

Dr. Christian Schindler
Director General
ITMF



Konjunkturelle und strukturelle Entwicklungen der Welttextilindustrie

Jahrestagung
Fachverband Textil-, Bekleidungs-,
Schuh- und Lederindustrie

Bad Blumau, 8. Oktober 2024

Contents

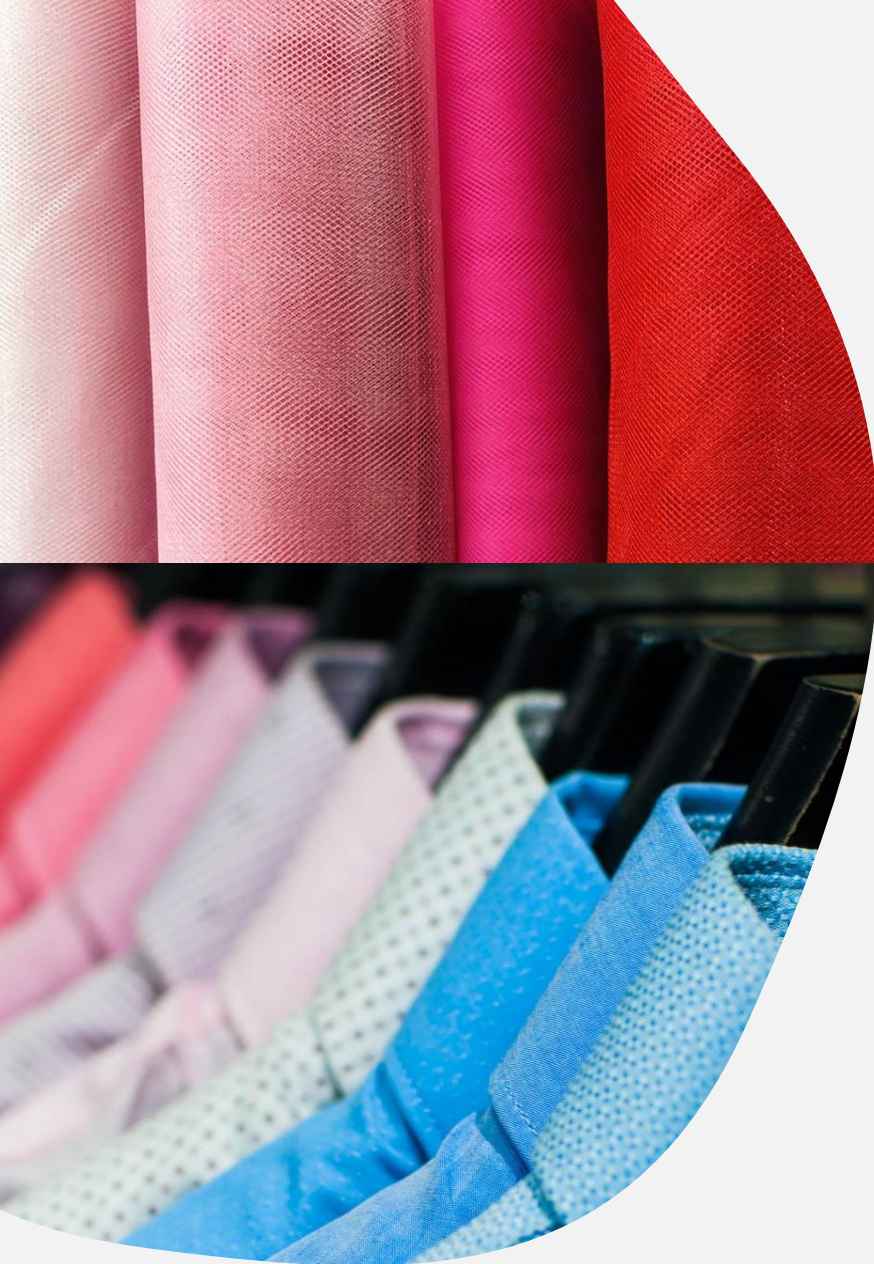


- 1) ITMF's Global Textile Industry Survey – September 2024
Regionen & Segmente
- 2) ITMF's Textile Machinery Shipment Statistics 2023
- 3) Trends Shaping the Global Textile Value Chain

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- 1) ITMF's Global Textile Industry Survey – September 2024
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Global Textile Industry Survey

GTIS28 2024.09

Christian Schindler | Director General
Olivier Zieschank | Director
International Textile Manufacturers Federation (ITMF)

Business situation and expectation

Order intake

Order backlog

Capacity utilisation rate



Contents

World

Region

Segment

Bonus

World

2024.09

Latest results



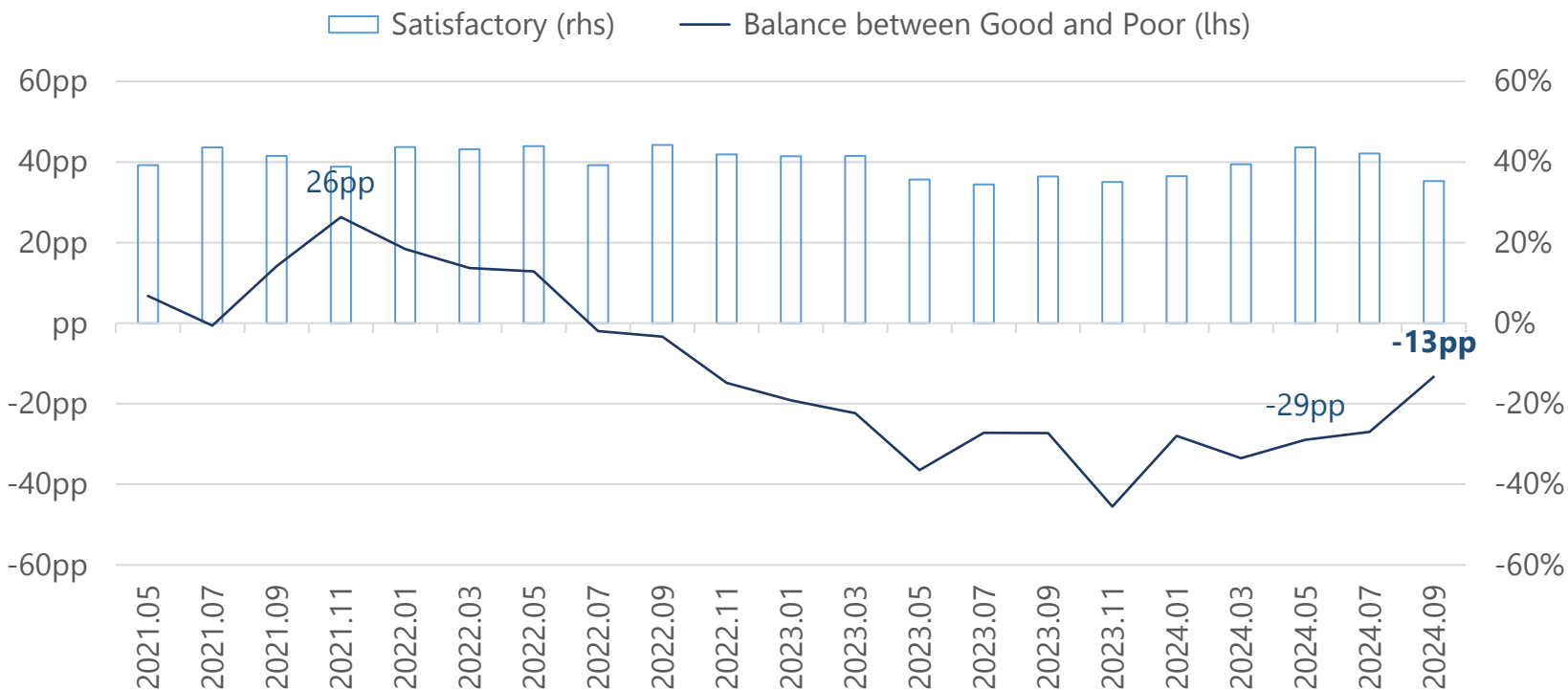
Good
26%



Satisfactory
35%



Poor
39%

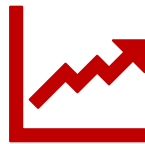


Note: The balance is the difference between the share of respondents describing their business situation as "Good" vs. "Poor", region average

World

2024.09

Latest results



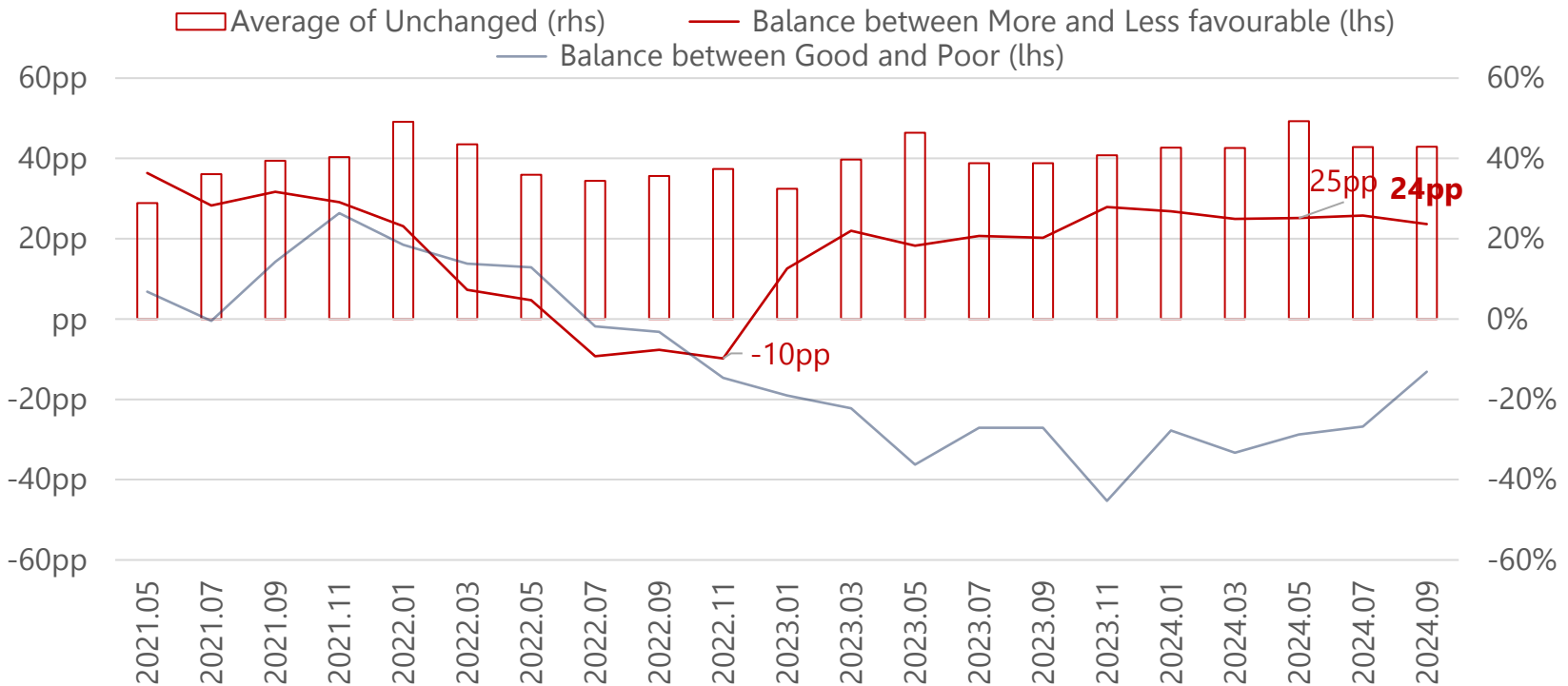
More fav.
40%



Unchanged
43%



Less fav.
17%



Note: The balance is the difference between the share of respondents describing their business situation as "More" vs. "Less" favorable, region average

World

2024.09

Latest results



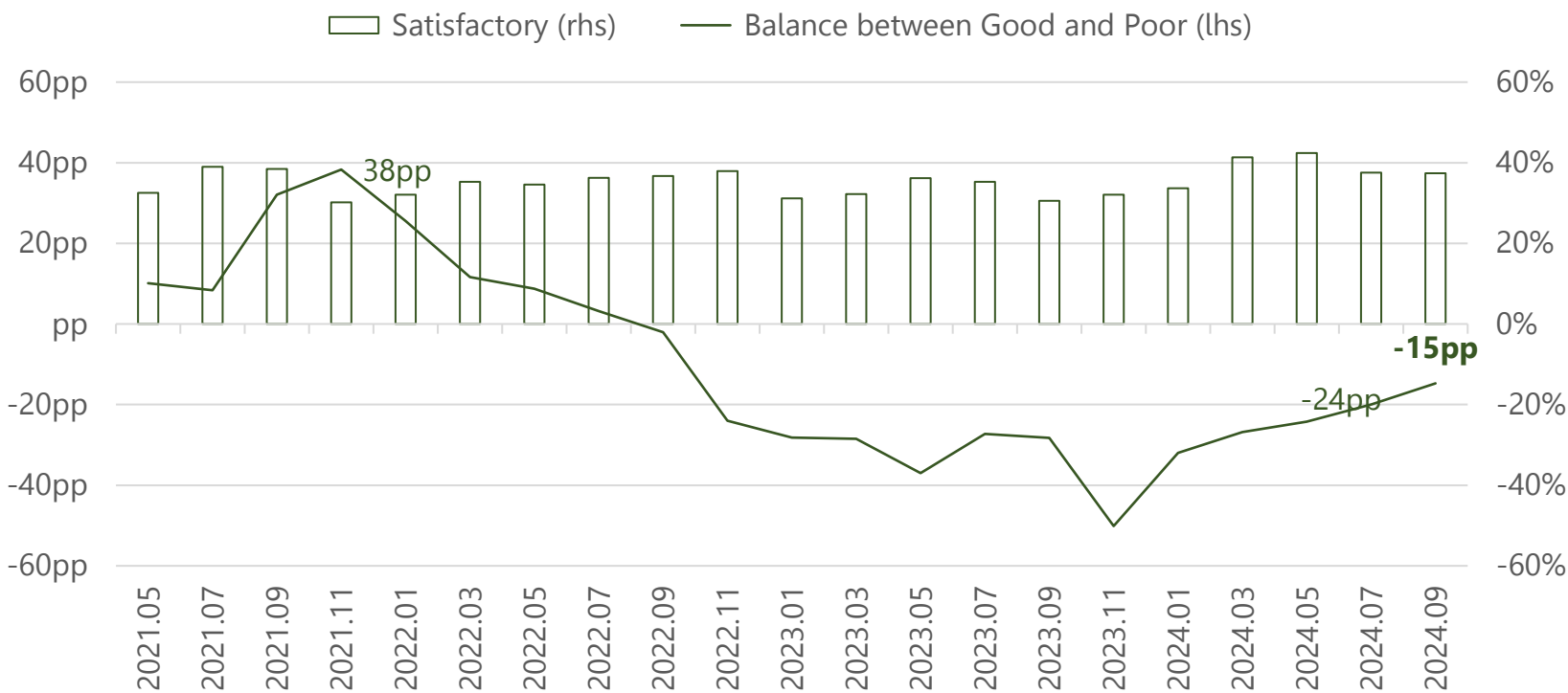
Good
24%



Satisfactory
37%



Poor
39%



Note: The balance is the difference between the share of respondents describing their business situation as "Good" vs. "Poor", region average

World

2024.09

Latest results



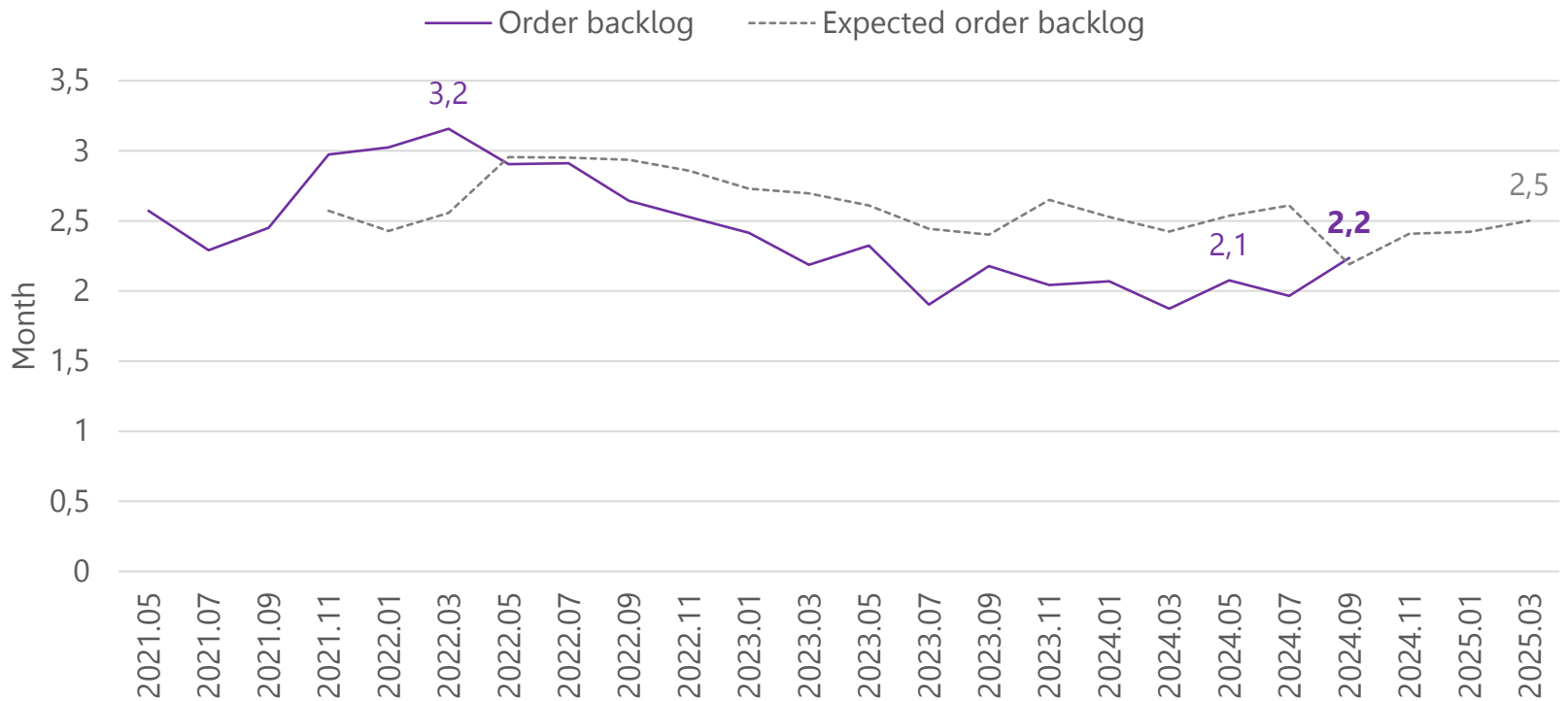
Current

2.2



Expected in 6 month-time

2.5



World

2024.09

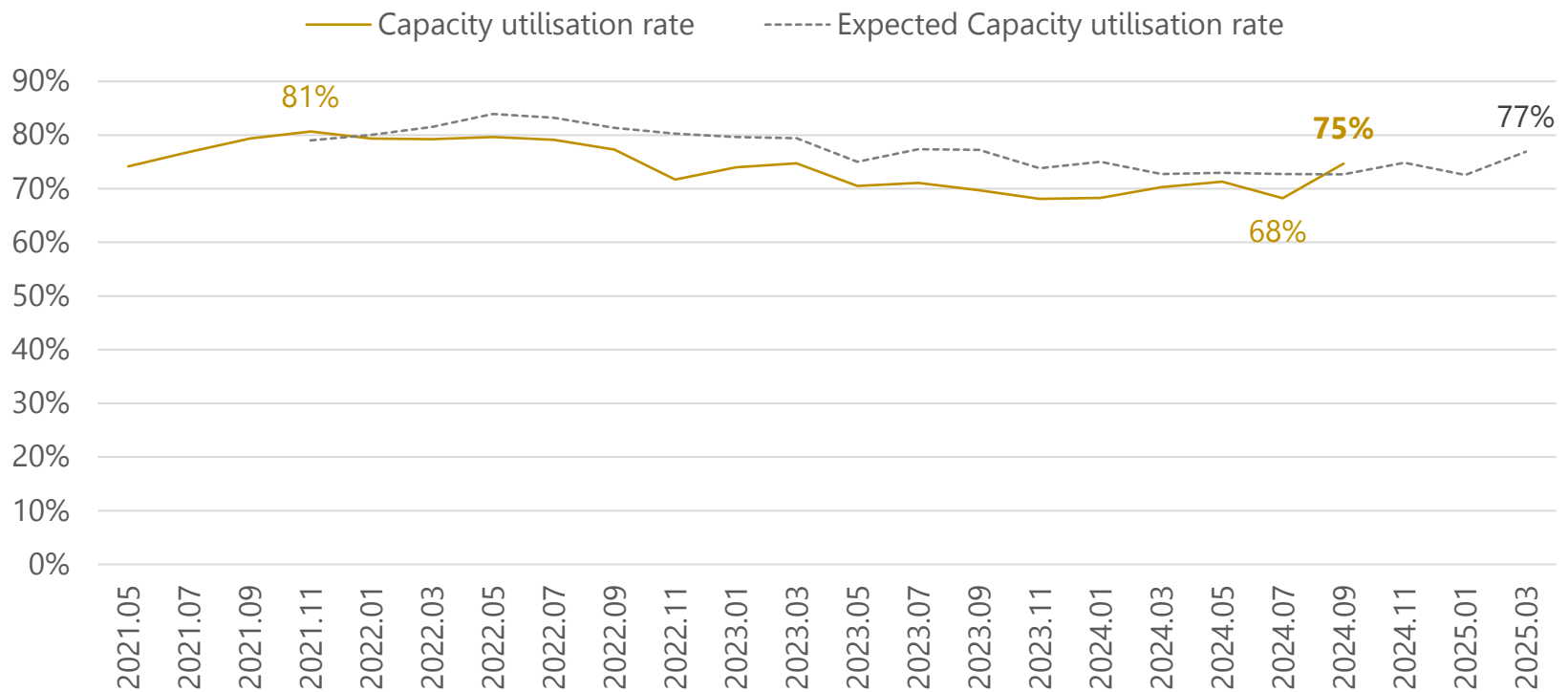
Latest results



Current
75%



Expected in 6 month-time
77%



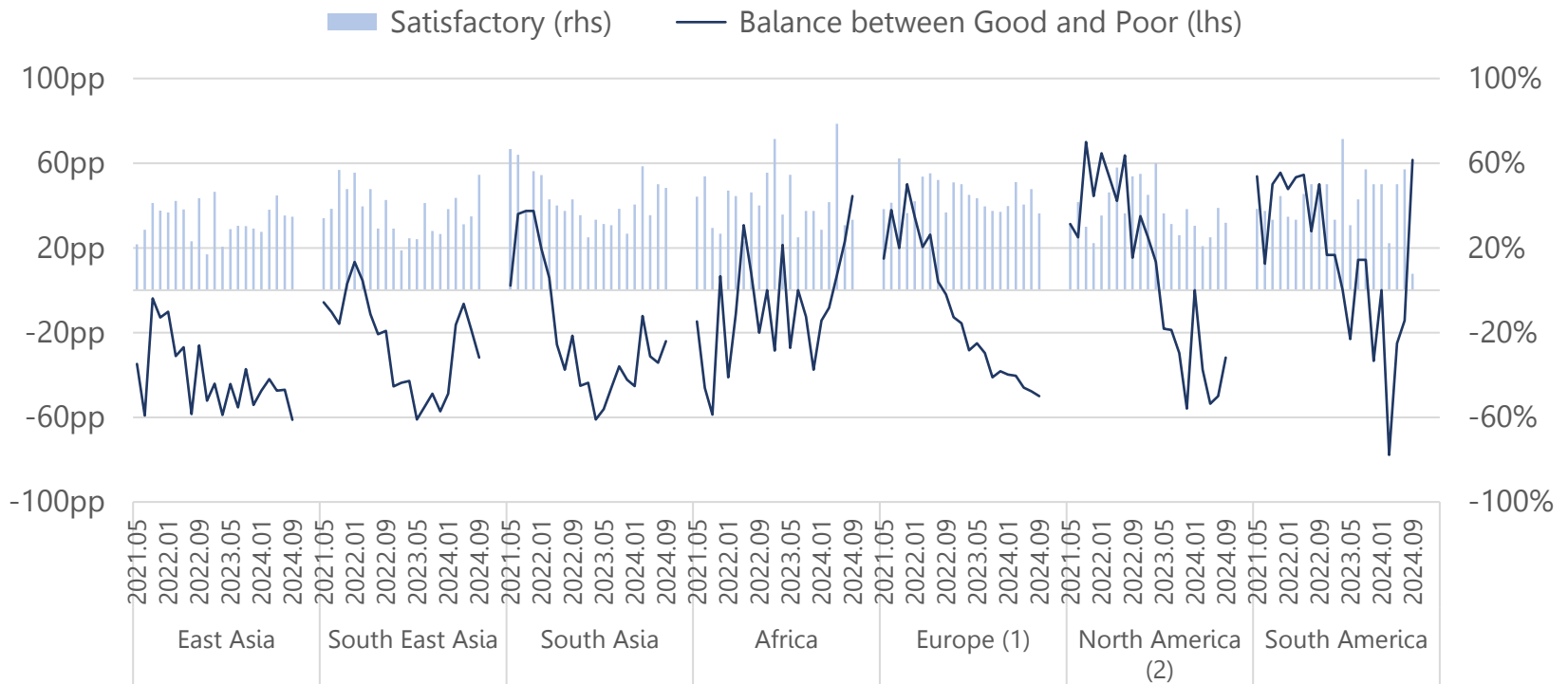
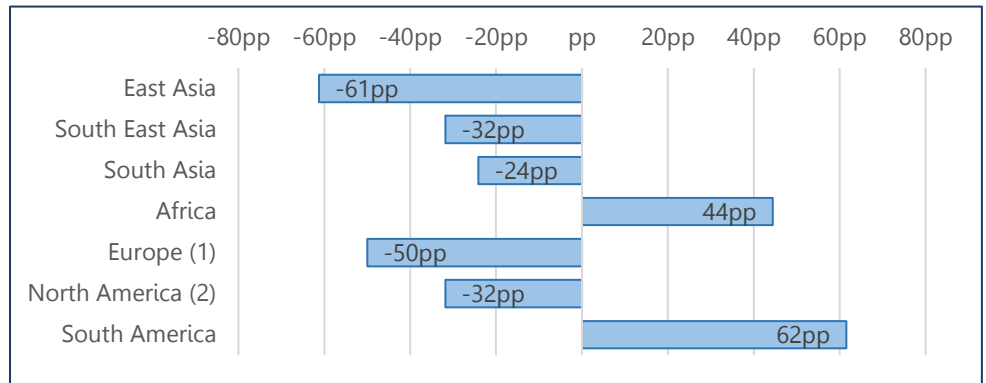


Regions

Regions

2024.09

Latest results

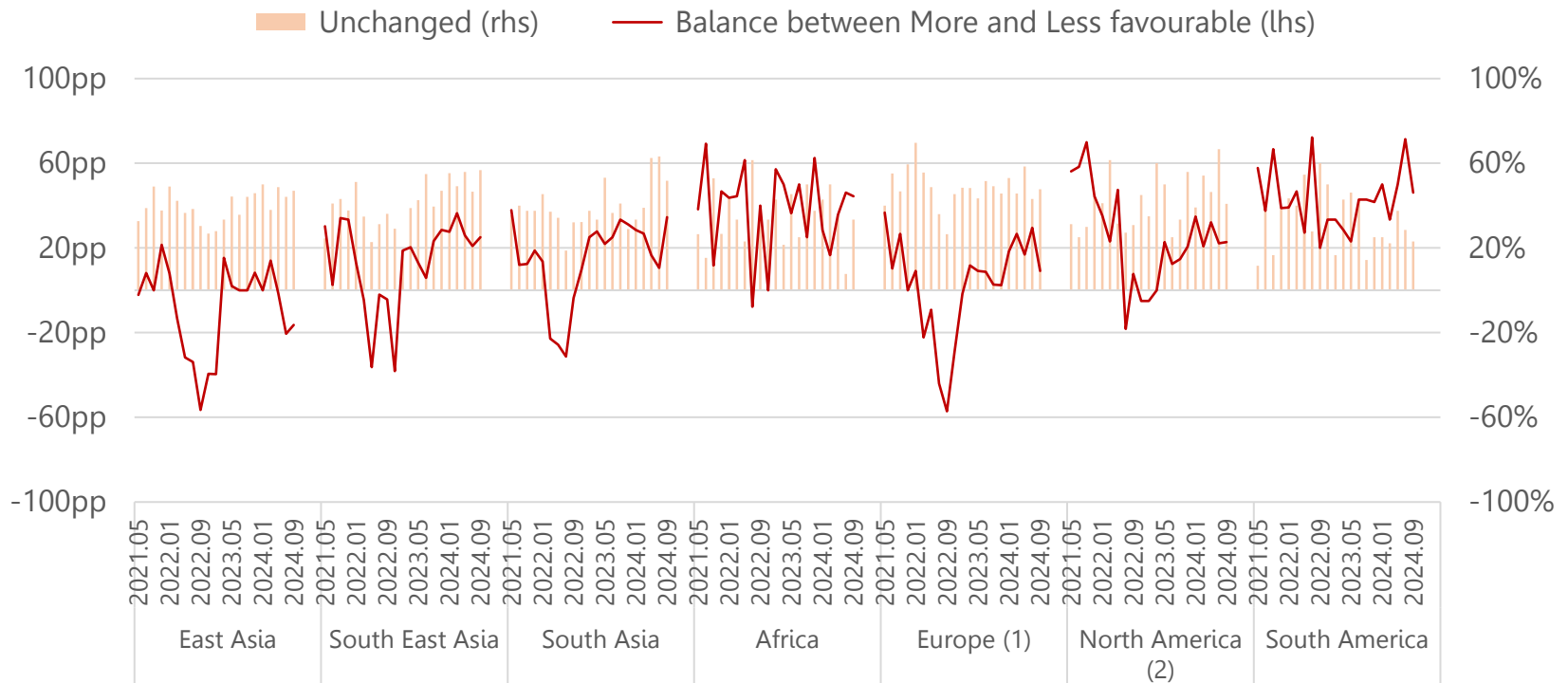
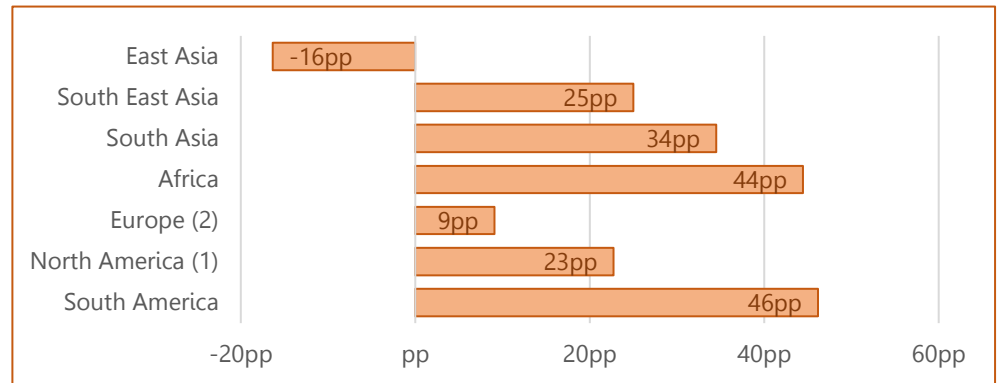


(1) incl. Türkiye and Central Asia | (2) incl. Central America

Regions

2024.09

Latest results

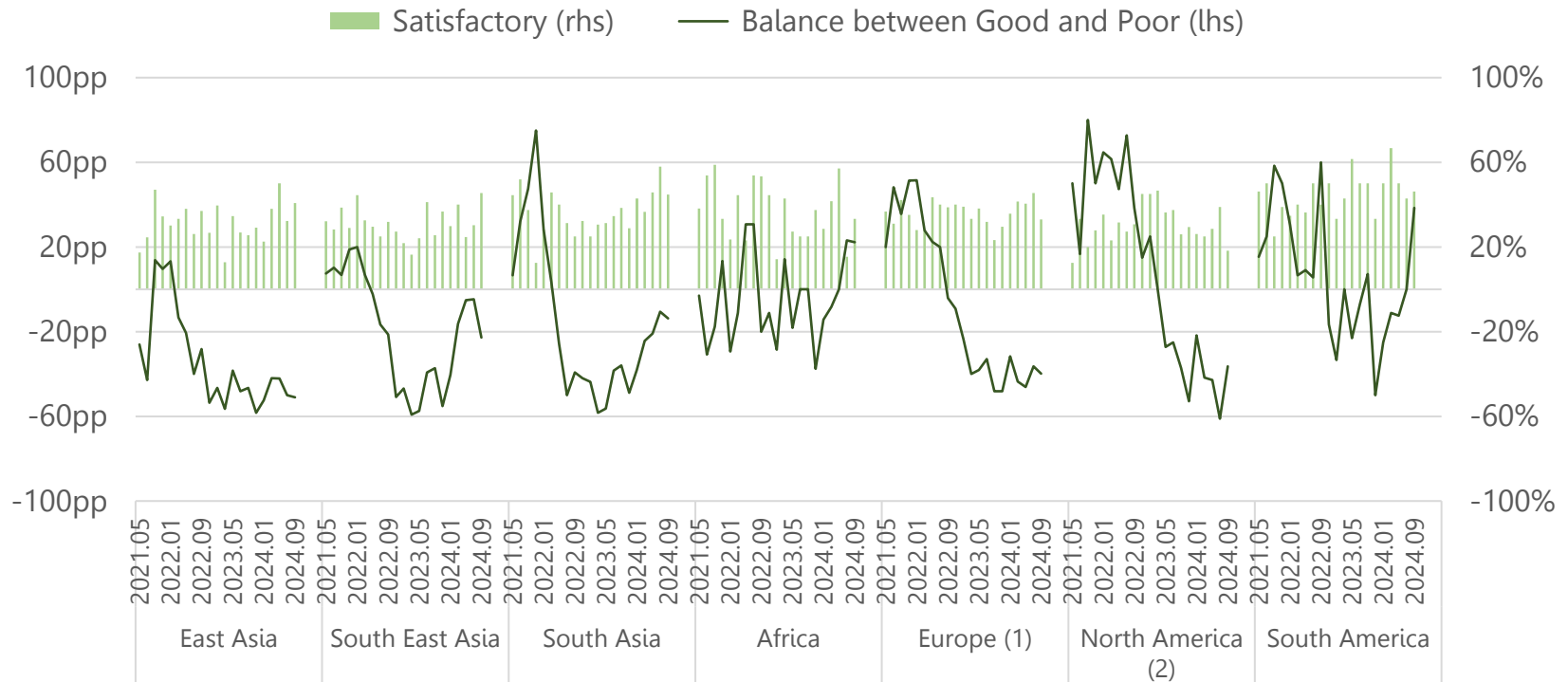
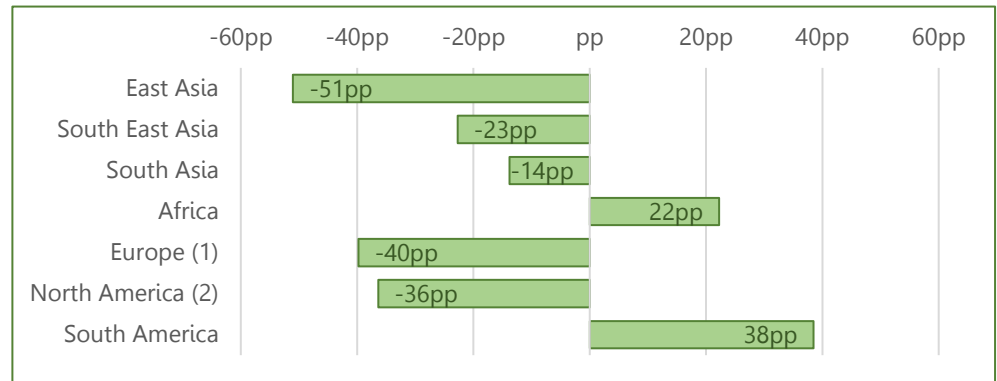


(1) incl. Türkiye and Central Asia | (2) incl. Central America

Regions

2024.09

Latest results

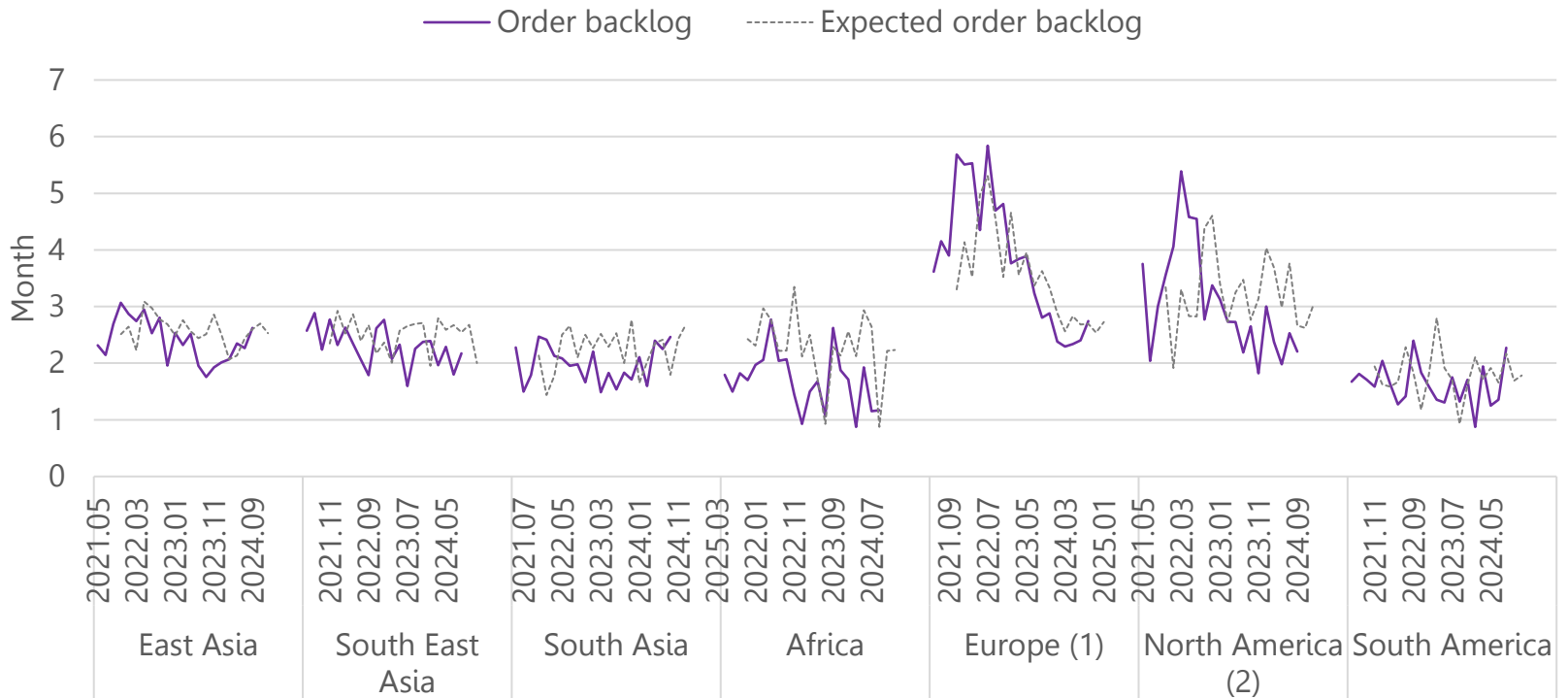
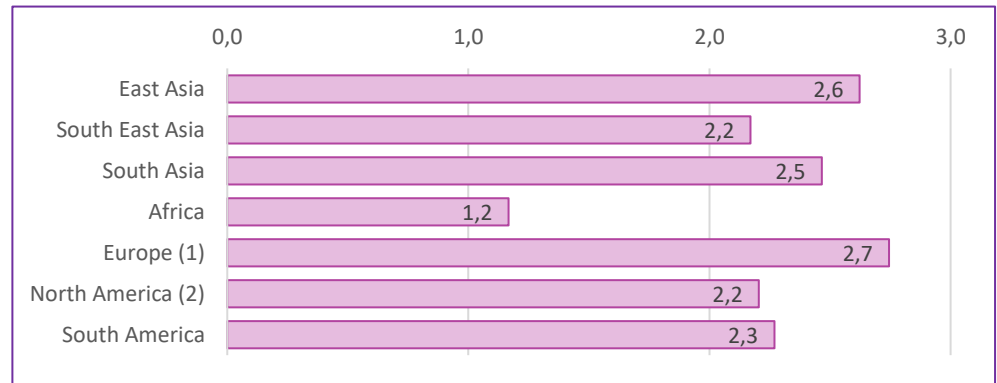


(1) incl. Türkiye and Central Asia | (2) incl. Central America

Regions

2024.09

Latest results

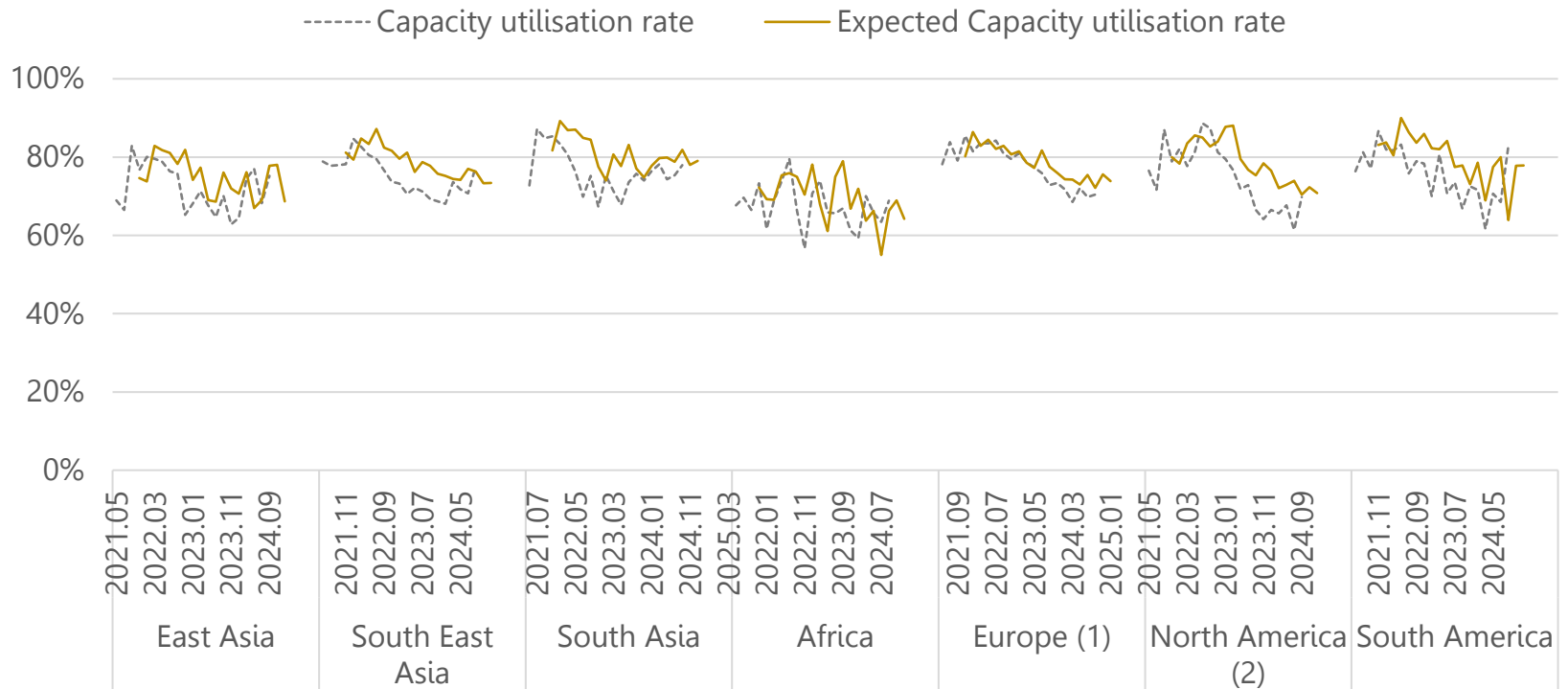
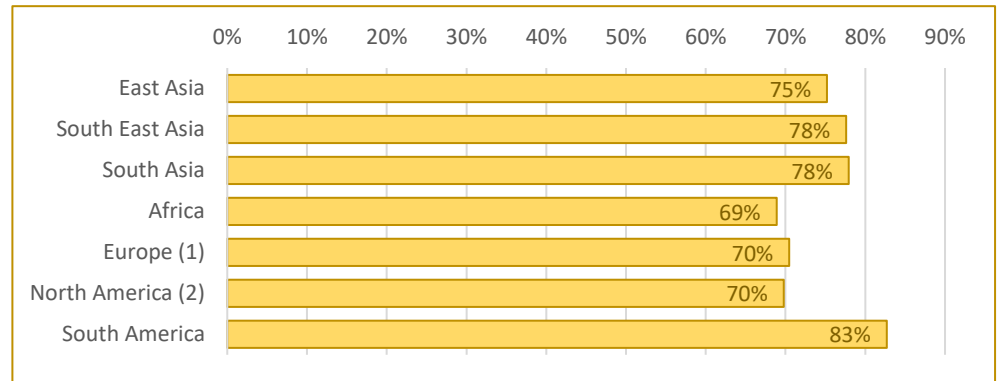


(1) incl. Türkiye and Central Asia | (2) incl. Central America

Regions

2024.09

Latest results



(1) incl. Türkiye and Central Asia | (2) incl. Central America

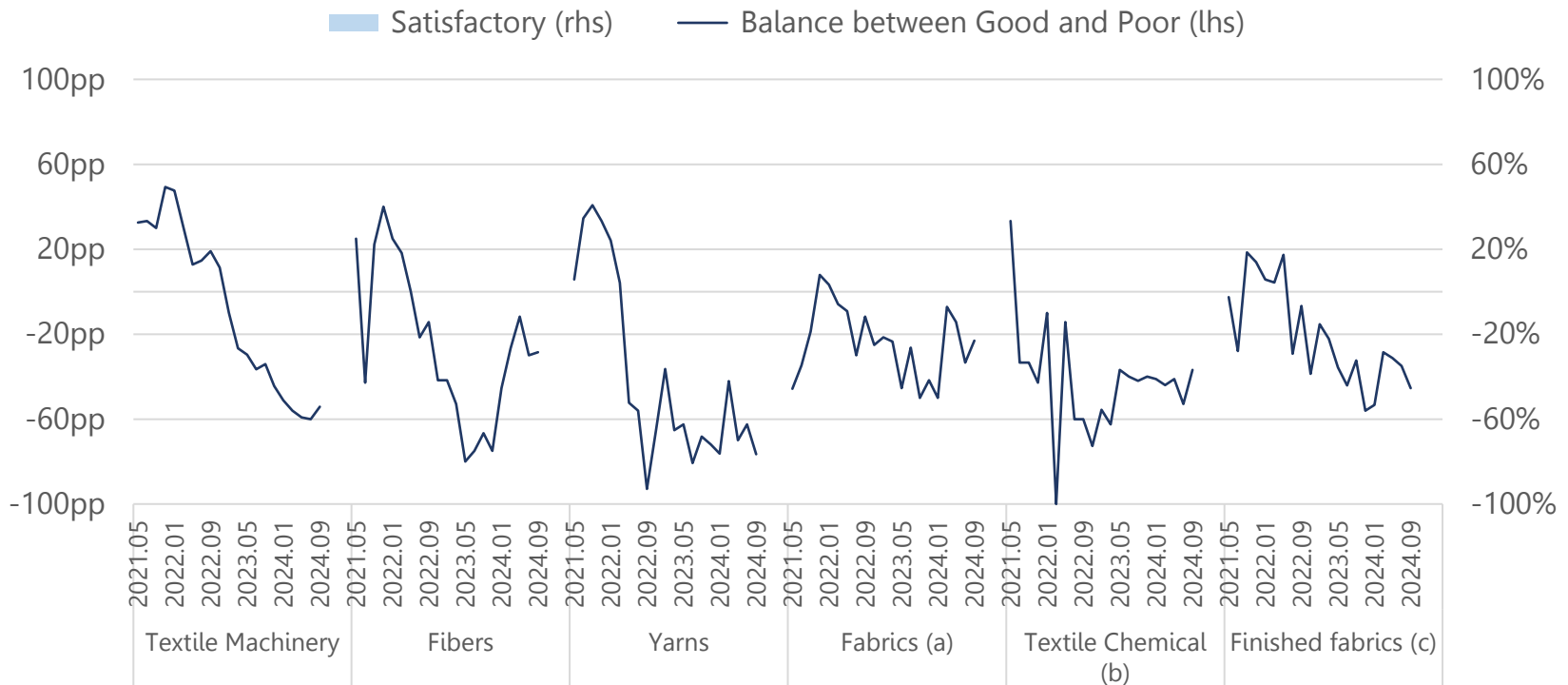
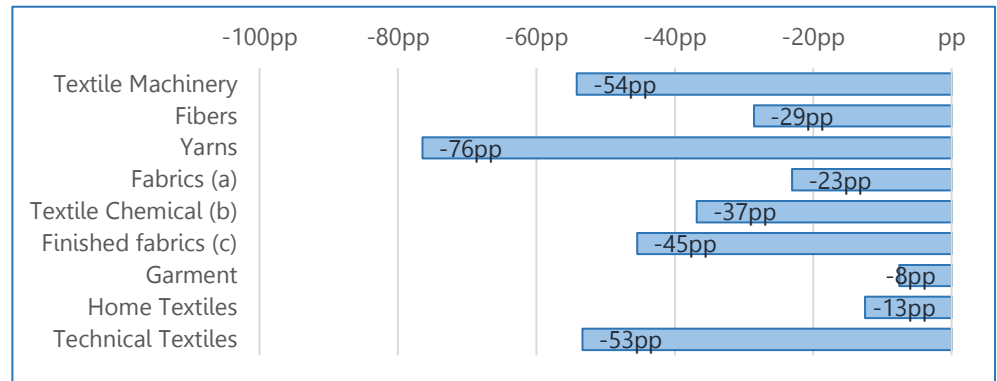


Segments

Segments

2024.09

Latest results

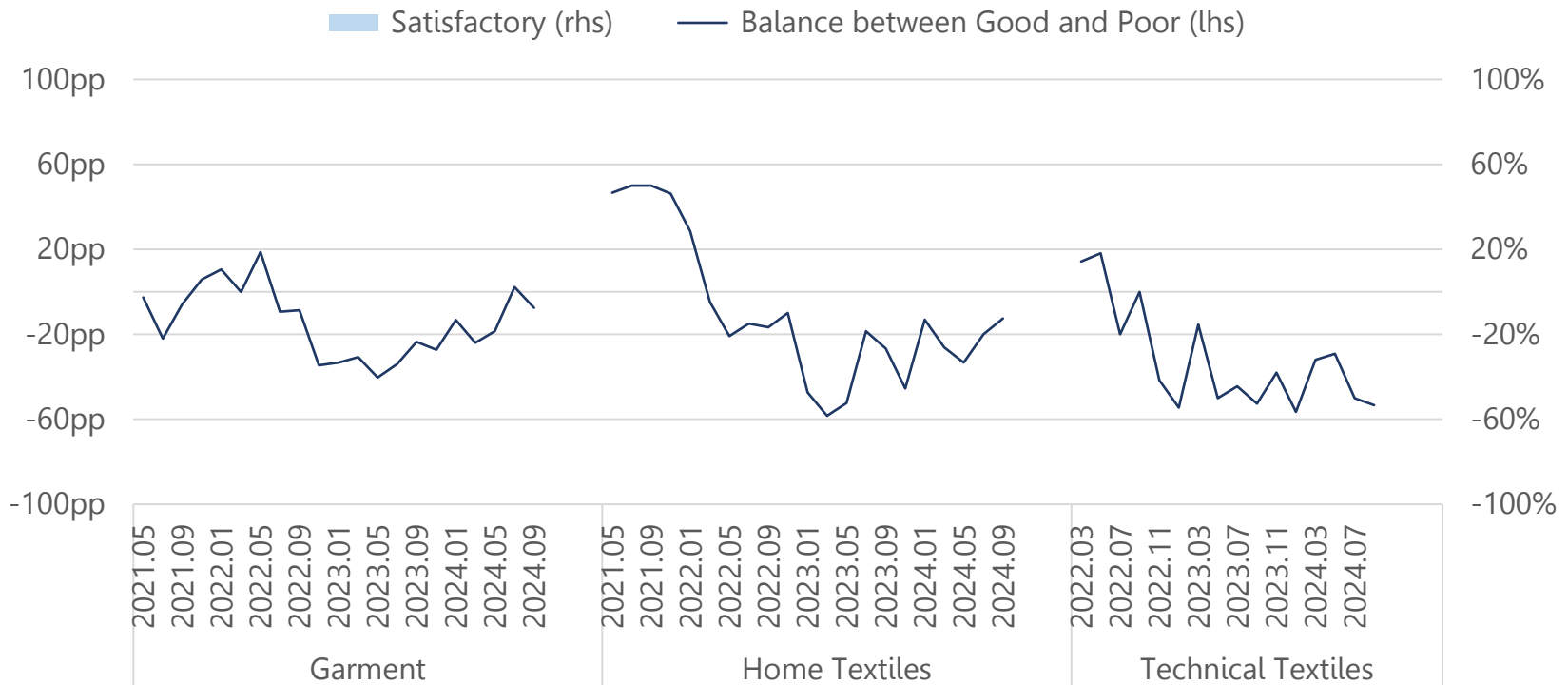
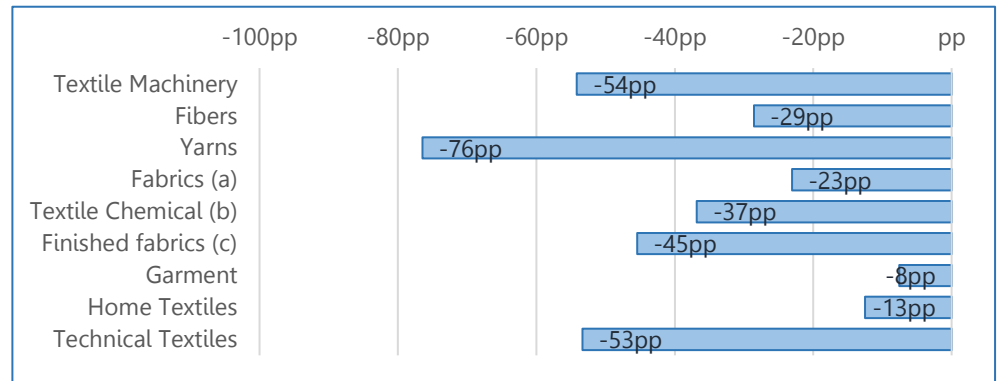


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

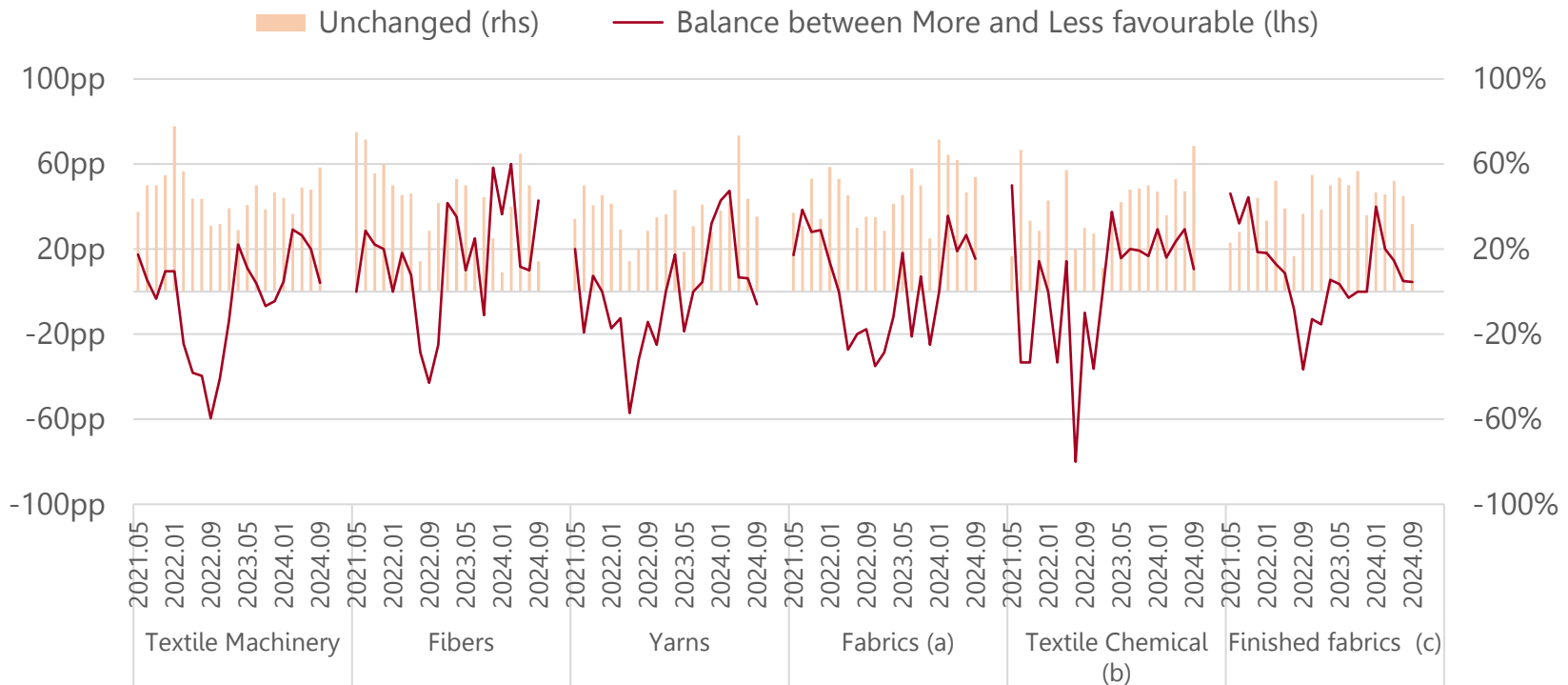
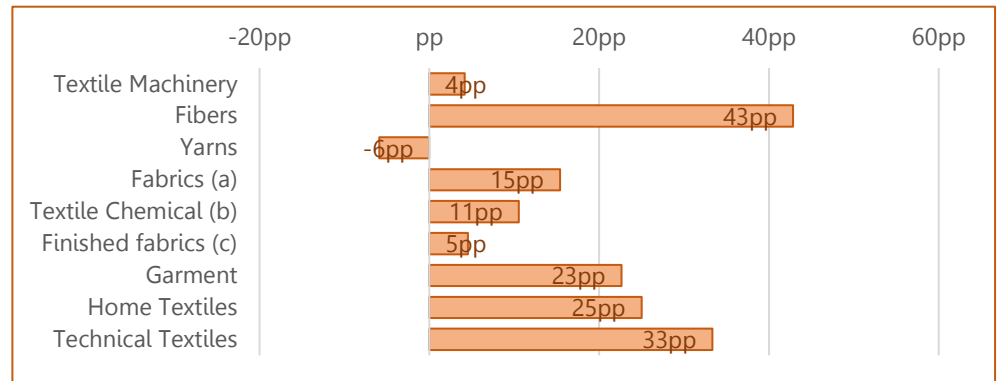


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed faabrics

Segments

2024.09

Latest results

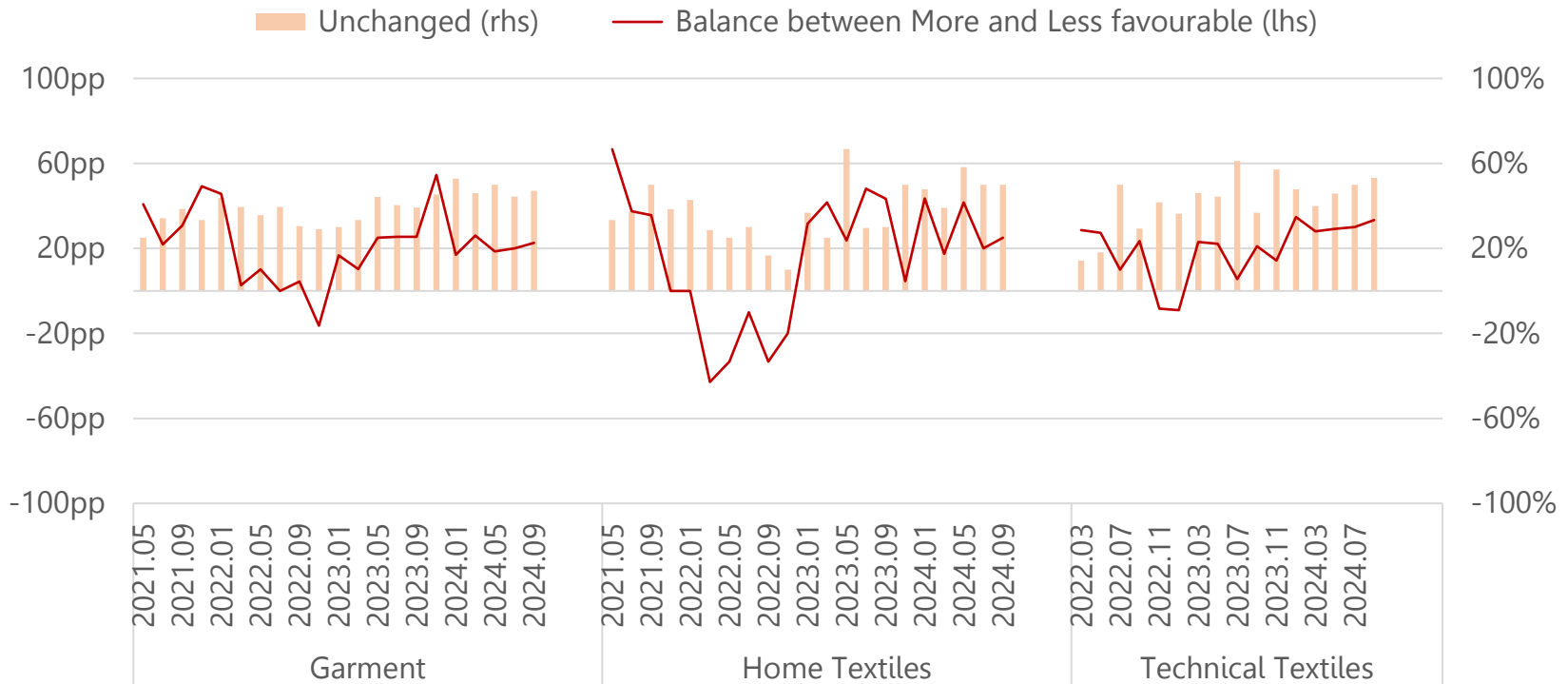
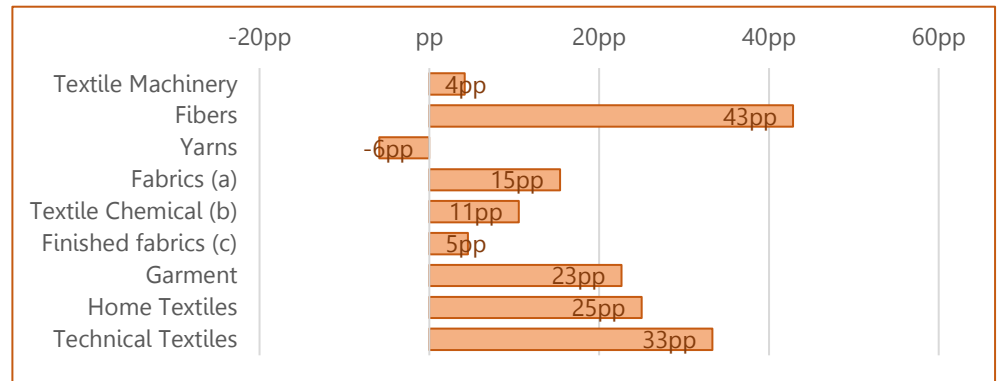


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Segments

2024.09

Latest results

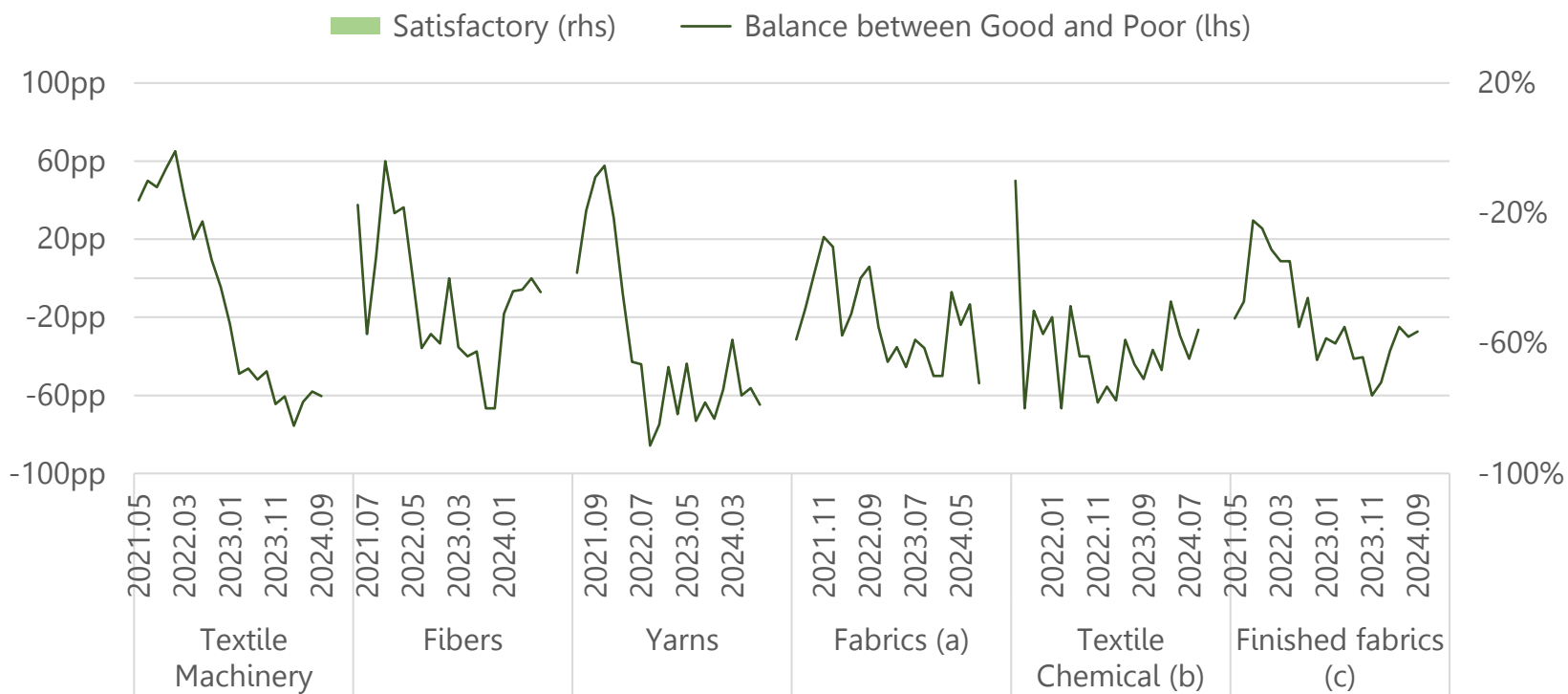
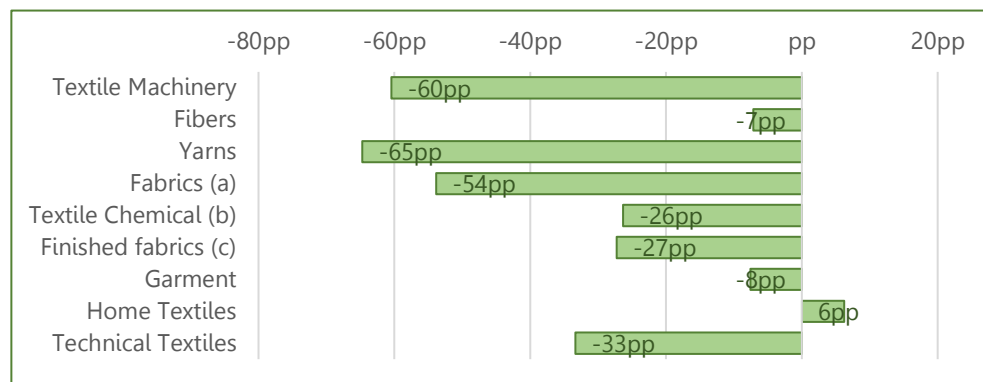


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

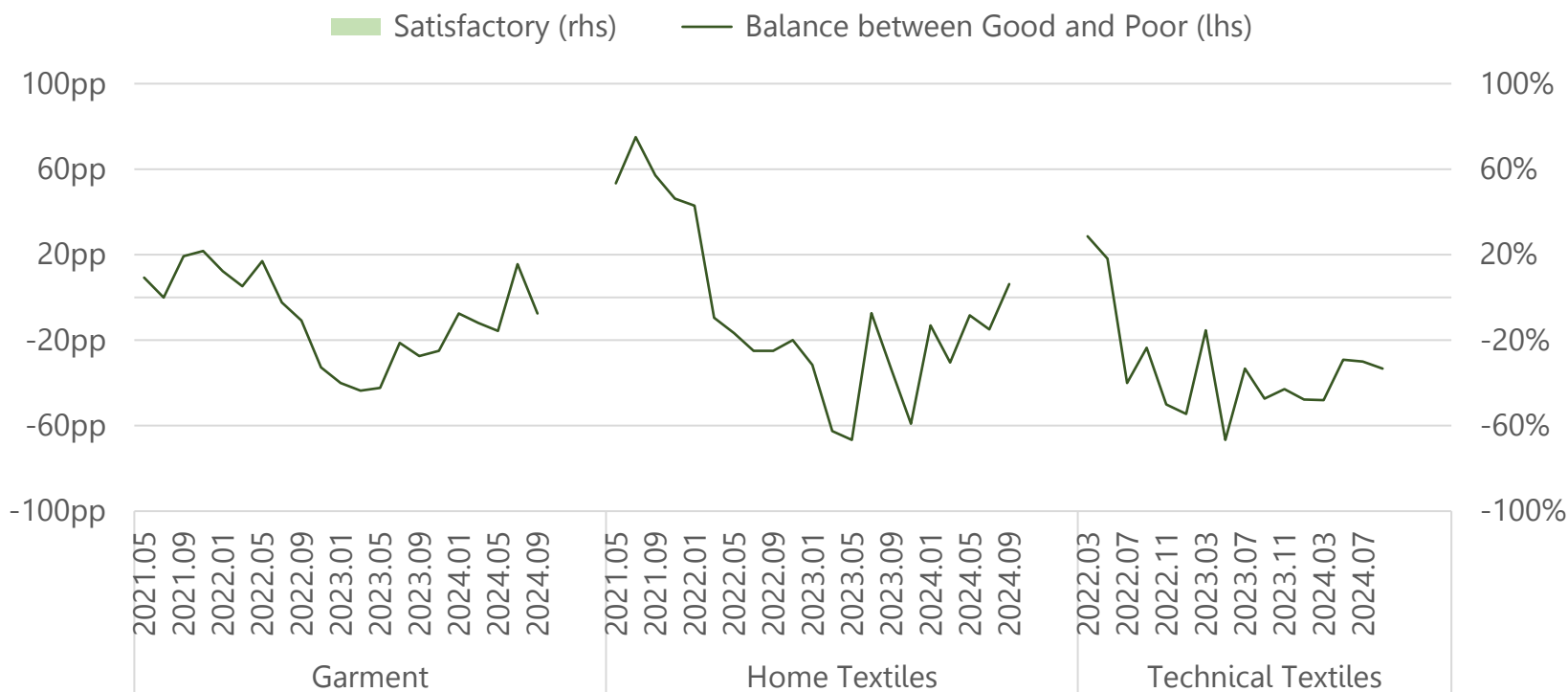
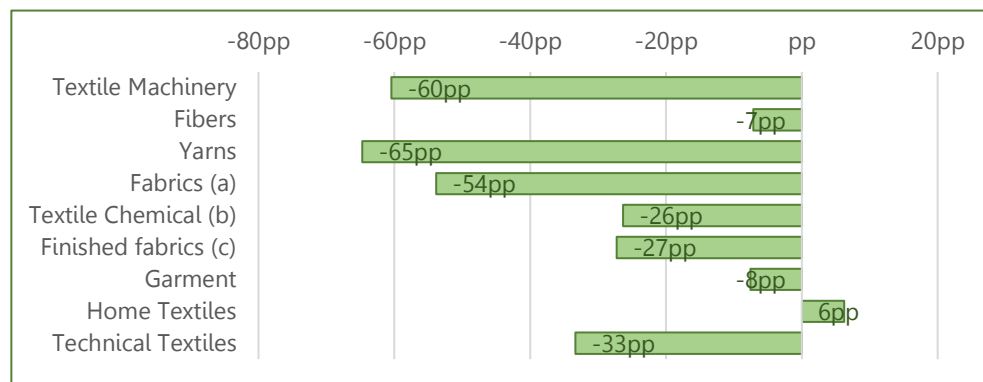


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

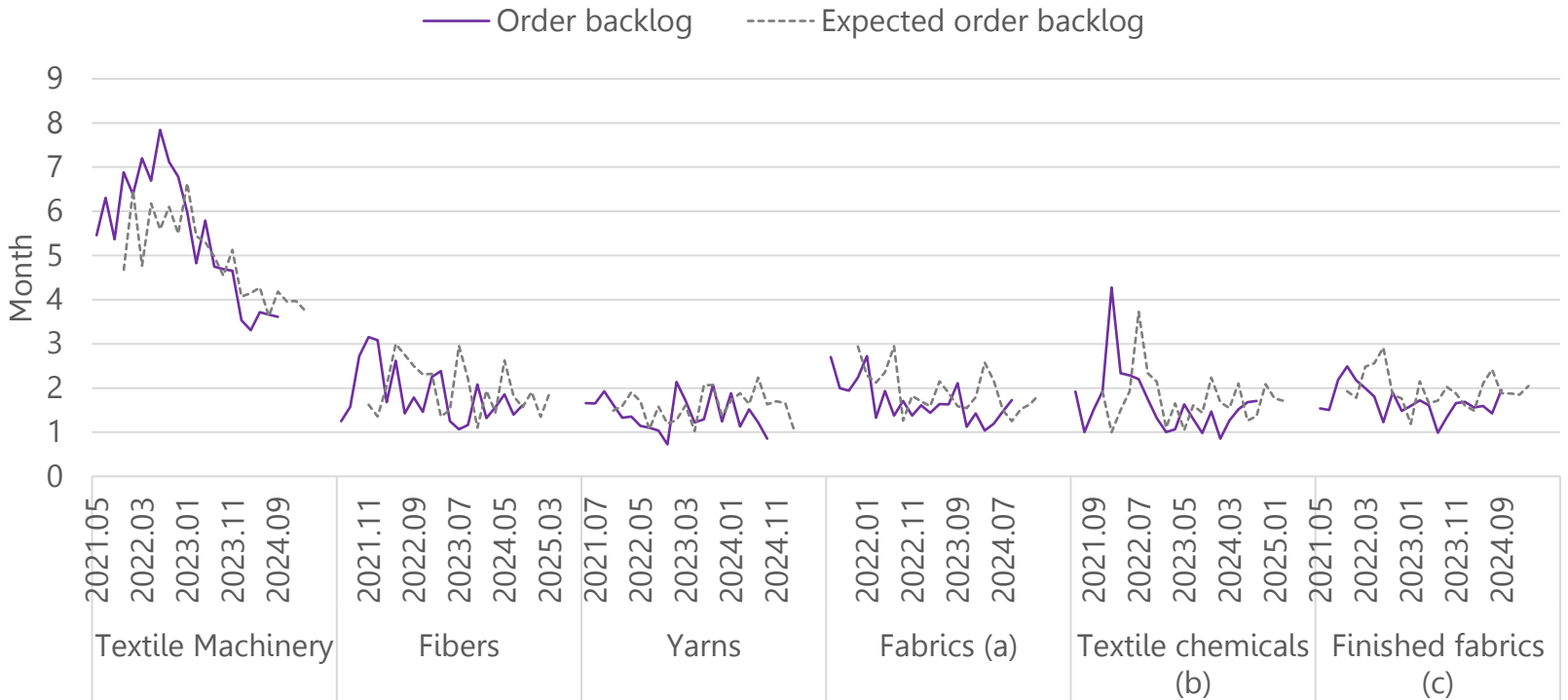
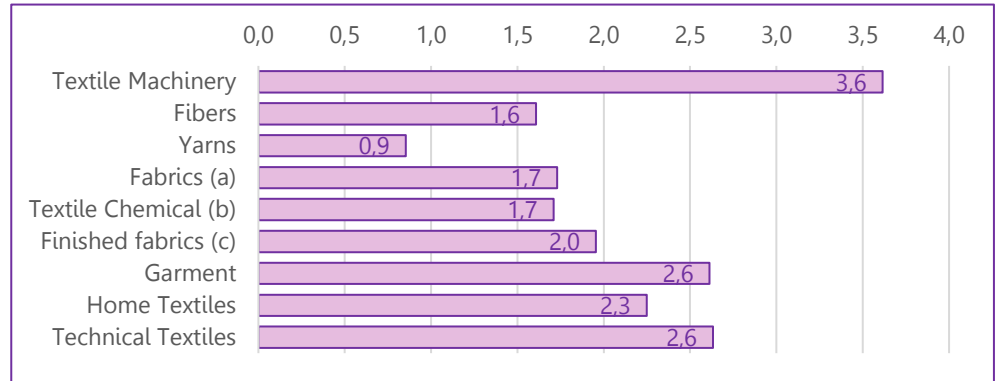


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

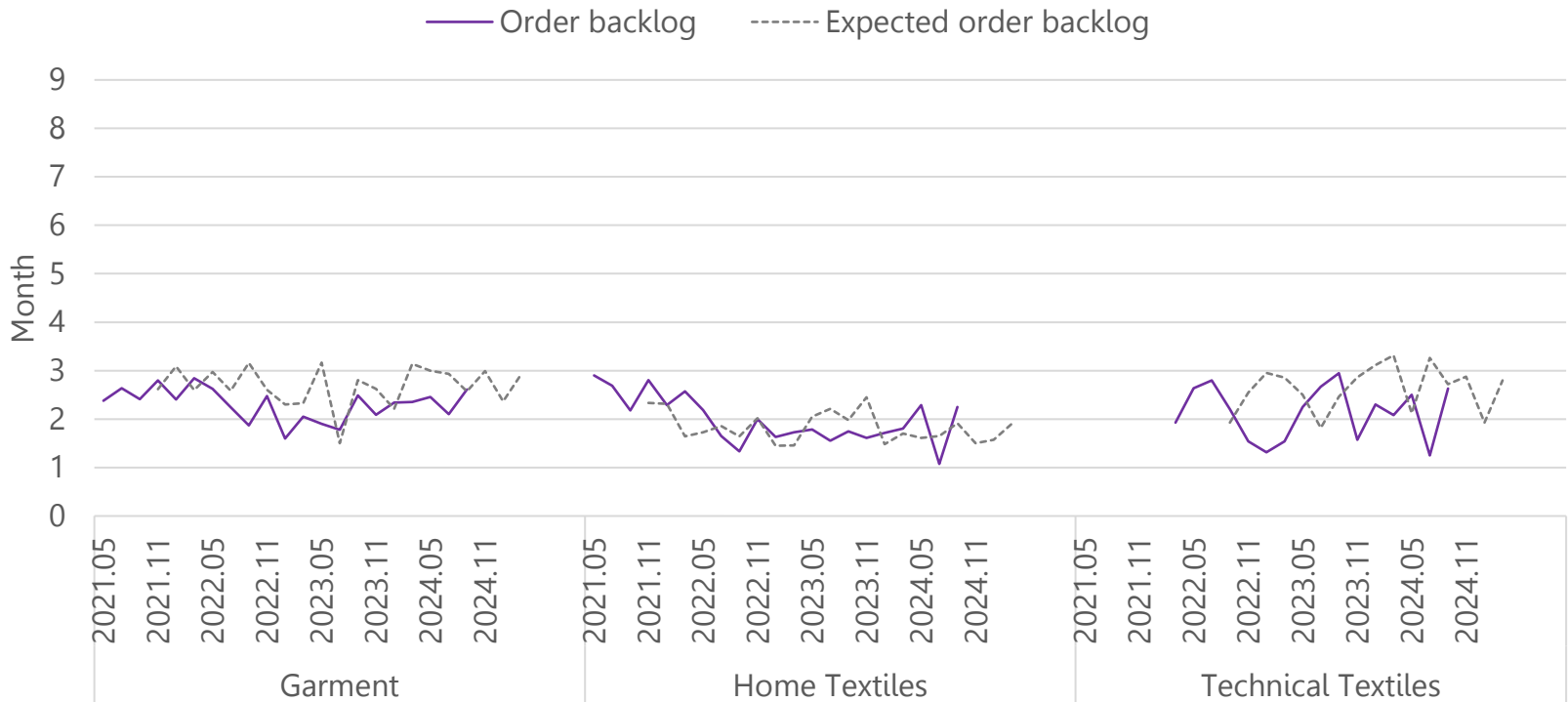
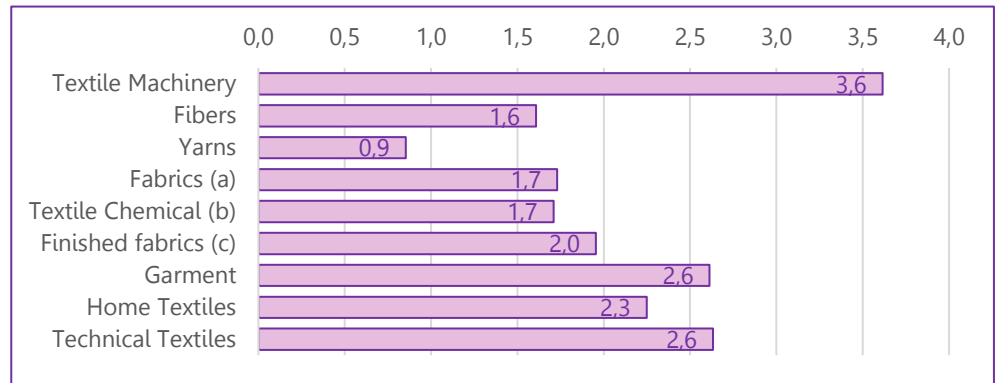


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

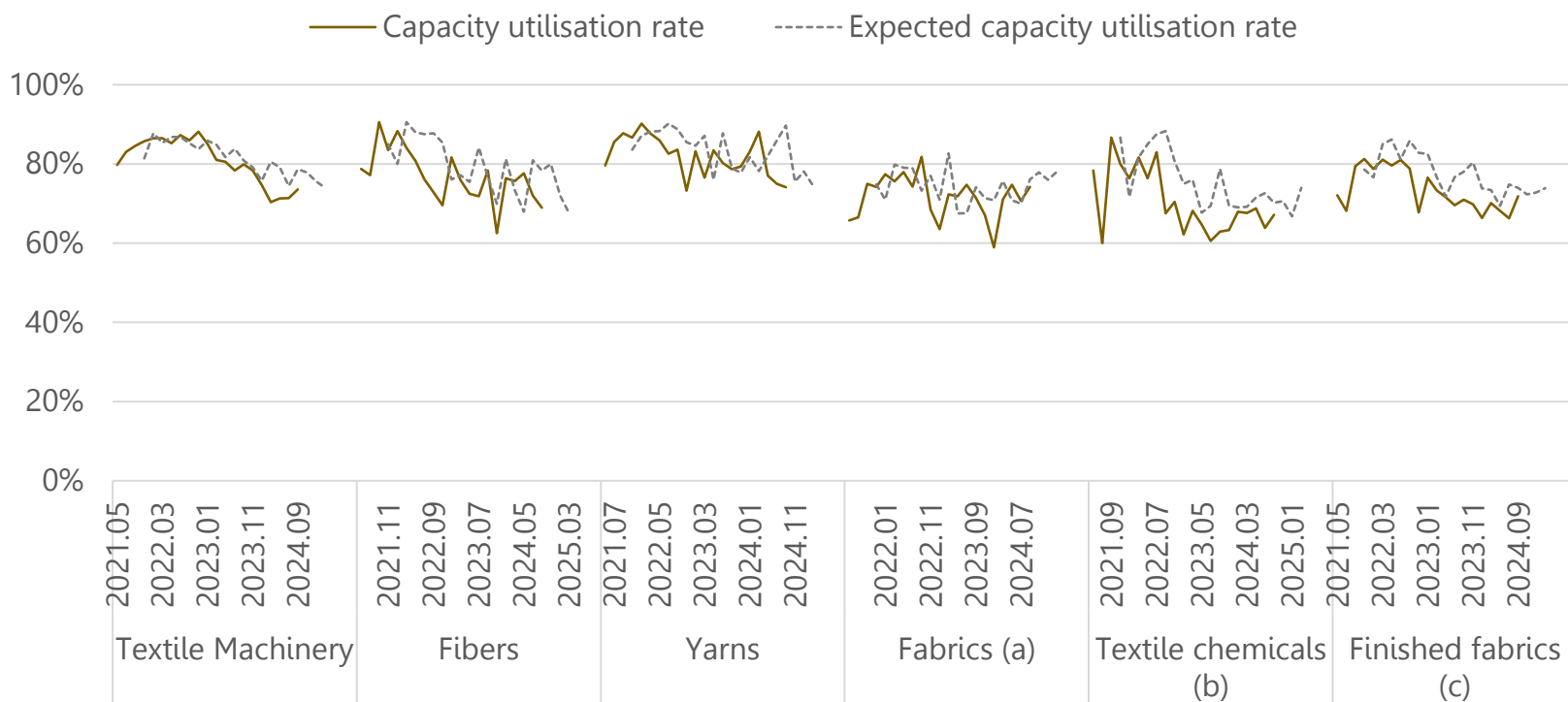
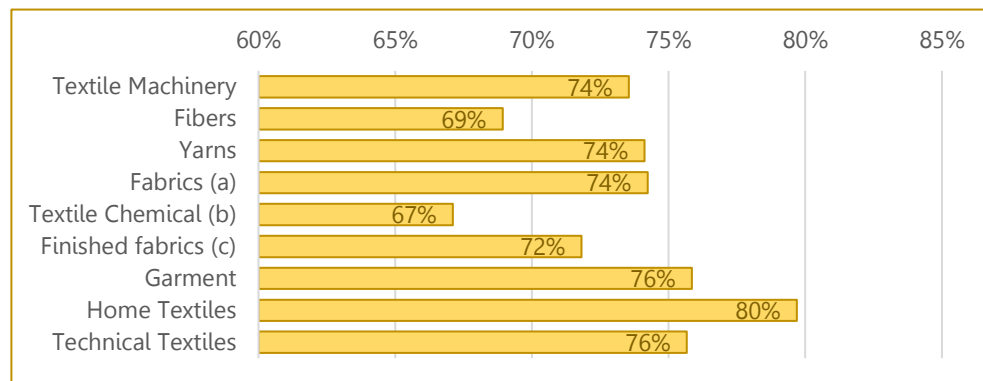


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

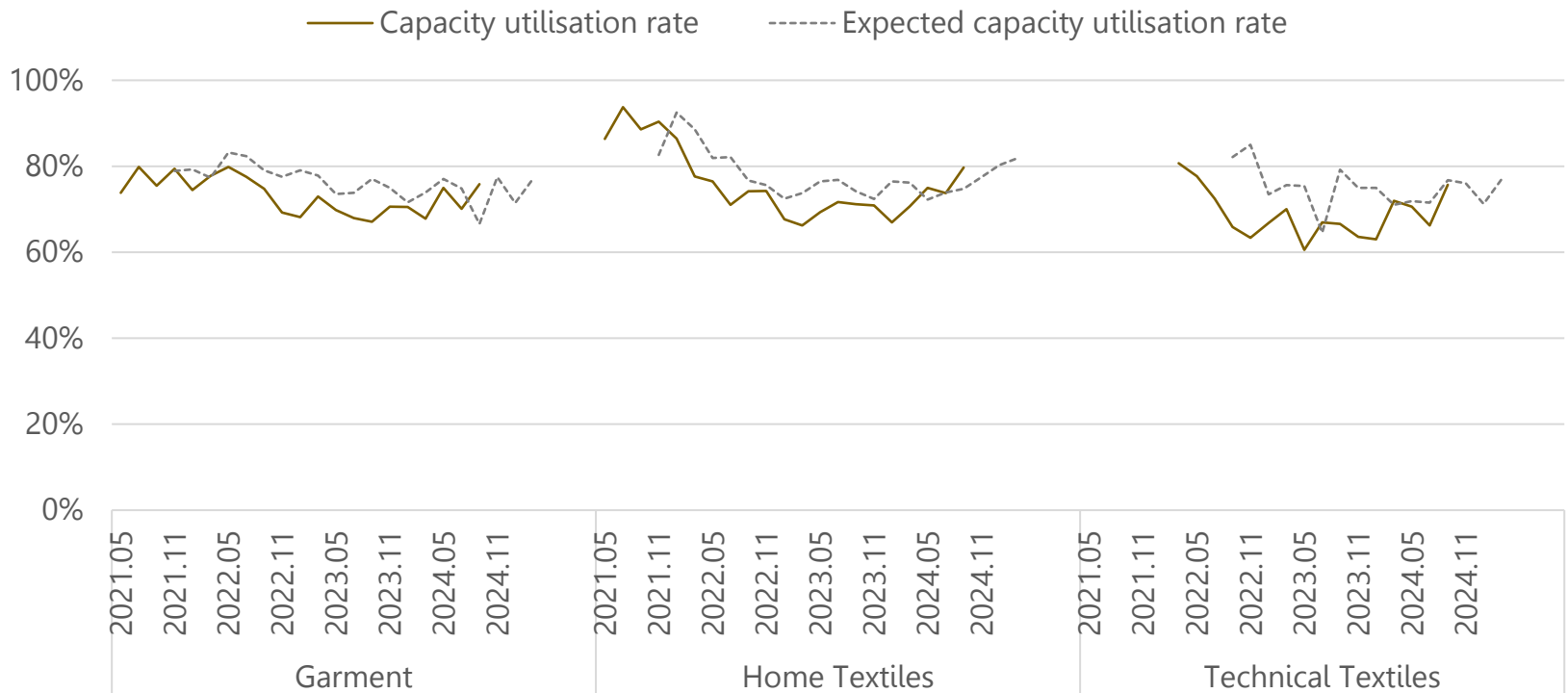
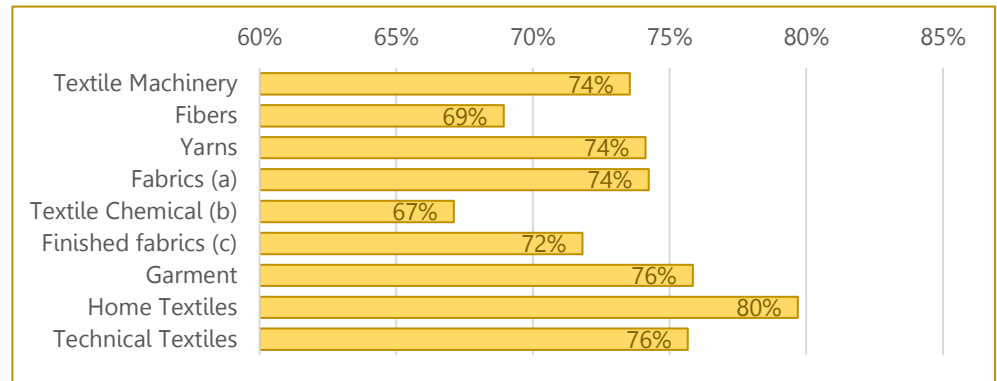


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Segments

2024.09

Latest results

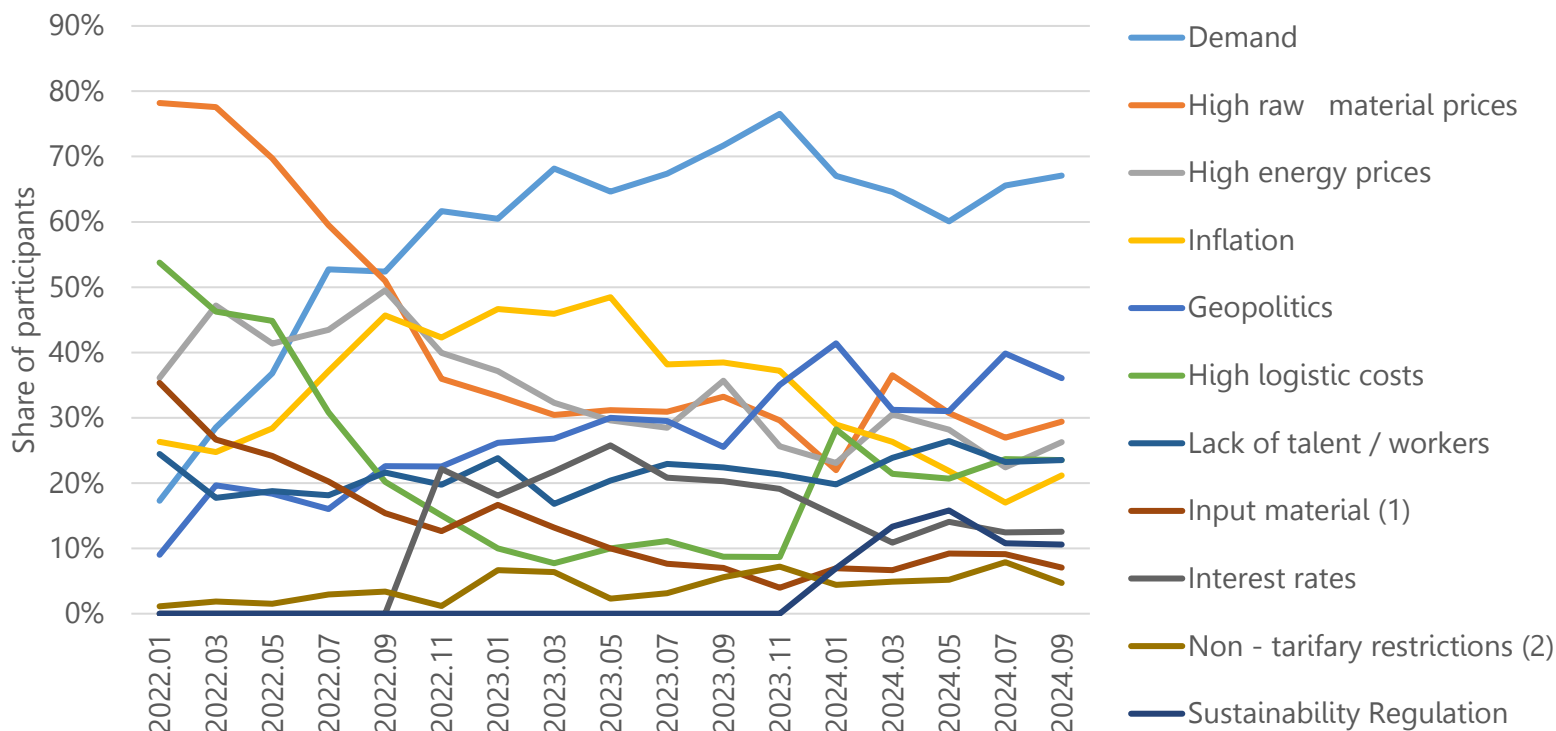
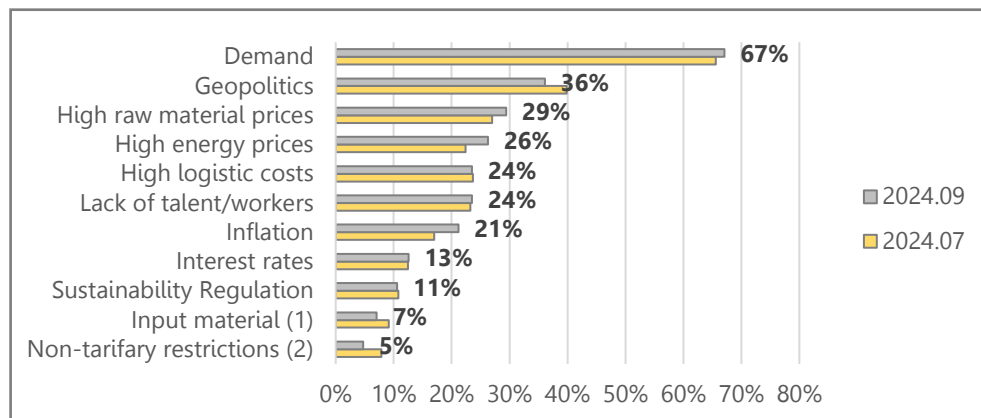


(a) incl. woven and knits | (b) incl. dyes and auxiliary products | (c) incl. dyed, finished, and printed fabrics

Bonus

2024.09

Latest results (share of participants)

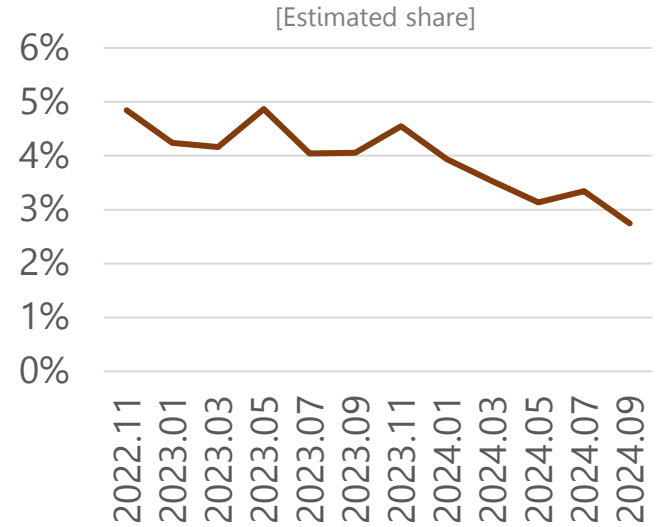
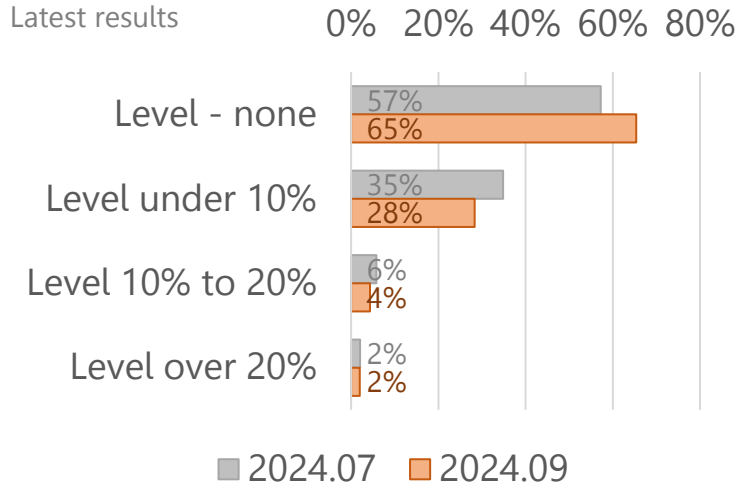


(1) Lack or delayed receipt of | (2) introduction of non-tariff restriction in commerce

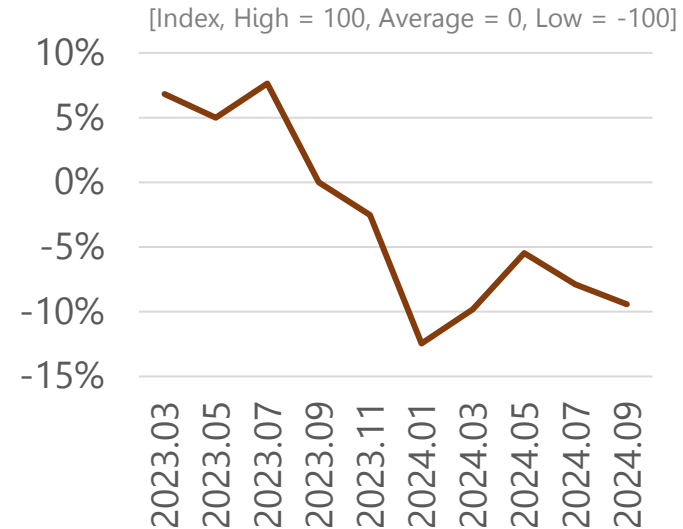
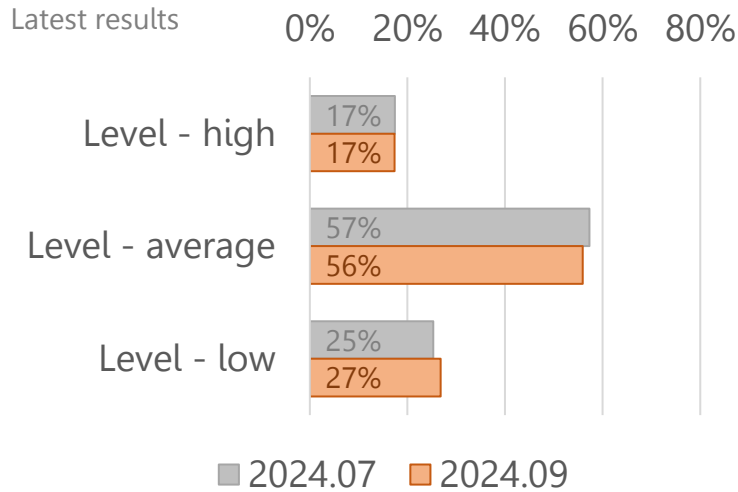
Bonus

2024.09

Order cancellation



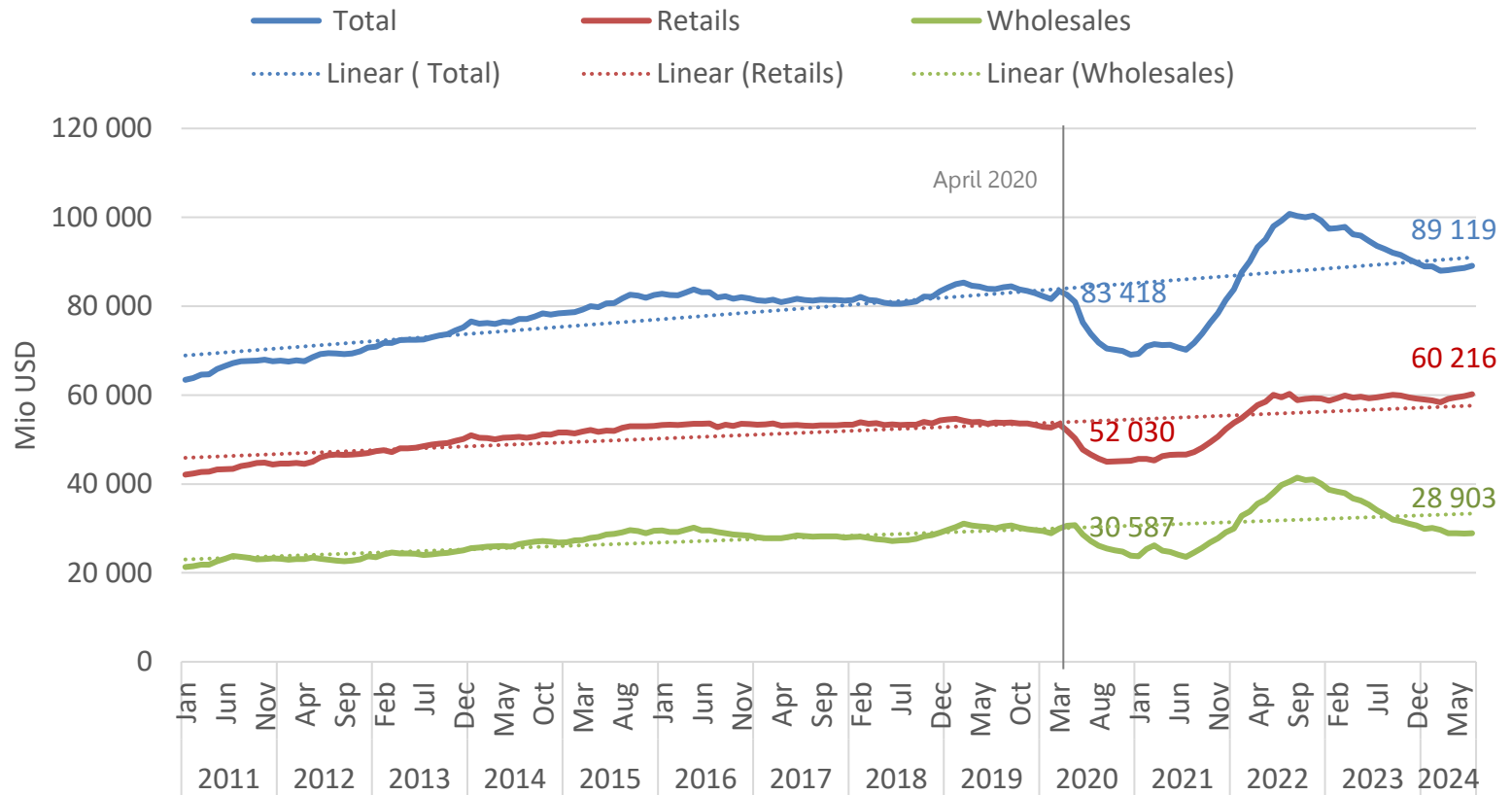
Inventory level



Bonus

July 2024

Evolution of apparel inventory levels in the USA *



* Retail Estimates of End-of-Month Retail Inventories, Clothing and clothing accessories stores, US census | Wholesales: Adjusted estimates of Monthly Sales of Merchant Wholesalers, Except Manufacturers' Sales Branches and Offices, Apparel, Piece Goods, & Notions, US census | Source: US Census, illustration: ITMF

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Global Shipment of New Textile Machinery (2023)

1. Spinning Machines
2. Texturing Machines
3. Weaving Machines
4. Circular Knitting Machines
5. Flat Knitting Machines
6. Finishing Machines

Spinning Machines

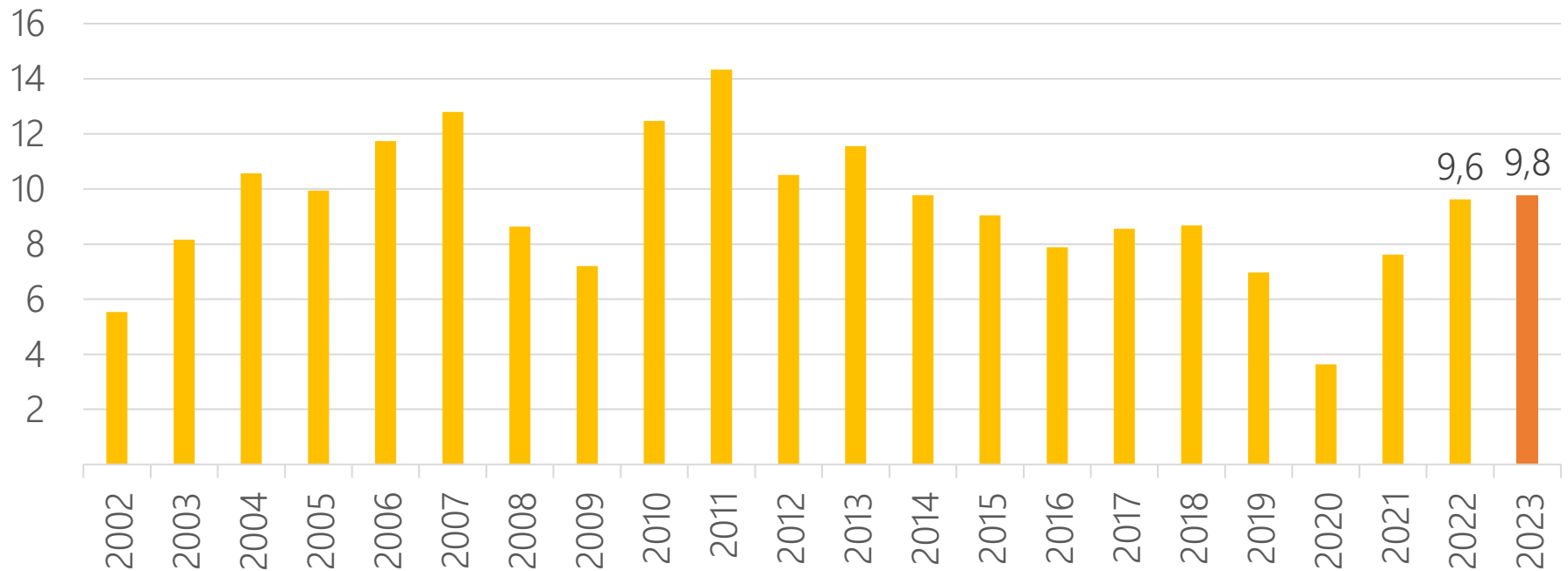
Short-Staple Spindles

Global Shipment of New Textile Machinery (2002-2023)

Shipped Short-Staple Spindles

World

(million units)

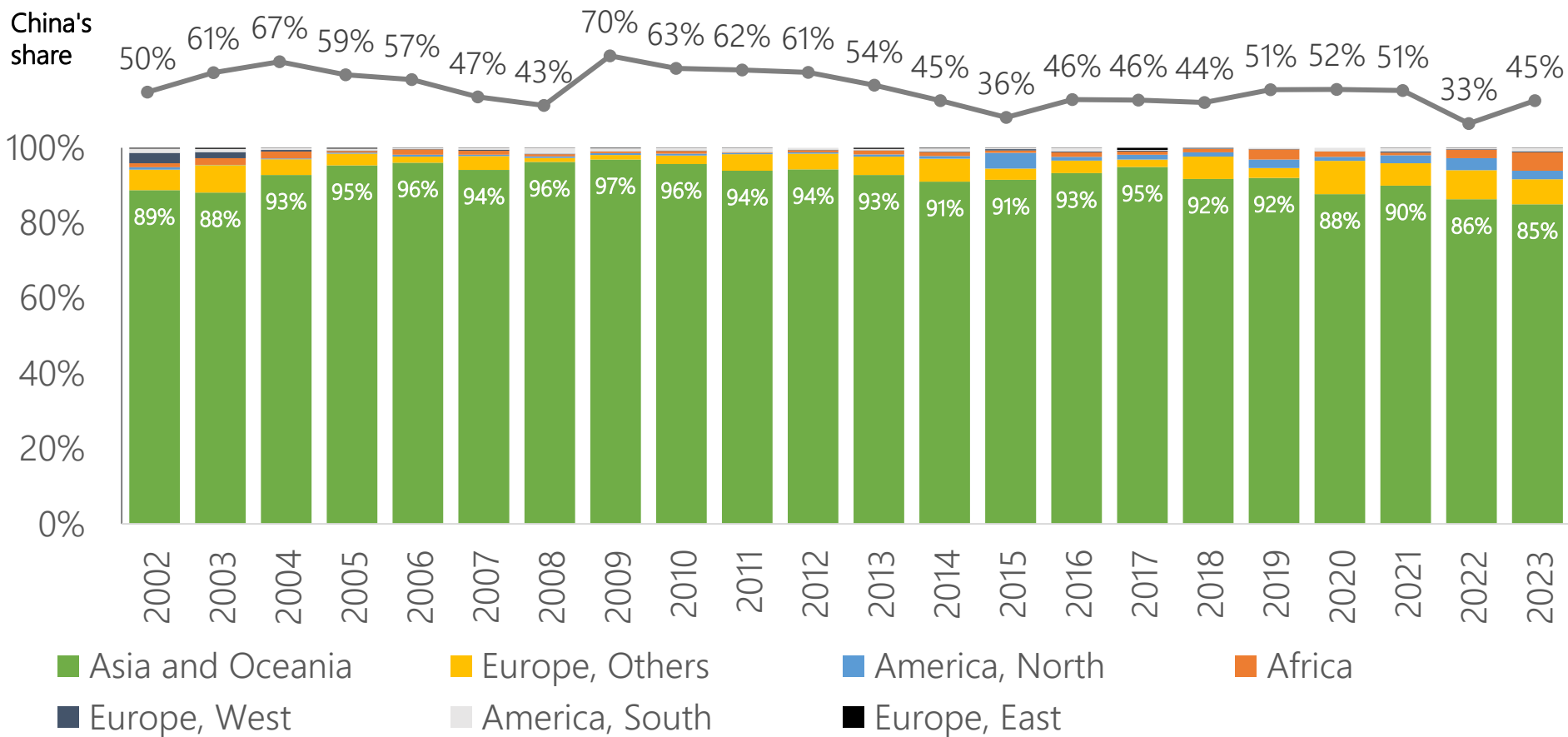


2%

YoY% (2023)

Shipped Short-Staple Spindles

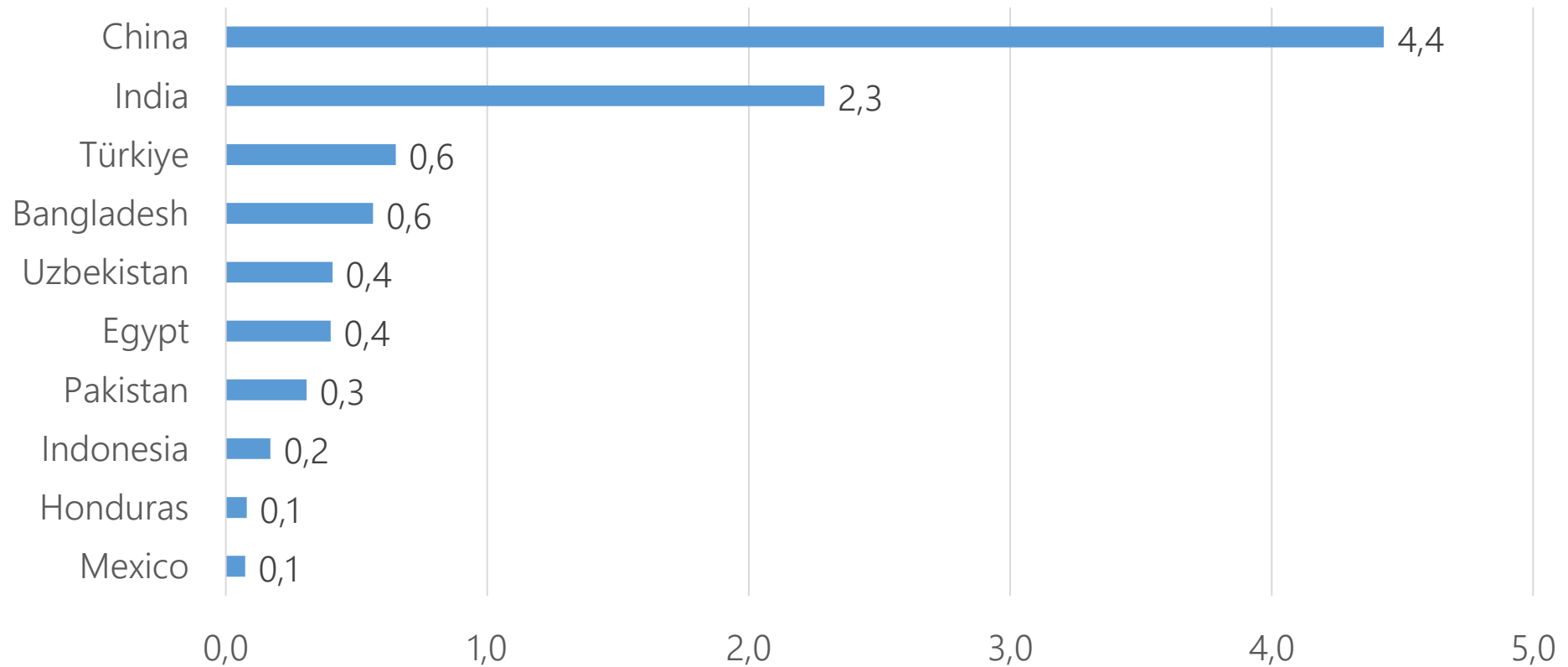
By Regions (Share to World Total)



Shipped Short-Staple Spindles

10 Biggest Investors (2023)

(million units)



Spinning Machines

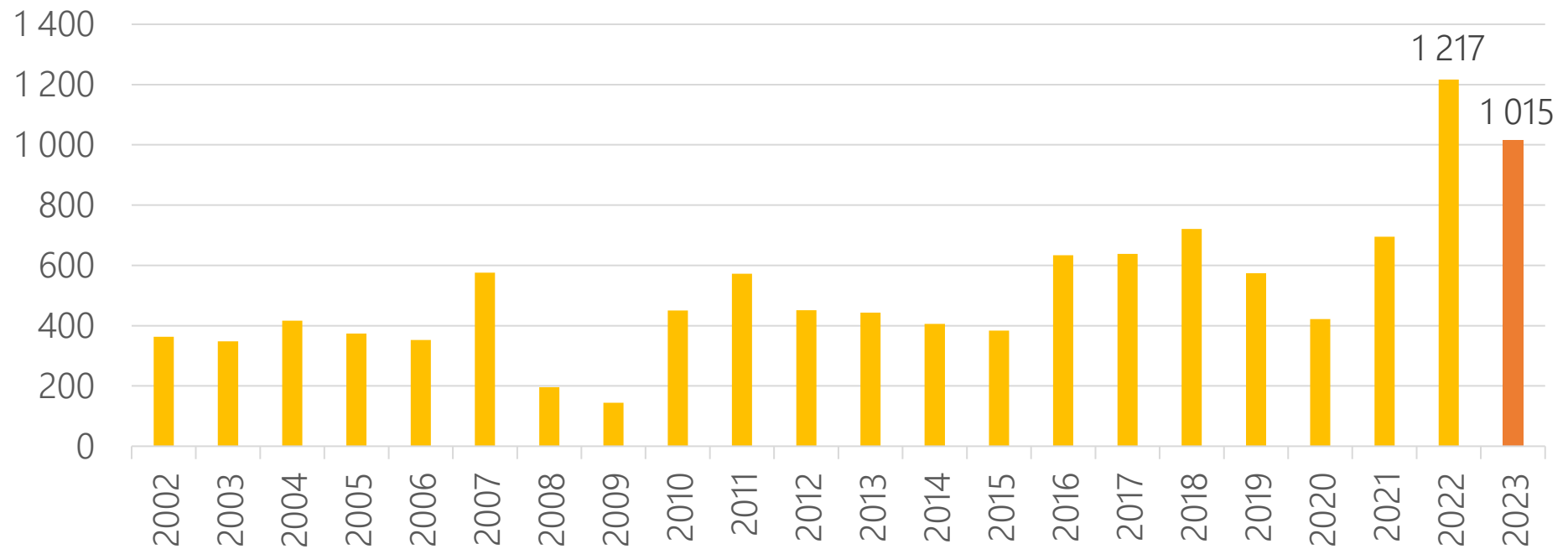
Open-End Rotors

Global Shipment of New Textile Machinery (2002-2023)

Shipped Rotors

World

(thousand units)

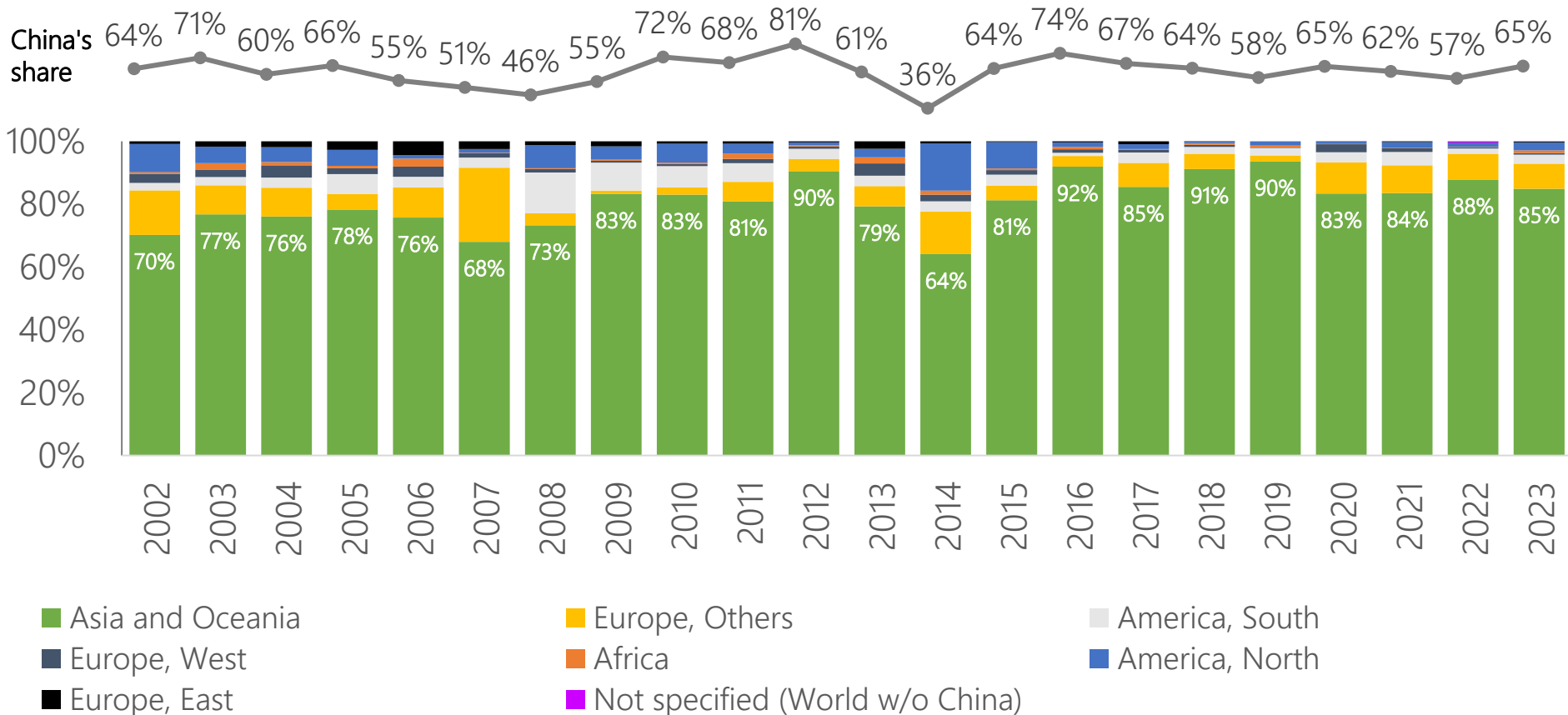


-17%

YoY% (2023)

Shipped Rotors

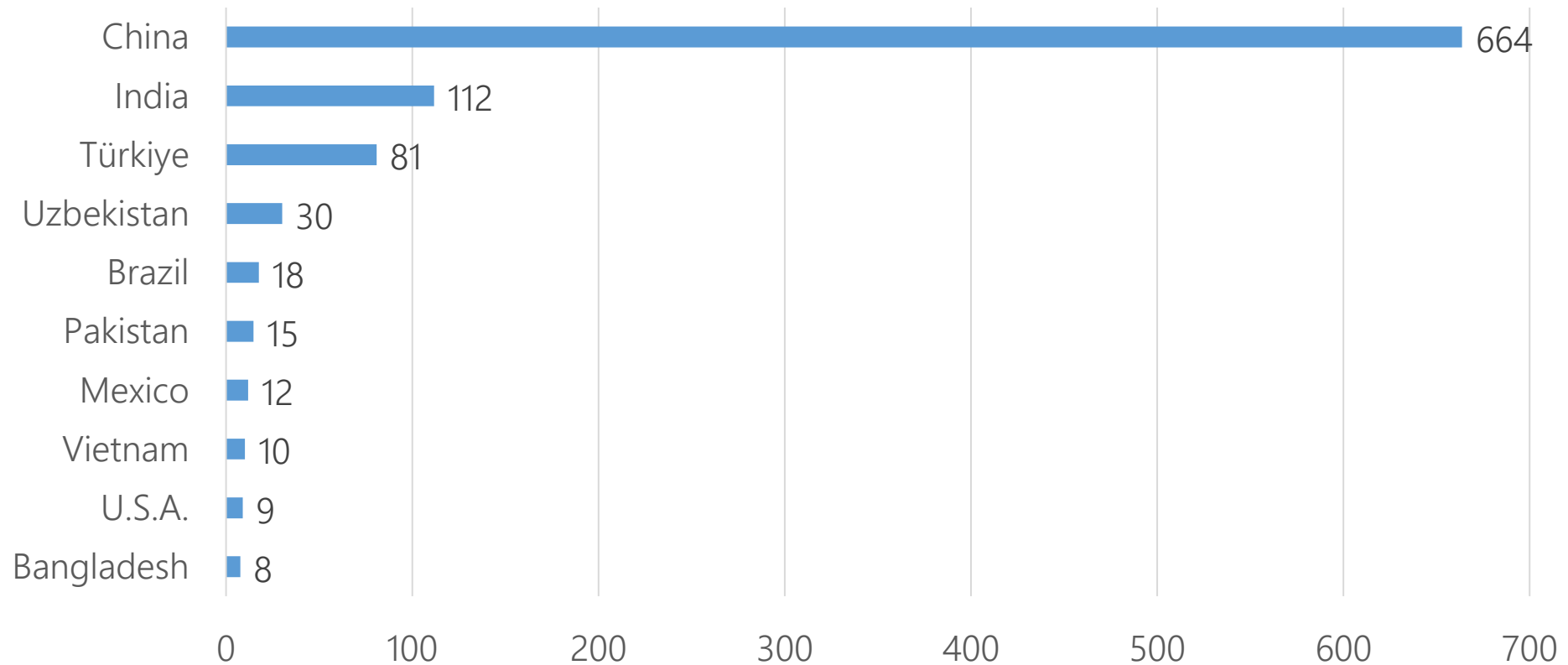
By Regions (Share to World Total)



Shipped Rotors

10 Biggest Investors (2023)

(thousand units)

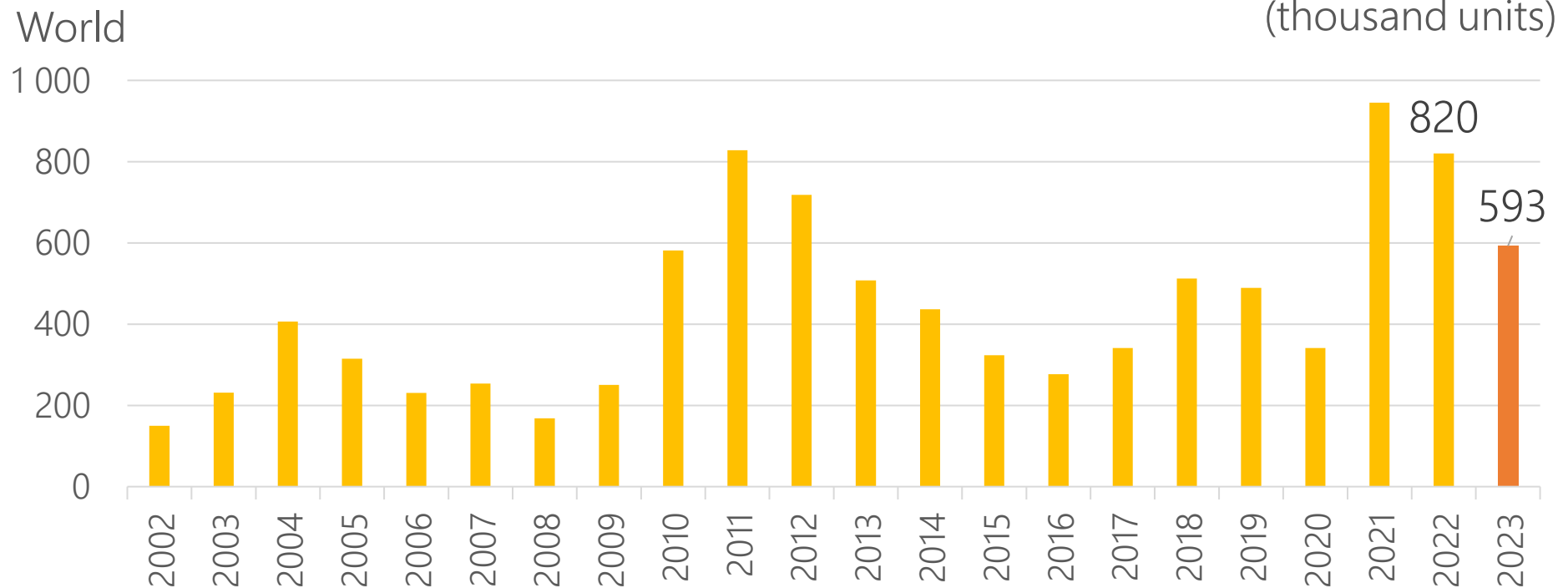


Texturing Machines

False Twist – Single & Double Heater

Global Shipment of New Textile Machinery (2002-2023)

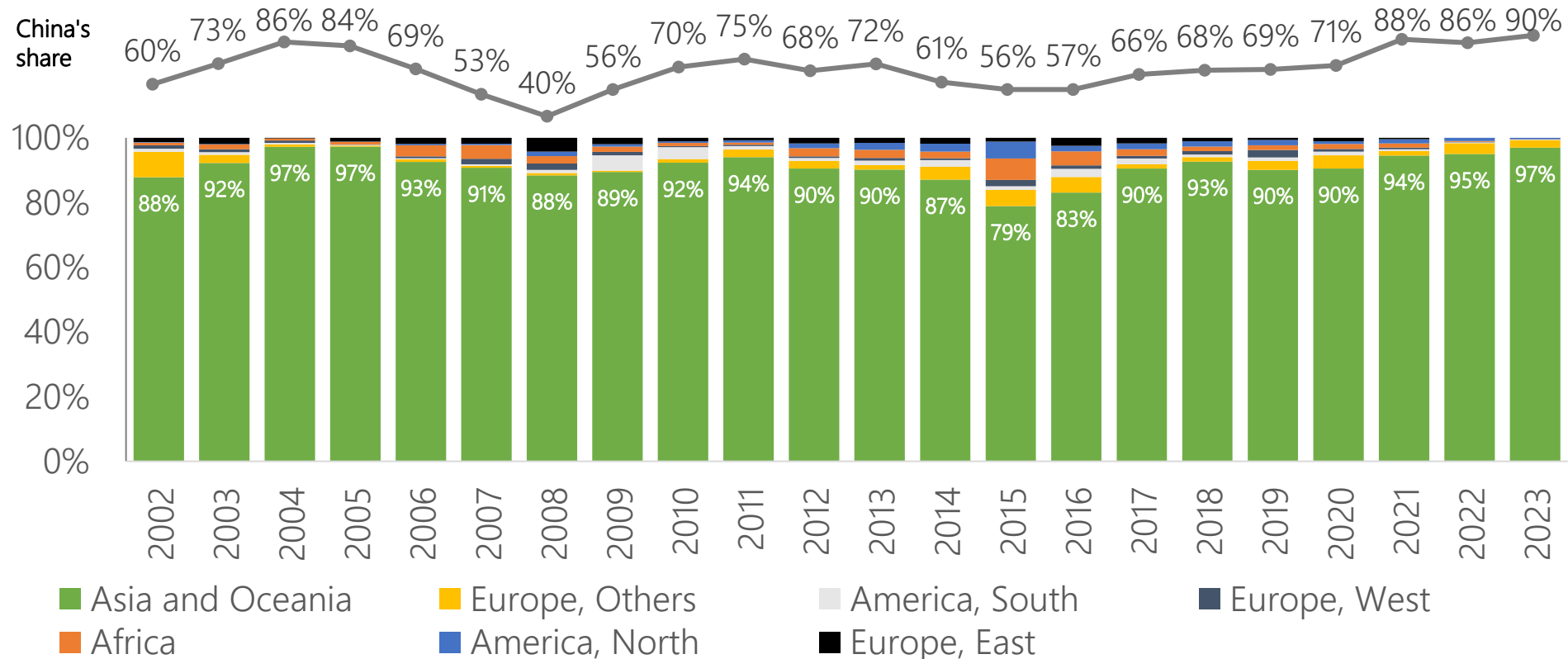
Shipped Texturing Spindles



-28%
YoY% (2023)

Shipped Texturing Spindles

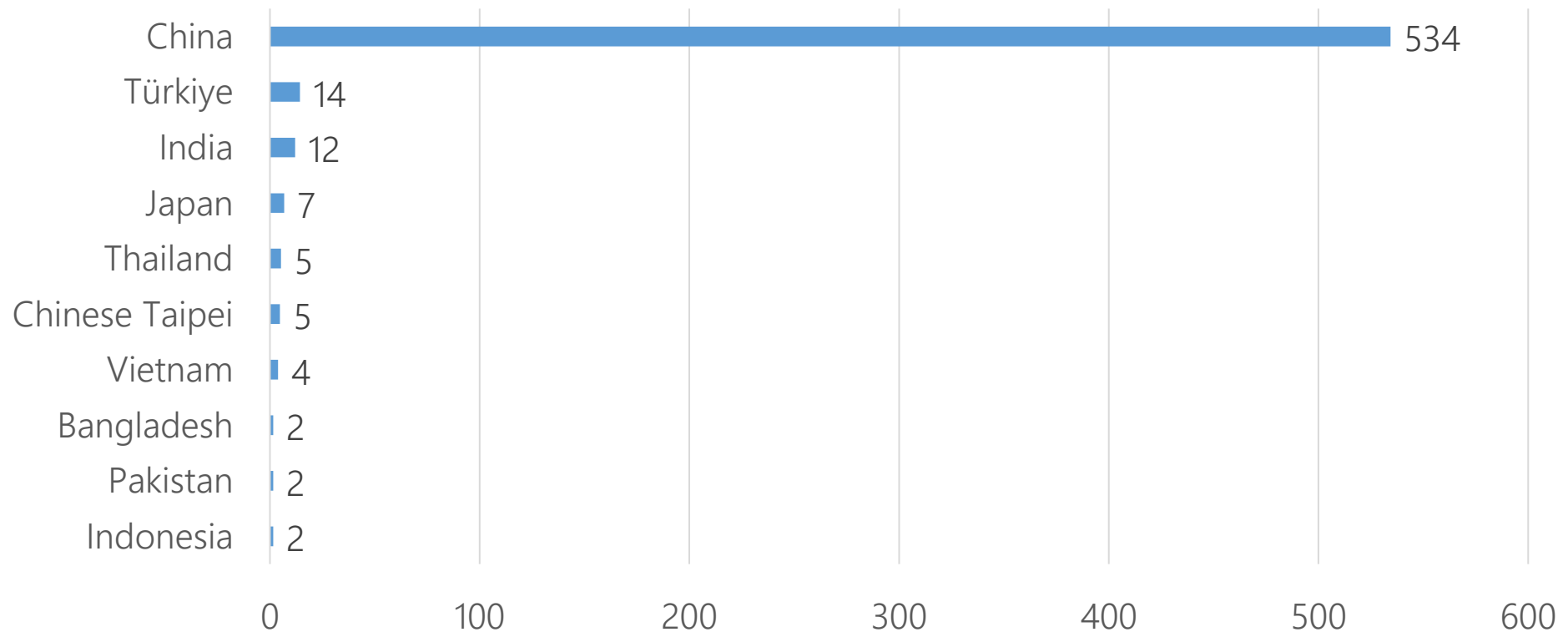
By Regions (Share to World Total)



Shipped Texturing Spindles

10 Biggest Investors (2023)

(thousand units)



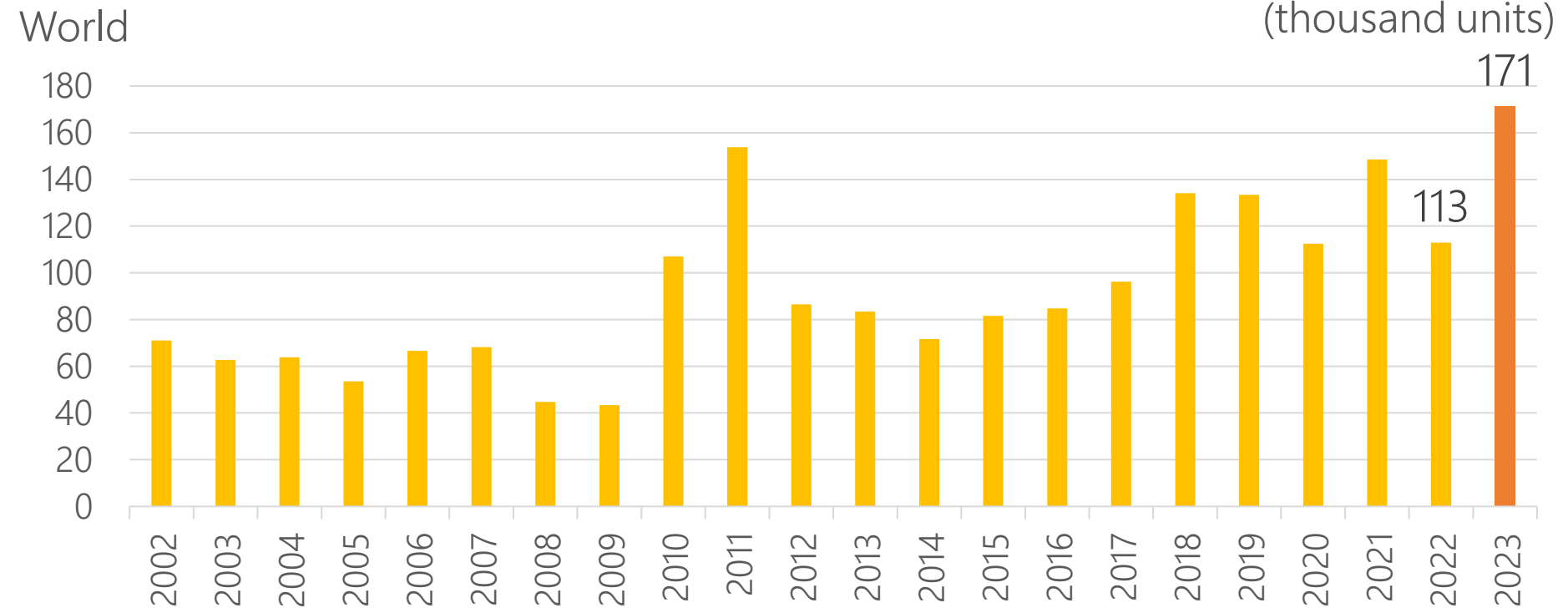
Mexico: 0

Weaving Machines

Air-Jet, Rapier and Projectile, Water-Jet

Global Shipment of New Textile Machinery (2002-2023)

Shipped Shuttle-Less Looms

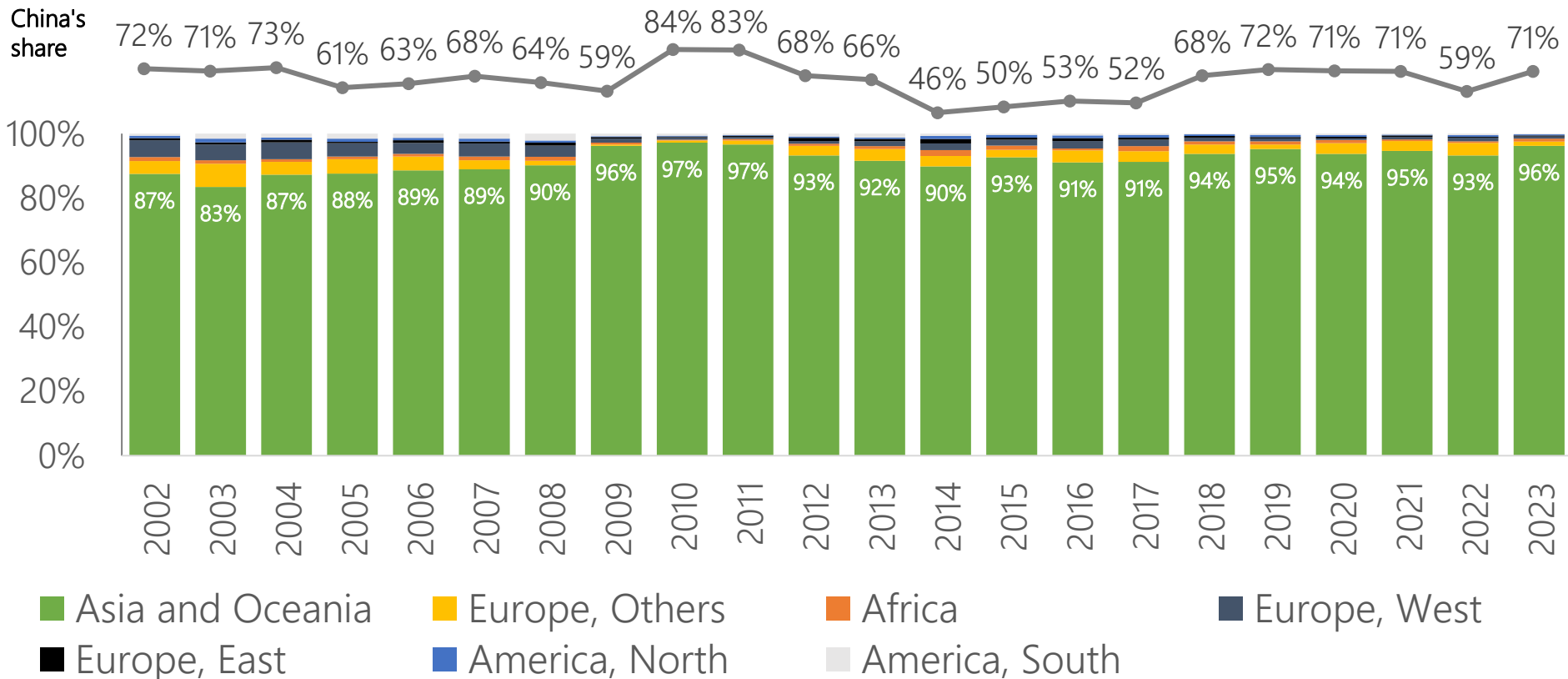


52%

YoY% (2023)

Shipped Shuttle-Less Looms

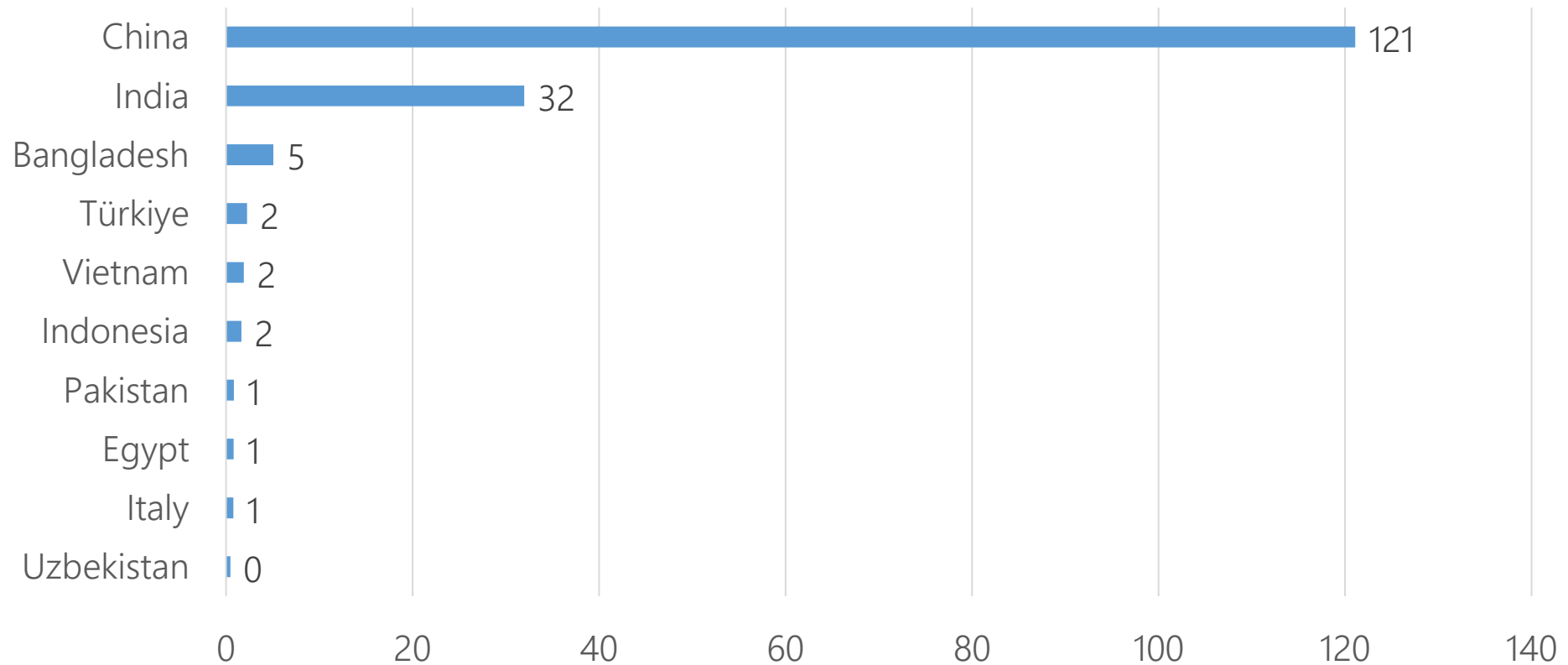
By Regions (Share to World Total)



Shipped Shuttle-Less Looms

10 Biggest Investors (2023)

(thousand units)



Mexico: 584

Large Circular Knitting Machines

Single (up to 24 inch), Single (26 inch or over)

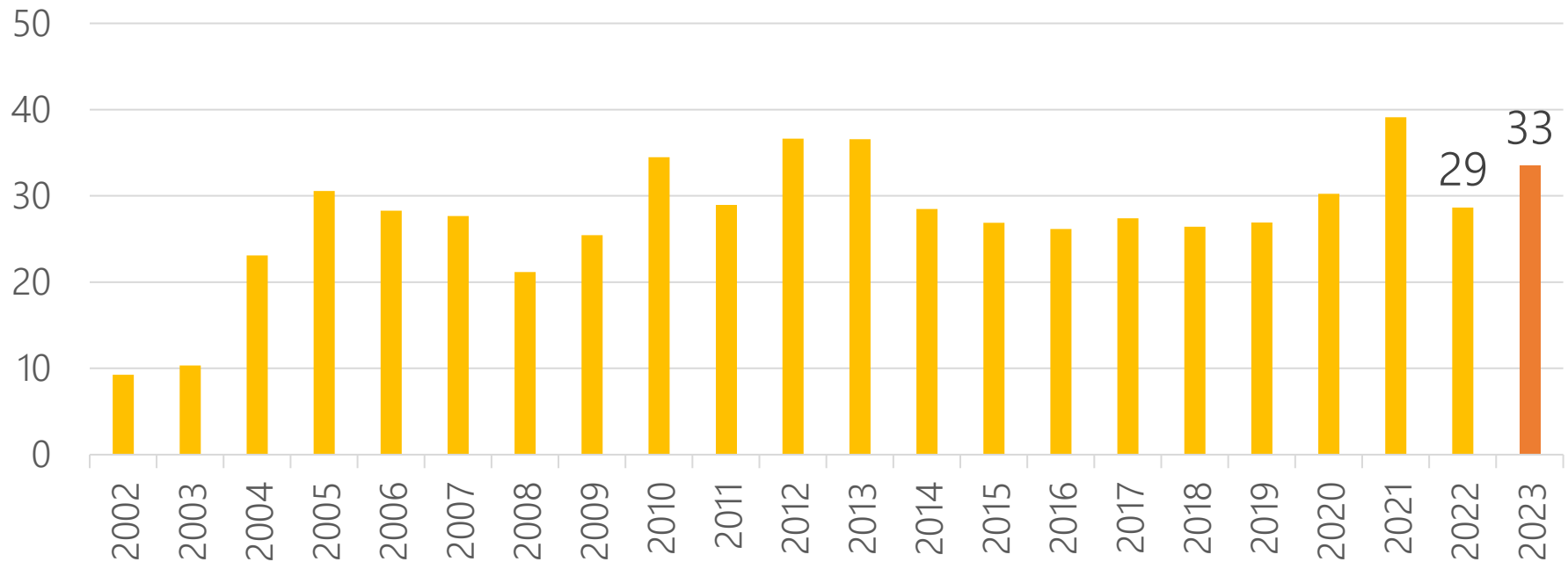
Double (up to 24 inch), Double (26 inch or over)

Global Shipment of New Textile Machinery (2002-2023)

Shipped Large Circular Knitting Machines

World

(thousand units)

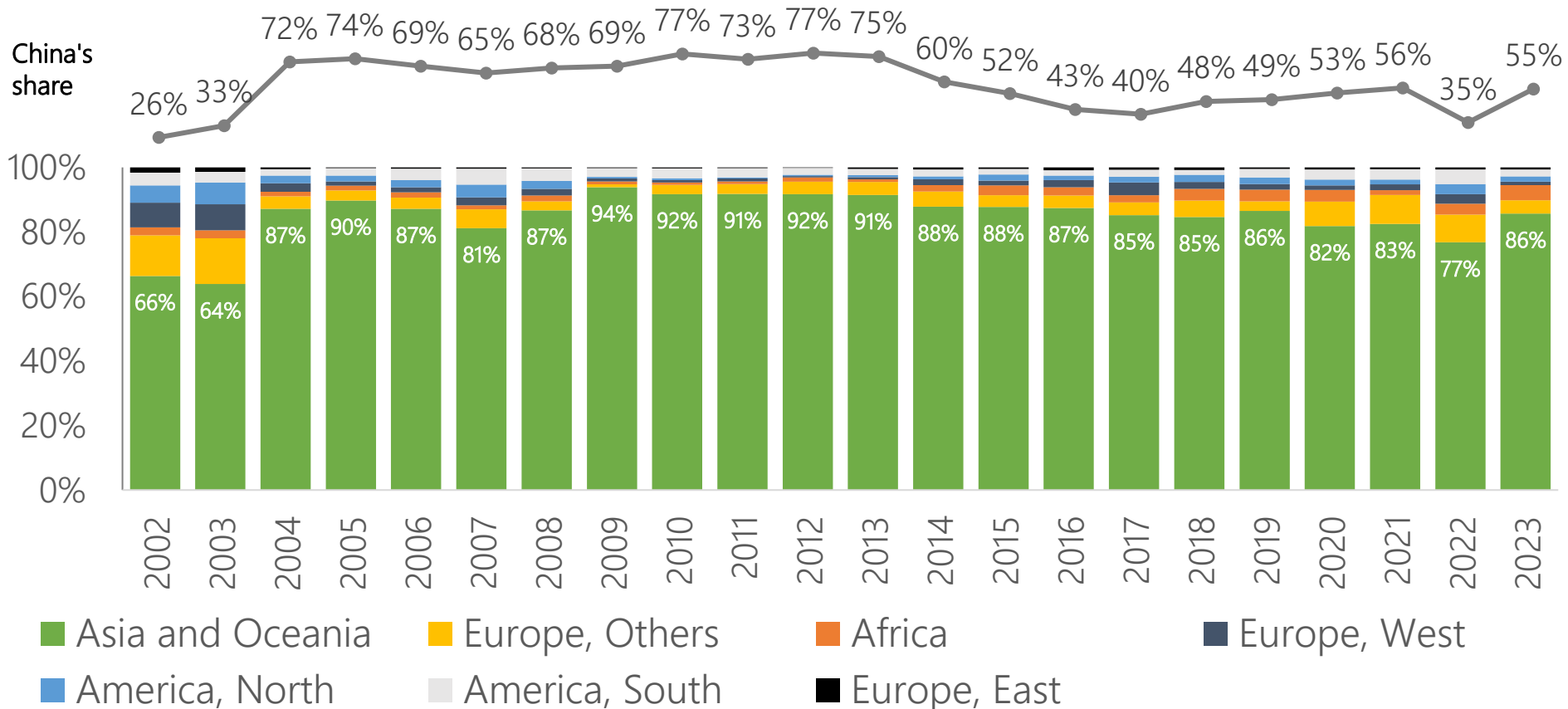


17%

YoY% (2023)

Shipped Large Circular Knitting Machines

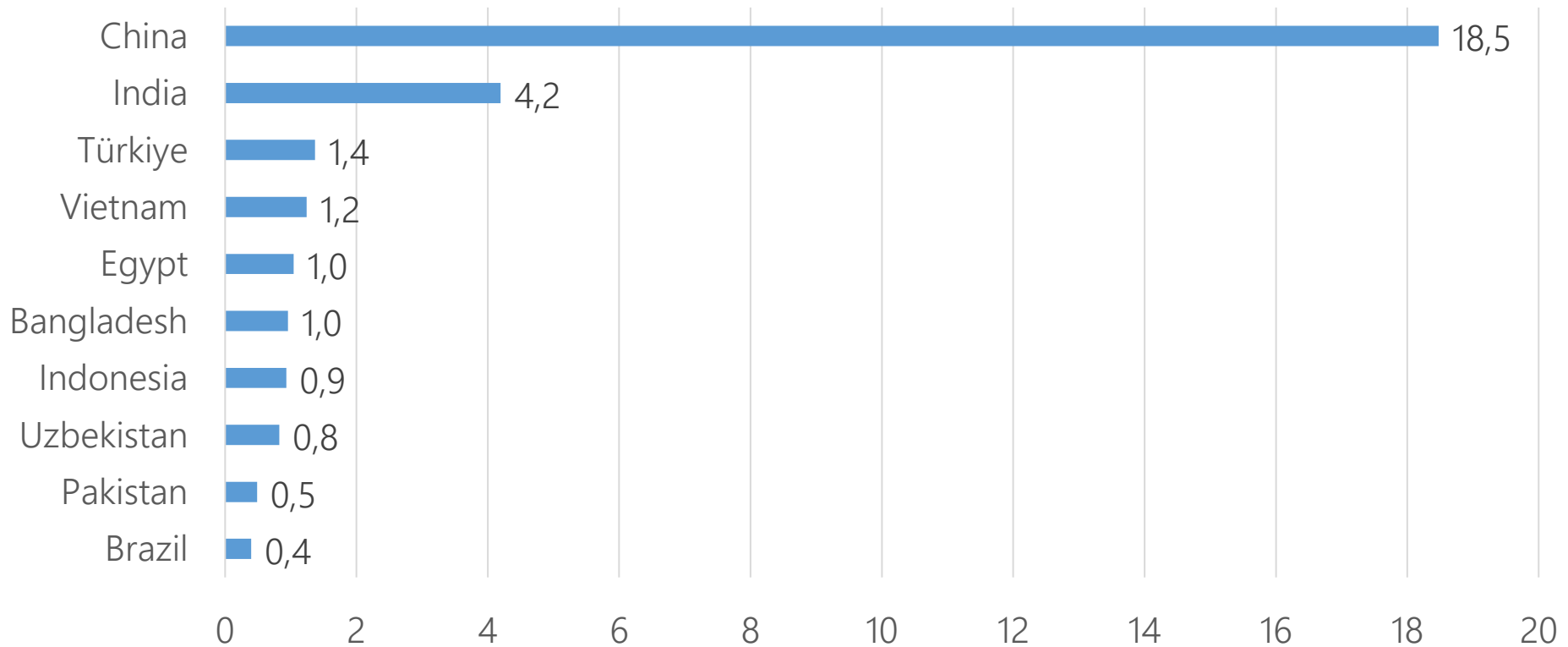
By Regions (Share to World Total)



Shipped Large Circular Knitting Machines

10 Biggest Investors (2023)

(thousand units)



Mexico: 198

Flat Knitting Machines

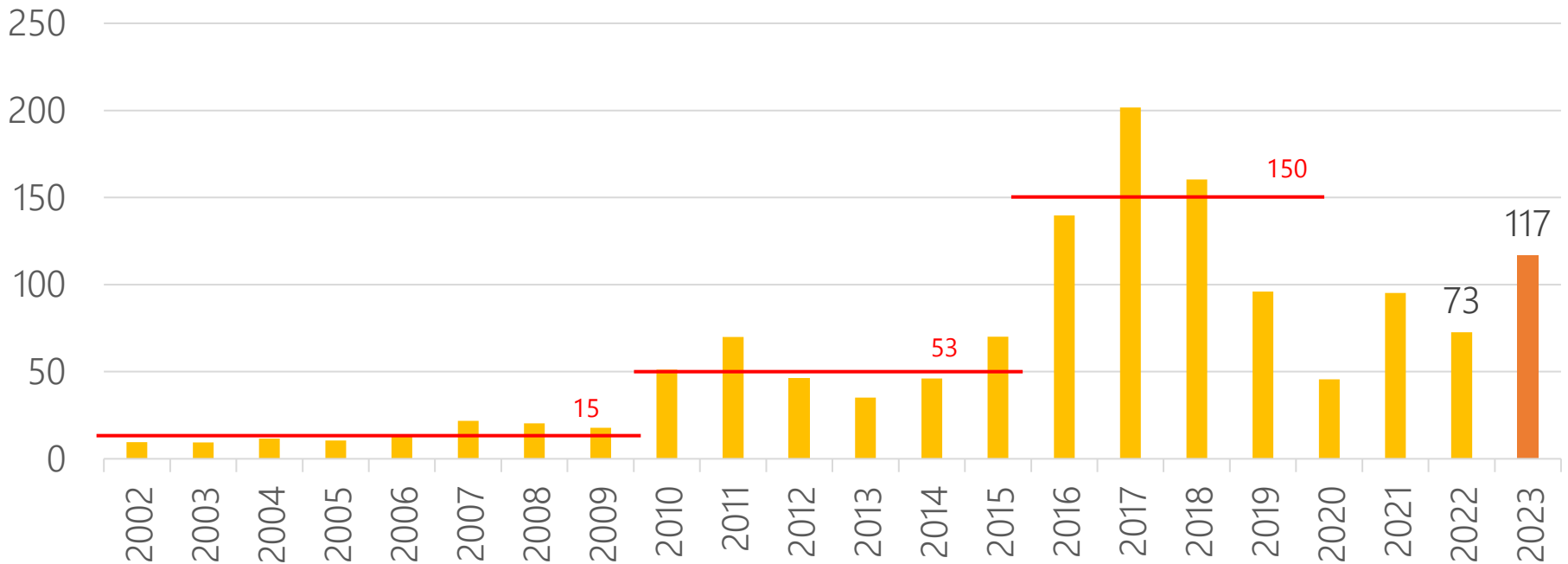
Flat Knitting Machines up to 70"

Flat Knitting Machines 70" and over

Global Shipment of New Textile Machinery (2002-2023)

Shipped Electronic Flat Knitting Machines

World (thousand units)

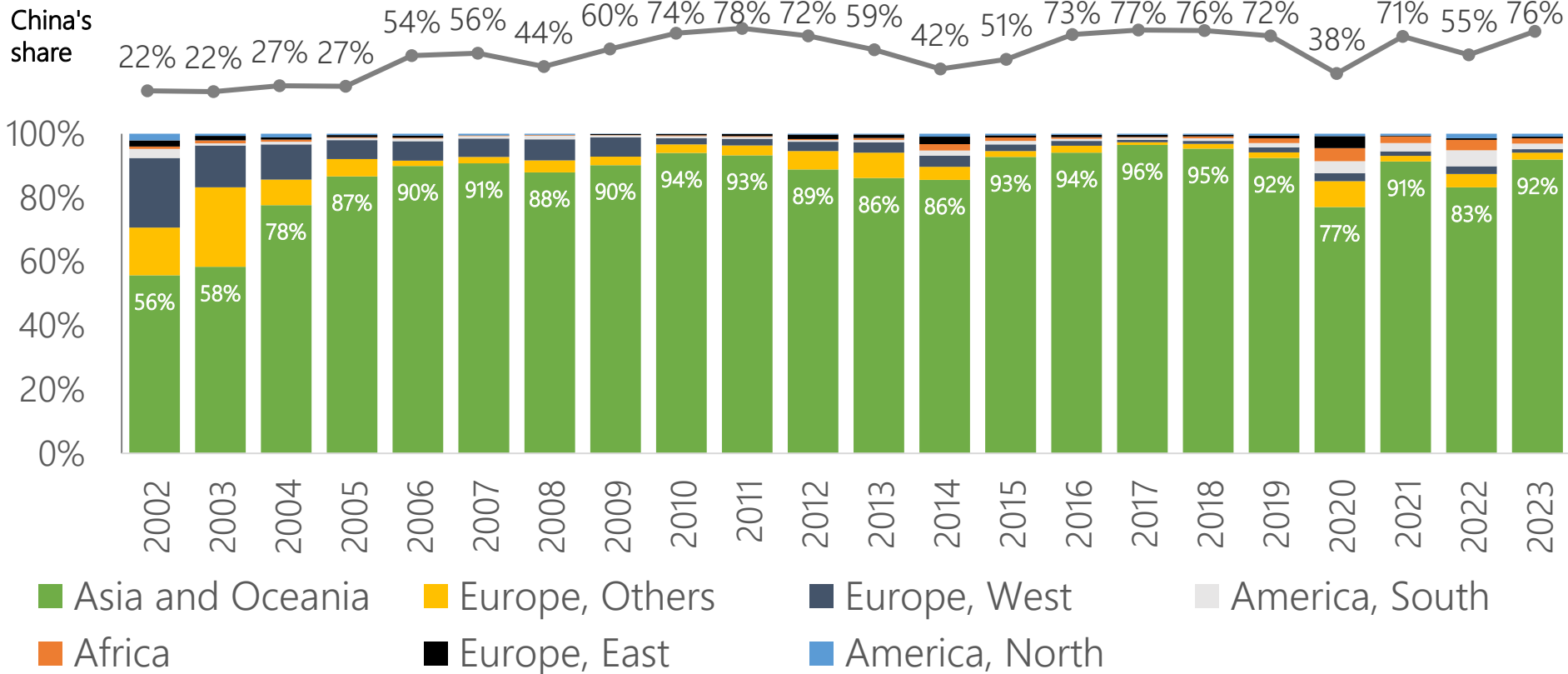


61%

YoY% (2023)

Shipped Electronic Flat Knitting Machines

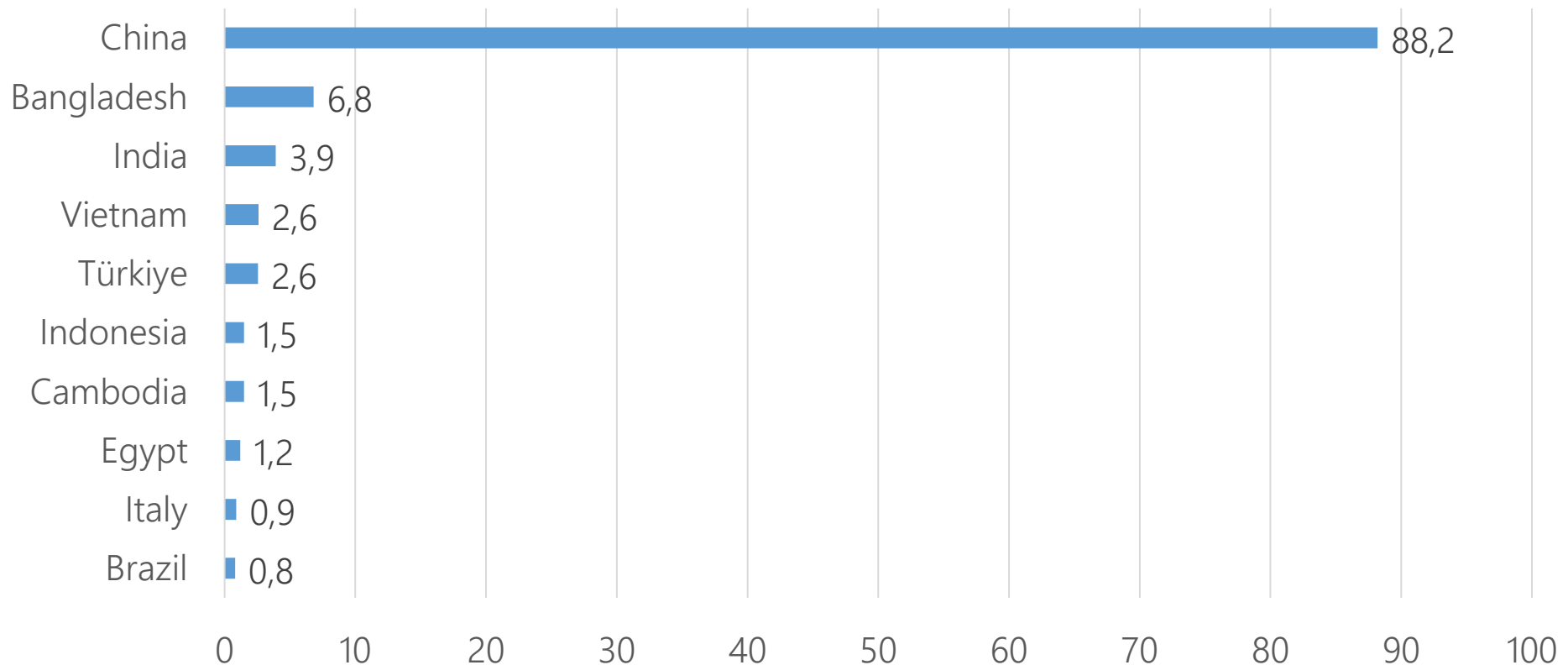
By Regions (Share to World Total)



Shipped Electronic Flat Knitting Machines

10 Biggest Investors (2023)

(thousand units)



Mexico: 624

Finishing Machines

Fabric Continuous (woven & knit)

[Bleaching – Line, Dyeing - Line (Hotflue), Dyeing - Line (CPB), Mercerizing – Line, Relax Dryers/Tumblers, Sanforizers/Compacters, Singeing Line, Stenters, Washing (stand-alone)]

Fabric Discontinuous (woven & knit)

[Air Jet Dyeing, Jigger Dyeing / Beam Dyeing, Overflow Dyeing]

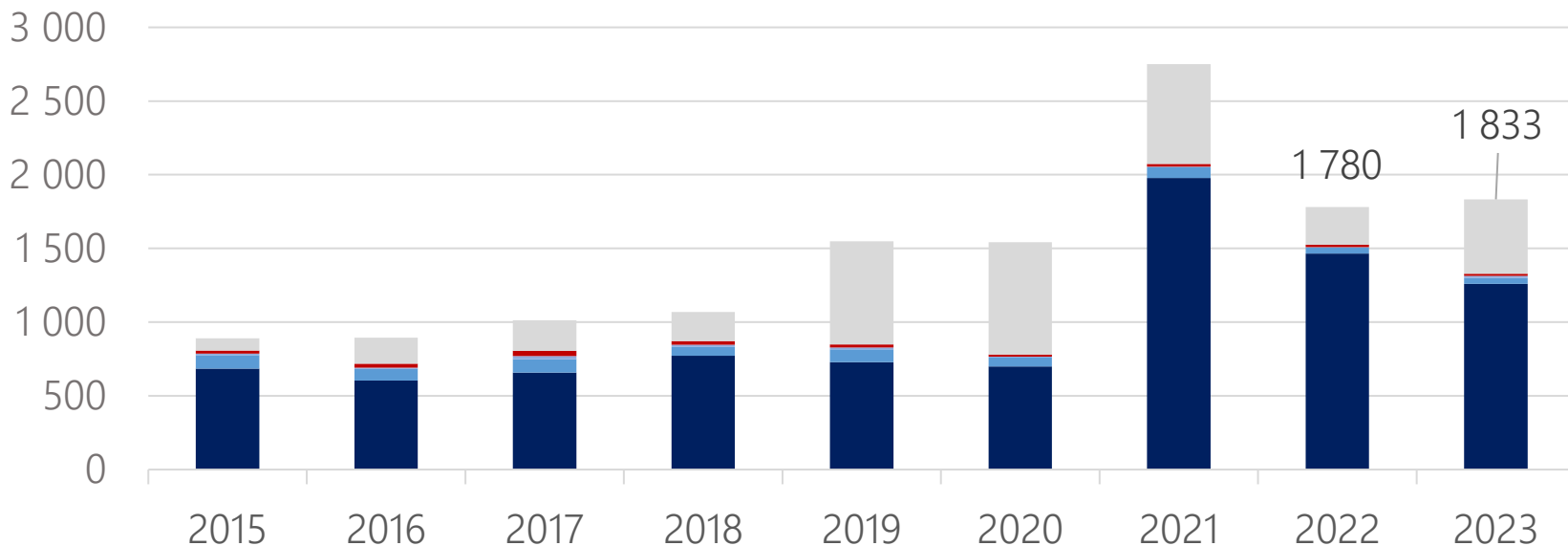
Global Shipment of New Textile Machinery (2015-2023)

Shipped Finishing Machines (Continuous)

World & Region, per Category

(units)

Stenters *



■ Asia and Oceania ■ Europe (incl. Türkiye) ■ Africa ■ The Americas ■ Not specified

Americas: 15

Mexico: 2

*Data entails estimates for world market since 2019

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Trends Shaping the Global Textile Value Chain

1) Sourcing Shifts

2) Sustainability & Circularity

3) Regulation

4) Second-hand Markets

5) Instant-Fashion (Shein, Temu, etc.)

Trends Shaping the Global Textile Value Chain

1) Sourcing Shifts

- a) China's shares in global apparel and home textile markets are shrinking
- b) Other countries are benefitting (Bangladesh, Vietnam)
- c) China's textile exports remain high and find their way indirectly in many end-products
- d) Re-shoring is not happening and near-shoring only very slowly
- e) Sourcing shifts only within Asia

Trends Shaping the Global Textile Value Chain

2) Sustainability & Circularity

Textile waste is a challenge in the EU (approx. 5 million tons of textile waste p.a. (12 kg per capita).

The EU's Vision for Textiles is based on 5 pillars:

- 1) All textile products placed on the EU market must be durable, repairable, recyclable, and made largely of recycled fibres.**
- 2) Fast fashion is out of fashion**
- 3) Re-use and re-pair services are available**
- 4) Circular clothes become the norm**
- 5) Textile waste collection becomes mandatory by 2025**

Trends Shaping the Global Textile Value Chain

3) Regulation

Textile regulation around the world will become a real challenge for the global textile value chain as regulation will comprise many different areas.

- **Waste regulation**
- **Social compliance (Uyghur Forced Labor Prevention Act (UFLPA))**
- **Transparency & Traceability (Digital Product Passport (DPP))**
- **Environmental regulation (PFAS, carbon emission, etc.)**

Trends Shaping the Global Textile Value Chain

4) Instant-Fashion

From brick & mortar Fast-Fashion in the 1990s (Inditex, H&M, etc.) via online Fast-Fashion in the 2000s (Asos, Zalando, Amazon, etc.) to cross-border online on demand Instant-Fashion in 2020s (Shein, Temu, etc.).

- **Shein's revenues in 2023: USD 32 bn**
- **Temu's revenues in 2023: USD 18 bn**

Their revenues are expected to double in 2024.

This is possible due to the on-demand models and the „**De Minimis**“-rule that allows duty-free and unchecked imports of products valued below a certain threshold (USA: USD 800).

Trends Shaping the Global Textile Value Chain

5) Second-hand Clothing Market

It has become a trend that used clothing and accessory products, especially luxury ones, are resold both on- and offline.

The global second-hand apparel market is valued at almost **USD 200 billion** in **2023** and expected to grow to USD 300 billion by 2026.





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