ITMF NEWS LETTER

International Textile Manufacturers Federation
Wiedingstrasse 9, CH - 8055 Zürich, Switzerland
Tel: (+41-44) 283 63 80 · Fax: (+41-44) 283 63 89
EMail: secretariat@itmf.org · Web: **www.itmf.org**

No. 124 – October 2026

In October, ITMF and IAF met with our host ABIT in Fortaleza, Brazil, for our annual conference. Speakers from every part of the value chain made one point clearly: cost alone no longer decides where textiles are made. Capital, speed, data and partnership now count as well. This issue explores that theme in a conference report.

From our partners, there are reports on Cotton Inc.'s view of U.S. apparel demand and the Asia Sourcing Show in Bangkok, a **members' discount on The Fiber Year** reports, and an article on the competition between fibres.

We hope you enjoy reading it..



Mr. Olivier Zieschank
director, ITMF

Contents

OBITUARY
- Walter Simeoni (23.11.1944 – 24.10.2026)

ITMF NEWS
- ITMF & IAF 2026: speakers look beyond cost to capital, speed, data and partnership
- Spinners meet in Fortaleza as investment concentrates in fewer countries
- Home Textile Producers Committee resumes its work
- Technical textiles look to defence, digital infrastructure and mobility
- Members help shape the 2027 conference and ITMF's services
- ITMF Board meets in Fortaleza and confirms future conference venues

PARTNER NEWS
- The Fiber Year 2026 and The Fabric Year 2026: 50% discount for ITMF members
- Asia Sourcing Show and Global Sourcing Summit return to Bangkok in June 2027
- Cotton Incorporated: U.S. apparel spending stays strong despite record-low consumer confidencee

UPCOMING EVENTS

PARTNER ARTICLES
- The fiber war gets decided at the purchase order

ITMF PUBLICAITONS
- Fortaleza 2026: price alone does not decide where textiles are made

ANNUAL CONFERENCE 2026 – SELECTED PICTURES

ITMF PUBLICATIONS - EXECUTIVE SUMMARIES

Fortaleza 2026: price alone does not decide where textiles are made



At the conference in Fortaleza, Brazil, on 14–15 October 2026, speakers agreed that cost alone no longer decides where textiles are made. Tighter trade rules, falling brand margins and the shift to data-driven operations mean that capital, speed and partnership along the chain now matter as much. Brazil showed both sides: brands are testing it as a complement to Asia, but high borrowing costs still hold back investment.

> read more

PARTNER ARTICLES - EXECUTIVE SUMMARIES

The fiber war gets decided at the purchase order



Cotton won't beat polyester on price or marketing. It can win orders by proving better fabric means fewer returns, fewer markdowns and more repeat purchases. The opportunity is in basics, socks, denim and home textiles, where customers can feel the difference.

> read more

OBITUARY

Walter Simeoni (23.11.1944 – 24.10.2026)

In Memory of Mr. Walter Simeoni

ITMF President (2006–2008)

The International Textile Manufacturers Federation (ITMF) mourns the passing of Walter Simeoni, its former President and Honorary Life Member. A respected leader of South Africa's textile industry and a valued colleague and friend within the international textile community, Walter devoted more than four decades to textile manufacturing, industry representation and the development of future leaders.

Born in Innsbruck, Austria, in 1944, Walter studied engineering and fabric forming technology before beginning his practical training at an integrated woollen mill in his home city. After qualifying as a weaving master, he moved to Durban, South Africa, where he worked for the Frame Group from 1967 to 1970. This combination of technical training and practical experience provided the foundation for his subsequent career in textile manufacturing.

In 1971, Walter joined SA Fine Worsteds, a subsidiary of Anglo Vaal Textiles, and became Factory Manager in 1974. He was appointed Managing Director of Deutsche Kap Asbestors in 1980, overseeing the company's relocation from Germany to South Africa. In 1983, he returned to Anglo Vaal as Manufacturing Director to assist in the recovery of Puma Jersey, becoming General Manager in 1985.

Walter rejoined the Frame Group in 1990 as Chief Executive Officer of Frame Spinning Mills. He became Managing Director of Frame Textiles in January 1991 and Group Managing Director in 1992. Leading one of South Africa's largest textile manufacturers, he helped develop its domestic and export operations. He also served as an Executive Director of Seardel Investment Corporation before being appointed Group Chief Executive Officer in June 2008, a position he held until his retirement in 2009. His leadership spanned a period of profound change, as manufacturers faced intensifying global competition, exchange-rate volatility and the end of international textile quotas.

Walter was a committed advocate for South African manufacturing. He chaired the South African Cotton Textile Manufacturers' Association from 1995 to 2000 and served as President of the Textile Federation of South Africa (TEXFED) from 2001 to 2005. He spoke up for the industry and engaged with government on trade policy and the conditions for textile companies to remain competitive. As Vice Chairman and a Director of Cotton South Africa, he also supported the development of the cotton value chain and sustainable cotton production.



Walter's international engagement included service as Africa's representative on the ITMF Spinners Committee for almost two decades. In this capacity he visited cotton producing countries around the world on a regular basis where they met with representatives of the cotton value chain and examined cotton production, ginning, quality, sustainability and traceability. He was also instrumental that in the year 2000 ITMF held its first Annual Conference in South Africa, the first time that the annual gathering took place in Sub-Sahara-Africa. After four years as Vice President, he was elected ITMF President on 26 September 2006, at ITMF's Annual Conference in Dubai, UAE. Walter became the first person from Africa to hold the office since the federation's establishment in 1904.

As ITMF President from 2006 to 2008, Walter brought his extensive manufacturing experience and a strong African perspective to the federation's work. At the ITMF Annual Conference 2007 in Cairo, Egypt, he drew attention to the challenges facing African textile producers, including the impact of unrestricted second-hand clothing imports on local manufacturing and employment. He believed firmly in the textile industry's capacity to create jobs and support economic development.

His commitment to ITMF continued long after his presidency. He continued serving on the ITMF Spinners Committee as well as attending the ITMF Board Meetings and the ITMF Annual Conferences.

His continued participation reflected his enduring interest in the industry and his willingness to share his knowledge with colleagues across borders.

He was not only a very knowledgeable industry expert but also an outstanding storyteller and entertainer. Nobody who ever spent an evening with him will ever forget the way he was telling and performing jokes.

His contributions also received recognition beyond the textile industry. In September 2001, the Management Institute of Southern Africa awarded him a fellowship for his contribution to commerce and industry in the region. In May 2006, the Scientific Board of the Novosibirsk State University of Economics and Management in Russia awarded him the title of Honorary Associate Professor.

Walter also valued education and lifelong learning. While leading the Frame Textile Group, he completed an MBA through the Management College of Southern Africa (MANCOSA). After retiring from full-time employment, he served as a Professor and a member of MANCOSA's Board of Advisors, contributing to research and academic exchange. The Professor Walter Simeoni Scholarship was established to support postgraduate and MBA students, extending his contribution to future generations.

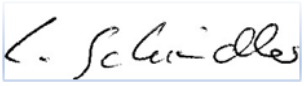
Beyond his professional achievements, Walter will be remembered for his integrity, humility, generosity, and humor. He freely shared his experience, encouraged younger professionals and built lasting friendships throughout the textile community. Those who worked with him valued his warmth and concern for others as much as his expertise and humor.

On behalf of ITMF, we extend our heartfelt condolences to Walter's family, friends and former colleagues. We will remember him with gratitude for his leadership, his friendship and his many years of service to the textile industry.

With heartfelt sympathy,



Juan Parés
President
For the Board & Past Presidents



Christian Schindler
Director General
For the Secretariat

ITMF NEWS

ITMF & IAF 2026: speakers look beyond cost to capital, speed, data and partnership





The ITMF Annual Conference and IAF World Fashion Convention, hosted with ABIT in Fortaleza, Brazil, on 14–15 October 2026, brought together speakers from across the textile and apparel chain. Varun Vaid of Wazir Advisors called competitiveness "a stack, not one parameter". He noted that 95% of the almost 6.1 million spindles shipped in 2025 went to Asia, and that a Brazilian mill borrows at almost 24%, compared with about 3% in China.

On trade, speakers from the AAFA, EURATEX, the CNTAC and ABIT discussed US tariffs, stricter EU border rules for low-value parcels and the growth of e-commerce imports. Juan Parés of ITMF called the EU–Mercosur agreement one of the industry's most significant opportunities. Bill McRaith of Future-Proof Fashion said brand margins have fallen from 9–12% to 3–5%. Other sessions covered the fibre outlook, recycling, and the ITMF–ITA white paper on AI.

A study by Gherzi for ABIT, ABRAPA and SENAI CETIQT presented Brazil as a complement to Asia rather than a substitute for it. Speakers also pointed to a gap: Brazil is the world's largest cotton exporter, yet it spins about the same 700,000 tonnes as in 2002. The ITMF Awards went to ten entries in three categories.

Read articles on each session here

Spinners meet in Fortaleza as investment concentrates in fewer countries

Fortaleza, 13 October 2026. The ITMF Spinners' Committee opened the Federation's meetings at the Annual Conference with participants from fibre, spinning, machinery and trade across four continents.

The Committee looked back on its 2026 visit to Türkiye, organized with Turkish partners in the Adana, Kahramanmaraş and Gaziantep region, where more than 20 participants saw synthetic, cellulosic and recycled fibre production. The travel report is available on the ITMF website.

An analysis of the ITMF's Global Textile Industry Survey of September from the perspective of spinners showed their situation slightly below the industry average, with a balance of -33 points against -30 worldwide. Lack of demand remained the main concern of spinners, followed by high raw material prices and geopolitics. The International Textile Machinery Shipment Statistics 2025 showed shipments of short-staple spindles and rotors each up 3%, with China receiving 70% of new spindles and 73% of new rotors. Participants discussed what this concentration means for spinners elsewhere, and the slow growth of textile-to-textile recycling.

The Committee will consider an activity for 2027, possibly linked to cotton growing, and will meet next at the ITMF Annual Conference 2027 in Egypt.

Home Textile Producers Committee resumes its work

Fortaleza, 13 October 2026. The ITMF Home Textile Producers Committee met in Fortaleza as the Federation's effort to restart the Committee's activities.

The Committee reviewed its visit to Binzhou, Shandong Province, in August 2026, organized with the China National Textile and Apparel Council and the China Home Textile Association. The programme combined presentations by international speakers, the visit of a highly automated spinning and weaving mill and the Intertextile home textile exhibition in Shanghai. ITMF thanks its Chinese partners for their hospitality. The report of the visit is available on the ITMF website.

Results of ITMF's Global Textile Industry Survey for home textile producers showed a volatile picture, and the Secretariat advised waiting for several surveys before reading a trend. Participants discussed why garment producers have recently fared better than home textile producers: households stocked up during the pandemic, high mortgage rates hold back new homes, consumers now spend more on travel and fashion, and polyester and fast online delivery are changing the market.

ITMF is considering an activity for the Committee in 2027 and welcomes ideas from members.

Technical textiles look to defence, digital infrastructure and mobility

Fortaleza, 13 October 2026. The ITMF Technical Textiles Committee, which held its second meeting, met in a joint session with the Home Textile Producers Committee in Fortaleza.

ITMF's Global Textile Industry Survey shows growing participation from technical textiles producers, around 20 in recent surveys. Their business situation has stayed slightly below the industry average, with a possible slight improvement in recent surveys that the Secretariat will watch before drawing conclusions. Their concerns match those of the whole value chain.

In the discussion, participants pointed to demand drivers the statistics do not yet capture: light materials for defence and drones, glass fibre for the electronics of artificial intelligence, infrastructure such as geotextiles and filtration, protective textiles, and composites for public transport. As the market is highly fragmented, such developments tend to benefit individual specialists rather than a whole segment.

The Committee invites its members to propose activities for 2027, such as a visit to a high-tech user of technical textiles, and to help shape its direction.

Members help shape the 2027 conference and ITMF's services



Fortaleza, 13 October 2026. Representatives of ITMF member associations and corporate members met with the Secretariat in the Directors Meeting, the Federation's informal platform for feedback on its work.

Discussion of the Annual Conference 2027 in Egypt focused on involving the next generation of the industry's leaders, on strong keynote speakers and on artificial intelligence, with a preference for concrete applications. Participants also reviewed the conference format.

The Secretariat called on member associations to share the link to the Global Textile Industry Survey with their networks, since broader participation would allow more detailed results. Members were reminded that the monthly newsletter is open to partner news and articles of global interest.

ITMF presented its white paper on artificial intelligence in the textile value chain, written with the Institut für Textiltechnik of RWTH Aachen University and published on 15 October 2026. The webinar series on AI is expected to continue in 2027.

ITMF Board meets in Fortaleza and confirms future conference venues

Fortaleza, 13 October 2026. The ITMF Board met in Fortaleza under the chairmanship of President Juan Parés, on the eve of the Annual Conference.

The Board approved the budget for 2027 and reconfirmed the coming Annual Conferences in Egypt. It thanked the Turkish partners for the Spinners' Committee visit to Türkiye and CNTAC for hosting the Home Textile Producers Committee in China.

Members are invited to save the date of the ITMF & VDMA Textile Machinery Workshop & Dinner in Frankfurt on 21 April 2027. The next Board meeting will take place in Frankfurt on 22 April 2027.

PARTNER NEWS

The Fiber Year 2026 and The Fabric Year 2026: 50% discount for ITMF members



The ITMF is very proud to collaborate with The Fiber Year GmbH to offer ITMF-members the new edition of The Fiber Year 2026 (TFY) and the Fabric Year 2026 at a special discount. Two offers are available to ITMF members:

- **50% discount:** ITMF-members may purchase a license for the new 2026 edition for an attractive price of
  - The Fiber Year: CHF 900.- instead of CHF 1'800.-
  - The Fabric Year: CHF 1'250.- instead of CHF 2'500.-
- ITMF members that are associations can:
  - forward the **above offer** to their corporate members; or
  - ask for a **tailor-made package** by contacting The Fiber Year GmbH directly to negotiate a price package for their own corporate members.

Please contact Andreas Engelhardt at info@thefiberyear.com for a discount or a tailor-made package.

The new publications offer a comprehensive view on the latest trends and developments in the global textile value chain– from fibers to fabric.

The Fiber Year (download overview here)

includes **world natural and manmade fibers**, **latest trade data**, **country profiles for 20 major industries** and the comprehensive **statistical appendix**

The Fabric Year (download overview here)

includes **world fabrics production across knitted, woven and nonwoven technologies, latest production dynamics for top 20 industries**

IMPORTANT: indicate your affiliation with ITMF when ordering the publication

Asia Sourcing Show and Global Sourcing Summit return to Bangkok in June 2027



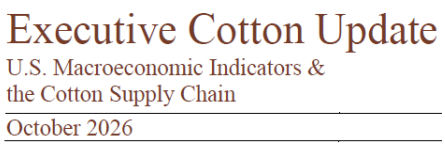


The 3rd Asia Sourcing Show (textiles, apparel and home textiles) will be held at IMPACT, Bangkok, Thailand, from 17 to 19 June 2027. CEMS-Global USA and the ASEAN Federation of Textile Industries (AFTEX) organise the show together. Building on its second edition, it aims to become a global sourcing hub in Asia, connecting the region's manufacturers with regional and international buyers. Many of these buyers are looking for new suppliers, more flexibility, competitive manufacturing and more resilient supply chains.

The 2nd Global Sourcing Summit runs alongside the show on 17–18 June. Under the theme "From Conversation to Action", it aims to turn the first edition's discussions into practical collaboration. It will bring together manufacturers, brands, sourcing leaders, industry associations, policymakers and technology providers. Topics include supply-chain diversification, regional integration, nearshoring, sustainability, digitalisation, workforce transformation and the changing geography of trade. CEMS-Global USA leads the Summit, with the International Apparel Federation (IAF) as strategic partner, AFTEX as co-organiser and the China Chamber of Commerce for Import and Export of Textiles (CCCT) as partner.

More information: asia-sourcing.com and globalsourcingsummit.com

Cotton Incorporated: U.S. apparel spending stays strong despite record-low consumer confidencee



Cotton Incorporated's Executive Cotton Update for October 2026 finds that U.S. consumers are still spending, even as confidence weakens. In August, real consumer spending was 2.6% higher than a year earlier, above the long-term average of 2.2%. In September, however, the Conference Board's Consumer Confidence Index fell 6.7 points to 81.9, its lowest level since 2014. Possible explanations for the continued spending include high home and stock prices, which make asset owners feel wealthier, and a personal savings rate that has dropped to 4.1%.

Apparel stands out. Inflation-adjusted spending on clothing rose 1.3% from July to August, the strongest monthly increase since December 2023, and was up 3.9% year-on-year. Retail clothing prices were 3.7% higher than a year earlier and are at their highest level since 1999. The import cost of cotton-dominant apparel rose slightly to USD 3.77 per square metre equivalent, before tariffs. For most sourcing countries, tariffs are now 10–12.5 percentage points higher than in 2024.

The report also warns of risks to future spending. Job creation slowed to 29,000 in September, and wage growth fell to 3.0%, below the rate of inflation since April.

> read more

UPCOMING EVENTS

2026

Asia-Pacific Texpo 2026
November 11-13, 2026
Singapore

Destination Africa 2026
November 14-15, 2026
Cairo, Egypt

Cotton USA™ Summit
November 16-18, 2026
Scottsdale, Arizona, USA

ITMA Asia & CITME 2026
November 20-24, 2026
Shanghai, China

International Textile Conference 2026
November 26-27, 2026
Aachen- Dresden-Denkendorf, Germany

INDIA ITME 2026
December 4-9, 2026
New Delhi, India

7th Sustainability Talks Istanbul
December 8, 2026
Istanbul, Türkiye

2027

heimtextil 2027
January 12-15, 2027
Frankfurt, Germany

ICAC's 84th Plenary Meeting
March 24-26, 2027
Alexandria, Egypt

Milano Fashion & Jewel 2027
February 20-22, 2027
Milano, Italy

ITMA 2027
September 16-22, 2027
Hanover, Germany

ITMF&IAF Conference 2027
October 18-20, 2027
Cairo, Egypt

PARTNER ARTICLES

The fiber war gets decided at the purchase order

by Robert P. Antoshak, Managing Partner and Radhika Shrinivas, Partner, Gherzi Americas



[1]

Cotton has spent twenty years losing a fight it prefers to call a misunderstanding. Radhika Shrinivas, Gherzi Americas Partner, and I spent several weeks working on a Gherzi Americas white paper, *The Fiber Wars*, to see whether the next decade looks any different. Some of it does. Less than cotton people would like, and in narrower places.

The score

Polyester supplied 59 percent of the 132 million tonnes of fiber the world produced in 2024. Cotton accounted for 19 percent, and its volume has gone nowhere since the 2007/08 season. Price is the sore tooth cotton people can't stop poking. The two fibers traded near even from 1981 through 2007. Since then, cotton has averaged about 1.7 times the price of polyester staple.

A gap that lasts that long gets bolted to the floor. Mills buy machinery suited to the cheaper fiber, and brands develop fabrics around it, so by the time cotton has a cheap season, the decision it might have swayed was made years earlier, in steel.

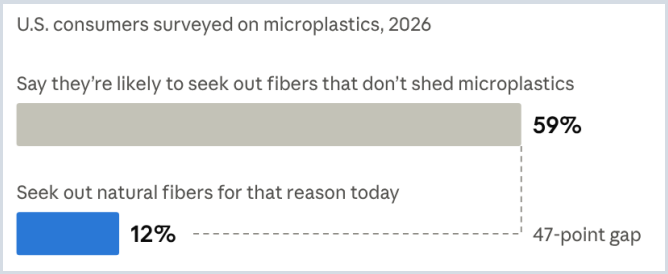
The polyester plants are paid for, too, which lets a producer with idle capacity sell cheap for years and flatten any challenger with a better environmental story. Don't count on $91 oil to bail cotton out. Farmers buy diesel.

Some of the help is leaving

Part of polyester's winning streak was manufactured in Washington. For years, a parcel worth less than $800 entered the United States duty-free, so an ultra-fast platform shipping one order at a time paid nothing while a retailer importing the same goods by the container paid full duty. The loophole closed last year.

Shein's U.S. revenue fell 14 percent in the first quarter of 2026, according to press accounts of its unaudited results. Card data puts its old customers at off-price and value chains, Kohl's and Old Navy among them. Those stores employ buyers and enforce quality standards, so a supplier can talk to them about durability again. Resale pushes the same way by putting a price on a shirt that survives the wash.

Figure 1: 59% say they will seek fibers that don't shed. 12% do.



Cotton Incorporated U.S. consumer survey, reported April 2026 · an industry organization; sample size not published

Then there's plastic. Cotton Incorporated found American awareness of microplastics at 41 percent this year, up from 17 percent in 2017. Two more numbers from that survey belong on the wall of every cotton marketing office.

The worry has outrun anything on the shelf. Somebody in a brand office has already put that 59 into next year's sales plan. Good luck to them.

Careful with the science, though. Microplastics have turned up in human blood and lung tissue, and a brain study made headlines last year, but the polymer it found most often was polyethylene, the stuff of packaging film. Nobody knows how much of anyone's exposure comes from clothes. Cotton sheds too. It breaks down faster in water, a real edge and a smaller one than "Plant Not Plastic" implies. Europe's rules against vague green claims took effect in September, and cotton is one slogan away from the overpromising it spent years mocking in recycled polyester.

Recycling stalls, and the landfill sends a bill

Recycled polyester slipped to about 12 percent of polyester output in 2024, and 98 percent of it came from bottles. Fiber made from old clothes comes to about 1 percent of everything the industry produces.

[1] The Fiber Wars – Cotton and Synthetics in the next decade, A Gherzi Americas White Paper

In nearly every case, the circular shirt on the rack is a former water bottle on a one-way trip. Beverage companies must meet an EU recycled-content mandate, and they want their flake back.

Now the bill. The EPA's newest textile numbers are from 2018, which tells you something, and they put 11.3 million tons of American textiles in landfills. Europe wants producer-responsibility schemes for textiles running by April 2028, and California has its own law. Once a garment pays for its own funeral, brands start caring how long it lasts. A cotton-poly blend with a few percent elastane fits great and is close to impossible to recycle. Pull the elastane and the jeans bag at the knee by lunch.

The farm and the purchase order

A farmer's cotton decision turns on what soybeans would pay on the same ground and whether the picker in the shed needs replacing. The bigger worry is the gin.

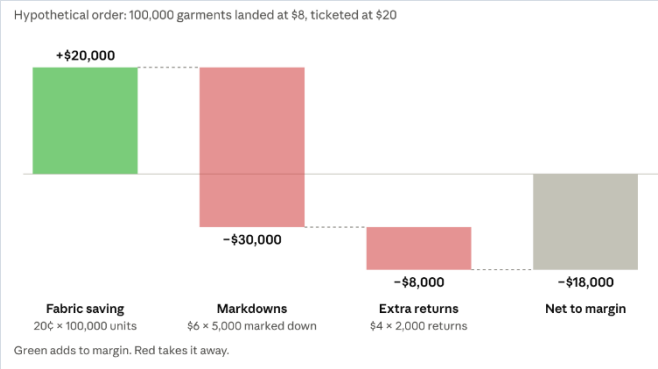
As farms leave, it spreads its costs over fewer bales, then shuts. A season in soybeans is a rotation. After the gin closes, that acre's gone.

Downstream, fiber share gets decided when a buyer writes a spec, long before anyone fights over spot prices. Take a 100,000-unit order landed at $8 and ticketed at $20. Sourcing finds a fabric that saves 20 cents a unit. Somebody gets congratulated. Suppose the cheaper fabric is a shade worse, and 5,000 units slide from full price into the first markdown while 2,000 extra come back as returns. Nobody traces that loss to the fabric. Run it in reverse and a better fabric pays for itself, which is cotton's best argument, provided the supplier makes it with the retailer's own numbers.

Six calls

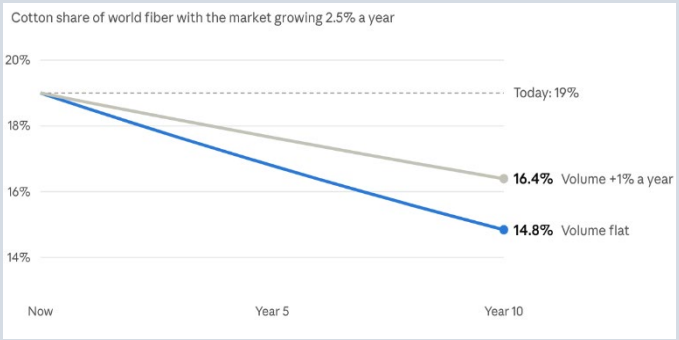
The paper puts six calls for the decade on the record, each paired with what would prove it wrong.

Figure 3: A $20K fabric saving ends $18K in the hole



Worked example from The Fiber Wars, Chapter 10 · hypothetical figures; returns counted at handling cost only.

Figure 4: Without losing a bale, cotton slides to under 15% of the world fiber



R Gherzi Americas arithmetic on Textile Exchange's 19% cotton share for 2024 · an illustration, not a demand forecast.

The first one stings. Cotton's share keeps falling even if its volume grows, because everything else is growing faster.

Calls two through five won't surprise anyone who got this far, though one number deserves a pin: recycled polyester stuck at 12 to 15 percent of polyester through 2031. Call six is the one to plan around. Performance wear and outerwear stay synthetic, and cotton groups that spend money fighting over them might as well donate it. The fight worth having is in the broad middle: basics, socks, denim and home textiles, where a customer can feel the difference.

Socks make the cleanest test. They get washed about as often as anything in the drawer, and the nylon and elastane that hold them up make them miserable to recycle. One high-volume style gives a brand fast answers through repeat purchases.

Monday morning

Cotton can lose the share fight and still make money. A set of product categories is back in play for any supplier who shows up with a better garment at a cost the buyer can live with. The industry spent decades telling shoppers cotton is the virtuous choice, while too many cotton tees shrank in the first wash. Customers remember the tee.

Pick one product and rebuild its economics, from the fiber purchase to what it sold for after markdowns and returns. Somewhere in there sits the failure that costs the most and shows up every season. One trial against it will tell you plenty, as long as you judge it by whether customers buy again. If they do, put money behind it.

Cotton has been losing this war one purchase order at a time, which happens to be the only way it can win any of it back.

The full report, *The Fiber Wars*, may be downloaded for free at gherziamericas.com.

ITMF PUBLICAITONS

Fortaleza 2026: price alone does not decide where textiles are made

by Christian Schindler, director general, ITMF and Olivier Zieschank, director, ITMF



At the ITMF Annual Conference and IAF World Fashion Convention, speakers from across the chain argued that capital, speed, data and partnership now weigh alongside cost.

Orders move every quarter, but a mill is a twenty-year commitment. Of almost 6.1 million short-staple spindles shipped in 2025, 95% went to Asia, Varun Vaid of Wazir Advisors told the conference, hosted by ITMF, IAF and ABIT in Fortaleza, Brazil, on 14 and 15 October 2026. Competitiveness, he argued, is a stack, not one parameter. Brazilian and Chinese wages are both about 800 dollars a month, but a Brazilian mill borrows at almost 24% against about 3% in China.

Trade: the rules of entry

Speakers split on how long tariffs will last. Paulo Portas, Portugal's former deputy prime minister, forecast two less protectionist years in the United States. Stephen Lamar of the American Apparel & Footwear Association expected no change of government to remove the tariffs, and said entry to the US will increasingly depend on proving how a product was made.

Dirk Vantyghem of EURATEX described a Europe managing its borders more strictly: each low-value parcel now pays an import duty of 3 euros and, from 1 November, a handling fee of 2 euros. Sun Ruizhe of the China National Textile and Apparel Council warned that some EU requirements use compliance as a pretext, and said China's share of US textile and apparel imports fell from 36.6% in Trump's first term to 16.9% in 2025. Fernando Pimentel of ABIT said e-commerce often stays outside these rules, with millions of small parcels reaching Brazil beyond the reach of anti-dumping cases. Juan Parés of ITMF named the EU–Mercosur agreement one of the industry's most significant opportunities.

Margins, fibres and data

Brands that once earned 9 to 12% EBIT now make 3 to 5%, said Bill McRaith of Future-Proof Fashion, as money leaks through markdowns and stock. In models built with Wharton, sourcing about 10% onshore and 20% nearshore raised profit by 151%. He advised manufacturers not to wait for brands but to bring them a solution together.

Andreas Engelhardt of The Fiber Year expected natural fibres to fall below 20% of world supply in roughly ten years, and recycling to need decades and government support to reach the mass market. Less than 1% of global fibre comes from textile waste, said Carlos Fernandes of ABRAFAS. The ITMF Awards, which went to ten entries in three categories, showed some planning to move faster: Yuantian Biotechnology plans a 100,000-tonne enzymatic line next year, and Epoch Biodesign aims at over 50,000 tonnes of capacity by 2030.

AI was the other thread. What sets a company apart, said Fabio Davidovici of Aramis, is its own data and context. Presenting the ITMF–ITA white paper on AI, Thomas Gries of ITA Aachen said few companies have an integrated flow of data even internally. Monica Magalhães of Moovers gave the closing keynote, calling AI a technological cycle of at least ten years.

Brazil's case and its gap

Laurent Aucouturier of Gherzi, presenting a study for ABIT, ABRAPA and SENAI CETIQT, argued that Brazil is a complement to Asia, not a substitute, and said Decathlon, H&M and the Inditex Group are already testing sourcing there. Yet Brazil, the world's largest cotton exporter, spins

the same 700,000 tonnes as in 2002, said Haroldo Cunha of ABRAPA, and Marcelo Villin Prado of IEMI said 80% of its cotton leaves at 10 to 12 reais a kilo and returns from Asia as products at 120. Textile investment stands at 3.7% of production value, against 4.8% for Brazilian industry, while Rodolfo Margato of XP Inc. forecast the Selic at 11.5% in 2027, against 15% in the first half of 2026.

Across the sessions, speakers looked to partnership for an answer, from Gries's partners at each interface of the chain to McRaith's manufacturers acting together, and several warned that technology depends on people.

"Not the cheapest place, but the readiest."

— Varun Vaid, Wazir Advisors

Questions for the future

Will Brazil spin its own blends of cotton and chemical fibres? Will long-term capital reach yarn and fabric? Will brands change how they reward buyers and planners? Who will pay to collect and recycle what the platforms sell? If AI gives small firms the efficiency of large ones, where will advantage lie?

Read the full report here

Annual Conference 2026 – selected pictures



















Textile & Apparel
Dialogues
MERCOSUR



BRAZIL 2026
INTERNATIONAL
CONFERENCE

BRAZIL 2026
INTERNATIONAL
CONFERENCE


BRAZIL 2026
INTERNATIONAL
CONFERENCE
FUTURE IN MOTION: TRANSFORMATION, INNOVATION, AND NEW REALITIES
HOSTED BY
ITMF

BRAZIL 2026
INTERNATIONAL


BRAZIL 2026
INTERNATIONAL
CONFERENCE

BRAZIL 2026
INTERNATIONAL
CONFERENCE



2026
ATIONAL
ERENCE

AUDITÓRIO


AUDITÓRIO
AUDITORIUM

FUTURE IN MOTION: TRANSFORMATION, INNOVATION, AND NEW REALITIES
HOSTED BY
ITMF

BRAZIL 2026
INTERNATIONAL
CONFERENCE


BRAZIL 2026
INTERNATIONAL

BRAZIL 2026
INTERNATIONAL
CONFERENCE
ITMF