



The textile industry continues to navigate an unsettled landscape — geopolitical disruption, raw material and energy costs surges, and the structural pressures of shifting global competition. Yet the headline finding of our 38th Global Textile Industry Survey offers a measure of encouragement: while the business climate remains negative, some indicators rebounded. We believe it is a fragile improvement rather than a turning point, but a welcome one.

This issue also reflects an organization very much in motion. We are delighted to welcome our newest member and a new colleague, Ms. Charito Jenny, to the ITMF team. You will find news about a great discount opportunity for [The Fiber Year 2026](#) and various events, such as our recent Textile Machinery Workshop, the latest webinar on "AI in the Textile Value Chain", or the ITMF & IAF Conference 2026 in Brazil.

Alongside our own activities, you will find news from our partners and a calendar of upcoming events across the global industry.



Mr. Olivier Zieschank
 director, ITMF

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EXECUTIVE SUMMARIES

Business situation: a negative climate, but the trough seems behind



Global business sentiment remained in negative territory in May 2026 at –17pp but had improved slightly. Africa was the only region in positive territory; East Asia continued to deteriorate. Along the value chain, only segments closest to the apparel end-consumer — garment and fabrics — had reached neutral, while capital goods and chemicals anchored the bottom.

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

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Business expectations rebounded



Respondents expected business conditions to improve markedly in six months' time, with the global balance reaching +16pp. Africa led with +63pp; East Asia remained the region with lower expectations. Brands and retailers headed segment expectations at +45pp, while spinners and textile chemical/dyes/auxiliary producers expect further deterioration.

² [> read more \(members only\)](#)

Order intake shows signs of recovery



Global order intake stood at -9pp in May 2026, still negative but well above the November 2023 low of -50pp and up compared to the last survey in March — recovering slightly faster than the headline business situation. Africa led at +50pp while North & Central America trailed at -32pp. Fiber and yarn producers now join garment manufacturers in positive territory.

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

Order backlog improves from a low base



The average global order backlog reached 2.5 months in May 2026, increasing since March 2026 low of 2.0 months but remaining historically modest. Africa stood well ahead at 4.0 months while South America trailed at 1.3 months — a near-threefold spread across regions. Textile machinery producers held the longest backlog at 3.4 months albeit much below their normal backlogs.

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

Capacity utilization climbs



Global capacity utilization stood at 74% in May 2026, increasing since last March. South America led at 81% while Africa registered the lowest rate at 70%. Spinners ran closest to a tight regime at 84%, while textile machinery producers sat at the bottom at 66%, consistent with spinners' improved business situation and capital-goods working through soft order books.

³ [> read more \(members only\)](#)

High raw material and energy prices join demand and geopolitics as main concerns



Demand led the global concern ranking at 53% and high raw material prices followed at 52%, both rising, while geopolitics and high energy prices stood at 42% each. Demand concern was most prevalent in the regions with the weakest order intake and least so in Africa and South-East Asia.

⁴ [> read more \(members only\)](#)

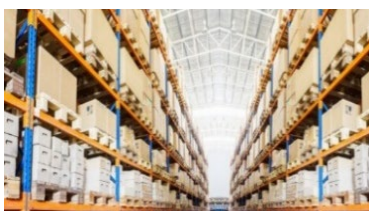
Order cancellations contained, but uneven across markets



At the global level, order cancellations remained low in May 2026. Regionally, Africa recorded the highest cancellation level at 5% while Europe recorded the lowest at 2.7%. Across segments, cancellations clustered at the consumer end of the chain, with home textiles highest at 4.4% and fibers lowest at 1.4%.

⁵ [> read more \(members only\)](#)

Inventories remain lean



The global inventory index stood at -16 in May 2026, decreasing since November 2025. Regionally, South America was the only region with stocks above normal (+6), while Africa (-33) and South Asia (-46) sat deepest in destocked territory. Along the value chain, spinners, textile machinery and garment producers scored the lowest.

⁶ [> read more \(members only\)](#)

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ITMF NEWS

ITMF's newest member

ITMF has welcome one new associate 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.



**AZERBAIJAN
TEXTILE
ASSOCIATION**

The **Azerbaijan Textile Association (ATA)** was established in 2018 with the mission of supporting the growth and development of the country's textile sector. From the beginning, ATA has focused on uniting companies involved in cotton and textile production, aligning local practices with international standards, and enhancing the export potential of Azerbaijani textiles. Over the years, ATA has expanded its reach through collaborations with international organizations, the introduction of new technologies, professional training programs, and active participation in global markets. Today, ATA stands as the only non-for-profit organization in Azerbaijan's textile sector, dedicated to promoting innovation, sustainability, and growth.

New staff member – Ms. Charito Jenny



On May 1st, 2026, **Ms. Charito Jenny**, Swiss and Philippine citizen, has started working for ITMF. She fills the gap that Ms. Roselyne Sanne left after leaving the ITMF-Secretariat at the end of 2025.

Ms. Jenny has already worked for ITMF during the last 25 years, first as external auditor of the Financial Statements (in the early 2000s) and afterwards as external supporter for the preparation of the Financial Statements.

Ms. Jenny was born in Manila, Philippines in 1966 and was awarded the degree BSBA (Bachelor of Science in Business Administration), majoring in accounting from the University of the East, Manila. She subsequently gained the Philippine licence CPA (Certified Public Accountant). She moved to Switzerland in 1989 and acquired a Swiss business diploma before starting her career in Switzerland. Charito has gained experience in diverse sectors of commerce and industry, always with a focus on financial and management accountancy.

Ms. Jenny speaks fluent English, German, Swiss German, and Tagalog (Filipino). She pursues her interests in travel, gardening, tennis and golf.

ITMF & IAF 2026 co-hosted by ABIT – Registration is Open!



This year's ITMF & IAF Conference 2026 will be held in Fortaleza, Brazil in the city of Fortaleza, Brazil, from October 14-15, 2026. The conference will be co-hosted by ABIT, the Brazilian Textile & Apparel Industry Association.

The conference will be held under the theme "*Future in Motion – Transformation, Innovation and New Realities*".

Register [here](#)

The prelim. program features a 2-day conference as well as a golf tournament, committee meetings, and factory visit (see below timeline). For more information and future updates, please click [here](#).

**Preliminary
Conference
Timeline**



October 2026

Oct. 12

Golf tournament

Oct. 13

Internal
Meetings

Oct. 14

Conference
Day 1

Oct. 15

Conference
Day 2

Oct. 16

Factory visit

ITMF addresses industry trends at CIRFS Executive Seminar 2026



To access a presentation, please contact secretariat@itmf.org

The Director General of ITMF was invited by the European Man-made Fibres Association (CIRFS) to deliver a presentation at the CIRFS [Executive Seminar 2026](#) (Spring Session) in Brussels, Belgium on May 20th, 2026. The theme of the seminar was "*Keeping competitive in a world of uncertainty*". In his presentation Mr. Schindler discussed the current industry situation as well as the long-term trends in the textile value chain.

Other presentations delivered during the seminar were | When Oil Costs \$200/b and Supply Dictates Demand: Polyester & Polyamide Value Chain Outlook -Tatian Bondar; S&P Global | From Volatility to Viability: Navigating Europe's Polyolefin Market, Michael McDermott, S&P Global | Current Dynamics of the World Cotton Sector, Fritz Grobten, Bremen Cotton Exchange | From Global Challenges to Shared European Solutions: Fostering a Competitive and Sustainable Textile Sector, Helene Diane Dage, European Commission | Current and future challenges in competitiveness and trade for EU manufacturing, Renaud Batier, Cerameunte | US Trade Policy Update, Kim Glas, Nation Council of Textile Organizations (NCTO) | Transatlantic Relations: Beyond the headlines, Mailinh Vasseux, American Chamber of Commerce | Perspectives and Trends in Textiles Recycling in Europe, Ekaterina Stoyanova, Recycling Europe

The meeting closed with a panel discussion about "*Next Generation Fibers - Scaling Bio-Based & Circular Materials for Market Adoption*" with Sahil Kaushik (Infinited Fibres), Dr. Shahriare Mahmood (Spinnova), Enrique Herrero (AeoniQ), and Simon Riepler (Beaulieu International Group).

ITMF's Home Textiles Producers Committee (HTP) partners with China Home Textiles Association (CHTA)



If interested in participating, contact the ITMF-Secretariat at secretariat@itmf.org.

Back-to-back with the Intertextile Shanghai Homes Textiles 2026 in Shanghai, China (August 18-20, 2026) the China Home Textiles Association (CHTA) in cooperation with the ITMF Home Textiles Producers (HTP) Committee will organize the "**Binzhou International Home Textiles Cooperation Conference 2026**" on August 21st in Binzhou, Shandong, China.

The theme of the conference is "*Globe, Links, Smart Future – Building a Shared, Green, and Intelligent Home Textile Ecosystem*".

Binzhou, Shandong is one of China's most important home textiles clusters, officially recognized as a "Pilot Zone for World-Class Home Textiles Industrial Cluster" and a "National Textile Industry Base City." The cluster spans seven sub-sectors from spinning, weaving, and dyeing to home textiles, apparel, and technical textiles forming a complete industrial chain from fiber to finished product. It is home to industry leaders including WEIQIAO Group (Fortune Global 500), YUYUE Home Textile (Top 10 in China), LOFTEX (national leader in towels), and HUAFANG (China's largest woven printing and dyeing enterprise).

CHTA takes care of the transportation by offering stress-free and seamless transportation from Shanghai to Binzhou (VIP Service with high-speed train (3h from Shanghai) + VIP shuttle (1h 20min)). For more information about the prelim. program, please click [HERE](#).

ITMF and ACIMIT host Textile Machinery Workshop in Como



ITMF and the Italian textile machinery association ACIMIT held their joint Textile Machinery Workshop on 12 May 2026 in Como, Italy, preceded by a factory visit to Efi Reggiani and followed by a dinner at the Teatro Sociale.

Moderated by ITMF Director General Christian Schindler, the afternoon program opened with country statements reviewing market conditions across Europe, India, Indonesia, Mexico, Pakistan, Türkiye, China and other key regions, led off by ITMF President Juan Parés.

A second session featured machinery-sector updates spanning spinning, weaving, knitting, texturing, finishing, printing and nonwovens, with contributions from leading European and Chinese manufacturers. Guest speakers Jeanine Ballone (World Collective) and Dirk Vantighem (EURATEX) closed the session, with ACIMIT President Marco Salvadé giving the final remarks.

ITMF 10th Webinar on "AI in the Textile Value Chain"



The 10th webinar of the ITMF series "AI in the Textile Value Chain" took place on 5 May 2026, under the title "AI Applications in the Textile Industry – part 8". Sehrat Duman of Konzek Technology, a company operating from Istanbul and Düsseldorf presented its approach to factory digitalisation, based on a single platform combining manufacturing execution system (MES), energy management, AI, and computer vision functions.

According to Konzek, factory-specific machine learning and deep learning models are trained on each customer's plant data, with large language models used as a development accelerator rather than end product. Konzek reported deployments in more than 100 factories and over 40 AI and MES modules currently in operation.

To access the recording and presentations, login, click [HERE](#) and then click at "Webinar Series".

PARTNER NEWS

Cotton Brazil Dialogues 2026 open for pre-registration



Cotton Brazil is offering ITMF newsletter readers the opportunity to take part in a week-long visit to Brazil's main cotton-growing regions. The [programme](#) provides insights into the country's sustainable production practices, including farm-level innovation and the use of precision and regenerative agriculture.

Two dates are available: **27–31 July 2026** and **17–21 August 2026**. Interested participants can register through the [Cotton Brazil website](#) or contact Lisa Ventura at Lisa.Ventura@abrpa.com.br.

The Fiber Year 2026: Exclusive offer for ITMF



The ITMF is very proud to collaborate with [The Fiber Year GmbH](#) by offering ITMF-members the new edition of “[The Fiber Year 2026 \(TFY\)](#)” at a special discount. ITMF-members may purchase a license for the new 2026 edition for an attractive price of CHF 900.- instead of CHF 1,800.

Please contact Andreas Engelhardt at info@thefiberyear.com to purchase the report or ask for special package conditions.

The new 400+ page TFY 2026 offers a comprehensive view on latest trends and developments in the global textile value chain– from fibers down to nonwovens – taking into account more than 700 company news. Especially in these turbulent times, TFY 2026 helps to better understand the ongoing and underlying dynamics of the global textile industry.

Download overview [here](#) to get more information on the report that include **world natural and manmade fibers, latest trade data, country profiles for 20 major industries** and the comprehensive **statistical appendix**

IMPORTANT: indicate your affiliation with ITMF when ordering the publication

Bremen Cotton Exchange questions fairness of fiber traceability frameworks



The Bremen Cotton Exchange has published a new paper, “*Fiber Traceability – a Vehicle to Ensure Sustainability or Injustice?*”, by analyst Veronica Bates Kassatly and statistician Terry Townsend. It examines the rationale behind current traceability approaches and their implications for textile sustainability claims and legislation.

The authors point out that polyester accounts for nearly 60% of global fibre production, yet virgin polyester is neither traced nor certified. They report that PET production involves more than 2,500 chemicals, 800 of them highly hazardous, against 135 highly hazardous chemicals used in cotton pesticides worldwide. Polyester’s water footprint is 5 to 7 times higher per kilogram than cotton’s, and about one-fifth of global polyester relies on feedstock from sanctioned countries.

[> read more](#)

Fashion Charter: April 2026 updates



The UNFCCC Fashion Industry Charter for Climate Action has issued its April 2026 update. UNFCCC Climate Week 3 took place in Yeosu, Republic of Korea, with the Implementation Forum on 23–24 April gathering policymakers, private sector representatives, civil society, and academia around the six axes of the Global Climate Action Agenda.

The Charter also reported on an Implementation Dialogue held on 26 March in Hanoi, focused on direct power purchase agreements and industrial electrification, with around 40 in-person and 155 virtual participants. A further dialogue is being prepared in China in cooperation with UNIDO and the China National Textile and Apparel Council (CNTAC).

The 2026 CDP disclosure cycle, through which signatories report GHG emissions and other climate-related data, will open in mid-June. For more info, please contact fashioncharter@unfccc.int

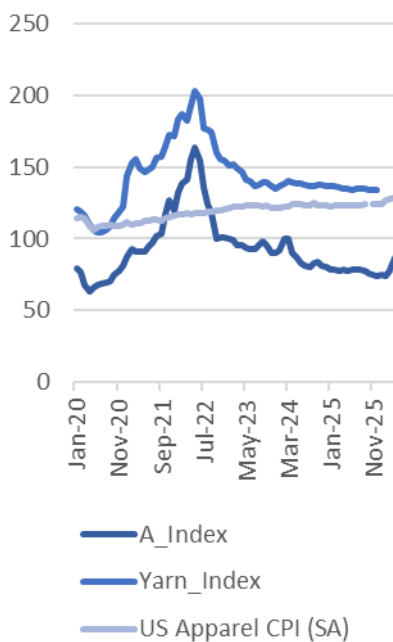
CAITME 2026: Central Asia's textile machinery showcase returns to Tashkent



The 17th Central Asian International Textile Machinery Exhibition (CAITME) will take place from 8–10 September 2026 at the Uzexpocentre NEC in Tashkent, Uzbekistan. Founded in 2004, CAITME is the region's leading trade fair for textile machinery and technologies, serving Central Asia and the CIS as the main business platform between equipment suppliers and local textile and garment manufacturers. The previous edition drew 210 companies from 21 countries and more than 6,000 professional visitors across 12,000 sq m. Organised by Iteca Exhibitions, the show offers live machinery demonstrations and a business program positioned around Uzbekistan's fast-growing textile sector — recently buoyed by textile exports that have passed the USD 1 billion mark.

[> read more](#)

Cotton Inc. presents the latest price movements in cotton textiles



Price Movements throughout the Cotton Textile Supply Chain (April 2026)

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 April): As measured by the CPI for garments, retail apparel prices increased month-over-month in April (+0.4%). Retail prices have been moving sharply higher in recent months (up +3.4% since January). Year-over-year, retail apparel prices were +4.2% higher. Relative to the 12-month average value before COVID (116.2 Mar 2019 to Feb 2020), the figure for April (128.5) is +9.6% higher.

Cotton-Dominant Apparel Import Prices (latest data point for March): The average price per square-meter equivalent of cotton-dominant apparel imports increased in the latest seasonally-adjusted data for March (from \$3.61/SME in February to \$3.68/SME). Compared to the 12-month average before COVID (Mar 2019 through Feb 2020 average was \$3.44/SME), the latest cost per cotton-dominant SME (\$3.68) is 7% higher.

Yarn (latest data point for April): Average Chinese yarn imports prices (HS 5205, USD/kg) increased 3.2% month-over-month in April. Year-over-year, the yarn import prices were 3.1% higher. Relative to the value before COVID (\$2.32/kg in Feb 2020), the latest monthly average for Chinese yarn imports (\$2.36/kg in April 2026) is 1.6% higher.

Fiber (latest data point for April): The A Index increased 11.9% month-over-month in April (from 77.18 in March to 86.4 cents/lb). Year-over-year, the A Index was 10.3% higher. Relative to the value before COVID (76.6 cents/lb in Feb 2020), the latest monthly average for the A Index (86.4 cents/lb in April 2026) is 12.84% higher.

UPCOMING EVENTS

2026**ITM 2026**

June 9-13, 2026
Istanbul, Türkiye

Future Fabrics Expo 2026

June 24-25, 2026
Brussels, Belgium

Textiles Recycling Expo

June 24-25, 2026
Brussels, Belgium

Milano Unica

July 7-9, 2026
Milano, Italy

Bharat-TEX 2026

July 14-17, 2026
New Delhi, India

Nastex Fair

July 18-21, 2026
Damascus, Syria

CAITME 2026

September 08-10, 2026
Tashkent, Uzbekistan

Dornbirn Global Fiber Congress 2026

September 16-18, 2026
Dornbirn, Austria

International Textile Forum

September 23, 2026
Dushanbe, Tajikistan

TITAS 2026

October 6-8, 2026
Taipei, Chinese Taipei

ITMF&IAF Conference 2026

October 14-15, 2026
Fortaleza, Brazil

Venice Sustainability Forum

November 5-6, 2026
Venice, Italy

APTEXPO 2026

November 11 -13, 2026
Singapore

Destination Africa

November 14-15, 2026
Cairo, Egypt

US Sourcing Summit 2026

November 16-18, 2026
Phoenix, Arizona, USA

ITMA Asia & CITME 2026

November 20 -24, 2026
Shanghai, China

INDIA ITME - 2026

December 4-9, 2026
New Delhi, India