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For more information, please contact [secretariat@itmf.org](mailto:secretariat@itmf.org)

We are pleased to present the results of the 10<sup>th</sup> Corona survey in this edition of the ITMF newsletter. The analysis presents the evolution of various indicators through time for the first time, highlighting trends in respondents' perception of their current and future business situation.

These trends reveal different effects of the COVID crisis on regions - depending on vaccination rates for example - and segments also, depending on their place in the value chain (see Articles 1- 4). The later finding mirrors Cotton Incorporated's John Devine analysis of manufacturer's ability to pass on increased raw material prices throughout the cotton value chain (see Article 5). Differences between up- and downstream segments are currently marked.

Further trends on retail sales, production index, and business confidence index in the USA, Europe and China are described in the now famous Brief State of the Industry. I encourage you to discover Josua Burkhart's valuable work in this contribution from hpo.



**Olivier Zieschank**  
director, ITMF

## MENU

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### REPORT: THE 10<sup>th</sup> ITMF CORONA-SURVEY

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### BRIEF STATE OF THE INDUSTRY

(members only)



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## EXECUTIVE SUMMARIES

### Article 1: Business situation in the global textile industry remain positive



The majority of respondents to the 10<sup>th</sup> ITMF Corona-Survey see a positive business situation. Regions with high vaccination rates and upstream segments perform better.

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

### Article 2: Business expectations remain rosy despite some clouds



Business expectations indicate an acceleration of the recovery. Nevertheless, there are differences between regions and segments.

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

### Article 3: Current and expected order intake up in most regions and segments



Order intake amongst companies around the world and across all segments is improving. This trend is expected to continue. Companies in East Asia and Africa are less optimistic, so are finishers/printers.

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

### Article 4: Order backlog and capacity utilization rates are stable across regions and segments



Global order backlog is unchanged at 2.4 months on average across all regions and segments. Outlook remains unchanged. Upstream segments are closer to full capacity utilization.

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



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## Article 5: Cotton Incorporated: Pass-through-analysis of cotton – Jul/Aug 2021 vs. pre-COVID



The price movements in the cotton supply chain reveal that the upstream segments – cotton fibres and yarns – have seen very strong price increases compared to pre-COVID-levels, whereas import prices of cotton-dominant apparel as well as apparel prices at retail level are still lower.

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

Article 1: "[This Picture](#)" from an unknow author is licenced by [CC BY](#)

Article 5: "[This Picture](#)" from an unknow author is licenced by [CC BY-NC-ND](#)

## ITMF news

### Welcome Santex Rimar – New ITMF member

SANTEX  
RIMAR  
GROUP

ITMF is delighted to count Santex Rimar (Switzerland) amongst our corporate members.

[SANTEX RIMAR GROUP](#) is one of the leading players in the world market of textile machinery manufacturers for weaving, textile finishing, technical textiles, and green technologies for water treatment and drying processes.

## Partner news

### GIZ Climate Action Online Trainings now available



A web-based training on Climate Action for textile, garment and footwear suppliers in Asia. Learn about global decarbonization efforts, discover how to account for operational greenhouse gas emissions, and find out how to implement available energy solutions to reduce emissions.

[> read more](#) (Link expires on 20.10.21)

## SLCP hires!



Are you looking for an opportunity to use your tech skills to contribute to the mission of improving working conditions in global supply chains? If so:

[> read more](#)

## IAF, EURATEX, and ABIT Collaborate on Content



The International, European and Brazilian associations IAF, EURATEX and ABIT are collaborating on the content of their annual, international conferences in the fall of 2021.

[> read more](#) (Link expires on 20.10.21)

## STTI publishes white paper on commercial compliance



The Sustainable Terms of Trade Initiative (STTI) is led by the [STAR Network](#) (an inter-Asian network of textile producer associations), the International Apparel Federation ([IAF](#)) and the [Better Buying Institute](#) and supported by [GIZ](#) FABRIC. The main objective of the STTI in phase one was to formulate purchasing practices from a manufacturer's perspective that contribute to fair and sustainable supply chains. In a second phase a dialogue between producers and buyers should be established to include commercial compliance into existing tools and initiatives. Furthermore, a supplier contract should be developed that helps to create transparency and promotes sustainable purchasing practices.

For more information about the STTI white paper see the following links:

[> Press Release](#) > [Executive Summary](#) > [White Paper](#)

(Links expires on 20.10.21)