



This edition of our newsletter reveals much valuable information. On the ITMF side, registration is gaining traction for the ITMF & IAF 2026 Conference in Brazil, co-hosted by ABIT — we warmly encourage you to secure your place. We also report on ITMF's active engagement at Bharat-Tex 2026 in India, and on two major publications: ITIS 2024, documenting consolidation amidst difficult market conditions, and the 48th ITMSS, which shows textile machinery deliveries declining in most segments in 2025.

From our partners, ITMF members benefit from a 50% discount on The Fiber Year 2026 and a reduced rate for S&P Global's petrochemicals fundamentals course on textiles. Further highlights include a benchmarking study of India's apparel export strategy against China, Bangladesh, and Vietnam, and the growing momentum of ATTI across Bangladesh, Türkiye, and Pakistan.

Finally, eight articles present the results of the 39th GTIS in detail. Together they offer a comprehensive snapshot of where the global textile industry stands in mid-2026.

We wish you an insightful read.



Mr. Olivier Zieschank
director, ITMF

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EXECUTIVE SUMMARIES

Business situation deteriorates slightly but remains above 2023 lows



The 39th ITMF Global Textile Industry Survey (mid-July 2026) shows a global business situation balance of -26pp, down since May 2025. South Asia reports the strongest regional reading (-3pp) and North & Central America the weakest (-58pp), while machinery manufacturers still record the lowest segment indicator at -40pp, despite a slight improvement.

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

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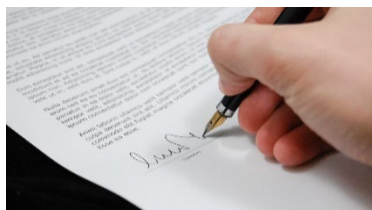
Business expectations remain positive despite a dip



The latest GTIS finds a global balance of +14pp for the expected business situation in 6 months, down from the previous survey. Africa (+50pp) and South Asia (+32pp) are the most optimistic regions, and machinery industry the most confident segment (+36pp). Spinners and textile chemical producers were the least optimistic.

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

Order intake remains at 2026 average level



The latest GTIS puts the global order intake balance at -27pp, down from the previous survey. Africa leads regionally at 0pp, South America trails at -58pp, and fabric producers report the weakest segment reading at -46pp. Machinery manufacturers and chemical producers were the only segments on a positive trend, albeit still in negative territory.

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

Order backlog edges down to 2.3 months



According to the July 2026 GTIS, the average order backlog worldwide stands at 2.3 months, slightly lower than in the previous survey. South-East Asia reports the longest backlog at 2.9 months, while machinery manufacturers lead all segments at 4.2 months, on a positive trend.

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

Capacity utilization slips to 71%



The Mid-July 2026 GTIS puts the global capacity utilization rate at 71%, down from the previous survey. South-East Asia leads regionally at 75%, while yarn producers report the highest segment rate at 81% and fabric producers the lowest at 68%.

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

Demand and geopolitics dominate textile industry concerns as cost pressures recede



According to ITMF's latest Global Textile Industry Survey, "Demand" (56%) and "Geopolitics" (46%) top the list of concerns for the next 6 months worldwide. Demand worries are most acute in the Americas and Europe, while East Asia is chiefly preoccupied with raw material prices and South Asia with geopolitics. Tariff and inflation concerns continue to fade globally.

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

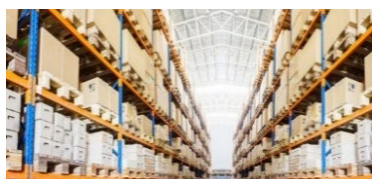
Order cancellations remain low, strongest in the Americas



The July 2026 GTIS shows order cancellations over the past 4 months at 2% globally, continuing to decline. North & Central America reports the highest regional rate at 5.3%, while textile chemical/dyes/auxiliary producers lead the segments at 7.1%.

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

Inventory levels stay below average despite a slight increase



The July 2026 survey puts the global inventory index at -10, up from -16 in the previous survey. South America reports the highest regional level at +33, while South-East Asia and Africa share the lowest at -23. Among segments, brands and retailers lead at +33 and machinery manufacturers trail at -37.

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

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ITMF NEWS

ITMF & IAF 2026 in Brazil co-hosted by ABIT – Registration is Open!



Hosted by:



Register [here](#)

This year's ITMF & IAF Conference 2026 will be held in the city of Fortaleza, Brazil, from October 14-15, 2026. The event will be co-hosted by ABIT, the Brazilian Textile & Apparel Industry Association.

The convention will be held under the theme "*Future in Motion – Transformation, Innovation and New Realities*" with a great line up of speakers, including 2 keynote addresses by:

Paulo Portas, Former Deputy Prime Minister and Foreign Minister, Portugal - *Geopolitics and Geoeconomics: Trends in a Transforming World*

Monica Magalhães, Futurist and Founder of Moovers, Brazil - *Closing Keynote*

The preliminary 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](#).

Preliminary
Conference
Timeline



October 2026

Oct. 12

Golf tournament

Oct. 13Internal
Meetings**Oct. 14**Conference
Day 1**Oct. 15**Conference
Day 2**Oct. 16**

Factory visit

ITMF publishes ITIS 2024: consolidation amidst difficult market conditions



International Textile Industry Statistics (annual)
(formerly International Cotton Industry Statistics)
latest issue: Vol. 67/2024 - published in July 2026

ITMF has published the 67th edition of its International Textile Industry Statistics (ITIS), covering installed capacity and raw material consumption in the short-staple organised (spinning mill) sector across virtually all textile-producing countries. The edition presents results for the reference year 2024, released as part of ITMF's continuing revision of the capacity and consumption time series.

The figures point to consolidation under difficult market conditions. The estimated global number of installed short-staple spindles fell to 219 million and installed open-end rotors to 9.6 million, both slightly below their 2023 levels. Installed air-jet spindles continued to rise and remained dominated by China, indicating a gradual substitution towards higher-performance technologies.

Installed shuttle-less looms were stable at 1.67 million, up 0.3% on the year, with 83% of them located in Asia and Oceania. Total raw material consumption in the short-staple organised sector edged down to 42 million tonnes, even as consumption of cellulosic and synthetic fibres rose slightly.

[> read more](#)

ITMF publishes 48th ITMSS: 2025 shipments down in most segments



International Textile Machinery Shipment Statistics - ITMSS

latest issue: Vol. 48/2025– published in July 2025

ITMF has released the 48th edition of its International Textile Machinery Shipment Statistics (ITMSS), covering deliveries in 2025 across six segments: spinning, draw-texturing, weaving, large circular knitting, flat knitting and finishing. The survey was compiled in cooperation with more than 200 textile machinery manufacturers, representing a comprehensive measure of world production.

Spinning was the exception to a broadly weaker year. Shipments of new short-staple spindles rose 3.3% to 6.11 million units, with 95% going to Asia and Oceania, where deliveries grew 8.5%. China, India, Bangladesh, Indonesia, Uzbekistan and Pakistan were the six largest investors. Open-end rotor shipments also increased, reaching 645,000 units, of which 94% went to Asia and Oceania.

Elsewhere the picture was negative. Long-staple spindle deliveries fell sharply, draw-texturing spindles declined by 23% and shuttle-less looms by 28%, to 164,000 units. Large circular knitting machines dropped by 13% to 24,500 units and electronic flat knitting machines by 22% to 106,000 units. Finishing was the only other segment to grow, with total deliveries up 8%.

[> read more](#)

ITMF actively engages at Bharat Tex 2026



EVERYTHING TEXTILES,
IN ONE PLACE.



Bharat-Tex 2026 was the 3rd edition of India's largest global textile trade fair showcasing innovation, sustainable fabrics, apparel, and fashion. More than 20'000 textile products were on display on an area of 1.6 million square feet with more than 130'000 trade visitors, including more than 7'000 overseas buyers. At this year's Bharat-Tex 2026 ITMF was actively involved in several activities of the exhibition's side program.

1) ITMF President, **Mr. Juan Parés**, participated as a panelist in a high-profile session jointly organized by ASSOCHAM (Associated Chambers of Commerce & Industry of India) and ITMF. The session's topic was "*Scaling through synergy – building local capability to power global textile value chains*". The other panelists were

Mr. Updeep Singh Chatrath, Chairman ASSOCHAM National Council on Textiles and Technical Textiles & CEO – Odisha and Resident Director, Welspun World | **Mr. Neeraj Jain**, Managing Director, Vardhman Textiles | **Mr. Manmohan Singh**, Group Executive Director & Chief Marketing Officer, Grasim Industries (Aditya Birla Group)

In a short introductory presentation ITMF Director General, **Mr. Christian Schindler**, provided an overview of the state of the global textile industry based on ITMF's statistical data (ITMSS, ITIS and IPCC) and surveys (GTIS).

2) As an Honorary Guest of the **CITI Textile Sustainability Awards 2026**, **Mr. Parés** delivered an address about the relevance and importance of sustainability in the global textile value chain.

3) **Mr. Schindler** moderated the session "*Smart factories & industry 5.0 – the future of textile manufacturing*" which was jointly organized by CITI and Gherzi. The session's panelists were:

Mr. Ashwin Chandran, Chairman, CITI & CMD, Precot | **Mr. D. Anandakumar**, Director, Morgan Tecnica | **Mr. Prasant Deka**, MD, Rieter, India | **Mr. S. Rajasekaran**, President-Operations, Textile machinery, LMW | **Mr. G. Radhakrishnan**, MD, Sieger Spintech

PARTNER NEWS

The Fiber Year 2026: 50% discount for ITMF members



The ITMF is very proud to collaborate with [The Fiber Year GmbH](#) by offering ITMF-members the new edition of "[The Fiber Year 2026](#) (TFY)" at a special discount. Two offers are available to ITMF members:

- **50% discount for ITMF members:** ITMF-members may purchase a license for the new 2026 edition for an attractive price of CHF 900.- instead of CHF 1,800.-.
- **Tailor-made packages for ITMF member associations:** ITMF members that are associations can contact The Fiber Year directly to negotiate their own price package for their own members.

Please contact Andreas Engelhardt at info@thefiberyear.com for the discount or a tailor-made package.

The new 400+ page TFY 2026 offers a comprehensive view on latest trends and developments in the global textile value chain– from fibers down to nonwovens – taking into account more than 700 company news. Especially in these turbulent times, TFY 2026 helps to better understand the ongoing and underlying dynamics of the global textile industry.

Download overview [here](#) to get more information on the report that include **world natural and manmade fibers, latest trade data, country profiles for 20 major industries** and the comprehensive **statistical appendix**

IMPORTANT: indicate your affiliation with ITMF when ordering the publication

S&P Global offers a discount to ITMF members for petrochemicals fundamentals course on textiles

3-DAY IN-PERSON TRAINING:

Understanding the Global Petrochemical Industry

Specialties, Green Chemistry & Digitalization



October 6-8, 2026

S&P Global Commodity Insights will hold a three-day in-person training course, "**Understanding the Global Petrochemical Industry: Specialties, Green Chemistry and Digitalization**", at its Frankfurt office from October 6–8, 2026. ITMF members can register at the equivalent price of the super early bird rate of USD 3,800 using the promotional code ITMF.

The programme covers petrochemical feedstocks — natural gas, NGLs, petroleum, coal and bio-based materials — and the industry's seven basic building blocks: syngas, ethylene, propylene, C4 olefins, benzene, toluene and xylenes. It follows each building block through its value chain to commodities including PE, PP, PVC, PS/EPS, PET and methanol, and covers specialised product areas such as polyurethanes, nylons, synthetic rubbers and acrylics.

The course is led by Jeff Plotkin, Vice President, Chemical and Energy Training at S&P Global Commodity Insights.

[> read more](#)

Register [here](#)

Please contact Lalaine Trinidad (ltrinidad@spglobal.com) if you have any problems completing the registration

Stitching India's Apparel Export Strategy": a benchmark of India against China, Bangladesh and Vietnam



A new open-access book, *Stitching India's Apparel Export Strategy: From Farm to Foreign*, examines why India's share of global apparel exports has remained at around 3% for nearly two decades, while Bangladesh and Vietnam expanded theirs from 2.2% and 1% in 2000 to 9% and 6% respectively by 2024. The book was launched by India's Union Minister of Textiles, Shri Giriraj Singh, at Bharat Tex 2026.

Its central contribution is a comparative policy analysis of China, Bangladesh and Vietnam across five pillars of competitiveness: scale and ecosystem; capital; labour and skilling; clusters and institutions; and market access and trade facilitation. It draws lessons from China's vertically integrated clusters and concessional finance, Bangladesh's financing architecture built around apparel cash flows, and Vietnam's alignment of investment promotion, trade agreement use and industrial infrastructure.

Further chapters address India's cotton sector, the shift towards man-made fibres, and company case studies. The book closes with a reform roadmap supporting India's ambition of becoming a USD 100 billion textile and apparel exporter

[> read more](#)

ATTI gathers pace across Bangladesh, Türkiye and Pakistan



ATTI, the manufacturer-led Apparel and Textile Transformation Initiative supported by ITMF and the International Apparel Federation (IAF), has expanded to a third country. In June 2026 ATTI signed a Memorandum of Understanding with the Pakistan Readymade Garment Manufacturers and Exporters Association (PRGMEA), establishing ATTI Pakistan alongside the pioneer chapters in Bangladesh and Türkiye. Work with PRGMEA on the national needs assessment is now under way.

In Türkiye, seven leading brands and seven manufacturers and sourcing agents met at İHKİB in Istanbul in June 2026 and committed to forming the ATTI Transformation Council. The Council will oversee implementation of the Transformation Plan devised in February 2026 and includes technical working groups on energy and water. Gökçenur Uysal has joined the team as ATTI Türkiye Coordinator.

In Bangladesh, the needs assessment continues through desk research, key informant interviews, manufacturer surveys and focus groups. The Findings Report will be published in October 2026, timed to the ITMF & IAF Conference in Fortaleza, Brazil, with a Transformation Workshop following in Dhaka in November. ATTI will also be present at COP31 in Antalya, Türkiye.

[> read more](#)



UPCOMING EVENTS

2026

[Intertextile SHANGHAI home textiles](#)

August 18-20, 2026
Shanghai, China

[Intertextile SHANGHAI apparel fabrics](#)

August 25-27, 2026
Shanghai, China

[CAITME 2026](#)

September 08-10, 2026
Tashkent, Uzbekistan

[Dornbirn Global Fiber Congress 2026](#)

September 16-18, 2026
Dornbirn, Austria

[International Textile Forum](#)

September 23, 2026
Dushanbe, Tajikistan

[TITAS 2026](#)

October 6-8, 2026
Taipei, Chinese Taipei

[ITMF&IAF Conference 2026](#)

October 14-15, 2026
Fortaleza, Brazil

[ICA Trade Event](#)

October 14-15, 2026
Istanbul, Türkiye

[Maroc In Mode](#)

November 3-5, 2026
Casablanca, Morocco

[Venice Sustainability Forum](#)

November 5-6, 2026
Venice, Italy

[APTEXPO 2026](#)

November 11-13, 2026
Singapore

[Destination Africa](#)

November 14-15, 2026
Cairo, Egypt

[Cotton USA™ Summit](#)

November 16-18, 2026
Scottsdale, Arizona, USA

[ITMA Asia & CITME 2026](#)

November 20-24, 2026
Shanghai, China

[INDIA ITME 2026](#)

December 4-9, 2026
New Delhi, India

[7th Sustainability Talks Istanbul](#)

December 8, 2026
Istanbul, Türkiye

2027

[heimtextil 2027](#)

January 12-15, 2027
Frankfurt, Germany

[ITMA 2027](#)

September 16-22, 2027
Hannover, Germany