

This edition of the ITMF newsletter reflects a textile industry balancing short-term uncertainty with longer-term transformation. Artificial intelligence and digitalisation feature prominently in ITMF activities and upcoming forums, highlighting their growing role in improving efficiency and competitiveness. At the same time, the OECD's focus on the Apparel and Textile Industry Transformation Initiative points to continued policy engagement around sustainability and industrial change.

Partner news underscores the importance of global exchange through major events and market updates, while the 36th Global Textile Industry Survey confirms a cautious outlook. Although some indicators show slight improvement, weak demand and geopolitical tensions remain the dominant concerns.



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director, ITMF

## Contents

### ITMF NEWS

**ITMF & ITA Webinar Series on AI in the Textile Value Chain**  
**International Textile Seminar Bremen (ITSB) will discuss AI and digitalisation**

**OECD to host session on Apparel and Textile Industry Transformation Initiative (ATTI)**

### PARTNER NEWS

**Cotton Inc. presents the latest cotton-textile price update**

**Bharat Tex to showcase Indian textiles in July**

**Bremen-World Cotton Centre in March 26**

**Cotton Brazil Dialogues 2026 offers field visits**

### UPCOMING EVENTS

#### REPORT ON THE 36<sup>TH</sup> GLOBAL TEXTILE INDUSTRY SUVEY

**Article 1: Business situation shows cautious improvements**

**Article 2: Business expectations waver, but trend holds**

**Article 3: Order intake low, slight uptick offers little relief**

**Article 4: Order backlog fell back to a level last seen in 2024**

**Article 5: Capacity utilization rates are low but stable**

**Article 6: Demand is still the biggest concern; companies react to US-tariffs with different strategies**

**Article 7: Order cancellations remain low**

**Article 8: Inventory levels slightly decreasing with strong regional variations**

## EXECUTIVE SUMMARIES

### Business situation shows cautious improvements



The January 2026 GTIS shows a modest improvement in the global business situation, driven by fewer "bad" assessments and more "satisfactory" ones, though conditions remain weak overall. High geopolitical uncertainty, trade tensions, and weak demand continue to weigh heavily on the textile value chain, with clear signs of overcapacity and gradual rebalancing. Some regions and downstream segments show relative resilience.

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

### Business expectations waver, but trend holds



Business expectations remain cautiously positive but have weakened since late 2025, despite most companies expecting conditions to remain unchanged over the next six months. Persistent geopolitical and trade-related uncertainty continues to limit confidence in recovery. While optimism varies by region and segment the overall outlook suggests stability.

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

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### Order intake low, slight uptick offers little relief



Order intake remains weak across the global textile industry, despite a gradual and sustained improvement from earlier lows. The latest survey points to stabilization rather than recovery, with most companies reporting only satisfactory or poor conditions and little expectation of near-term improvement. Regional and segment differences persist, but ongoing uncertainty and weak demand continue to constrain order growth.

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

### Order backlog fell back to a level last seen in 2024



Global order backlogs continued to decline in January 2026, falling back to levels last seen in 2024 and signaling ongoing weakness in demand. While some regional and segment-specific differences remain, particularly for textile machinery and downstream producers, most parts of the value chain operate with very short backlogs. Overall, the data points to limited visibility.

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

### Capacity utilization rates are low but stable



Global capacity utilization remained stable but low at 71% in January 2026, reflecting persistent weak demand across the textile value chain. With growth prospects unchanged and overcapacities still present, higher utilization appears unlikely without further industry consolidation. Regional and segment differences persist, but overall activity levels indicate continued underuse of production capacity.

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

### Demand biggest concern & different strategies to US-tariffs



Weak demand remains the dominant global concern for the textile industry, followed by heightened geopolitical tensions and tariffs, which continue to undermine confidence and stability. While cost pressures and labour shortages persist, they are currently secondary concern. In response, companies are largely pursuing cautious adjustment strategies focusing on efficiency, automation, and market diversification.

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

### Order cancellations remain low



Order cancellations remained low and stable at around 3% in early 2026, marking a clear improvement from the peaks seen in 2023. While some regional and segment differences persist, recent trends suggest easing pressure, particularly for garment producers and knitters/weavers. Overall, cancellations are no longer a major destabilizing factor for the industry.

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

### Inventory levels slightly decreasing with strong regional variations



Global inventory levels declined further in January 2026, remaining below normal as companies continue to manage risk amid trade uncertainty and weak demand. Regional and segment differences are pronounced, with particularly low inventories in parts of Asia and Africa and among upstream producers. Overall, the data points to a cautious inventory strategy aimed at preserving flexibility in an uncertain trade environment.

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

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## ITMF NEWS

# ITMF & ITA Webinar Series on AI in the Textile Value Chain



Seven webinars have been proposed to our members on the topic **ITMF & ITA Webinar Series "AI in the Textile Value Chain"** so far. The last five webinars concentrated on applications of AI along the entire textile value chain. Due to the increasing number of such applications, ITMF and ITA have decided to add two webinars in the first quarter of 2026.

The preliminary dates for these two webinars are **February 24, 2026**, and **March 31, 2026** (12:00-13:15 hrs. CET). We will re-confirm the dates and inform our members about the speakers and topics closer to the first date in January. The recordings and presentations of the previous seven webinars are available on the ITMF Members' Area.

To access the past webinars, login, click [HERE](#) and then click at "Webinar Series".

## International Textile Seminar Bremen (ITSB) will discuss AI and digitalisation



Advancing digitalisation and the use of Artificial Intelligence (AI) are fundamentally changing the textile value chain – from fibre and yarn production to fabric formation, finishing, quality assurance, logistics, etc. For fibre and textile producers, this presents concrete opportunities to increase productivity, transparency and sustainability, as well as to secure international competitiveness.

The symposium '*AI and Digitalisation – Opportunities for the Textile Industry*' is aimed specifically at manufacturers of fibres, yarns and textiles. The focus is on practical applications, current technological developments and strategic approaches for the successful integration of digital solutions and AI-based systems into existing production processes.

The ITSB will take place on **March 24<sup>th</sup>, 2026 (14:00-16:30 hrs.) in the Bremen Cotton Exchange (Room 406)**, one day before the start of the [Intl. Cotton Conference Bremen 2026](#) (March 25-27, 2026). The ITSB is jointly organised by ITMF, Bremen Cotton Exchange, Fiber Institute Bremen, and IVGT. Participation is free of charge. More information about the ITSB, the agenda, the speakers and topics will be made available shortly on the following website: <https://textileseminar.com/>

Click [HERE](#) to register to the webinar



# OECD to host session on Apparel and Textile Industry Transformation Initiative (ATTI)



The **Organisation for Economic Co-operation and Development (OECD)** will feature a dedicated side session on the **Apparel and Textile Transformation Initiative (ATTI)** during its *Forum on Due Diligence in the Garment and Footwear Sector* on **9 February 2026**. The session, titled *"The Apparel and Textile Transformation Initiative: Overview and updates on country programmes,"* will run from **11:30 AM to 12:30 AM** and offer participants a comprehensive look at ATTI's progress and future plans.

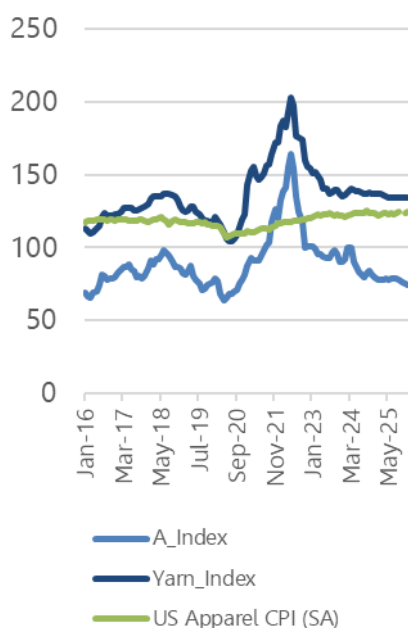
ATTI, a **manufacturer-led, nationally oriented, and globally coordinated programme**, seeks to accelerate sustainability and operational transformation across the apparel and textile industry. The initiative currently supports **country-level chapters in Bangladesh and Türkiye**, working with key industry associations to develop and implement tailored transformation plans under the strategic oversight of its Global Council.

The OECD session will provide updates from these country programmes, highlight insights from local stakeholders, and outline plans for expanding ATTI's reach to help manufacturers respond effectively to environmental and sustainability challenges in the sector.

[Read more](#) or [register](#)

## PARTNER NEWS

### Cotton Inc. presents the latest cotton-textile price update



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

Source: Cotton Inc. | Illustration ITMF

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

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

**Retail (latest data point for December 2025):** As measured by the CPI for garments, retail apparel prices increased month-over-month in December (+0.4%). Year-over-year, retail apparel prices were +0.4% higher. Relative to the 12-month average value before COVID (116.2 Mar 2019 to Feb 2020), the figure for December (124.3) is +6.5% higher.

**Cotton-Dominant Apparel Import Prices (latest data point for November 2025):** The average price per square-meter equivalent of cotton-dominant apparel imports was flat in the latest seasonally adjusted data for November (at \$3.63/SME both months). 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 (\$3.63) is +5.5% higher.

**Yarn (latest data point for December 2025):** Cotlook's yarn index increased +0.1% month-over-month in December. Year-over-year, the yarn index was -2.0% lower. Relative to the value before COVID (118.35 in Feb 2020), the latest monthly average for Cotlook's yarn index (134.07 in December 2025) is +13.3% higher.

**Fiber (latest data point for December 2025):** The A Index decreased -1.5% month-over-month in December (from 75.16 in November to 74.1 cents/lb). Year-over-year, the A Index was -7.4% lower. Relative to the value before COVID (76.6 cents/lb in Feb 2020), the latest monthly average for the A Index (74.05 cents/lb in December 2025) is -3.3% lower.

## Bharat Tex to showcase Indian textiles in July 26



**Bharat Tex 2026**, a global textiles event, will be held from **14–17 July 2026** at **Bharat Mandapam**, New Delhi. The event is being organised by the **Bharat Tex Trade Federation (BTTF)**, comprising India's textile Export Promotion Councils and industry associations, with support from the **Government of India**.

The 2026 edition is expected to bring together more than **5,500 exhibitors**, **7,000 international buyers** from over **130 countries**, and approximately **130,000 visitors**. The event will cover the full textile value chain and include exhibitions, knowledge sessions, and business meetings. The previous edition of Bharat Tex, held in February 2025 across venues in New Delhi and Greater Noida, featured over 5,000 exhibitors and hosted a series of policy and industry discussions, alongside B2B and B2G engagements. The event also included a keynote address by **Narendra Modi**. Bharat Tex 2026 will continue to serve as a platform for industry stakeholders, policymakers, and international participants to engage on developments in the global textile sector.

[> read more](#)

## Bremen-World Cotton Centre in March 26



**INTERNATIONAL  
COTTON  
ADVISORY  
COMMITTEE**

The **38<sup>th</sup> International Cotton Conference Bremen**, organised by the **Bremen Cotton Exchange** in cooperation with the **Fibre Institute Bremen**, will take place from **25–27 March 2026** in **Bremen**.

The conference will bring together representatives from research, trade, manufacturing and related sectors to exchange views on current developments in cotton cultivation, quality testing, textile processing and markets. The program will include technical presentations and discussions addressing both scientific findings and practical industry issues. The event will be held in a hybrid format, allowing participation both on site and online, and is part of the broader Bremen Cotton Week, which hosts additional meetings and sector-related events.

In addition, the **International Cotton Advisory Committee (ICAC)** will hold its **83<sup>rd</sup> Plenary Meeting** at Bremen's Parliament building on **23 - 24 March 2026**. For the first time, the ICAC Plenary will be hosted in close cooperation with the Bremen Cotton Exchange and the Fibre Institute Bremen e.V. (FIBRE).

[> read more](#)

## Cotton Brazil Dialogues 2026 offers field visits



**Cotton Brazil** has announced two editions of the **Cotton Brazil Dialogues 2026**, scheduled for **27–31 July** and **17–21 August 2026**. The programme will take place during Brazil's peak cotton harvesting season and will include field visits across **Mato Grosso, Bahia, and Goiás**.

Participants will visit cotton farms, ginning facilities and laboratories, gaining first-hand insight into Brazil's on-farm ginning model and the integration of sustainability and innovation along the value chain. The programme also features thematic seminars and networking opportunities with a range of industry stakeholders.

Cotton Brazil is an industry-wide initiative led by **Abrapa**, in partnership with ANEA and ApexBrasil, and focuses on promoting the quality, sustainability and traceability of Brazilian cotton. For further information, interested participants may contact Lisa Ventura at [lisa.ventura@abrapa.com.br](mailto:lisa.ventura@abrapa.com.br).

[> read more](#)

# UPCOMING EVENTS

**2026****Texworld Apparel Sourcing****Paris**

February 2-4, 2026  
Paris, France

**Première Vision Paris**

February 3-5, 2026  
Paris, France

**VIATT**

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

**International Cotton****Conference 2026**

March 25-27, 2026  
Bremen, Germany

**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

**ITM 2026**

June 9-13, 2026  
Istanbul, Türkiye

**Textiles Recycling Expo**

June 24-25, 2026  
Brussels, Belgium

**Bharat-Tex 2026**

July 14-17, 2026  
New Delhi, India

**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

**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

**ITMA 2027**

September 16-22, 2027  
Hannover, Germany