Global Textile Machinery Shipments shrunk in 2025, except for spinning

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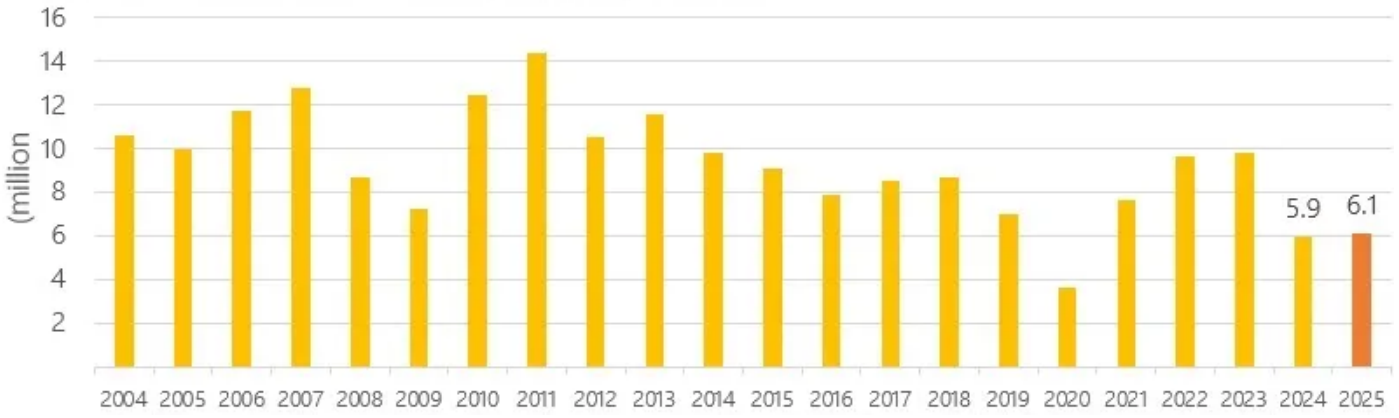
In 2025, global shipments of new short-staple spindles and open-end rotors increased by +3.3% and 3.5%, respectively (year-on-year). Deliveries of long-staple spindles decreased by -42%. The number of draw-texturing spindles delivered dropped by -23% and shuttle-less looms shipped by -28%. Shipments of large circular knitting machines deteriorated by -13% and shipped flat knitting machines registered a -22%-decrease. The sum of all deliveries in the finishing segment slightly rose by +8%.

These are the main results of the 48th annual International Textile Machinery Shipment Statistics (ITMSS) just released by the International Textile Manufacturers Federation (ITMF). The report covers six segments of textile machinery, namely spinning, draw-texturing, weaving, large circular knitting, flat knitting, and finishing. A summary of the findings for each category is presented below. The 2025 survey has been compiled in cooperation with more than 200 textile machinery manufacturers representing a comprehensive measure of world production.

SPINNING MACHINERY

The total number of shipped short-staple spindles increased by 195K units in 2025 to a level of 6.11 million (see Graph 1). Most of the new shipments went to Asia & Oceania (95%) where deliveries grew by 8.5% compared to 2024. Shipment to Africa, Europe (incl. Türkiye), and South America decreased by -46%, -33%, and -19%, respectively. Deliveries only increased for destinations in North and Central America (+264% to 77K). The six largest investors in the short-staple segment were China, India, Bangladesh, Indonesia, Uzbekistan, and Pakistan.

Graph 1: Shipments of new short-staple spindles, 2004-2025



645K open-end rotors were shipped worldwide in 20254. This represents about 50K units more than recorded in 2024. 94% of global shipments went to Asia & Oceania where deliveries increased by +9% to 607K. China, India, and Vietnam were the world's 3 largest investors in rotors and saw increased investments of +4%, +12% and +17%, respectively. Deliveries increased in all major destination countries except for Türkiye and Bangladesh, the 6th and 7th largest destinations in 2025, where shipment dropped by -78% and -55% compared to 2024.

Global shipments of long-staple (wool) spindles decreased to 90K units in 2025 (-31%). This negative effect was driven by suppressed deliveries to Asia and Oceania where 76K units were shipped, about 55% of 2023's deliveries. 46% of total deliveries were shipped to China, 19% to India, and 16% to Iran.

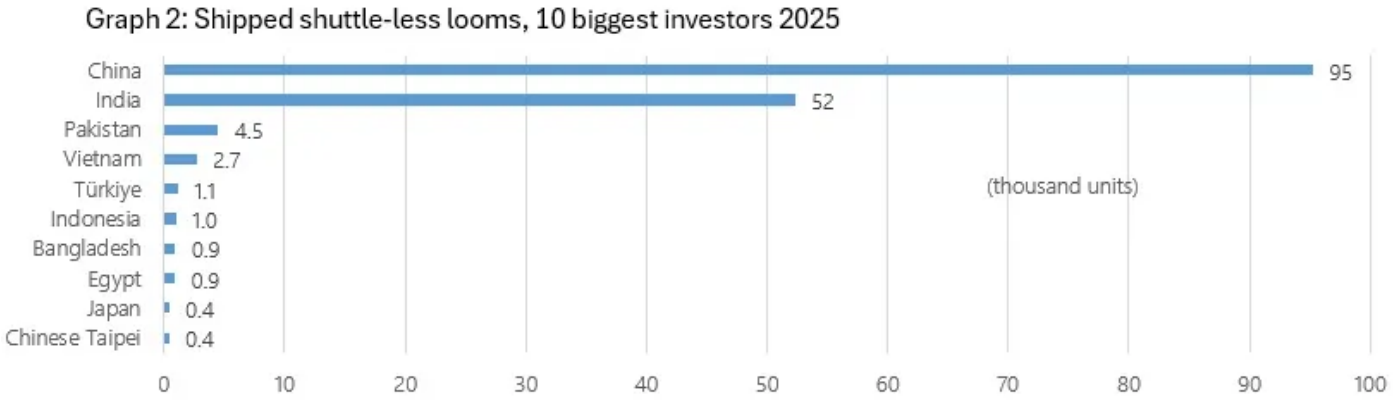
TEXTURING MACHINERY

Global shipments of single heater draw-texturing spindles (mainly used for polyamide filaments) decreased by -21% from nearly 83K units in 2024 to 65K units in 2025. With a share of 97.6%, Asia & Oceania remained the strongest destination for single heater draw-texturing spindles in 2025. China, Indonesia, and Chinese Taipei were the 3 main investors in this segment with shares of global deliveries of 92%, 2%, and 1.4%, respectively.

In the category of double heater draw-texturing spindles (mainly used for polyester filaments), global shipments decreased by -22% to a level of 743K units. Asia's share of worldwide shipments remained at 98% and China continued to be the world's largest investor, accounting for 93% of global shipments.

WEAVING MACHINERY

In 2025, global shipments of shuttle-less looms decreased by -27.5% to 164K units. Deliveries in all categories decreased. Air-jet looms dropped by -6%, rapier and projectile looms by -18%, and water-jet looms by -38% to 54.6K, 20.5K and 88.5K, respectively. The main destination for shuttle-less looms was Asia & Oceania with 95% of worldwide deliveries. 98%, 89%, and 98% of global air-jet, rapier/projectile, and water-jet looms were shipped to the region, respectively. The main investor in air-jet and water-jet looms was China (see Graph 2), where shipment decreased by -32% (air-jet) and -57% (water-jet). The main investor in Rapier and projectile looms was India, with a 21% increase in deliveries in 2025.



CIRCULAR & FLAT KNITTING MACHINERY

Global shipments of large circular knitting machines decreased by -13% to 24.5K units in 2025. Asia & Oceania was the world's leading investor in this category with 86% of global shipments. China was the favoured destination with 53% of all deliveries (11.7K units), an increase of +9% compared to 2024. India and Vietnam ranked second and third destinations with 4.1K and 1.8K shipped units, respectively.

The number of shipped electronic flat knitting machines decreased by -21% to 106K machines in 2025. The fall was driven by Asia & Oceania, which received 93% of world shipments, despite ordering 24% less machines compared to 2024. Deliveries to all other regions increased. China remained the world's largest investor with an 66%-share of total shipments.

FINISHING MACHINERY

In the "fabrics continuous" segment, the number of shipped stenters increased by +3% from 2.2K units in 2024 to 2.3K units in 2025. This number includes an estimate for the total number of stenters shipped by companies which have not participated to the ITMF survey. Participating companies reported mixed results for all other machines in this category (decrease of -75% for Singeing lines and an increase of +24% for Mercerizing lines). In the "fabrics discontinuous" segment, the number of "Overflow Dyeing" shipped in 2025 increased by -30% to 2.9K units. Deliveries of "air jet dyeing" and "Jigger Dyeing / Beam Dyeing" dropped by -0.6% to 902 units and 28% to 269 units, respectively.