

textil+mode: No Turnaround in Sight as the Year Begins

According to the January economic report from textil+mode, the economic indicators for November are once again characterised by negative signs. Despite occasional positive swings in recent months, the downward trend for both textiles and clothing continues. This applies to all key indicators such as turnover, employment, retail sales and exports.

After a slight recovery in the previous month, **sales** fell again in November, significantly: -8.7 percent for textiles and -4.5 percent for clothing. This means that total annual sales in the first eleven months are -4.3 percent down on the previous year (textiles -4.5 percent, clothing -4.1 percent). The declines affect all segments, with only nonwovens manufacturers still posting a nominal increase of +0.6 percent. Among clothing manufacturers, with the exception of workwear and knitwear, all segments are in decline. The **number of businesses** in 2024 is significantly lower than in the previous year: at the end of November, textiles were down by -3.7 percent, clothing by -7.8 percent and overall by -4.6 percent.

German production is also falling in line with the trend, even if the development in the individual months is relatively volatile. Textile production fell by -2.7 percent over the entire year, while the decline

for clothing was -10.9 percent. Producer prices are now only rising slightly, particularly for textiles (+0.3 percent as at November).

Producer prices for clothing products rose by +1.7 percent in November.

Sales in the clothing retail sector have lagged behind the performance of the retail sector as a whole throughout 2024, as was the case in the current month of November. Overall, clothing retail sales were down 1.0 percent in November, while the retail sector as a whole grew by +2.4 percent in the same period. Prices in the clothing retail sector rose by +2.6 percent in November.

Export trade declined in November, particularly for textile products. In November, -6.6 percent fewer textile products were exported, while exports of clothing fell by -1.3 percent. Overall, exports fell by -3.0 percent. **Imports** also fell by -3.2 percent in November. As of November, imports of raw materials fell by -16.3 percent.

Source: Confederation of the German Textile and Fashion Industry (textil+mode), Extract from the economic report 01.2025: [Konjunkturbericht 01.2025](#)



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Experts Meet in Bremen: Schreiber GmbH at the Cotton Seminar

A productive Cotton Seminar took place in Bremen, where industry experts from Schreiber GmbH in Neuhoof, Germany, were guests. The company operates internationally and has broad experience and technical expertise in the development and production of wicks.


During the seminar, the Schreiber experts discussed key issues in the cotton industry with Elke Hortmeyer and Jens Wirth from the BBB and Axel Drieling from the Fibre Institute. The focus was on different types of cotton, developments on the cotton market and price trends. The dialogue provided valuable insights into the current challenges and opportunities facing the industry.

The Cotton Seminar underlines the importance of dialogue between industry, research and trade in order to deepen specialist knowledge and further develop the quality of cotton processing.



Jens Wirth (BBB), Elke Hortmeyer (BBB), Carsten Staubach (Schreiber GmbH), Nicole Will (Schreiber GmbH), Axel Drieling (FIBRE)



 **Revision: List No. 539 of 31 Jan 2025**
(Changes since list no. 538 of 09 January 2025)
List of firms having failed to fulfil arbitration awards made by CICCA* Member Associations.

Additions

Spain	Tavex Europe SL	24 Oct 2024	ICA
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Deletions

Belgium	NV Bunge, Antwerp	26 Mar 1994	AFCOT
Indonesia	PT Royal Cotton Indonesia (now known as PT Greenmill Spinning International)	09 Mar 2012	ICA
Indonesia	PT Royal Cotton Indonesia (now known as PT Greenmill Spinning International)	31 May 2012	ICA
Vietnam	An Nam Commerce Textile Co Ltd	31 Oct 2023	ICA

*] Committee for International Co-operation between Cotton Associations, Liverpool/GB
ICA = International Cotton Association, Liverpool/GB
Complete CICCA List of Unfulfilled Awards:
<https://baumwollboerse.de/en/the-association/organisation/network/>

IMPRINT

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BREMEN VALUE DIFFERENCES

The value differences of the Bremen Cotton Exchange No. 2/23 according to Bremen Cotton Report No. 29/30 of 03 August 2023 remain in force until further notice. They can be found on the [website](#) of the Bremen Cotton Exchange.

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SAVE THE DATES

Board Meeting and General Assembly

Board Meeting: **20 March 2025**
General Assembly: **26 June 2025**

Further information will be announced in due time.



STATISTICS



World Cotton Situation

Data in Million Tonnes

Seasons begin on August 1		2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
- million tonnes -							(estimated)	(projected)
BEGINNING STOCKS	World Total	18.66	17.95	20.61	19.48	18.71	19.47	18.56
China		9.03	8.88	9.02	9.37	8.60	8.44	8.71
USA		0.91	1.08	1.62	0.79	1.00	1.01	0.69
PRODUCTION	World Total	25.21	26.04	24.61	25.06	24.43	24.12	25.55
China		6.04	5.80	5.91	5.73	5.98	5.60	6.15
India		5.66	6.20	5.99	5.29	5.72	5.49	5.20
USA		4.00	4.34	3.18	3.82	3.15	2.63	3.14
Brazil		2.01	2.78	3.00	2.36	2.55	3.20	3.70
Pakistan		1.67	1.46	0.96	1.27	0.84	1.42	1.20
Uzbekistan		0.64	0.53	0.70	0.59	0.59	0.59	0.64
Others		5.20	4.93	4.87	6.01	5.60	5.19	5.52
CONSUMPTION	World Total	26.03	23.05	25.71	25.84	23.64	24.98	25.42
China		8.25	7.23	8.40	8.31	7.50	8.30	8.30
India		5.40	4.45	5.70	5.30	5.20	5.39	5.60
Pakistan		2.36	2.34	2.15	2.45	1.90	2.30	1.88
Europe & Türkiye		1.82	1.60	1.79	2.01	1.82	1.82	1.81
Bangladesh		1.58	1.50	1.64	1.73	1.60	1.60	1.85
Vietnam		1.51	1.45	1.52	1.46	1.30	1.42	1.50
Brazil		0.73	0.57	0.69	0.70	0.70	0.70	0.75
USA		0.65	0.47	0.52	0.56	0.45	0.40	0.39
Others		3.73	3.44	3.30	3.32	3.18	3.05	3.34
EXPORTS	World Total	9.12	9.07	10.70	9.61	8.28	9.87	9.61
USA		3.20	3.33	3.49	3.06	2.71	2.56	2.39
Brazil		1.31	1.95	2.42	1.74	1.45	2.70	2.58
Australia		0.79	0.30	0.35	0.79	1.36	1.19	1.20
CFA-Zone		1.16	1.07	1.19	1.31	0.88	1.04	1.19
India		0.76	0.70	1.36	0.87	0.25	0.46	0.30
Uzbekistan		0.16	0.10	0.10	0.03	0.01	0.02	0.00
IMPORTS	World Total	9.22	8.78	10.66	9.61	8.23	9.81	9.61
Bangladesh		1.54	1.50	1.69	1.70	1.40	1.55	1.80
China		2.10	1.60	2.84	1.85	1.38	3.00	2.13
Vietnam		1.51	1.41	1.55	1.36	1.35	1.47	1.66
Türkiye		0.79	1.02	1.19	1.24	0.95	0.64	1.00
Indonesia		0.66	0.55	0.55	0.58	0.38	0.50	0.44
Trade Imbalance 1/		0.10	-0.29	-0.04	0.01	0.05	-0.06	0.00
Stocks Adjustment 2/		0.01	-0.03	0.01	0.01	0.02	0.01	0.00
ENDING STOCKS	World Total	17.95	20.61	19.48	18.71	19.47	18.56	18.69
China		8.88	9.02	9.37	8.60	8.44	8.71	8.68
USA		1.08	1.62	0.79	1.00	1.01	0.69	1.05
ENDING STOCKS/MILL USE (%)								
World less China 3/		50.96	73.38	58.45	57.67	68.36	59.05	59.05
China 4/		107.69	124.82	111.51	103.46	112.48	104.98	104.52
COTLOOK A INDEX 5/		84.35	71.33	84.96	131.68	101.62	92.02	80.92

Note:

- 1/ The inclusion of linters and waste, changes in weight during transit, differences in reporting periods and measurement error account for differences between world imports and exports.
- 2/ Difference between calculated stocks and actual; amounts for forward seasons are anticipated.
- 3/ World-less-China's ending stocks divided by world-less-China's mill use, multiplied by 100.
- 4/ China's ending stocks divided by China's mill use, multiplied by 100.
- 5/ US cents per pound. Average price for a given season, August 1 to July 31 or average-to-date.

Source: ICAC, Cotton this Month, 03 February 2025