



As we turn the page into the second quarter of 2025, the global textile industry continues to navigate a challenging landscape. The latest *Global Textile Industry Survey* captures the complex dynamics currently shaping our sector.

Amid these fluctuations, one thing remains clear: resilience, adaptability, and collaboration are more critical than ever. At ITMF, we remain committed to being a platform where ideas converge, partnerships thrive, and innovation accelerates, as you can read in the latest ITMF and partner news.

To our readers observing Ramadan, we wish you a joyful and peaceful Eid as the holy month ends.



Mr. Olivier Zieschank
director, ITMF

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EXECUTIVE SUMMARIES

Textile industry struggles persist



The global textile industry's remains in a challenging situation. Although the business situation had been improving since November 2023, it has slightly deteriorated in March 2025. Positive developments are registered in East Asia and North & Central America, albeit from very low levels. Among segments, garment producers reported the most stable outlook.

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

Global business expectations remain optimistic



The textile industry remains optimistic about the outlook for Q4 2025. Optimism is strongest in Africa and the Americas, while East Asia stands out with a negative outlook. Across segments, garment, fiber, and finished fabrics producers are the most hopeful, whereas technical textiles and home textiles show limited or no improvement expectations.

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

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Upward trajectory of global orders tapers off



Globally, the textile industry's order intake balance deteriorated since January 2025, ending the upwards trend which started in November 2023. Regionally, South-East Asia showed resilience with a near-neutral balance, contrasting with East Asia and Europe. Among producer types, garment manufacturers maintained relatively good order intake.

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

Global textile industry faces renew backlog decline, albeit small



The global textile industry reported a 2.2 month-average order backlog, slightly decreasing since January 2025. Between regions, Europe leads with the highest backlog, due to the strong presence of textile machinery manufacturers who still exhibit the highest backlog among segments.

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

Capacity utilization rates hold firm worldwide



The survey revealed a worldwide capacity utilization rate of 73%, up from the low 68% in November 2023. The Asian regions led with respect to this indicator with rates above 74%. Among segments, yarn producers achieved the highest utilization at 81%, while textile chemicals producers recorded the lowest at 64%.

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

Rising concerns about demand and geopolitics



The latest survey highlighted further growing concern about demand (62%) and geopolitics (41%) for the next six months. While energy prices, raw materials prices, and inflation have slightly eased, worries around interest rates and sustainability regulations were slowly gaining momentum.

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

Global order cancellations remain low



Order cancellations continued decreasing since November 2023. Regionally, East-Asia remained the most impacted with 4.7 %, followed by South America at 4.2%. Among producers, textile chemicals experienced the highest cancellations at 5.9%.

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

Global textile inventory levels are slightly building up



The March 2025 GTIS reported a worldwide textile inventory level index of –11, increasing from its low of –18 in November 2024. Regionally, South America showed the highest inventory with a neutral index. Among segments, yarn producers exhibited the strongest inventory with an index of 4, whereas garment producers reported the lowest inventory at –29.

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

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ITMF NEWS

ITMF's newest member

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



Welspun World is a global conglomerate based in India, with businesses spanning home textiles, flooring, advanced textiles, steel, pipes, and infrastructure. Operating in over 50 countries, Welspun focuses on innovation, sustainability, and customer-centric growth across its diverse industries.

[> read more](#)

ITMF & ITA to host third webinar on AI applications in textiles



Access all previous webinars:
[Virtual Forum](#) / "Webinar Series".

Next webinar
April 2nd, 2025, from 12:00 to
13:15hrs (Zurich-time)
[Register here](#)

We continue our exploration of cutting-edge technologies with the third installment of our webinar series, "AI Applications in the Textile Industry", scheduled for **April 2nd**, 2025, from 12:00 to 13:15 CET.

This session will spotlight the transformative potential of artificial intelligence in reshaping textile value chains, reducing waste, and reimagining consumer experiences. Featured presentations include:

- Maximilian Bock of **Eekual** (Belgium), who will discuss how AI is collapsing traditional boundaries of time and space to enable instant, personalized clothing for the masses.
- Mr. Jonas Falkner and Mr. Friedrich Weninger from **MIR Insight** (Norway), presenting their approach to AI-powered market risk identification and forecasting aimed at minimizing waste and limiting financial losses.
- Mr. Jelle Demeulemeester of **MYND** (Belgium), offering an academic perspective on the textile value chain through the lens of AI.

ITMF attended the 2025 Cellulose Fiber Conference in Germany



CELLULOSE FIBRES
— CONFERENCE —
2025
New with Biosynthetics

The ITMF participated in the Cellulose Fiber Conference 2025, held on March 12–13 in Cologne, Germany. The event gathered 125 participants from 35 countries, highlighting global interest in sustainable textile solutions.

Amongst other highlights, experts presented diverse perspectives on the transition toward renewable and recycled materials in the textile industry. Key discussions included the urgent need to reduce fossil-based inputs, challenges around standardizing fiber identities, and the rising importance of cellulosic fibers like lyocell. Notable speakers included Michael Carus (nova-Institute), Anna Palmberg (IKEA), Dieter Eichinger (CIRFS), and Andreas Engelhardt (The Fiber Year), who shared insights on market dynamics, consumer perceptions, and technological bottlenecks.

The ITMF's presence underscored our commitment to supporting innovation, collaboration, and policy dialogue around fiber transformation and circular textile value chains.

[> read more](#)

ITMF joined EU dialogue on circular textiles in Brussels



On 19 March 2025, the ITMF took part in a high-level meeting in Brussels, bringing together European policymakers and stakeholders from across the textile value chain to discuss the future of textile sustainability in Europe.

The meeting was organized by the European Branded Clothing Association ([EBCA](#)) and took place in Brussels on March 19, 2025. The discussion was centered on the European Union's evolving regulatory framework for textiles, with a particular focus on eco-design and circularity. Two core topics dominated the agenda:

1. Durability: Participants explored how to define, test, and implement durability standards that reflect real-world usage while remaining technically and economically feasible. A key concern was the impact of durability requirements on different textile categories and the potential bias toward synthetic fibers. While some advocated for performance-based testing at product level, others stressed the need for simplified, harmonized methods to avoid bottlenecks, especially for natural fibers. There was consensus on the importance of realism, trade-offs, and the need for rules that do not disrupt the supply chain or disadvantage manufacturers in around the world.

2. Recyclability: The discussion highlighted the trade-offs between recycled content and product durability. While post-industrial waste remains the main feedstock for textile-to-textile recycling, the EU aims to prioritize

post-consumer waste in future regulation. Challenges such as lack of infrastructure, chemical restrictions, and data availability were brought up, alongside proposals for a portfolio-based reporting approach to ease compliance for brands. Concerns were also raised about regulatory timelines and the impact of chemical rules on recyclability, particularly for blended or chemically treated fabrics.

Throughout the meeting, ITMF emphasized the importance of balanced, practical regulation that supports innovation and sustainability while preserving the competitiveness of global textile producers. The federation welcomed the EU's goals and called for a harmonized, scalable, and inclusive approach that reflects the complexity of the global textile value chain.

[> read more about EBCA](#)

ITMF at the WPC 2025: Polyester demand rises, so does the need for sustainable action

“The growing dominance of polyester in the fiber market has significant future implications.

As polyester becomes increasingly important and relevant across various applications, there is a notable rise in consumer preference for this material, leading to a form of 'addiction'. This shift is driving developments within the fiber industry as a whole, as polyester continues to gain traction.

However, the industry must navigate both the challenges and opportunities that arise, ultimately shaping a more sustainable future for the textile value chain.

Navigating the Future of PET and Polyester: Consumer Impact, Demand Potential and Circular Affordability, WPC 2025

For the 40th edition of [S&P's World Petrochemical Conference 2025](#) more than 1'500 participants from around the globe came together to discuss the state of and outlook for the global petrochemical industry. The general theme of the conference was *“Chemicals - The Next 40 Years - Investing for Market Growth and a Low Carbon Future”*. During the 3.5-days conference more than 200 industry experts shared their expertise and perspectives. Some overarching themes were:

Adapting to Geopolitical Turmoil | End-use Markets Driving Growth | Renewable Feedstock Supplies | Advancing Technology, Innovation and Collaboration | New Decarbonization Fuels Powering Supply Chain | Plastics Circularity – Can We Speed it Up? | Growing Role of Carbon Price in Decarbonizing the Industry

The session titled *“Navigating the Future of PET and Polyester: Consumer Impact, Demand Potential and Circular Affordability”* with description on the left was especially dedicated to fibers.

In this session, **Mr. Uday Gill**, ITMF Board Member, presented the paper about *“Circularity and Sustainable Solutions -Textile Value Chain”* (see [here](#)).

Ms. Tatiana Bondar of ITMF member S&P Global delivered a presentation titled *“Will the World's Addiction to Polyester Continue?”*.

During the event Mr. Gill also gave Chemweek an interview which can be viewed [here](#).

ITMF Awards & Start-up Awards 2025 – Application deadline approaches fast



Deadline: **April 30, 2025**
 Apply here
[ITMF Awards 2025](#)
[ITMF Start-up Awards 2025](#)

Following the success of previous years, ITMF will once again present the **ITMF Awards 2025** and the **ITMF Start-up Awards 2025** at the ITMF & IAF Conference, taking place on October 24–25, 2025 in Yogyakarta, Indonesia.

The awards will recognize excellence in the categories of [Sustainability & Innovation](#), [International Cooperation](#), and outstanding contributions from [start-ups](#). A high-level international jury of industry experts will evaluate all applications and select the winners. Interested candidates can find detailed information and application forms on the **ITMF website** under "Awards." The **deadline for applications is April 30, 2025**. Associations are encouraged to nominate candidates or invite them to apply directly.

PARTNER NEWS

Is cotton a thirsty crop? No, 2'300 litres of water needed, not 20'000!



Cotton is often criticized as a "thirsty crop," with claims that producing just one kilogram of cotton lint requires nearly 20'000 litres of water. However, a global analysis of cotton's water footprint from 2020 to 2024 by the International Cotton Advisory Committee ([ICAC](#)) corrects this notion.

According to the [note published recently](#), only ¼ of the water used in cotton production comes from irrigation, which is a resource under the farmers' control. The rest comes from rain. As the study shows, the additional quantity of water used for cotton farming is close to **2'300 litres per kg of cotton lint**, a figure quite far from formerly claimed "20'000 litres". The real issue, the study argues, lies in irrigation efficiency, not in total water use. As shown in the analysis of 271 cotton-growing states or provinces across 38 major cotton-producing countries over the period 2020–2024, cotton is not inherently a "thirsty crop." The label oversimplifies a complex issue and unfairly penalizes a crop that, when managed well, is both productive and water efficient. The focus of the discussion on water consumption in cotton production should shift from blaming cotton's rainwater use to improving irrigation practices and adopting smarter farming technologies for a sustainable future.

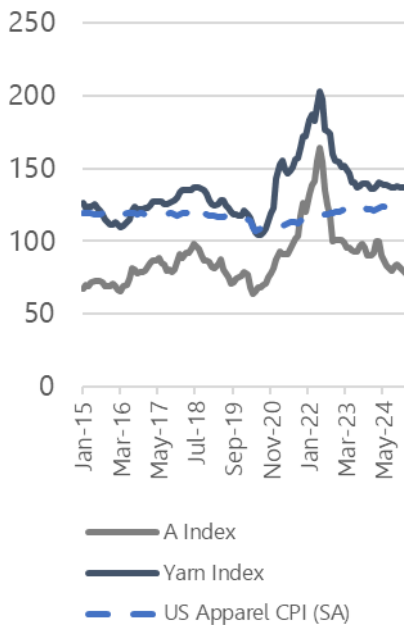
[> read the note](#)

Fashion Charter webinar to spotlight pro-climate advocacy in the fashion industry



A recent webinar organised by the UN Fashion Industry Charter for Climate Action (the fashion charter) at the beginning of March highlighted "**How the Fashion Industry Can Be Leading Responsible Policy Advocates**". Building on January's session on responsible business engagement and Nationally Determined Contributions (NDCs), this event featured insights from the We Mean Business Coalition, which is spearheading efforts to support companies in driving climate action through policy advocacy. [> read more](#)

Cotton Inc. presents the latest price movements in cotton textiles



Price Movements throughout the Cotton Textile Supply Chain (March 2025)

Source: Cotton Inc. | Illustration ITMF

[> download data set](#) | [> download charts](#)

Mr. Jon Devine, [Cotton Incorporated](#), studies price movements in the cotton supply chain every month. Here is his last analysis from retail to fiber:

Retail (latest data point for February): As measured by the CPI for garments, retail apparel prices increased month-over-month in March (+0.1%). Year-over-year, retail apparel prices were +0.1% lower. Relative to the 12-month average value before COVID (116.6 Mar 2019 to Feb 2020), the figure for February (122.8) is +5.3% higher.

Cotton-Dominant Apparel Import Prices (latest data point for December 2024): The average price per square-meter equivalent of cotton-dominant apparel imports decreased in the latest seasonally adjusted data for January (from \$3.68/SME last December to \$3.61/SME). Compared to the 12-month average before COVID (Mar 2019 through Feb 2020 average was \$3.45/SME), the latest cost per cotton-dominant SME (\$3.61) is +4.7% higher.

Yarn (latest data point for January): Cotlook's yarn index deteriorated by -0.2% month-over-month in January. Year-over-year, the yarn index was +0.4% higher. Relative to the value before COVID (118.35 in Feb 2020), the latest monthly average for Cotlook's yarn index (136.76 in January 2025) is +16% higher.

Fiber (latest data point for January): The A Index decreased month-over-month in March (-2.2% from 79.94 in December 2024 to 78.2 cents/lb). Year-over-year, the A Index has strongly decreased (92.15 cents/lb in March 2023). Relative to the value before COVID (76.6 cents/lb in Feb 2020), the latest monthly average for the A Index is +0.4% higher.

UPCOMING EVENTS

2025

[Proposte](#)

May 6-8, 2025
Cernobbio (Como), Italy

[TextileExpo Uzbekistan 2025](#)

May 14-16, 2025
Uzexpocentre NEC, Uzbekistan

[IGDS World Department Store Summit](#)

June 11-12, 2025
Seoul, Korea, Rep.

[Premier Vision](#)

July 1 -3, 2025
Paris, France

[Milano-UNICA](#)

July 8-10, 2025
Fiera Milano, Italy

[CAITME 2025](#)

September 9-11, 2025
Tashkent, Uzbekistan

[64rd Dornbirn-GFC](#)

September 10-12, 2025
Dornbirn, Austria

[Texworld and Apparel Sourcing](#)

September 15-17, 2025
Paris, France

[Market Week](#)

September 15-18, 2025
New-York, USA

[ICA Trade Events and Dinner](#)

October 8-9, 2025
Dubai, UAE

[ITMF-IAF Annual Conference 2025](#)

October 24-25, 2025
Yogyakarta, Indonesia

[ITMA Asia + CITME Singapore 2025](#)

October 28-31, 2025
Singapore

[ICAC 83rd Plenary Meeting](#)

November 17-20, 2025
Mwanza, Tanzania

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

November 27-28, 2025
Aachen, Germany