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The 14th ITMF Corona-Survey reveals that the overall business situation in the global textile value chain remains relatively stable despite rising energy, transportation, and raw material costs. It also shows that upstream segments suffer more from such cost increases as their situation is worsening (see Article 3). Business expectations have been trending downwards since May 2021 as well, with a strong acceleration since March 2022 (see Article 4).

Despite such decreasing trends, expectations have always remained in positive territory. This translated in 2021 in very strong investments in the global textile industry (see Article 1). China remained the biggest investor in new machinery in most segments, but relative costs of production are ever evolving. Article 3 compares chosen manufacturing costs for different textile products in 14 different countries, informing on the reasons why some regions attract more investment than others.



Dr. Olivier Zieschank
director, ITMF

MENU

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REPORT ON THE 14th ITMF CORONA-SURVEY

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EXECUTIVE SUMMARY

Article 1: World Shipments of new textile machinery: pre-pandemic levels have been reached in 2021



Shipments of new textile machinery increased in most segments in 2021. Shipments of draw texturing spindles reached an all-time high. Other segments also show signs of recovery in the aftermath of the COVID-19 pandemic. This situation is expected to continue in 2022 due to high order backlogs.

[> read more](#)

Article 2: Tracing production costs in the primary textile industry in 14 countries



The International Production Cost Comparison (IPCC) compares manufacturing costs of different textile products in all the segments of the primary textile industry. It breaks down the manufacturing and total cost for yarn and fabric into various cost elements to better understand their relative importance and respective influence on the total costs.

[> read more](#)

Article 3: Overall and on average, the business situation remains positive but not in Asia



The business situation in the global textile value chain in May 2022 is slightly weaker than in March 2022 but remains in positive territory overall. There are significant differences between regions and segments.

[> read more](#)

Article 4: Business expectations almost unchanged since March 2022



On average business expectations are still positive. There are significant differences between regions and also segments. Asian regions are pessimistic while the regions in the Americas are optimistic. Unlike the upstream segments, downstream segments anticipate a more favorable business going forward.

[> read more](#)

ITMF NEWS

Registration open for ITMF 2022 Davos Switzerland (Sep 18-20, 2022)



After 3 years, the ITMF members can meet again in-person in Davos, in the wonderful settings of the Swiss Alps in the heart of Europe.

ITMF is proud and delighted that both [Swiss Textiles](#) and [Swiss Textile Machinery](#) are co-hosts of this year's conference.

General Theme: *Climate Change and a Sustainable Global Textile Value Chain*.

"The world is faced with many short- and mid-term challenges. The long-term challenge our industry must deal with is climate change. Identifying solutions for a more sustainable textile production, new products, and market opportunities is key for a successful textile value chain.

Speakers: We are delighted that we can welcome so many experts from the industry and academia from the global textile value chain. Speakers who will be sharing their expertise and visions are from the following companies/organisations:

European Center for Innovative Textiles (CETI), France
SLCP, The Netherlands
CNTAC, China
Supima, USA
WoodMackenzie, Ukraine
SASA, Turkey
IKEA, Turkey
Lantal, Switzerland

Puma, Germany
Adidas, Germany
Bcomp, Switzerland
H&M, Sweden
Archroma, Switzerland
Wageningen University, The Netherlands
SLN Moda, Turkey
Bremen Cotton Exchange, Germany
ABRAPA, Brazil

Unifi, USA
Apelt, Germany
Rieter, Switzerland
Sefar, Switzerland
ITA, RWTHA, Germany
Euratex, Belgium
Sequal Initiative, Spain
Infinited Fiber, Finland
Tendam, Spain

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Start-up Sessions: Next to speakers with a long history in the fibre, chemical, textile machinery, textile, garment and home textile industry we are also inviting up to 6 start-up companies to share their innovations and business models. Engaging with start-ups is an effort to learn from each other and to help identify new solutions that turn challenges into opportunities

ITMF Awards 2022: For the first time, ITMF will recognise persons/companies for their outstanding achievements with the newly introduced ITMF Awards. In 2022, the ITMF Awards will be granted in two categories, namely "*Innovation & Sustainability*" and "*International Cooperation*".

World Café 2022: The format of the World Café, which was introduced for the first time in 2019 in Porto, Portugal, will provide delegates with the opportunity to discuss actively in smaller groups selected questions. The results of the different groups will be shared among the participants at the end of World Café with some main take aways.

Networking Opportunities: The delegates will have many opportunities to discuss with old and new friends and colleagues the state of the industry and the way forward. The networking opportunities during the conference are numerous – breakfast, coffee breaks, lunches, and dinners. The traditional Welcome Dinner will take place in a **mountain restaurant "Fuxägufer"** high above the city of Davos. The informal get-together will take place in an extraordinary setting with traditional entertainment.

The traditional Gala Dinner will take place in the **Hotel Schweizerhof** in the city of Davos and will feature a fashion show by the Swiss Textile & Design School. All information about the **ITMF 2022 Davos** can be found on the [ITMF Conference 2022 Website](#).

The latest International Production Cost Comparison (IPCC 2021) has been released



The new edition of the [International Production Cost Comparison](#) (IPCC) from ITMF has been published. The report measures the manufacturing costs of different textile products in the primary textile industry broken down into various cost elements at each stage of the textile value chain.

The 2021 edition adds Central America and Mexico to the historical cost analysis in Bangladesh, Brazil, China, Egypt, India, Indonesia, Italy, Korea Rep., Pakistan, Turkey, USA, and Vietnam. Cost factors, manufacturing costs and total production costs are available for different textile products in the segments of spinning, draw texturing, weaving, knitting, and finishing.

PARTNER NEWS

OECD: NEW course on Due Diligence for Garment and Footwear Supply Chains



Launch of OECD e-learning course on Due Diligence for Garment and Footwear Supply Chains,

Following the successful launch of the OECD e-learning Academy on Responsible Business Conduct last year, a new e-learning course on Due Diligence for Garment and Footwear Supply Chains is now available to supplement your learning from the Essentials of OECD Due Diligence for Responsible Business Conduct (RBC) and advance your knowledge on OECD risk-based due diligence in supply chains specific to the sector.

The new course aims to help learners deepen their knowledge of prevalent human rights, labour rights and environmental risks in the garment and footwear sector and understand how to implement OECD due diligence recommendations in their own operations and supply chain.

The course is divided in two sections:

OECD Sectoral Guidance (30min) is an introduction to the sector and presents key characteristics of the sector and background to RBC and development of the OECD Garment and Footwear Guidance

OECD due diligence framework (1h30) is a presentation of the due diligence process step by step, considering key issues such as purchasing practices and stakeholder engagement

[> register here](#)

Who owns the textile value chain?



Article by Mr. Uday Gill, Group Chief Strategy Officer, published in The Fibre Year 2022

As the textile industry gravitates towards best-cost countries for production, it experiences disruptions in its supply chain that is often accompanied by increased impacts on biodiversity, social equity, climate as well as on human and marine life. Eventually the environmental impact responsibility also shifts to new geographies but there is a lag, and the industry thrives until it moves to the next low-cost location. The textile producing countries will continue to pay disproportionate environmental cost in return for economic activity, unless they aggressively implement operational efficiency, upgrade to new technology and use low impact materials. Policy plays a key role in this transformation and national governments have a vested interest since 75% of carbon emissions come from textile production and 25% during use and end of life. Nature alone cannot deal with the consequences of this human quest for economic prosperity, we have only one Earth!

[> read more](#) (link expires on June 22nd)

UPCOMING EVENTS

June

[Intex South Asia Bangladesh](#)

June 16-18, 2022
Dhaka, Bangladesh

[Heimtextil](#)

June 21-24, 2022
Frankfurt, Germany

[Techtextil](#)

June 21-24, 2022
Frankfurt, Germany

[Intex South Asia Sri Lanka](#)

June 27-29 2022
Colombo, Sri Lanka

[Première Vision](#)

July 5-7, 2022
Paris, France

[GFC Dornbirn](#)

September 14-16, 2022
Dornbirn, Austria

[ITMF Annual Conference 2022](#)

September 18-20, 2022
Davos, Switzerland