

Global textile outlook diverges sharply by region: ITMF May 2025 Survey

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The International Textile Manufacturers Federation (ITMF) has released its 32nd Global Textile Industry Survey (GTIS), conducted between May 12–22, 2025, revealing wide regional disparities in performance and outlook within the global textile sector.

While the overall global business situation remains challenging, with a negative balance of -20 percentage points, Africa stands out with a robust +23 pp, followed by South America at +6 pp. In contrast, East Asia faces significant headwinds, recording the weakest performance with -48 pp. Despite current challenges, future expectations are more optimistic, registering a global balance of +24 pp. North America leads confidence levels with +65 pp, trailed by Africa at +54 pp, whereas East Asia remains cautious with -18 pp.

Order intake continues to be a concern, declining steadily for four months and landing at -21 pp in May. Africa is the only region showing positive momentum (+18 pp), while Europe (-45 pp) and East Asia (-41 pp) remain subdued. Nevertheless, global order backlogs show signs of recovery, now averaging 2.3 months.

Capacity utilization reached 72 per cent in May, with Asian countries maintaining leadership. Upstream sectors, particularly spinning, are operating at higher rates than downstream segments.

Demand weakness is the leading concern for 61 per cent of survey respondents over the next six months, followed by trade tensions and rising operational costs. However, order cancellation rates remain low and stable across all regions, indicating some resilience in the supply chain.

The ITMF findings suggest a global industry under pressure but with emerging bright spots and a cautiously improving sentiment in several key markets.