21st ITMF Global Textile Industry Survey

ITMF’s survey on the state of the global textile industry since May 2021

formerly known as
ITMF Corona-Survey

July 18th, 2023
Global business situation and expectations [Jul 2023]

### Situation
Balance between good and poor*

- Good: 19%
- Satisfactory: 34%
- Poor: 46%

### Expectations
Balance between more and less favorable*

- More favorable: 41%
- Unchanged: 39%
- Less favorable: 20%

*pp = percentage point

Source: ITMF GTIS, 8-21st Edition

Note: average over regions
## Situation

### Balance between good and poor*

<table>
<thead>
<tr>
<th>Region</th>
<th>pp</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Asia</td>
<td>55 pp</td>
</tr>
<tr>
<td>South East Asia</td>
<td>55 pp</td>
</tr>
<tr>
<td>South Asia</td>
<td>46 pp</td>
</tr>
<tr>
<td>Africa</td>
<td>-</td>
</tr>
<tr>
<td>Europe*</td>
<td>30 pp</td>
</tr>
<tr>
<td>North &amp; Cent. America</td>
<td>19 pp</td>
</tr>
<tr>
<td>South America</td>
<td>14 pp</td>
</tr>
</tbody>
</table>

## Expectations

### Balance between more and less favorable*

<table>
<thead>
<tr>
<th>Region</th>
<th>pp</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Asia</td>
<td>-</td>
</tr>
<tr>
<td>South East Asia</td>
<td>6 pp</td>
</tr>
<tr>
<td>South Asia</td>
<td>25 pp</td>
</tr>
<tr>
<td>Africa</td>
<td>50 pp</td>
</tr>
<tr>
<td>Europe*</td>
<td>9 pp</td>
</tr>
<tr>
<td>North &amp; Cent. America</td>
<td>13 pp</td>
</tr>
<tr>
<td>South America</td>
<td>43 pp</td>
</tr>
</tbody>
</table>

*pp = percentage point  
Source: ITMF GTIS, 21st Edition  
*incl. Türkiye and Central Asia  
**incl. dyes and auxiliary producers
Order Intake and Order Backlog

Order Intake

- World*** (27 pp)
- East Asia (48 pp)
- South Asia (38 pp)
- South East Asia (39 pp)
- Africa
- Europe* (33 pp)
- North & Cent. America (25 pp)
- South America (7 pp)

Order Backlog

- World*** 1.9
- East Asia 1.9
- South Asia 1.5
- South East Asia 1.6
- Africa 1.1
- Europe* 3.2
- North & Cent. America 2.2
- South America 1.8

pp = percentage point
Source: ITMF GTIS, 8-21st Edition
*incl. Türkiye and Central Asia
**incl. dyes and auxiliary producers
***average over regions

[Jul 2023]
### Capacity Utilisation and Main Concerns [Jul 2023]

#### Capacity Utilisation Rate

<table>
<thead>
<tr>
<th>Share of respondents</th>
<th>Under 50%</th>
<th>50-60%</th>
<th>60-70%</th>
<th>70-80%</th>
<th>80-90%</th>
<th>Over 90%</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Main Concerns

- **Weakening Demand**: 67%
- **Inflation**: 38%
- **High raw material prices**: 31%
- **Geopolitics**: 30%
- **High energy prices**: 28%
- **Rising interest rates**: 21%
- **Lack of talent/workers**: 23%
- **High logistic costs**: 11%
- **Input material****: 8%

**Source**: ITMF GTIS, 20-21st Edition

---

<table>
<thead>
<tr>
<th>Region</th>
<th>Share of respondents</th>
<th>Calculated average</th>
</tr>
</thead>
<tbody>
<tr>
<td>World**</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>East Asia</td>
<td>64%</td>
<td></td>
</tr>
<tr>
<td>South Asia</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>South East Asia</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>Africa</td>
<td>65%</td>
<td></td>
</tr>
<tr>
<td>Europe*</td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>North and Cent. America</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>South America</td>
<td>74%</td>
<td></td>
</tr>
</tbody>
</table>

**Textile Mach. Prod.**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Fiber Producer**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Spinner**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Weaver and/or Knitter**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Textile Chemical Prod**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Dyer, Finisher / Printer**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Garment Producer**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Home Textile Prod.**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

*incl. Türkiye and Central Asia

**Input material**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

**Lack of or delayed receipt of**
- World*: 78%
- East Asia: 56%
- South Asia: 80%
- South East Asia: 74%
- Africa: 59%
- Europe*: 69%
- North and Cent. America: 68%
- South America: 71%

*incl. dyes and auxiliary producers

**average across regions

**Lack of or delayed receipt of**

---
Have you had orders cancelled in the past 4 months?  [Jul 2023]

- No: 51% (May-23), 50% (Jul-23)
- Yes, 0% to 10%: 35% (May-23), 38% (Jul-23)
- Yes, 10% to 20%: 8% (May-23), 9% (Jul-23)
- Yes, more than 30%: 5% (May-23), 2% (Jul-23)

How would you rate your current inventory level?  [Jul 2023]

- High: 26% (May-23), 27% (Jul-23)
- Average: 53% (May-23), 53% (Jul-23)
- Low: 21% (May-23), 19% (Jul-23)