Global Textile Machinery Shipments Declined in 2025 as Spinning Segment Defied Overall Slowdown

Textile Value Chain

International Textile Machinery Shipment Statistics show lower deliveries across most machinery categories, while short-staple spindles and open-end rotors recorded annual growth.

Global shipments of textile machinery recorded a mixed performance in 2025, with most machinery segments registering lower deliveries compared to the previous year. According to the 48th annual International Textile Machinery Shipment Statistics (ITMSS) released by the International Textile Manufacturers Federation (ITMF), only the spinning segment posted growth, while weaving, knitting, texturing and several finishing machinery categories experienced declines.

The latest ITMSS report, compiled in cooperation with more than 200 textile machinery manufacturers, covers six machinery categories: spinning, draw-texturing, weaving, large circular knitting, flat knitting and finishing.

During 2025, global shipments of short-staple spindles increased by +3.3%, while open-end rotors rose by +3.5% compared with 2024. In contrast, deliveries of long-staple spindles declined by -42%, draw-texturing spindles dropped by -23%, shuttle-less looms fell by -28%, large circular knitting machines decreased by -13%, and flat knitting machines recorded a -22% decline. The finishing machinery segment registered an overall increase of +8% in deliveries.

Spinning Machinery

Global shipments of short-staple spindles reached 6.11 million units in 2025, representing an increase of 195,000 units compared to 2024.

Asia & Oceania remained the dominant destination, accounting for 95% of all deliveries, with shipments rising 8.5% year-on-year. Shipments declined to Africa (-46%), Europe (including Türkiye) (-33%), and South America (-19%), while North and Central America recorded an increase of 264%, reaching 77,000 units.

The six largest investors in short-staple spinning machinery were China, India, Bangladesh, Indonesia, Uzbekistan, and Pakistan.

Worldwide shipments of open-end rotors increased to 645,000 units, around 50,000 units higher than in 2024. Asia & Oceania accounted for 94% of global deliveries, increasing by 9% to 607,000 units.

China, India, and Vietnam remained the three largest investors in open-end rotors, with investments rising by 4%, 12%, and 17%, respectively. Deliveries declined in Türkiye (-78%) and Bangladesh (-55%).

Shipments of long-staple (wool) spindles decreased to 90,000 units in 2025, down 31%. Asia & Oceania received 76,000 units, equivalent to about 55% of 2023 deliveries. Of the global total, 46% went to China, 19% to India, and 16% to Iran.

Texturing Machinery

Deliveries of single heater draw-texturing spindles, mainly used for polyamide filaments, declined by 21%, from nearly 83,000 units in 2024 to 65,000 units in 2025.

Asia & Oceania remained the primary destination with 97.6% of global shipments. China, Indonesia, and Chinese Taipei accounted for 92%, 2%, and 1.4% of worldwide deliveries, respectively.

Global shipments of double heater draw-texturing spindles, primarily used for polyester filaments, declined by 22% to 743,000 units. Asia continued to receive 98% of total shipments, while China remained the largest investor with 93% of worldwide deliveries.

Weaving Machinery

Global shipments of shuttle-less looms fell by 27.5% to 164,000 units during 2025.

All loom categories registered lower deliveries:

- Air-jet looms: 54,600 units (-6%)
- Rapier and projectile looms: 20,500 units (-18%)
- Water-jet looms: 88,500 units (-38%)

Asia & Oceania received 95% of worldwide shipments, accounting for 98% of air-jet, 89% of rapier/projectile and 98% of water-jet loom deliveries.

China remained the largest investor in air-jet and water-jet looms, although shipments declined by 32% and 57%, respectively. India led investments in rapier and projectile looms, recording a 21% increase in deliveries.

Circular and Flat Knitting Machinery

Global shipments of large circular knitting machines declined by 13% to 24,500 units in 2025.

Asia & Oceania accounted for 86% of total deliveries. China remained the largest destination, receiving 11,700 units, or 53% of global shipments, representing a 9% increase over 2024. India and Vietnam ranked second and third with 4,100 and 1,800 units, respectively.

Shipments of electronic flat knitting machines decreased by 21% to 106,000 machines. Asia & Oceania received 93% of worldwide deliveries despite ordering 24% fewer machines than in 2024.

Deliveries to all other regions increased, while China remained the largest investor with a 66% share of global shipments.

Finishing Machinery

Within the fabrics continuous segment, shipments of stenters increased by 3%, rising from 2,200 units in 2024 to 2,300 units in 2025. This figure includes estimated shipments from manufacturers that did not participate in the ITMF survey.

Participating companies reported varied performance across other finishing machinery categories, including a 75% decline in Singeing lines and a 24% increase in Mercerizing lines.

In the fabrics discontinuous segment, shipments of Overflow Dyeing machines reached 2,900 units in 2025. Deliveries of Air Jet Dyeing machines decreased by 0.6% to 902 units, while Jigger Dyeing / Beam Dyeing machines declined by 28% to 269 units.