



The latest GITS survey indicates signs of recovery, but caution remains essential as improvements are primarily driven by progress in South America and Africa. Despite weak demand being a significant concern for 2 years now, signs of recovery are slowly showing. Order cancellations remain low, and order backlogs are seeing gradual positive movement, signaling a potential turning point in global operations.

As the sector rebuilds, capacity utilization might have reached an inflection point, hinting at a more stable future. The outlook for the global textile market remains slightly positive, with a balanced approach to maintaining business growth while addressing lingering challenges.



Mr. Olivier Zieschank
director, ITMF

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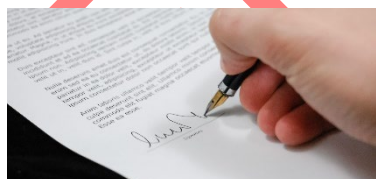
UPCOMING EVENTS

REPORT: THE 28TH GLOBAL TEXTILE INDUSTRY SURVEY

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EXECUTIVE SUMMARIES

Order intake still negative but steadily improving



The balance between "Good" and "Poor" order intake made a steady improvement for 10 consecutive months, recovering from its low in November 2023. South America and Africa stood out with the highest order intake balance.

[> read more \(members only\)](#)

Order backlog follows a slight positive trend



The reported average global order backlog was 2.2 months in September 2024. This marks an increase since last July and a recovery from its previous low of 1.9 months in March 2024.

[> read more \(members only\)](#)

Capacity utilization rates might have reached an inflection point



Global capacity utilization rate reached 75% in September 2024. This rate has been increasing since July 2024, with a notable improvement from a first low of 68% in November 2023.

[> read more \(members only\)](#)

Weak demand is the main concern since 2022



66% of survey participants regarded weak demand as the main concern in September 2024, unchanged from July 2024. Since business expectations are still cautiously positive, the main factor for better business will be for retailers, brands, and wholesalers to place more orders.

[> read more \(members only\)](#)

Order cancellations are at their lowest recorded level



A vast majority of survey respondents (63%) reported that they did not suffer from any order cancellations in September 2024. Higher levels were reported in South America.

[> read more \(members only\)](#)

Inventories remain average along the textile value chain



The number of companies judging inventory levels to be average remained high at 55% (slightly down from 57% in July). The apparel inventory levels at retailers and wholesalers in the USA has been rising again for a few months. It seems that the bottom has been reached.

[> read more \(members only\)](#)

ITMF NEWS

ITMF at ABRAPA's Annual Congress 2024



Ron Lawson, Partner, LOGIC ADVISORS, USA, Mr. Alexandre Schenkel, President, ABRAPA, Brazil, Mr. Christian Schindler, Director General, ITMF, Mr. Miguel Faus, President, ANEA, Brazil

From September 3-5, 2024, the Brazilian Cotton Growers' Association, ABRAPA, held its 14th annual congress in Fortaleza, Brazil. Around 3'500 participants attended this mega-event (exhibition and conference). At this year's congress ABRAPA celebrated the 25th anniversary since the foundation of the association.

Mr. Christian Schindler, Director General of ITMF, was invited to speak about the current business environment and the outlook for the global textile industry with a special focus on the cotton textile value chain. He stated that the industry is suffering since more than 1.5 years from weak demand and rising costs which have in many cases have eroded the profit margins or even led to losses.

The panel was moderated by Mr. Marcelo Duarte, Director of International Relations, ABRAPA. He stated that Brazil's cotton industry *"has reinvented itself in cotton production. Today we are leaders, and this leadership brings us a lot of responsibility, because we no longer have to follow others, but show the way"*.

Mr. Ron Lawson of LOGIC ADVISORS, USA, discussed in his keynote speech the current cotton supply and demand scenario. ABRAPA-President, Mr. Alexandre Schenkel, emphasized that controlling costs is essential in cotton production, while at the same time keeping the quality.

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In his comments Mr. Miguel Faus, President of the National Association of Cotton Exporters (ANEA), highlighted the necessity to adapt and to take advantage of emerging market opportunities to sell cotton in a weak business environment.

Erich Trachtenberg, Executive Director of the ICAC, stated that “cotton is a natural, biodegradable fibre with the

potential to reduce poverty and conflict, especially in Africa. It brings female empowerment, since 43% of cotton producers are women”. He added that cotton can mitigate climate change, as the “fibres sequester carbon. Furthermore, the crop can adapt to dry conditions, growing where other crops cannot”.

ITMF at the CANAINTEX Annual Convention 2024



Mr. Christian Schindler and Mr. Rafael Zaga, President of CANAINTEX

CANAINTEX, the Mexican Fiber, Textile, Apparel & Footwear Federation, held its annual convention from 26-29 September 2024 in Cancun, Mexico. Mr. Christian Schindler, Director General of ITMF, was invited to deliver a presentation about the current state of and outlook for the global textile value chain.

In his presentation Mr. Schindler shared the latest results of ITMF’s Global Textile Industry Statistics (GTIS) as well as the data of ITMF’s International Textile Machinery Shipment Statistics (ITMSS) with a specific focus on North America and Mexico. According to the results of the GTIS for September 2024 the current state of the global textile industry is still very challenging, albeit with some green shoots in different regions (South America and Africa) and segments (downstream segments). Furthermore, he highlighted that the data from the US-census for apparel inventories at retail and wholesale level seem to indicate that the reduction of inventories have bottomed out. This might lead to a higher order intake in the coming months. Looking at the

ITMSS-data Mr. Schindler concluded that the regional centre of investments was and is Asia and China in particular. While there are investment shifts within Asia, there seems to be no visible trend towards nearshoring.

According to Mr. Schindler some major trends the global textile industry is facing are:

- 1) Sourcing shifts within Asia
- 2) More sustainability & circularity requirements by brands
- 3) Increased level of regulation by governments

- 4) Growing importance of second-hand markets
- 5) Instant-Fashion by cross-border online business models

The discussions about Mexico’s domestic challenges focused very much around two topics: 1) the problem of large quantities of illegal imports that are threatening the local industry’s survival and 2) the “de-minimis”-rule that allows large quantities of textile products entering the markets without tariffs or checks about social and environmental compliance.

ITMF’s newest member

ITMF has welcome a new corporate member in the last few weeks. This illustrates how important our unique platform is for companies and organisations in different regions and segments of the global textile value chain.

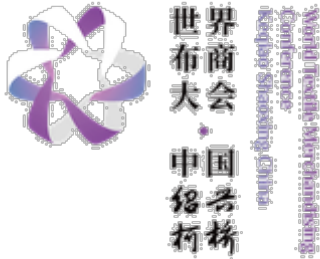


Heberlein Technology AG, based in Switzerland, is a leading global provider of air interlacing and air texturing jets for synthetic continuous filament yarns. Founded in 1835, the company has over 180 years of experience in the textile industry. Heberlein specializes in high-quality solutions for the manufacturing and processing of multifilament yarns, including products such as the PolyJet-BCF for carpets and the SwissJet for multifilament yarn interlacing. The company is also known for its innovations in ceramics technology, which it applies across various industries.

[> read more](#)

PARTNER NEWS

7th World Textile Merchandizing Conference 2024 will be held in Keqiao, China on October 23-26



The 7th World Textile Merchandizing Conference 2024 will be held from October 23 to 26 in Keqiao District, Shaoxing City, Zhejiang Province, China. This conference is themed "Future Fashion Advanced by New Quality Productive Forces". It will explore the significance and key paths of new quality productive forces empowering the global textile industry to build a development community, an innovation community, and a responsible community from various dimensions such as technological innovation, cultural empowerment, green development, and open cooperation. It will also envision a new future for the worldwide textile industry of mutual benefit, shared prosperity, and interconnected symbiosis.

[> read more](#)

APTEXPO 2024 will be held in Singapore on November 13-15



The Asia-Pacific region is a cornerstone of global textile and garment manufacturing. As the industry navigates the rapidly evolving landscape, the inaugural Asia-Pacific Textile and Apparel Supply Chain Expo & Summit (APTEXPO 2024) is poised to be a catalyst to help the stakeholders thrive and overcome the challenges.

Themed, "Re-engineering towards a Resilient, Adaptive and Sustainable Supply Chain", the event is sponsored by the ASEAN Federation of Textile Industries (AFTEX) and the China National Textile and Apparel Council (CNTAC), and co-organised by MP Singapore Pte Ltd and The Sub-Council of Textile Industry, CCPIT (CCPIT TEX). The Singapore Fashion Council (SFC) will also be supporting the event as the host association in Singapore.

[> read more](#)

Uzbekistan's textile revolution: shaping a new industry giant



Uzbekistan's recent strides toward becoming an economically vibrant and modern state in Central Asia have garnered attention. For years, the country was overshadowed by a negative reputation for censorship, environmental harm, and human rights abuses. However, in recent years, Uzbekistan has made significant progress on both political and private fronts to address these challenges and reshape its image. Since 2017, the government has pursued a reform agenda, achieving notable improvements across society, politics, and the economy, with a particular focus on the cotton and textile industries.

[Read more about this story in a report written by Gherzi, GIZ, and the German Cooperation.](#)

India's textile industry gears up for Bharat-Tex 2025



Bharat Tex 2025 will take place from February 14-17, 2025, in New Delhi. It is set to be a landmark event, uniting the textiles, fashion, and sustainability sectors in India's thriving textile industry. Building on the momentum from the previous edition, this premier platform will gather top policymakers, global CEOs, and industry professionals to explore the latest trends and innovations across the entire textile value chain, from traditional handloom to cutting-edge apparel manufacturing.

The event will feature dynamic exhibitions, knowledge sessions, B2B networks, and product launches, creating an unparalleled opportunity for industry leaders to connect and collaborate.

With a focus on sustainability, circularity, and digitization, Bharat Tex 2025 will also highlight India's commitment to sustainable growth. Interactive pavilions will showcase innovations in fabric testing, product demonstrations, and master classes by skilled artisans, reinforcing India's position as a leader in eco-friendly textile production. Bharat Tex 2025 aims to push the boundaries of the textile industry, positioning India as a global leader in both tradition and forward-looking innovation.

[> read more about Bharat-Tex](#)

Largest textile fair in Morocco and Africa set for November 2024



The Moroccan Association of Textile and Clothing Industries (AMITH) has partnered with CEMS Global to host the largest textile fair in Morocco and Africa. Scheduled from **November 7th to 9th, 2024**, in **Casablanca, Morocco**, this highly anticipated event will bring together leading industry players, buyers, and suppliers from across the globe.

The 2024 edition will feature four concurrent exhibitions:

- The **21st Maroc in Mode (MIM) International Textile Fair**
- The **2nd Morocco Yarn & Fabric Sourcing Show**
- The **2nd Textech Morocco International Expo**
- The **46th Dye+Chem Morocco Expo**

With Morocco ranked as Europe's 8th largest textile supplier, this event promises to be a significant platform for businesses looking to tap into Africa's and Morocco's booming textile and apparel markets. Attendees will have the chance to network, explore new suppliers, and showcase cutting-edge products and innovations.

[> read more](#)

Dornbirn GFC honoured Mr. Uday Gill for his life-time achievement



Until recently, Mr. Uday Gill was CEO of the Fibers Segment at Indorama Ventures, overseeing a \$4.5 billion business operating across 19 countries and 44 sites, with a focus on automotive, hygiene, and lifestyle verticals, as well as sustainability and recycling efforts. He also holds many board positions, including board member at ITMF. During the 63rd [Dornbirn-GFC](#) in September 2024, Mr [Uday Gill](#) was honoured for his lifetime achievements in the MMF industry.

World Cotton Day and the fiber for all generations



Cotton Brazil, the market development and promotion initiative by the Brazilian Cotton Growers Association (ABRAPA), encourages widespread participation in the "The Fiber for All Generations" campaign in honor of World Cotton Day. This global initiative seeks to engage various stakeholders in celebrating the role and sustainability of cotton across generations.

The concept will be illustrated through people of different ages, showcasing how cotton is present at all stages of life. Photos will be made available for use, with proper credits to be defined.

[> read more](#)

UPCOMING EVENTS

2024

[ITMA Asia & CITME 2024](#)

October 14-18, 2024
Shanghai, China

[ICA-Trade Event 2024](#)

October 16-17, 2024
Liverpool, UK

[7th World Textile Merchandizing Conference](#)

October 23-26, 2024
Kegiao, China

[Uzbek Textile Expo](#)

November, 2024
Tashkent, Uzbekistan

[Moroccan International Textile and Apparel Exhibition \(MIM 2024\)](#)

November 7-9, 2024
Casablanca, Morocco

[APTEXPO 2024](#)

November 13-15, 2024
Singapore, Singapore

[Aachen-Dresden-Denkendorf International Textile Conference 2024](#)

November 21-22, 2024
Stuttgart, Germany

[Sustainability Talks Istanbul 2024](#)

December 3, 2024
Istanbul, Türkiye