Vietnam surpassing China as the largest apparel supplier to the US for the first time in decades, while US imports from China fell by 35.6%. Emerging suppliers such as Cambodia, Pakistan, and Indonesia gained ground, and companies increasingly explored sourcing beyond Asia in countries including Egypt, Peru, and Kenya. Cotton apparel's share of US imports rose, driven by lower relative tariff rates on cotton products and growing sustainability awareness. Despite tariff advantages, nearshoring to CAFTA-DR and USMCA countries has yet to deliver meaningful volume growth.

[> read more](#)

UPCOMING EVENTS

2026

[Atexcon 2026](#)

April 2-3, 2026
Hyderabad, India

[Indo Intertext 2026](#)

April 15-18, 2026
Jakarta, Indonesia

[TechTextil 2026](#)

April 21-24, 2026
Frankfurt, Germany

[Textiles Recycling Expo USA](#)

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

[Proposte](#)

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

[Asia sourcing 2026](#)

June 3-5, 2026
Bangkok, Thailand

[Global Sourcing Summit 2026](#)

June 3-5, 2026
Bangkok, Thailand

[ITM 2026](#)

June 9-13, 2026
Istanbul, Türkiye

[Future Fabrics Expo 2026](#)

June 24-25, 2026
Brussels, Belgium

[Textiles Recycling Expo](#)

June 24-25, 2026
Brussels, Belgium

[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

[International Textile Forum](#)

September 23, 2026
Dushanbe, Tajikistan

[Dornbirn Global Fiber](#)

[Congress 2026](#)

September 16-18, 2026
Dornbirn, Austria

[TITAS 2026](#)

October 6-8, 2026
Taipei, Chinese Taipei

[ITMF&IAF Conference 2026](#)

October 14-15, 2026
Fortaleza, Brazil

[Destination Africa](#)

November 2026
Cairo, Egypt

[Venice Sustainability Forum](#)

November 5-6, 2026
Venice, Italy

[ITMA Asia & CITME 2026](#)

November 20 -24, 2026
Shanghai, China

[INDIA ITME - 2026](#)

December 4-9, 2026
New Delhi, India

[US Sourcing Summit 2026](#)

November 16-18, 2026
Phoenix, Arizona, USA