Results of the 11th ITMF Corona-Survey

Focus: Textile Machinery Producers

Virtual ITMF Textile Machinery Workshop
16th of November 2021
Zoom
Contents

Introduction

World overview

Regional analysis

Focus on textile machinery

Summary & concluding remarks
World overview
Business situation vs. Business expectations [World]

Balance between good and poor / more or less favourable*

Source: ITMF Corona-Survey, 8th – 11th * based on regional averages
Rate the following indicators for the given point in time

**Balance between good and poor***

*Source: ITMF Corona-Survey, 8th – 11th *average of regional sentiment

**Order Intake [World]**

- Situation
- Expectations

May-21 | Jul-21 | Sep-21 | Nov-21 | Jan-22 | Apr-22 | Jun-22
---|---|---|---|---|---|---
19 pp | 14 pp | 32 pp | 33 pp | 34 pp | 37 pp | 41 pp | 41 pp

Source: ITMF Corona-Survey, 8th – 11th

*average of regional sentiment*
Rate the following indicators for the given point in time

Order Backlog [World]

Source: ITMF Corona-Survey, 8th – 11th
*average of regional sentiment
Rate the following indicators for the given point in time

Capacity utilisation rate [World]

Source: ITMF Corona-Survey, 8th – 11th

*average of regional sentiment
A regional analysis
How do you describe your current business situation?

Regional analysis [Situation]

- Balance between good and poor*
- Improving or still good
- Still difficult

Source: ITMF Corona-Survey, 8th – 11th
What are your business expectations to be in 6 months?

Regional analysis [Expectations]

Balance between more and less favourable

100 pp
60 pp
20 pp
(20 pp)

May-21 Jul-21 Sep-21 Nov-21

Note: Optimism in East Asia might be rising

Source: ITMF Corona-Survey, 8th – 11th
Focus on textile machinery producers
How do you describe your current business situation?

Balance between good and poor*

By segment [Situation]

Source: ITMF Corona-Survey, 8th – 11th
What are your business expectations to be in 6 months?

By segment [Expectations]

<table>
<thead>
<tr>
<th>Segment</th>
<th>May-21</th>
<th>Jul-21</th>
<th>Sep-21</th>
<th>Nov-21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiber Producer</td>
<td></td>
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<tr>
<td>Garment Producer</td>
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<tr>
<td>Textile Machinery Producer</td>
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<tr>
<td>Textile Chemical/Dyes/Auxiliary Producer</td>
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<tr>
<td>Finisher and/or Printer</td>
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<tr>
<td>Spinner</td>
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<tr>
<td>Weaver and/or Knitter</td>
<td></td>
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</tr>
</tbody>
</table>

Source: ITMF Corona-Survey, 8<sup>th</sup> – 11<sup>th</sup>
Rate the following indicators for the given point in time

Order Intake [Textile Machinery Producer]

Balance between good and poor*

Source: ITMF Corona-Survey, 8th – 11th
Rate the following indicators for the given point in time

Order Backlog [Textile Machinery Producer]

Source: ITMF Corona-Survey, 8\textsuperscript{th} – 11\textsuperscript{th}
Rate the following indicators for the given point in time

Capacity utilisation rate [Textile Machinery Producer]

<table>
<thead>
<tr>
<th>Situation</th>
<th>Expectations</th>
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</thead>
<tbody>
<tr>
<td>May-21</td>
<td>0.75</td>
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<tr>
<td>Jul-21</td>
<td>0.68</td>
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<tr>
<td>Sep-21</td>
<td>0.73</td>
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<tr>
<td>Nov-21</td>
<td>0.76</td>
</tr>
<tr>
<td>Jan-22</td>
<td>0.73</td>
</tr>
<tr>
<td>Apr-22</td>
<td>0.71</td>
</tr>
<tr>
<td>Jun-22</td>
<td>0.72</td>
</tr>
</tbody>
</table>

Source: ITMF Corona-Survey, 8th – 11th
Do you expect inflation to remain high beyond 2022?

**World**

- Yes: 63%
- No: 18%
- Cannot tell: 20%

**Regions**

- South America: 17 pp
- Europe (incl. Turkey): 31 pp
- South East Asia: 36 pp
- North America: 44 pp
- Africa: 50 pp
- East Asia: 54 pp
- South Asia: 59 pp

**Producer type**

- Textile Machinery: 31 pp
- Fiber Producer: 50 pp
- Spinner: 64 pp
- Weaver and/or Knitter: 54 pp
- Textile Chemical*: 11 pp
- Finisher and/or Printer: 34 pp
- Garment Producer: 52 pp
- Nonwoven Producer: 50 pp
- Home Textile Producer: 63 pp

*Balance between Yes and No*  
Source: 11th ITMF Corona-Survey
Summary & concluding remarks:

- The situation has been improving globally.
- Expectations slightly weaker globally, albeit on a high level.
- Most regions in a rather good situation, except East-Asia.
- From high level, most regions anticipate less favorable business.
- Upstream segments in a better situation than downstream ones.
- Downstream segments expect to catch up with upstream ones.
- Textile machinery companies in an extraordinary good situation, also, expectations remain cautiously optimistic.
- Inflation is expected to remain high beyond 2022.
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