



ITMF's indicator for business situation in the textile industry has been dragging in negative territory for quite some time. While ITMF's latest Global Textile Industry Survey (GTIS) has not shown signs of further deterioration, it has not shown real progress either. Globally, participants to the survey do not expect marked improvement in 2024.

The detailed analysis of the latest GTIS is presented in Articles 1-8 of this edition of the ITMF newsletter alongside interesting ITMF and partner news. Don't miss the extended analysis on fibre quality through the cotton production pipeline by Mr. René van Sluijs to understand the latest trend in cotton testing.



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Zieschank  
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## EXECUTIVE SUMMARIES

### Business situation is dragging in negative territory



The latest GTIS shows an economic situation marginally improving due to a higher number of companies deeming the business as "satisfactory" rather than a true improvement. The unusually long phase of weakness forces companies to producing at a loss or lower the capacity utilization rate.

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### Business expectations remain positive, with no changes expected in 2024



The business expectation has been stagnating in positive territory for a year, illustrating respondents' optimism rather than knowledge of an actual improvement. Overall, the entire supply chain lacks orders and suffers from high costs that pressure down or even wipe out profit margins.

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### Order intake improved slightly but is no boost



The balance between “good” and “poor” order intake improved slightly. Expectations about order intake in six months also trended upwards, which can be seen as a good sign. A clear upward trend has been recorded in South-East Asia and South Asia.

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### Order backlog showed a minor uptick



Since the summer of 2023, order backlog is fluctuating around 2 months on average across all regions and segments. It rose slightly from 1.9 months in March 2024 to 2.1 months in May, but it is premature to interpret this increase as a positive trend.

[> read more](#)

### Capacity utilization rates witnessed a modest rise



The average capacity utilisation rate increased from 70% in March to 71% in May 2024. The indicator was on a downward trajectory since it peaked at the end of 2021 at 80%. Survey participants anticipate a better capacity utilisation in six month-time.

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### Major concern is weak demand but trending downwards



Weak demand has remained the main concern for the textile value chain since September 2022, although the indicator has lost relative importance in the last 6 months. Other are high raw material prices, geopolitics, and high energy prices. The lack of workers / talents has reached the highest recorded level.

[4 > read more](#)

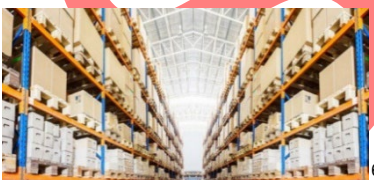
### Order cancellation remains low



Globally, 58% of respondents did not experience any order cancellations at all. This is slightly down from 59% in March, an all-time high. Africa and Europe recorded relatively low order cancellations while the phenomenon is felt more strongly in the Americas. Among segments, the highest levels of order cancellation are reported by spinners and finishers / dyers / printers.

[5 > read more](#)

### Inventory level still deemed average



In May 2024, 59% of companies reported average inventory levels. Among the regions, North America registered the highest levels, while among the segments, spinners had the highest. Inventories at brands and retailers remain high but are slowly decreasing.

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## ITMF NEWS

### ITMF's newest members

ITMF has welcome three new corporate members 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.



Testex is a globally active and independent Swiss testing and certification organization, focusing on testing and certification of textiles and leather products. It was founded in 1846 as the "Silk Drying Institute Zurich". Today the company employs more than 300 people at around 40 locations worldwide.

[> read more](#)



Established in 1975, Busana Apparel Group is one of the largest garment manufacturers and exporters with 30 manufacturing facilities located in Indonesia and Ethiopia. The company portrays itself as a one-stop shop for woven apparel production, specializing in men's and women's casual wear, formal wear, active sportswear and technical garments with a total capacity to produce and export of 50 million pieces per annum.

[> read more](#)



Somteks Pazarlama Ticaret A.Ş. is one of oldest representation companies in Türkiye. As such, the company founded in 1979 by Orhan Torfilli serves as a vital link in the textile supply chain by providing machinery, equipment, and parts essential for textile manufacturing processes.

[> read more](#)

## ITMF & IAF Conference 2024 in Uzbekistan: a high-level program takes shape



The ITMF & IAF Conferences 2024 will be held on **September 8th-10th** in Samarkand, Uzbekistan. During the event, industry experts will share the cutting-edge developments defining the textile-apparel industrial complex. The collaboration between the two organisations is a great asset and will also be a central theme of a special session featuring **Inditex**, **Epic Group** and **International Finance Corporation** (IFC, part of the World Bank Group). This session will focus on decarbonization and will show how a collaborative approach across the supply chain can achieve the real progress.

As regulation in the apparel and textile industries is rapidly increasing, representatives of the **American Apparel & Footwear Association** (AAFA), **the China National Textile & Apparel Council** (CNTAC), **the European Textile & Apparel Industry Federation** (EURATEX), and the **Japan Textile Federation** (JTF) will also explain the shape that regulation will take in their countries and regions in the coming years.

These topics and others including fibers, digitalization, and AI, will be discussed in the ancient city of Samarkand, Uzbekistan, a country with a rapidly growing textile and apparel industry, attracting interests from across the world. This convention will be a unique industrial gathering of leaders from across the entire textile and apparel supply chain, from all parts of the world.

Register to the [ITMF & IAF Conference 2024 in Samarkand](#)

## PARTNER NEWS

# 15th IGDS World Department Store Summit to be held in Berlin on 12-13 September



IGDS  
World Department  
Store Summit  
12-13 September 2024 | Berlin  
[www.wdss2024.org](http://www.wdss2024.org)

The 15th IGDS World Department Store Summit (WDSS 2024) will be held on 12-13 September 2024 in Berlin, Germany. The event will address the development, outlook and opportunities in the retail and department store industries, featuring a line-up of CEO speakers on the topic **Embracing Experiential Retailing**.

[> read more](#)

# ITMA ASIA & CITME 2024 be held on October 14-18<sup>th</sup> in Shanghai



ITMA ASIA + CITME 2024 is scheduled to be held from October 14th to 18th, 2024, at the National Exhibition and Convention Centre in Shanghai, China. The event will bring nearly 1,600 textile machinery manufacturers from around the world together, covering an exhibition area of over 160,000 square meters. The exhibits encompass a wide range of machinery equipment and design software across the entire textile and garment industry chain, including spinning, weaving, knitting, printing, dyeing, non-woven, embroidery, sewing, braiding, anti-staining, testing, packaging, and textile chemicals.

[> read more about ITMA Asia](#) [> read more about CIME](#)

# R-Inove traces authenticity of PPE, wool, and polyamide



R-Inove is a technology start-up specialised in traceability of the entire textile value chain and winner of the ITMF Start-Up Award 2022. The company uses a binary code printed on the textile thread before it becomes a mesh or fabric to trace all production steps from field to store and beyond. Its technology can now be used to trace authenticity of personal protective equipment (PPE) as well as wool and polyamide textile products.

[> read more](#)



## EXTENDED ANALYSIS

### Understanding and preserving fibre quality through the cotton production pipeline – part 2



As was highlighted the first part of the article published in the [ITMF newsletter 96](#) in April 2024, fibre quality is of paramount importance and there is an international consensus that the measurement of cotton fibre properties by the traditional method of subjective classing should be replaced by objective measurement by high volume testing instruments.

There are, however, some technical and operating issues to overcome to ensure that classing facilities and all other testing facilities are standardised, so that they provide dependable, consistent, and repeatable results.

One way to do this is by participating in Interlaboratory Round Trials and this led to the creation, by the International Cotton Advisory Committee (ICAC), of a Task Force on the Commercial Standardisation of the Instrument Testing of Cotton (CSITC) in 2003.

Read more about the how round trials work as well as the benefits of participation for classing and testing facilities, growers/producers, traders, and spinners in this article by **Mr. van der Sluijs**, Principal Consultant Textile Technical Services and Chair of CSITC.

[> read more](#)

## UPCOMING EVENTS

2024

### [Texworld Apparel Sourcing](#)

#### [Paris](#)

July 1-3, 2024

Paris-Porte de Versailles, France

### [Premier Vision](#)

July 2-4, 2024

Paris, France

### [3rd International Conference on Advanced Textile Science and Technology](#)

July 5-8, 2024

Shanghai, China

### [Istanbul Fashion Connection 2024](#)

August 7-9, 2024

Istanbul, Türkiye

### [ITMF Annual Conference & IAF Fashion Convention 2024](#)

September 8-10, 2024

Samarkand, Uzbekistan

### [Texhibition Istanbul 2024](#)

September 11-13, 2024

Istanbul, Türkiye

### [CAITME 2024](#)

September 11-14, 2024

Tashkent, Uzbekistan

### [Dornbirn GFC 2024](#)

September 11-13, 2024

Dornbirn, Austria

### [IGDS World Department Store Summit 2024](#)

September 12-13, 2024

Berlin, Germany

### [Market Week](#)

September 16-19, 2024

New-York, USA

### [Cinte Techtexil](#)

September 19-21, 2024

Shanghai, China

### [ICAC's 82nd Plenary Meeting 2024](#)

Sept. 30 - Oct. 3, 2024

Tashkent, Uzbekistan

### [Amsterdam Textile Show](#)

October 2-4, 2024

Amsterdam, The Netherlands

### [ITMA Asia & CITME 2024](#)

October 14-18, 2024

Shanghai, China

### [ICA-Trade Event 2024](#)

October 16-17, 2024

Liverpool, UK

### [Uzbek Textile Expo Autumn 2024](#)

October 15-17, 2024

Tashkent, Uzbekistan

### [Sustainability Talks Istanbul 2024](#)

December 3, 2024

Istanbul, Türkiye

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