ITMF’s Annual Conference – Meeting of the Global Textile Value Chain
2012 Hanoi/Vietnam – in Cooperation with VINATEX

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The International Textile Manufacturers Federation, generally better known under its acronym, ITMF, is a private sector international organization for the world’s textile industry with a long tradition dating back to its foundation in 1904. ITMF sees itself as the world’s leading forum for discussion of matters relevant to the global textile value chain – from fibres to retail – and to all allied industries including the textile machinery and the chemical industries. As a non-profit and non-governmental organization, ITMF serves as an agency for the collection of information on textile manufacturing developments around the world. Furthermore, it also provides a neutral meeting forum for the textile and allied industries for the exchange of information and for discussions on all matters affecting the global textile value chain. Finally, ITMF fulfills the function of a liaison agent between the textile industries and governments and intergovernmental organizations as well as with all other international organizations representing other sectors interested in the textile industry.

It is in this context that the Federation is organizing in cooperation with the Vietnam National Textile & Garment Group (VINATEX) the ITMF Annual Conference 2012 in Hanoi/Vietnam. It is the first time that the ITMF Annual Conference will be held in South East Asia. While other countries in the region like Indonesia, Malaysia or Thailand have already been integrated in the global textile value chain for several decades, this is not the case for Vietnam. It is only in the past two decades that Vietnam has appeared as an important and growing producer, importer and exporter of textiles and apparel. Vietnam’s integration in the global economy was boosted by its admission to the World Trade Organization (WTO) in the year 2007.

The main objective of both government and central bank in recent years was to reduce the inflation rate to an acceptable level below 10%. This would enable them to lower interest rates and to stimulate growth. Both fiscal and monetary policy helped to curb inflation from around 18% in 2011 to a forecasted 8% in 2012. Real GDP growth since 2007 reached between 5.3 and 8.5% and is forecasted at 5.7% in 2012. The relative strong growth in Vietnam is supported by private consumption. Net retail sales grew in the 1st half of 2012 by an average of 5-6%, which was lower than in 2008-2011. Another important growth factor is Vietnam’s export industry. The country’s exports continue to soar and are shifting more and more from a commodity-driven export model (e.g. oil, rice, rubber, coffee or coal) to a more balanced export-model with a higher share of capital- and labour-intensive manufacturing items such as cell phones, cameras, computers, textiles, garments and footwear.

International Textile Manufactures Federation (ITMF) is a non-profit and non-governmental organization, which serves as an agency for the collection of information on textile manufacturing developments around the world. It also provides a neutral meeting forum for the textile and allied industries for the exchange of information and for discussions on all matters affecting the global textile value chain. Finally, ITMF fulfills the function of a liaison agent between the textile industries and governments and intergovernmental organizations as well as with all other international organizations representing other sectors interested in the textile industry.

In the context of the ITMF Annual Conference 2012 in Hanoi/Vietnam, VINATEX serves as an agency for the collection of information on textile manufacturing developments around the world. It also provides a neutral meeting forum for the textile and allied industries for the exchange of information and for discussions on all matters affecting the global textile value chain. Finally, ITMF fulfills the function of a liaison agent between the textile industries and governments and intergovernmental organizations as well as with all other international organizations representing other sectors interested in the textile industry.
Especially Vietnam's garment industry has seen an enormous growth in the past decade with exports soaring from USD 1.8 billion in 2000 to USD 10.8 billion in 2010, an increase of 500%. The export growth of textiles was even more impressive, though from a lower level, reaching USD 2.7 billion in 2010 as compared to USD 0.3 billion in 2000. This represents an increase of 800%. The growing exports of textiles were the result of considerable investments in the primary textile industry.

According to data of ITMF's "International Textile Machinery Shipment Statistics" the average shipments of new short-staple ring-spindles to Vietnam between 2002 and 2011 amounted to approx. 235,000 spindles per year.

In the same time-span shipments of open-end rotors reached on average 3,600 rotors per year. The graph shows that the global economic and financial crisis of 2007/08 had a negative effect on investments in 2009, whereas investments picked up again in 2010 and 2011.

Vietnam's textile industry not only invested in new spinning but also in new yarn-processing technologies. In 2002, only around 100 new shuttle-less looms were installed. This number jumped to almost 600 in 2008. On average shipments of shuttle-less looms to Vietnam between 2002 and 2011 averaged around 670 per year. It is interesting to note that also during the years following the crisis, investments in new shuttle-less looms did not plummet significantly.

Investments in circular knitting machines showed a somewhat different pattern. The number of annual shipments of large circular knitting machines had already risen strongly between 2002 and 2005 from approx. 150 to approx. 350 per year. This might be explained by the fact that investments in circular knitting machines are significantly smaller in comparison to investments in new shuttle-less looms. From 2006 until 2008 investments in this segment fell to approximately 200 new circular knitting machines per year but picked up again in 2009 and 2011, reaching between 250 and 300.

In 2009, the number of shuttle-less looms was doubled, with 300 machines being installed in 2011. However, despite the increase in machinery, the number of textile workers in Vietnam has remained relatively stable, with an average of 22,000 workers employed in the textile industry in 2011.

In summary, the growth in Vietnam's textile industry is largely due to increased investments in machinery and technology. The industry continues to expand, with a focus on improving productivity and efficiency.
In the segment of electronic, flat knitting machines investments were negligible until 2009 when not more than 10 machines were installed. In 2010 and 2011 investments suddenly jumped to around 100 machines per year.

ITMF’s annual publication on shipments of new textile machinery shipped around the world is certainly an important indicator for anyone interested in analysing changes and developments in the textile industry. Today’s shipments of textile machinery to a certain country are likely tomorrow’s production in that country.

In addition to data on shipments of new textile machinery, ITMF publishes data on production costs in 9 different countries around the world, on installed spinning and weaving capacities in literally every relevant textile country worldwide and on textile production.

Nevertheless, the role of ITMF is not limited to the compilation and publication of statistical information. The members of the Federation value very much the opportunity to convene once a year, in order to meet and discuss both short-term as well as long-term developments in the industry. The ITMF Annual Conference is traditionally held in one of the Federation’s member countries and hosted by one or more of its members. As mentioned above this year’s Annual Conference will be held in Hanoi/Vietnam and will be hosted by the Vietnam Textile and Garment Group (VINATEX). This offers the Vietnamese textile industry a chance to showcase its achievements and to promote further cooperations with, and investments from, business partners around the world. The principle of rotating conference venues has the purpose of highlighting the textile industries in all regions of the world.

The value of an international platform for the global textile industry such as the ITMF is the possibility to meet and to discuss with colleagues and experts the challenges and opportunities from around the world in a relaxed and productive atmosphere. Since participants of ITMF Annual Conferences comprise not only representatives of the textile industry but of the entire textile value chain from fibre to retail, the conference provides the unique opportunity to have a comprehensive and hence a strategic view on the entire industry.

A look at the programmes of ITMF Annual Conferences shows the objective of offering a wide range of topics relevant to the textile industry. A conference for a global industry needs to look at macro-economic developments, since global economic conditions have an enormous impact on the global textile industry. An analysis of the raw material situation of cotton and man-made fibres is a traditional part of the conference covered in the “Fibre Session”. In the other general sessions, the conference discusses industry topics that are relevant for the nearby and more distant future. In Vietnam there will be a general session on “How to Do Business in Times of Volatility and Uncertainty”. Another will discuss “From Fibre to Retail – How to Handle the Supply Chain”. A further session of the conference will examine the consumer side with a discussion on “Old and New Retail or multiple countries representing various sectors of the industry. In 2011, the conference will be split into two parts: one focusing on the Asian region and the other covering the rest of the world.

ITMF provides a platform for member countries to showcase their expertise and experiences, facilitating knowledge exchange and fostering collaborative initiatives. The conference is an integral part of the textile community’s efforts to foster growth, innovation, and sustainability in the industry.

In conclusion, the ITMF Annual Conference serves as a vital platform for the global textile industry, encouraging discussion, sharing of knowledge, and fostering collaborations. It underscores the importance of a global perspective in shaping the future of the textile sector.
Markets”. Since a strong, growing segment is that of technical textiles and nonwovens, one general session will discuss developments in these areas (“Technical Textiles and Nonwovens”). Finally, the Hanoi conference will of course also look at the Vietnamese textile industry (“Vietnam’s Textile and Apparel Industry on the Rise”).

Next to these general sessions will be meetings of sub-committees like the Spinners Committee, the Home Textiles Producers Committee and the Fibre/Technical Textiles Committee. Another important part of ITMF Annual Conferences is the opportunity to meet old friends and to make new ones on various occasions. This opens the possibility to discuss informally matters of mutual interest. The ITMF Annual Conference shows that in times of internet and mobile phones, personal contacts and meetings are important and appreciated as opportunities for sharing information and experiences and for strengthening and expanding one’s international network.

In ITMF years, the event will discuss the纺织行业发展，开广泛讨论。作为一个全球性的会议，ITMF年会将关注宏观经济形势变化，因为全球性经济形势对纺织业有重大影响。在“纺织讨论环节”中，与会者将对棉花与人造纤维的发展形势进行分析，这是ITMF年会必不可少的一项内容。在另一项常规会议上，与会者将对纺织行业的话题开展讨论，讨论行业在未来的发展趋势。在越南河内的年会上，与会者将讨论“在波动、不确定的市场环境下，怎样开展商务活动”这一话题，以及“从反对再到零售——怎样处理供应链”的话题。大会还将从消费者角度讨论“新旧零售市场的对比”这一话题。由于纺织技术与非编产品取得强劲增长，大会还将讨论上述领域的发展（“纺织技术与非编织类产品”）。当然，河内年会将讨论越南纺织业的发展趋势（“越南的纺织与服装业发展迅猛”）。

在常规会议结束后，纺织工业协会，棉花产业联合委员会，国内纺织品制造商委员会，纺织品纺织品委员会也将举行分组会议。ITMF年会促进会员交流的同时，还积极吸引新会员的加入，在互利互惠的前提下，就多项议题开展非正式讨论。在互联网与移动时代，人与人之间的交流依然很重要。ITMF年会促进纺织行业间的交流，鼓励信息共享，经验交流，以进一步加强和拓展企业的国际化网络。