Results of the 46 th ITMF International Textile Machinery - TECHNICAL TEXTILE VALUE CHAIN

TECHNICAL TVC

New textile machinery shipments increased in 2023 in most categories, with the exception of texturing.

In 2023, global shipments of new short-staple and long-staple spindles rose by +2% and +5%, respectively, and dropped by -17% for open-end rotors (year-on-year). Deliveries of draw-texturing spindles decreased by -28% while the number of shipped shuttle-less looms rose by +52%. Shipments of large circular knitting machines grew by +17% and shipped flat knitting machines registered a 60%-increase. The sum of all deliveries in the finishing segment remained stable on average.

The International Textile Manufacturers Federation (ITMF) has announced the 46th annual International Textile Machinery Shipment Statistics (ITMSS), including the following key findings.
Six categories of textile technology are covered in the report: spinning, draw-texturing, weaving, Finishing, flat knitting, and huge circular knitting. An overview of the results for every category is seen below. More than 200 textile companies have collaborated to prepare the 2023 study. makers of machinery serving as a comprehensive indicator of global production.

Rotating Devices
The total number of shipped short-staple spindles increased by 155 thousand units in 2023 to a level of 9.78 million. Most of the new shipments went to Asia & Oceania (85%) where deliveries have been stable compared to 2022 (+0.1%). Shipment to Europe (incl. Türkiye) and North and Central America decreased by -13% and -27%, respectively, and increased in Africa (+120% to 475 thousand) and South America (+140% to 81 thousand). 85% of shipments to Africa went to Egypt. The six largest investors in the short-staple segment were China, India, Türkiye, Bangladesh, Uzbekistan, Egypt.

In 2023, 1 million open-end rotors were supplied globally. This is almost 200,000 fewer units than were reported in 2022. 85% of global shipments went to Asia & Oceania where deliveries decreased by -19% to 860 thousand. China, India, and Türkiye were the world's 3 largest investors in rotors and saw investments drop by -4%, -24% and -20%, respectively. Deliveries decreased in all major destination countries except for Brazil and Mexico, the 5 th and 7 th largest destinations in 2023, where shipment rose by +20% and +46% compared to 2022.

Global shipments of long-staple (wool) spindles increased to 98 thousand unit in 2023 (+5%). This positive effect was driven by a rise in deliveries to Europe (incl. Türkiye) and South America where 25 and 1.6 thousand units were shipped, respectively. 31% of total deliveries were shipped to China, 29% to Türkiye, and 19% to Iran.

Texturing Equipment
Global shipments of single heater draw-texturing spindles (mainly used for polyamide filaments) decreased by -33% from nearly 65 thousand units in 2022 to 43 thousand units in 2023. With a share of 97%, Asia & Oceania remained the strongest destination for single heater draw-texturing spindles in 2023. China, Türkiye, and India were the 3 main investors in this segment with shares of global deliveries of 90%, 2,6%, and 2,3%, respectively. Worldwide shipments of double heater draw-texturing spindles, which are mostly used for polyester filaments, dropped by 27% to 550 thousand spindles. Asia now accounts for 97% of global shipping, and China

remains the world’s biggest investor. making about 91% of exports worldwide.

Weaving Equipment
In 2023, global shipments of shuttle-less looms increased by +52% to 171 thousand units. Deliveries in the categories “air-jet” and “water-jet” grew by 34% and +96% to 53 and 92 thousand looms, respectively. The number of “rapier and projectile” looms rose by +0.1% to 27 thousand units. The main destination for shuttle-less looms was Asia & Oceania with 96% of worldwide deliveries. 97%, 85%, and 99% of global air-jet, rapier/projectile, and water-jet looms were shipped to the region, respectively. The main investor for air-jet and water-jet looms was China. The main investor for rapier-and-projectile looms was India with 10 thousand units (despite a -8% decrease compared to 2022).

Flat and Circular Knitting Equipment

Large circular knitting machine shipments increased to 33 thousand units globally in 2023, a 17% increase. With 86% of worldwide shipments, the Asia-Pacific region was the world’s top investor in this area. China received 63% of all deliveries, making it the most preferred destination (18,476 units). an increase from 2022 of +86%. Turkey and India came in second and third. locations that shipped 4’195 and 1’367 units, respectively.

In 2023, there were 177,000 electronic flat knitting machines shipped, a +61% increase over the previous year. 92% of global shipments went to Asia and Oceania, which drove the rise. Exports to other continents declined, with the exception of Europe (including Turkey), where 650

There were deliveries of units. China continued to be the biggest investor in the world, with a +82% share of all shipping.

Finishing Equipment
The quantity of exported stenters in the “fabrics continuous” sector rose from 1,780 units in 2022 to 1,833 units in 2023, a +3% rise. This figure comprises an approximation for the overall quantity of stenters sent out by businesses that did not take part in the ITMF survey. For all other machines in this category, participating businesses reported varying outcomes (between a +103% rise for bleaching-line and a -42% decrease for relax dryers/tumblers. In the section on “fabrics discontinuous,” the quantity of “air jet” and “jigger dyeing / beam dyeing” shipment of “dying” fell by -8% and -0.3% in 2023, to 715 and 772 units, respectively. Deliveries classified as “overflow dyeing” increased to 2,122 units, a +4.2% increase.