



83rd Plenary Meeting | Facilitating investment in the Textiles & Apparel value chain in emerging markets | First Opening Session

Industrial policy and investment dynamics in disruptive times

Bremen, 23rd March 2026

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Agenda

1. Mega trends and investment drivers
2. Investment policy eco system
3. About Gherzi



The global textile industry is characterized by 5 mega trends and key investment drivers (1/3)

Global textile demand shows **long-term growth** (2 % pa)

1



Accelerated **shifts in sourcing patterns**

2



Sustainability – a policy imperative

3



Digitalization across the textile value chain

4



Leading to **integrated business models**

5

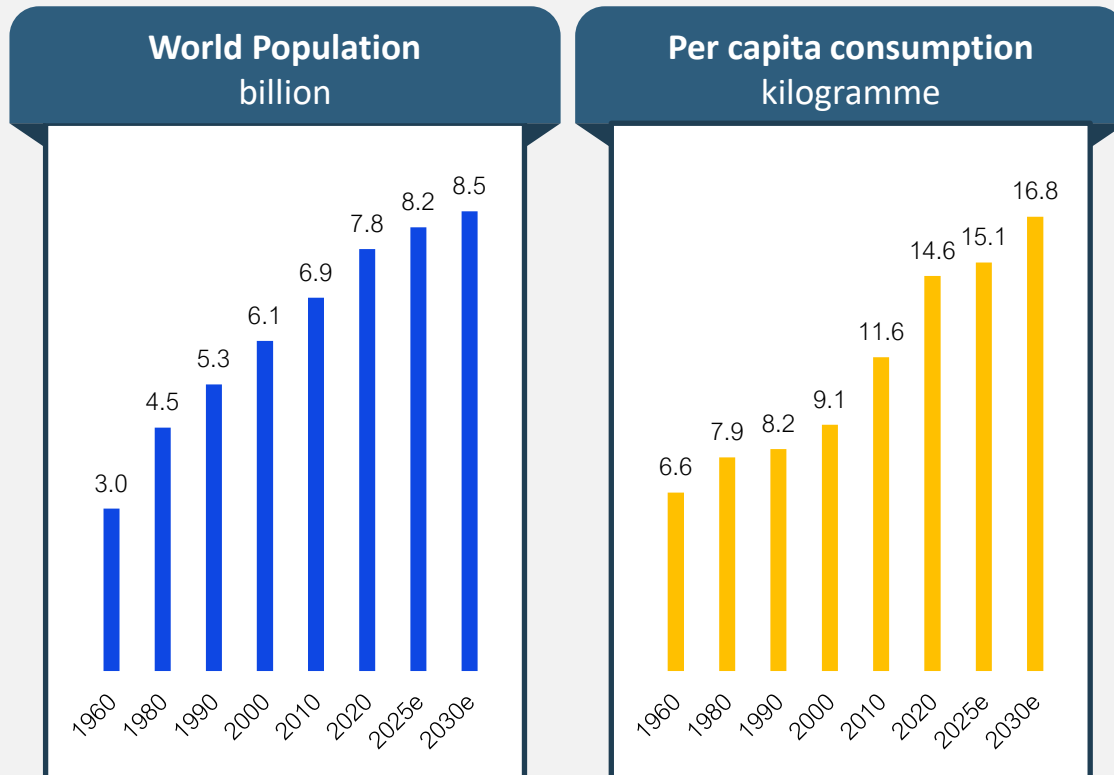


The global textile industry is characterized by 5 mega trends and key investment drivers (2/3)

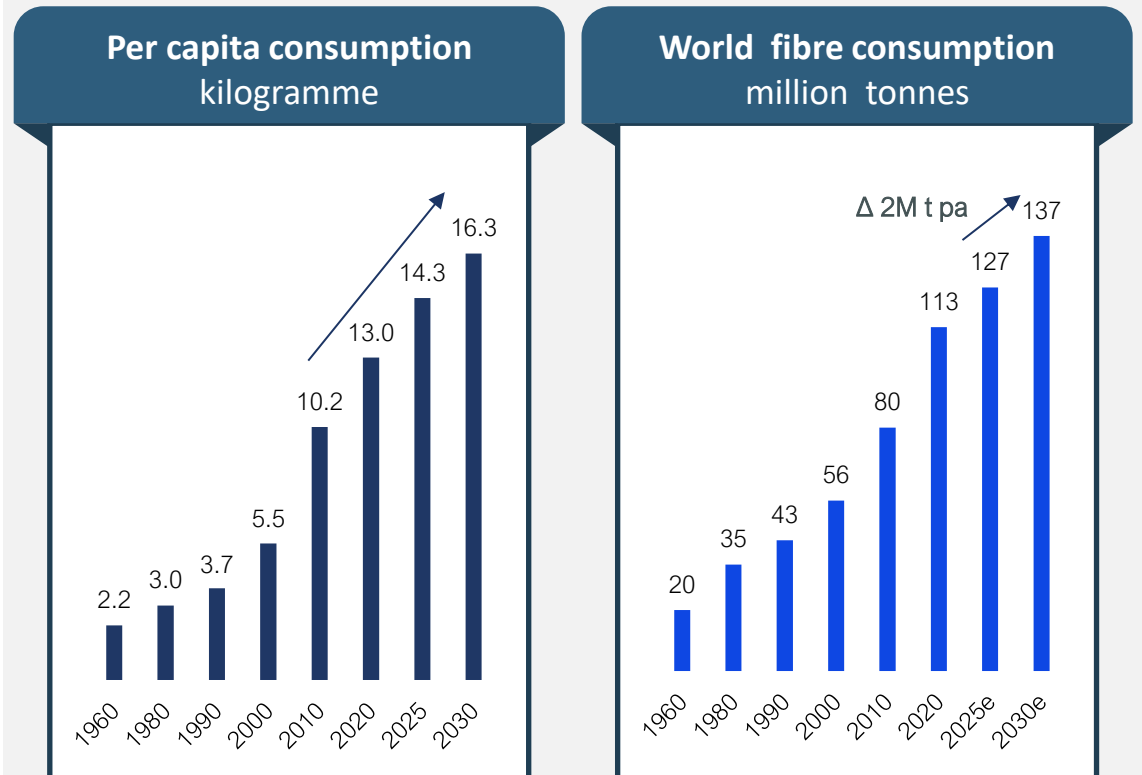
Textile DEMAND

World textile consumption per capita (Kgs)

World



Asia

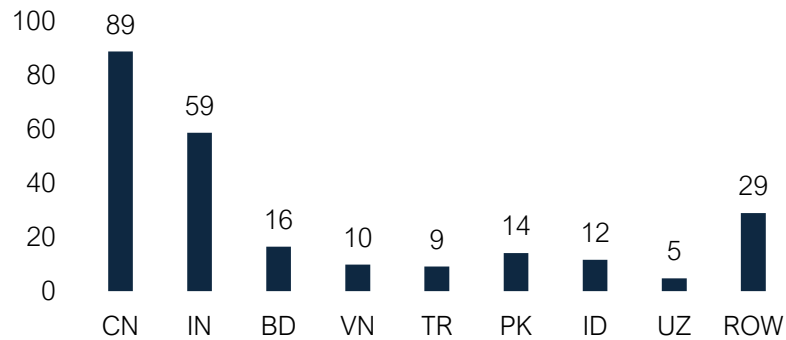


The global textile industry is characterized by 5 mega trends and key investment drivers (3/3)

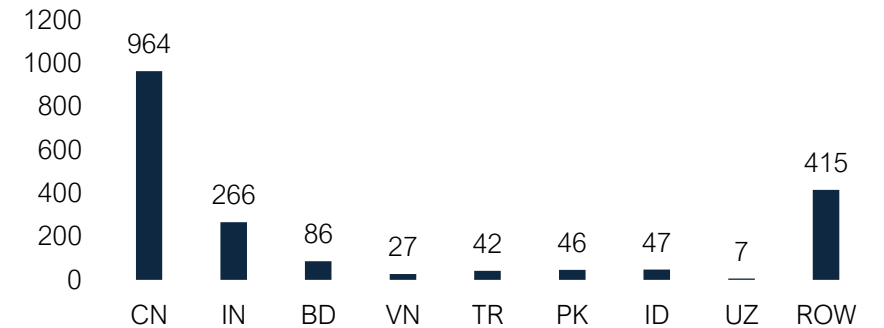
Textile INVESTMENT

Textile machinery investments (Top 10)

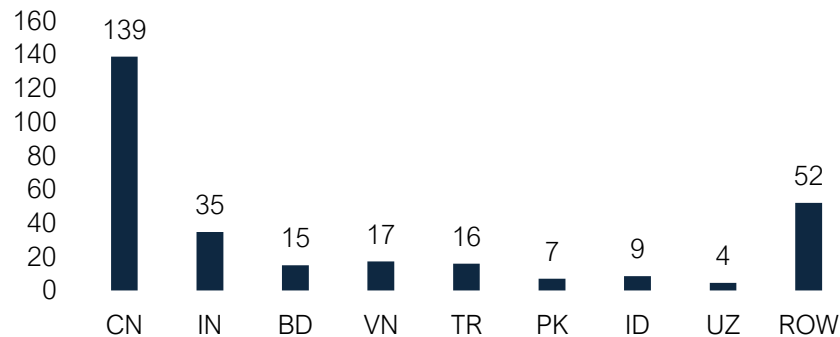
Ring spindles installed (mn)



Shuttle-less weaving mcs installed ('000)

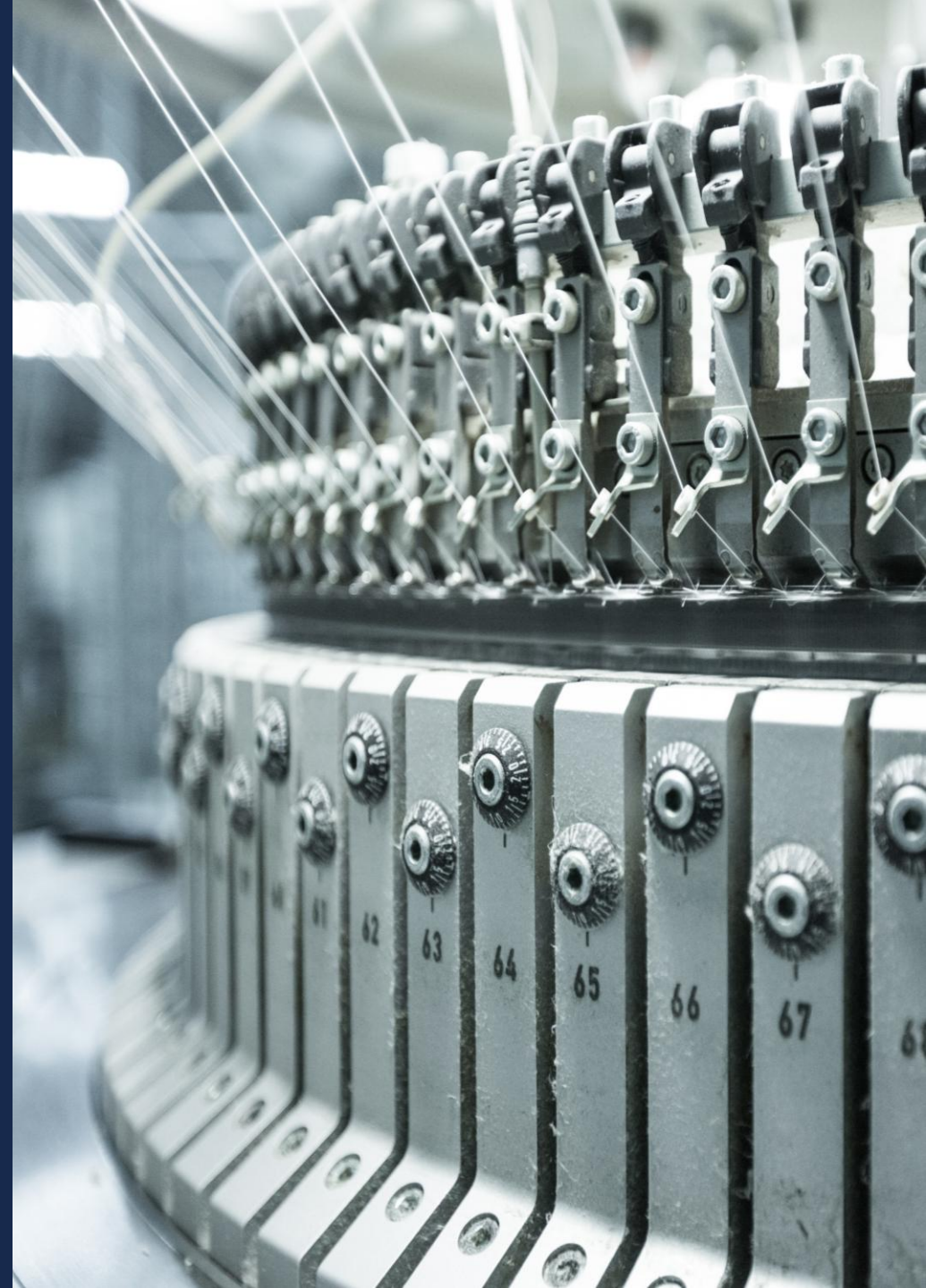


Circular knitting mc's cumulative shipment ('000)



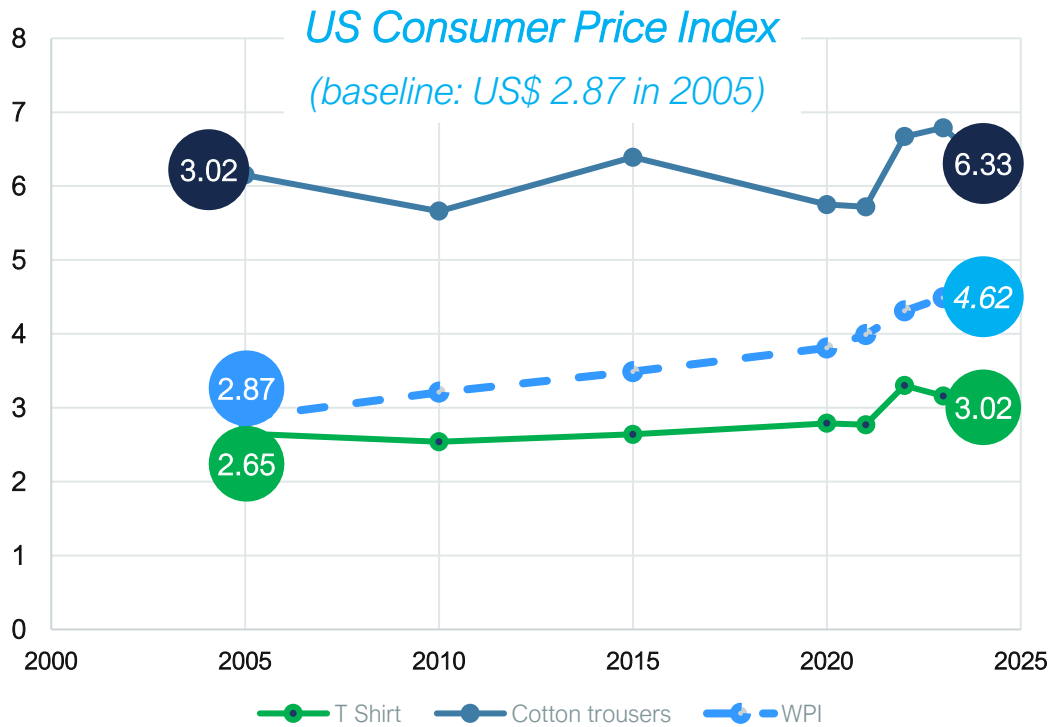
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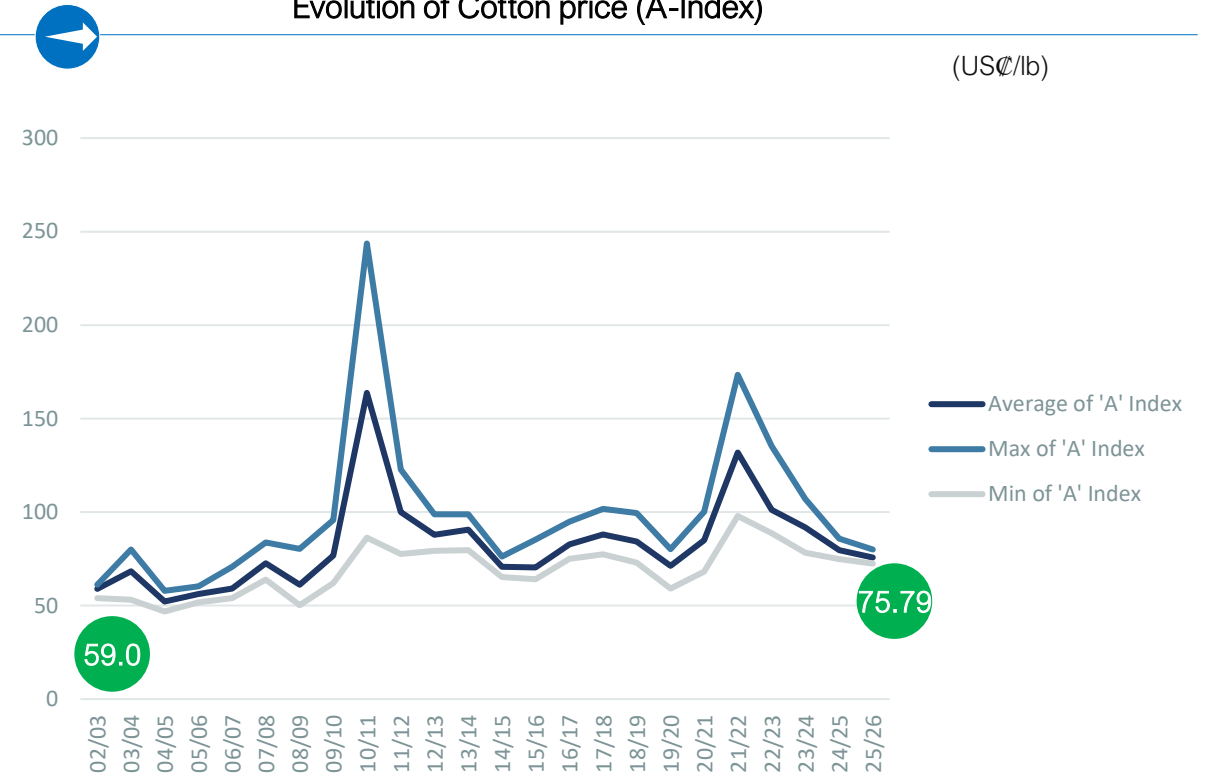


2 Investment is driven by the textile value chain dynamics and collaboration between government and industry (1/3)

Average unit price of Cotton t-shirt and Cotton Trousers in the USA versus CPI increase (US\$/Piece)



Evolution of Cotton price (A-Index) (US¢/lb)



Price competitiveness remains critical for investment decisions

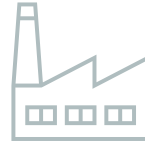
Source: OTEXA M/B Cotton T Shirts (Cat 338) and Cotton Trousers (Cat 347)

Source: ICAC

2 Investment is driven by the textile value chain dynamics and collaboration between government and industry (2/3)



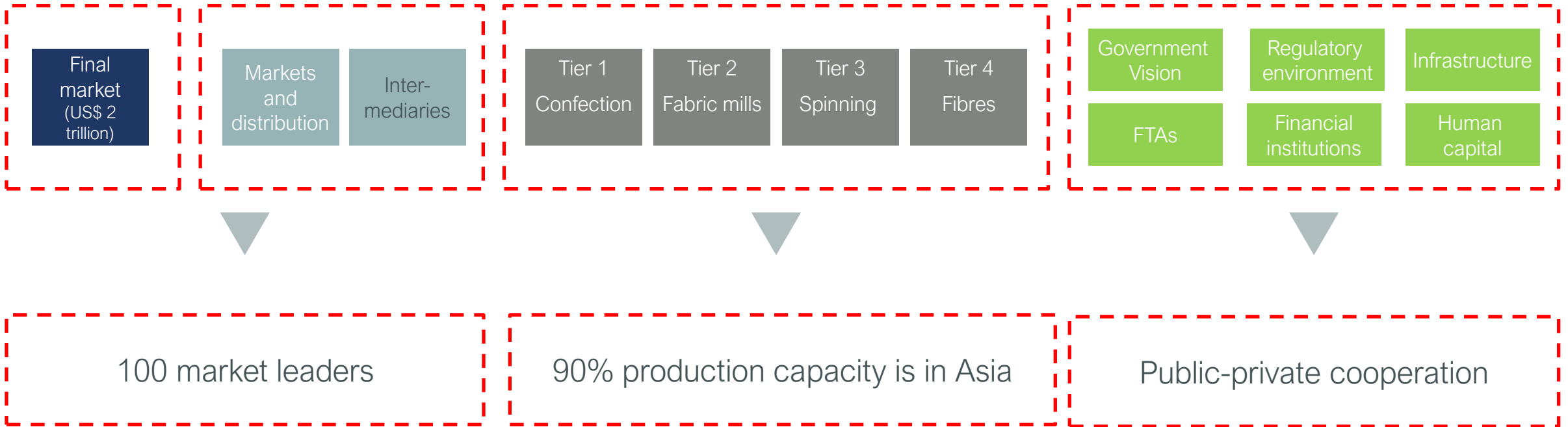
Demand



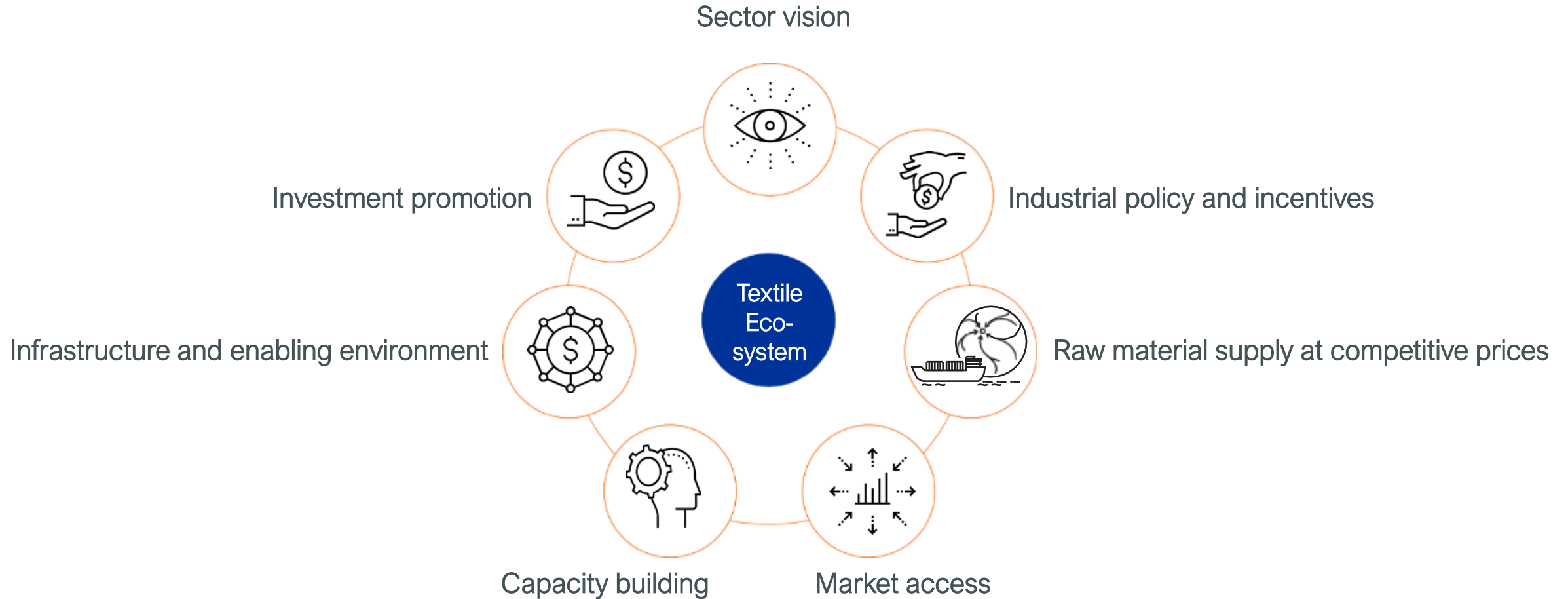
Supply



Catalysts / enablers



2 Investment is driven by the textile value chain dynamics and collaboration between government and industry (3/3)



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MANAGEMENT & OPERATIONS

Strategy and Operational Improvement
 Sustainability
 Innovation (incl. digital)
 Supply Chain (incl. traceability and legislation)
 Product Development
 Restructuring

CORPORATE FINANCE



ENGINEERING & LOGISTICS

Master planning
 Detailed architecture + engineering
 Project controlling + construction management
 Clean technologies



Mergers & Acquisitions
 Due diligence
 Feasibility Studies



We are an independent, global firm of consultants, technical specialists, engineers, architects and planners working across all areas of industrial and infrastructure projects.

Being independent for the last 90 years, we have always been putting the interest of our clients first.

Founded in Switzerland, we continue to bring our hallmark «Swissness» into services offered to our customers worldwide.

For further information, please visit www.gherzi.com

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