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Union BUDGET 2025-26

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Editor :

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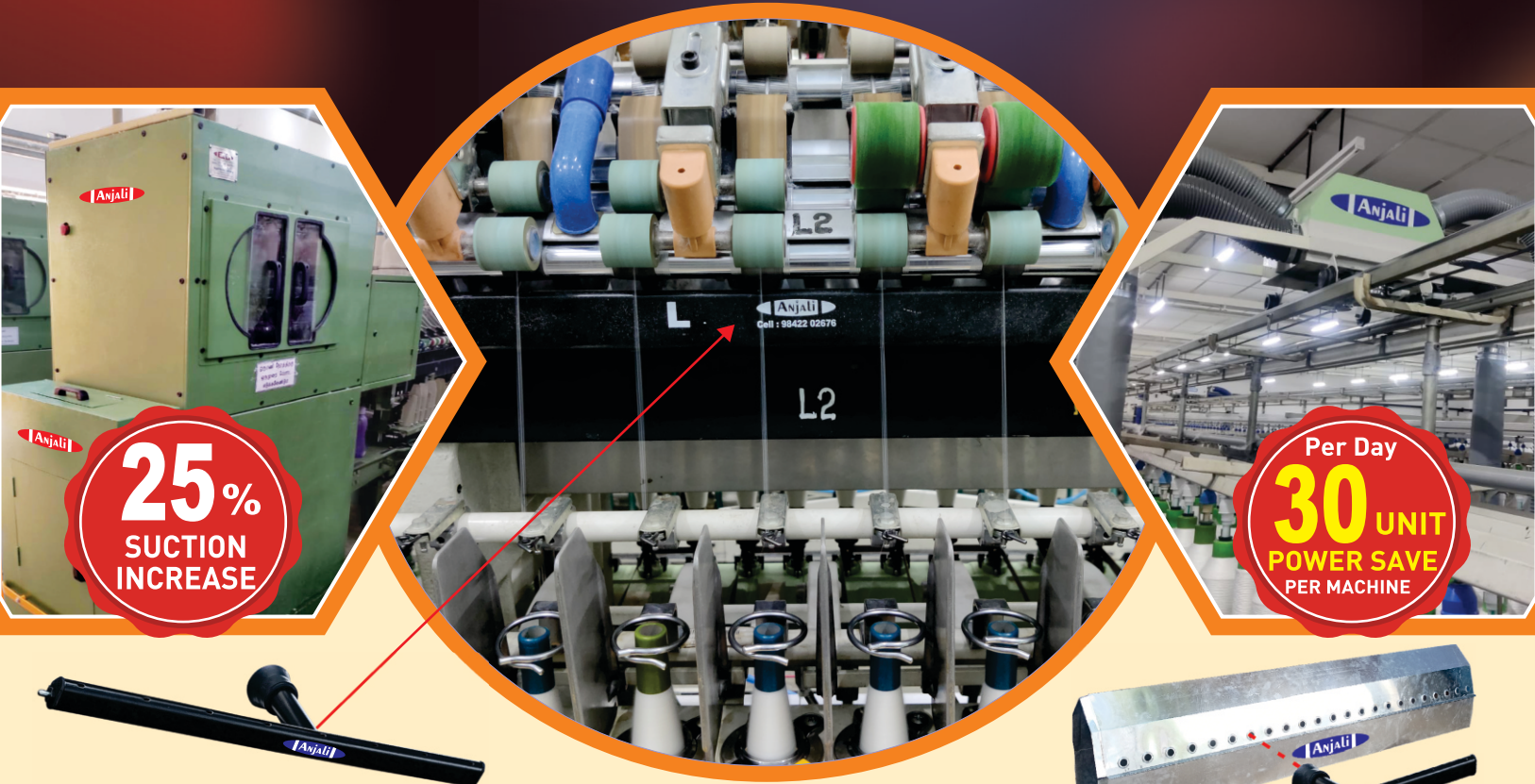
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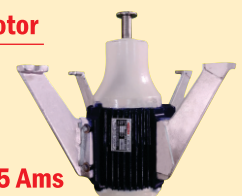
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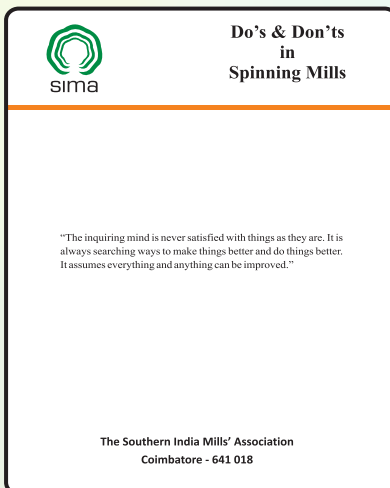
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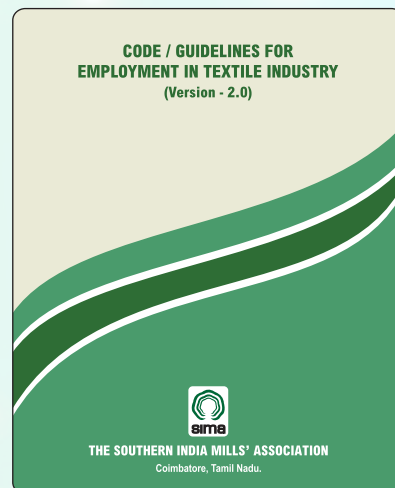
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TOM	76.2575	2700 76.	20-Apr-2022
EndApr22	76.3275	3475 76.	30-Apr-2022
EndMay22	76.6025	6225 76.	31-May-2022
17May22	76.5150	5350 76.	17-May-2022
EndJun22	76.8525	8725 76.	30-Jun-2022



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From the Chairman

Friends,

The outcome of the Union Budget 2025-26 is a promising development for the textile industry, with a significant focus on boosting domestic manufacturing, enhancing export competitiveness and promoting innovation through initiatives like the "Cotton Mission," revised customs duties and support for technical textiles, ultimately aiming to position India as a global textile hub; however, there are calls for further simplification of regulations and increased access to credit for MSMEs to fully realize the potential for growth. We are extremely thankful to the Hon'ble Prime Minister, Hon'ble Union Ministers for Finance, Agriculture, Commerce & Industry and Textiles, for favourably considering our pre-budget memorandum and announcing several benefits for the textiles and clothing industry.

However, challenges such as fluctuating raw material prices, the non-availability of quality cotton at internationally competitive prices, 11% import duty on cotton, outdated manufacturing infrastructure and intense global competition pose significant hurdles for the industry. These factors are limiting the ability to achieve the ambitious growth targets, even as the industry is emerging from a prolonged recession and gains momentum in both export and domestic markets.

Exports of Textile and Apparel (T&A) outpaced total goods exports during January 2025. The country's T&A exports jumped 14% to \$3.402 Billion. Apparel exports, in particular, surged by 12% to \$1.606 Billion in January. Textile exports also jumped by 16% to \$1.796 Billion in the same month. This impressive growth in textile and apparel exports was probably helped by the continued weakness of the Indian rupee against the US dollar, benefitting Indian exporters in the global market. The exports of all goods eased by 2% to \$36.425 Billion in the same month.

During the first ten months of the current fiscal 2024-25 export of textile and apparel gained by 8.30%, reaching \$29.997 Billion. Within the textile sector, exports of cotton yarn, fabrics, made-ups, and handloom products increased modestly by 4%, reaching \$9.954 Billion in the first ten months of this fiscal. Exports of man-made yarn, fabrics, and made-ups rose by 6% to \$4.036 Billion. At the same time, imports of raw cotton & waste and import of textile yarn, fabrics and made-ups climbed by 100% and 8% respectively.

On the raw material front, although domestic cotton prices remain higher than international prices, the overall demand for the Indian textile sector seems to be improving, aided by stable cotton prices and favourable forex rates. With Cotton Corporation of India likely to procure more than 100 lakh bales of cotton at MSP, the prices are likely to remain stable ensuring predictable input costs in future. Government initiatives and customs duty hikes on fabric imports are expected to benefit the sector.

From the Chairman

Despite The U.S. President Donald Trump's tariff threats on textiles, the Indian Government is actively engaging with the UK and the EU in Free Trade Agreement (FTA) negotiations. A reciprocative FTA with these nations could provide significant benefits to the Indian textile industry, strengthening the country in achieving its strategic objectives.

As already communicated to the members, the Government of Tamil Nadu is extending 6% interest subvention for a period of 5 years (scheme duration is 10 years) for replacing Ring Frames which are 15+ years old with either state-of-the-art ring frames or airjet spinning frames and replacing rotor kits of Open-End spinning machines. However, the constraint is that Rs. 10 crores allocated for the Scheme by the Government for the FY 2024-25 must be compulsorily utilized by the beneficiaries on or before 31st March 2025. Based on the representation of the Association, the Government has relaxed the condition of submitting bank loan details as processing and sanction of loan usually takes around 3 to 6 months resulting in a restriction for the interested mills in opting for the scheme within 31st March 2025. Therefore, members who have placed order and those who are intending to place order for new machines as per the scheme guidelines may upload the Application immediately and avail the benefit.

I optimistically hope that the mills in the State would fully utilise the budget allocated for the niche scheme and make it successful by enhancing their global competitiveness through modernisation.



Dr S K Sundararaman
Chairman

Highlights of Union Budget 2025 - 26

Union Budget 2025 - 26 enhances global competitiveness for textile industry

The Hon'ble Union Finance Minister, Smt. Nirmala Sitharaman, has presented the Union Budget for the year 2025-26 on (1st February 2025) in Parliament. The major Highlights of the Union Budget 2025-26 as applicable to the textile industry are as follows:

Budget Allocations

- ❖ Rs.100 crores for National Mission on Hybrid Seeds
- ❖ Rs.635 crores for Amended Technology Upgradation Fund Scheme (ATUFS) (Rs.635 crores were allocated during 2024-25 which was subsequently revised to Rs. 390 crores)
- ❖ Rs.1,148 crores for Production Linked Incentive (PLI) Scheme for Textiles
- ❖ Rs.330 crores for Integrated Scheme for Skill Development (Rs.166 crores were allocated during 2024-25 which was subsequently revised to Rs.331 crores)
- ❖ Rs.370 crores for National Technical Textiles Mission (Rs.375 crores were allocated during 2024-25 which was subsequently revised to Rs.250 crores)
- ❖ Rs.300 crores for PM - MITRA (Rs.300 crores were allocated during 2024-25 which was subsequently revised to Rs.44 crores)
- ❖ Rs.2,700 crores for Skill India Programme (Rs.2,685.64 crores were allocated during 2024-25 which was subsequently revised to Rs.2,318 crores)

- ❖ Rs.3,000 crores for New ITI Upgradation Scheme (Rs.1,000 crores were allocated during 2024-25)

Customs

- ❖ Extension of exemption from Import duty for shuttleless looms, certain weaving/knitting machines/non-woven manufacturing machines/garmenting machines (including their parts, spares and accessories) extended till 31.03.2027 (reduced from 7.5% to nil rate with effect 1.04.2023 till 31.03.2025)
- ❖ Customs Tariff rate on knitted fabrics (classified under tariff items 6004 10 00, 6004 90 00, 6006 22 00, 6006 31 00, 6006 32 00, 6006 33 00, 6006 34 00, 6006 42 00 and 6006 90 00) revised to "20% or Rs. 15 per kg, whichever is higher".

MSME

- ❖ Revision in classification criteria for MSMEs
- ❖ Medium sector - investment limit increased to Rs.125 crore from Rs. 50 crore and turnover limit increased from Rs. 250 crores to 500 crores
- ❖ Credit Guarantee Scheme for MSMEs in the Manufacturing Sector - For facilitating term loans to MSMEs for purchase of machinery and equipment without collateral or third party guarantee, a credit guarantee scheme will be introduced. The scheme will operate on pooling of credit risks of such MSMEs.

Highlights of Union Budget 2025 - 26

A separately constituted self-financing guarantee fund will provide, to each applicant, guarantee cover up to Rs. 100 crore, while the loan amount may be larger. The borrower will have to provide an upfront guarantee fee and an annual guarantee fee on the reducing loan balance.

- ❖ New mechanism for facilitating continuation of bank credit to MSMEs during their stress period- While being in the 'special mention account' (SMA) stage for reasons beyond their control, MSMEs need credit to continue their business and to avoid getting into the NPA stage. Credit availability will be supported through a guarantee from a government promoted fund.

Cotton

- ❖ Mission for Cotton Productivity - 5-year mission to facilitate improvements in productivity and sustainability of cotton farming.

- ❖ National Mission on High Yielding Seeds - Targeted development and propagation of seeds with high yield, pest resistance and climate resilience

Promoting exports

- " Export Promotion Mission: With sectoral and ministerial targets to facilitate easy access to export credit, cross-border factoring support, and support to MSMEs to tackle non-tariff measures in overseas markets. Sustainability and climate certifications fall under non-tariff measures.

Bharat Trade Net:

- ❖ A digital public infrastructure, 'Bharat Trade Net' (BTN) for international trade will be set-up as a unified platform for trade documentation and financing solutions.
- ❖ Support for integration with Global Supply Chains - National Framework for GCC as guidance to states for promoting Global Capability Centres in emerging tier 2 cities.

Techno Facts Benchmarking Survey

SIMA conducts this benchmarking survey on a monthly basis by collecting key performance indicators from mills. Processed report showing the position (rank) of these performance indicators and countwise production among participating mills are sent to the participating mills. The Report helps mills in taking corrective actions in improving productivity and better utilisation of factors of production.

For participating in the Survey please feel free to contact -

SIMA Industrial Engineering Division

India's Textile & Apparel exports outpace total goods shipment in January

- ❖ In January, India's textile and apparel exports rose by 13.88 per cent to \$3.402 billion, significantly outperforming the overall goods exports which declined by 2.41 per cent.
- ❖ The growth was supported by a weaker Indian rupee, enhancing competitiveness in global markets.
- ❖ Textiles and garments both showed substantial growth, contributing to an increase in their share of total merchandise exports.

India's textile and apparel (T&A) exports outpaced total goods exports during January 2025. The country's T&A exports jumped 13.88 per cent to \$3.402 billion. The exports of all goods eased by 2.41 per cent to \$36.425 billion in the same month. Textile and apparel exports gained 8.30 per cent, reaching \$29.997 billion in the first ten months of the current fiscal 2024-25 (April-March), while the outbound shipment of all goods inched up by 1.39 per cent in the same period.

Apparel exports, in particular, surged by 11.45 per cent to \$1.606 billion in January. Textile exports also jumped by 16.14 per cent to \$1.796 billion in the same month. This impressive growth in textile and apparel exports was probably helped by the continued weakness of the Indian rupee against the US dollar, benefitting Indian exporters in the global market.

Textile exports grew by 8.30 per cent to \$17.075 billion in the first ten months of FY25, compared to \$16.114 billion in the same period of the previous

year. Apparel exports rose by 11.56 per cent, reaching \$12.922 billion, up from \$11.583 billion in the corresponding period last fiscal. The share of T&A in India's total merchandise exports increased to 8.36 per cent during April 2024-January 2025 and to 9.34 per cent in the latest reported month, according to the Ministry of Commerce and Trade.

Within the textile sector, exports of cotton yarn, fabrics, made-ups, and handloom products increased modestly by 4.10 per cent, reaching \$9.954 billion in the first ten months of this fiscal. Exports of man-made yarn, fabrics, and made-ups rose by 5.99 per cent to \$4.036 billion, while carpet exports saw a significant increase of 11.47 per cent to \$1,285.08 million.

In January 2025, T&A exports totalled \$3.402 billion. Textile exports rose by 16.14 per cent, reaching \$1.796 billion, up from \$1.546 billion in January 2024. Garment shipments grew by 11.45 per cent, totalling \$1.606 billion, compared to \$1.441 billion in January 2024. The export of cotton yarn, fabrics, made-ups, and handloom products grew by 16.41 per cent to \$1,038.55 million, while man-made yarn, fabrics, and made-ups exports surged by 12.14 per cent to \$425.82 million. Carpet exports also increased by 18.04 per cent to \$135.58 million.

Imports of raw cotton and waste climbed by 100.69 per cent to \$1,040.41 million in April-January 2025, compared to \$518.43 million in the same period of the last fiscal. Imports of textile yarn, fabrics, and made-ups increased by 7.74 per

Foreign Trade Performance

cent, rising from \$2,081.22 million to \$1,931.67 million.

and import of selected major commodities during April 2024 - January 2025 compared to a year ago.

Table 1 shows the quick estimates of the export

Table - 1 : Quick Estimates for Selected Major Commodities

Exports (Million USD)	Jan'24	Jan'25	% Change	Apr'24 - Jan'25	Apr'23 - Jan'24	% Change
Cotton Yarn/Fabs/made-ups, Handloom Products etc	892.13	1,038.55	16.41%	9,562.20	9,954.57	4.10%
Man-made Yarn/ Fabs/ made-ups etc.	379.71	425.82	12.14%	3,808.05	4,036.10	5.99%
RMG of all Textiles	1,441.36	1,606.42	11.45%	11,583.03	12,922.23	11.56%
Jute Mfg. Floor Covering	24.87	34.99	40.69%	283.80	318.92	12.37%
Carpet	114.86	135.58	18.04%	1,152.80	1,285.08	11.47%
Handicrafts excl. handmade carpet	135.03	161.35	19.49%	1,307.25	1,480.37	13.24%
Textiles	1,546.60	1,796.29	16.14%	16,114.10	17,075.04	5.96%
Apparel	1,441.36	1,606.42	11.45%	11,583.03	12,922.23	11.56%
Textiles & Apparel	2,987.96	3,402.71	13.88%	27,697.13	29,997.27	8.30%
All Commodities	37,323.80	36,425.71	-2.41%	3,53,973.67	3,58,906.54	1.39%
% Share of T&C in Total Exports	8.01%	9.34%		7.82%	8.36%	

Exports (Million USD)	Jan'24	Jan'25	% Change	Apr'23 - Jan'24	Apr'24 - Jan'25	% Change
Cotton Raw & Waste	19.62	121.72	520.39%	518.43	1,040.41	100.68%
Textile yarn Fabric, made-up articles	184.64	237.86	28.82%	1,931.67	2,081.22	7.74%

Source: DGCIS/MOC

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legal@simamills.org

Foreign Trade Performance

Commodity Group wise Performance (FTPA)

The foreign trade performance analysis report of the Commerce Ministry based on DGCI&S provisional data showed that the country's export during April-November 2024 amounted to USD 283.69 billion, 2 per cent higher than previous year corresponding period export of USD 278.25 billion. Among various commodity groups, export of textiles and allied products stood at USD 23.15 billion, 6 per cent higher than the previous year same time export level of USD 21.75 billion.

The country's imports during April - November 2024 amounted to USD 472.53 billion, 5 per cent higher than previous year same time import level of USD 449.24 billion. The import of textiles and allied products group stood at USD 5.75 billion as against previous year same time import level of USD 5.75 billion.

Table-2 shows the export and import performance of major commodity groups in April-November

2024 compared with the previous year same period performance.

Export of cotton yarn during the period April - November 2024 stood at USD 2325.26 million, 9 per cent lower than previous year same time export level of USD 2557.59 million, export of cotton fabrics, made-ups etc stood at USD 4549.38 million, 5 per cent higher than previous year same time export level of USD 4334.22 million. Export of man-made staple fibre during the period stood at USD 292.69 million, an increase of 10 per cent compared to previous year export level of USD 265.41 million. At the same time, export of man-made yarn, fabrics, made-ups registered a growth of 4 per cent and RMG of manmade fibres registered a marginal growth of 3 per cent during the period. Table-3 shows export of various commodities under the textiles and allied products in April-November 2024 compared with the previous year corresponding period export in dollar terms along with percentage growth.

News Snippet

Unit prices of Bangladesh's RMG exports to EU dropped in 2024

- ❖ Despite Bangladesh's RMG exports to the EU growing by 4.86 per cent YoY to \$19.77 billion last year, exporters observed unit prices declining as the growth in volume outpaced the rise in value.
- ❖ The per-unit price fell to \$16.07 per kg in 2024 from \$16.88 per kg in the previous year—a sharp 5-per cent drop.
- ❖ Turkiye, India, China, Vietnam and Cambodia also saw declines in unit prices.
- ❖ Despite Bangladesh's readymade garment (RMG) exports to the European Union (EU) growing by 4.86 per cent year on year (YoY) to \$19.77 billion last year, exporters observed unit prices declining as the growth in volume outpaced the rise in value.
- ❖ The per-unit price fell to \$16.07 per kg in 2024 from \$16.88 per kg in the previous year—a sharp 5-per cent drop.

Foreign Trade Performance

Table - 2 : Export & Import performance of Major Commodities Group – USD Million

Commodity	Export			Import		
	Apr - Nov 2023	Apr - Nov 2024 (P)	% Growth	Apr - Nov 2023	Apr - Nov 2024 (P)	% Growth
1. Plantation	1,339.72	1,756.30	31.10	669.80	1069.20	59.63
2. Agri & Allied Products	23,825.72	25,321.90	6.28	20219.96	23488.16	16.16
3. Marine Products	5,227.56	4,953.34	-5.25	145.69	176.90	21.43
4. Ores & Minerals	3,819.03	3,201.38	-16.17	32087.16	29107.17	-9.29
5. Leather & Leather Manufactures	3,024.17	3,080.31	1.86	671.62	691.74	3.00
6. Gems & Jewellery	21,407.83	19,233.40	-10.16	52259.44	55790.33	6.76
7. Sports Goods	269.97	287.70	6.57	270.25	268.57	-0.62
8. Chemicals & Related Products	36,477.51	39,091.98	7.17	44135.86	41702.20	-5.51
9. Plastic & Rubber Articles	5,753.43	6,485.36	12.72	17472.21	17802.55	1.89
10. Articles of Stone, Plaster, Cement, Asbestos, Mica or Similar Materials; Ceramic Products; Glass and Glassware	4,600.89	4,263.72	-7.33	2473.00	2696.47	9.04
11. Paper & Related Products	3,079.54	3,055.34	-0.79	6139.69	6514.87	6.11
12. Base Metals	21,797.13	20,335.64	-6.70	30351.02	32206.25	6.11
13. Optical, Medical & Surgical Instruments	2,508.16	2,661.64	6.12	5727.88	6285.84	9.74
14. Electronics Items	17,087.83	21,892.79	28.12	55093.63	61235.64	11.15
15. Machinery	27,187.24	29,685.32	9.19	40322.03	43047.18	6.76
16. Office Equipments	221.55	193.46	-12.68	46.05	47.05	2.17
17. Transport Equipments	18,013.18	23,830.15	32.29	15006.22	15949.89	6.29
18. Project Goods	2.11	1.58	-24.84	728.15	731.68	0.48
19. Textiles & Allied Products	21,759.49	23,153.83	6.41	5757.10	5759.51	0.04
20. Petroleum Crude & Products	55,021.33	44,092.77	-19.86	115033.19	123037.27	6.96
21. Others	5,835.46	7,120.01	22.01	4630.36	4925.13	6.37
Total	2,78,258.84	2,83,697.95	1.95	449240.30	472533.61	5.19

Foreign Trade Performance

Table - 3 : Export of commodities under Textiles & Allied Products Group – USD Million

Commodity	Apr - Nov 2023	Apr - Nov 2024	% Growth
Textiles & Allied Products	21,759.49	23,153.83	6.41
Manmade Staple Fibre	265.41	292.69	10.28
Cotton Yarn	2,557.59	2,325.26	-9.08
Cotton Fabrics, Made-ups Etc.	4,334.22	4,549.38	4.96
Other Textile Yarn, Fabric Made-up Articles	476.93	602.38	26.30
Silk, Raw	0.61	2.89	377.22
Natural Silk Yarn, Fabrics, Made-ups	51.67	87.18	68.72
Manmade Yarn, Fabrics, Made-ups	3,053.77	3,188.76	4.42
Wool, Raw	0.24	0.26	4.94
Wollen Yarn, Fabrics, Made-ups, etc.	129.24	106.88	-17.30
RMG Cotton Including Accessories	4,995.65	5,708.35	14.27
RMG Silk	62.77	53.85	-14.22
RMG Manmade Fibres	1,714.10	1,768.08	3.15
RMG Wool	146.15	121.86	-16.62
RMG of Other Textile Material	1,927.74	2,201.69	14.21
Coir and Coir Manufactures	219.53	254.22	15.80
Handloom Products	97.98	94.72	-3.33
Silk Waste	25.88	23.55	-9.00
Jute, Raw	9.83	9.95	1.18
Jute Yarn	6.69	9.83	46.84
Jute Hessian	64.48	66.68	3.41
Floor Covering of Jute	55.21	60.02	8.70
Other Jute Manufactures	107.58	109.56	1.84
Carpet (Excluding Silk) Handmade	884.87	987.68	11.62
Silk Carpet	30.09	27.58	-8.35
Cotton Raw Including Waste	541.25	500.56	-7.52

Foreign Trade Performance

At the same time import of raw cotton including waste during the period stood at USD 775.80 million an increase of 65.30 per cent as against previous year import level of USD 469.33 million; cotton yarn imports during the period April-November registered a positive growth of 2 per cent to USD 16.88 million, also, import of cotton fabrics, made-ups etc., group and RMG of Cotton Including accessories registered a growth of 3% and 2% respectively when compared a year ago.

On the MMF front, import of manmade staple fibres during the period stood at USD 328.21 million, 9 per cent higher than previous year same time import level of USD 301.27 million. Import of manmade yarn, fabrics, madeups group declined by 14 per cent to USD 1778.72 million compared with previous year import level of USD 2066.73 million. Table -4 shows import of various commodities under the textiles & allied products group during April-November 2024 compared with previous year corresponding period import in dollar terms along with percentage growth.

India's export of items covered under HS Codes 50 to 63

- ❖ India's export of cotton products covered under HS Codes 52 during April - November 2024 registered a negative growth of 6 per cent and stood at USD 4063.05 million, as against the previous year same time export level of USD 4332.15 million.
- ❖ At the same time, export of Man-made filaments during the period stood at USD

1164.44 million, an increase of 3 per cent as against previous year export level of USD 1135.49 million.

- ❖ Manmade staple fibres covered under HS Codes 55 registered a negative growth of (-1) per cent compared to previous year export level of USD 1074.15 million.
- ❖ Exports of garments covered under HS Codes 61 & 62 during the period stood at USD 5004.18 million and 4863.12 million, which is higher by 15% and 8% respectively when compared to previous year same time export level of USD 4338.33 million and USD 4519.12 million respectively.
- ❖ Made-ups exports covered under HS Code 63 increased by 10 per cent during the period.

Table-5 shows India's export of textile items covered under HS Codes 50 to 63 in USD million during November 2024 compared with same period of the previous year.

India's Import of items covered under HS Codes 50 to 63

- ❖ India's import of cotton products covered under HS Codes 52 during April - November 2024 stood at USD 902.06 million, an increase of 51 per cent compared to previous year same time import level of USD 599.15 million.
- ❖ Import of man-made filaments during the period stood at USD 958 million which is lower by 21 per cent when compared with previous year same time import level of USD 1209.40 million.

Foreign Trade Performance

Table - 4 : Import of commodities under Textiles & Allied Products Group – USD Million

Commodity	Apr - Nov 2023	Apr - Nov 2024	% Growth
Textiles & Allied Products	5,757.10	5,759.51	0.04
Manmade Staple Fibre	301.27	328.21	8.94
Cotton Yarn	16.48	16.88	2.43
Cotton Fabrics, Made-ups Etc.	398.10	410.20	3.04
Other Textile Yarn, Fabric Made-up Articles	830.94	829.27	-0.20
Silk, Raw	111.04	80.12	-27.85
Natural Silk Yarn, Fabrics, Made-ups	36.63	37.17	1.47
Manmade Yarn, Fabrics, Made-ups	2,066.73	1,778.72	-13.94
Wool, Raw	152.91	146.34	-4.30
Wollen Yarn, Fabrics, Made-ups, etc.	93.26	75.14	-19.43
RMG Cotton Including Accessories	501.70	513.46	2.35
RMG Silk	16.74	4.60	-72.50
RMG Manmade Fibres	327.85	375.18	14.43
RMG Wool	52.75	25.24	-52.16
RMG of Other Textile Material	152.50	158.49	3.93
Coir And Coir Manufactures	3.80	2.07	-45.37
Handloom Products	1.09	1.49	37.01
Silk Waste	0.94	1.13	20.35
Jute, Raw	64.65	60.71	-6.10
Jute Yarn	40.46	37.38	-7.62
Jute Hessian	23.65	27.07	14.46
Floor Covering of Jute	0.31	0.36	14.22
Other Jute Manufactures	72.11	50.14	-30.46
Carpet (Excluding Silk) Handmade	21.77	24.13	10.86
Silk Carpet	0.09	0.24	148.89
Cotton Raw Including Waste	469.33	775.80	65.30

Foreign Trade Performance

Table - 5 : Export of Textile items covered under HS Codes – USD Million

HS Code	Commodity	November 2023	November 2024	% Growth
50	Silk	8.54	15.50	81.55
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	11.35	10.56	-6.99
52	Cotton.	505.88	483.80	-4.37
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	33.86	40.50	19.63
54	Man-Made Filaments.	117.07	115.77	-1.11
55	Man-Made Staple Fibres.	122.17	117.80	-3.57
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	40.89	50.37	23.19
57	Carpets and other textile floor coverings.	157.54	163.86	4.01
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	23.28	25.15	8.04
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	34.75	37.60	8.20
60	Knitted or crocheted fabrics.	38.60	42.45	9.99
61	Articles of apparel and clothing accessories, knitted or crocheted.	505.72	552.93	9.33
62	Articles of apparel and clothing accessories, not knitted or crocheted.	515.71	570.40	10.61
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	393.91	423.31	7.46

Foreign Trade Performance

- ❖ Also import of garments covered under HS Codes 62 during the period decline by 1%.
- ❖ Import of made ups covered under HS Code 63 stood at USD 414.41 million, which is lower by 7 per cent when compared to previous year same time import level of USD 445.74 million.

Table - 6 shows India's import of textile items covered under HS Codes 50 to 63 in USD million during November 2024 compared with same period of the previous year.

HS Code wise Performance

Export & Import Quantum April - November 2024

- ❖ Export of cotton covered under HS Codes 5201-5203 during the period April - November 2024 stood at 276.11 million kgs, which is higher by 1 per cent when compared with previous year same time export level of 272.83 million kgs, At the same time, its imports during the period stood at 370.74 million kgs, 87 per cent higher than previous year same time import level of 198.78 million kgs.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 743.66 million kgs, which is lower by 8 per cent than previous year same time export level of 811.67 million kgs.
- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period stood at 1438.13 million square metres, which is higher by 2 per cent compared to previous year same time export level of 1412.28 million square metres.

Export and Import Value - April - November 2024

- ❖ Export of cotton in all forms covered under HS Codes 5201 to 5203 during April- November 2024 declined by 8% to USD 500.55 as against its previous year export level of USD 541.25 million. At the same time its import during the period stood at USD 775.80 million which is higher by 65% as against the previous year import level of USD 469.33 million.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period was valued at USD 2333.15 million, 9 per cent lower than previous year same time export level of USD 2565.57 million. Its import stood at USD 17.14 million during April - November 2024.
- ❖ Export of woven fabrics of containing cotton covered under HS Codes 5208 to 5212 during the period was valued at USD 1229.36 million as against previous year export level of USD 1225.34 million. At the same time its import stood at USD 95.14 million, a decrease of 3 per cent compared to a year ago.

Table - 7 shows export and import of HS Codes 5201 to 5212 during November 2024 compared with the corresponding period export and import in the previous two years in quantitative terms.

Table - 8 shows export and import of HS Codes 5201 to 5212 during November 2024 compared with the corresponding period export and import in the previous two years in dollar terms.

Foreign Trade Performance

Table - 6 : Import of Textile items covered under HS Codes – USD Million

HS Code	Commodity	November 2023	November 2024	% Growth
50	Silk	18.31	15.96	-12.80
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	23.49	22.62	-3.69
52	Cotton.	47.09	187.50	298.19
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	53.46	59.84	11.93
54	Man-Made Filaments.	103.37	120.09	16.18
55	Man-Made Staple Fibres.	75.34	69.36	-7.94
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	34.92	42.97	23.02
57	Carpets and other textile floor coverings.	13.63	14.60	7.14
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	16.94	16.73	-1.22
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	64.17	65.76	2.48
60	Knitted or crocheted fabrics.	55.02	67.21	22.15
61	Articles of apparel and clothing accessories, knitted or crocheted.	56.53	64.24	13.64
62	Articles of apparel and clothing accessories, not knitted or crocheted.	61.49	67.83	10.31
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	56.39	52.23	-7.38

Foreign Trade Performance

Table - 7 : Export / Import – Million kgs / sq.mtrs

HS Code	Description	Export			Import		
		November 2023	November 2024	% Growth	November 2023	November 2024	% Growth
5201	Cotton, Not Carded or Combed	34.18	28.70	-16.05	9.43	87.31	825.41
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	4.33	5.03	16.36	4.40	3.54	-19.44
5203	Cotton, Carded or Combed	4.36	4.00	-8.21	0.04	0.00	-88.21
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	0.09	0.09	-1.50	0.00	0.01	37.99
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	88.81	86.30	-2.83	0.14	0.37	164.85
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	5.70	5.45	-4.44	0.08	0.13	60.29
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	0.02	0.05	96.86	0.01	0.00	-97.60
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	110.03	109.77	-0.24	8.97	12.51	39.39
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	23.96	28.92	20.73	0.77	1.03	33.15
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.39	5.88	9.23	1.93	1.96	1.67
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	7.40	9.69	30.84	1.05	0.68	-34.72
5212	Other Woven Fabrics of Cotton	1.68	2.90	72.55	0.12	0.24	112.57
	Cotton (HS 5201-5203)	42.87	37.73	-11.98	13.87	90.86	555.06
	Cotton Yarn (HS 5204-5207)	94.62	91.88	-2.90	0.24	0.51	112.65
	Woven Fabrics of Cotton (HS 5208-5212)	148.46	157.16	5.86	12.83	16.42	27.96

Foreign Trade Performance

Table - 8 : Export / Import– USD Million

HS Code	Description	Export			Import		
		Nov 2023	Nov 2024	% Growth	Nov 2023	Nov 2024	% Growth
5201	Cotton, Not Carded or Combed	69.01	53.14	-23.00	28.66	169.12	490.14
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	5.91	6.00	1.50	1.74	1.56	-10.58
5203	Cotton, Carded or Combed	6.15	5.17	-15.99	0.21	0.04	-79.53
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	0.77	0.89	15.65	0.03	0.04	25.33
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	274.62	262.59	-4.38	0.35	1.64	363.61
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	15.21	16.14	6.09	0.31	0.30	-2.32
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	0.25	0.41	60.79	0.01	0.01	-46.10
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	84.88	80.69	-4.93	9.43	8.77	-7.07
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	30.17	36.03	19.40	2.16	2.34	8.12
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	6.22	7.32	17.77	1.82	1.40	-23.16
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	10.81	12.76	18.09	2.11	1.51	-28.40
5212	Other Woven Fabrics of Cotton	1.88	2.66	41.76	0.25	0.79	214.52
	Cotton (HS 5201-5203)	81.07	64.31	-20.67	30.61	170.72	457.73
	Cotton Yarn (HS 5204-5207)	290.85	280.03	-3.72	0.70	1.99	184.29
	Woven Fabrics of Cotton (HS 5208-5212)	133.96	139.46	4.11	15.77	14.81	-6.09

Index of Industrial Production

India's Industrial Production Grows 3.2% In December 2024

India's industrial output, measured by the Index of Industrial Production (IIP) grew by 3.2 per cent in December 2024, from 5.2 per cent in November 2024. The growth rates of the three sectors, mining, manufacturing and electricity for December 2024 were 2.6 per cent, 3.0 per cent and 6.2 per cent, respectively. The quick estimates of IIP stands at 157.2 against 152.3 in December 2023. The Indices of Industrial Production for the mining, manufacturing and electricity sectors for December 2024 stand at 143.1, 156.2 and 192.8 respectively.

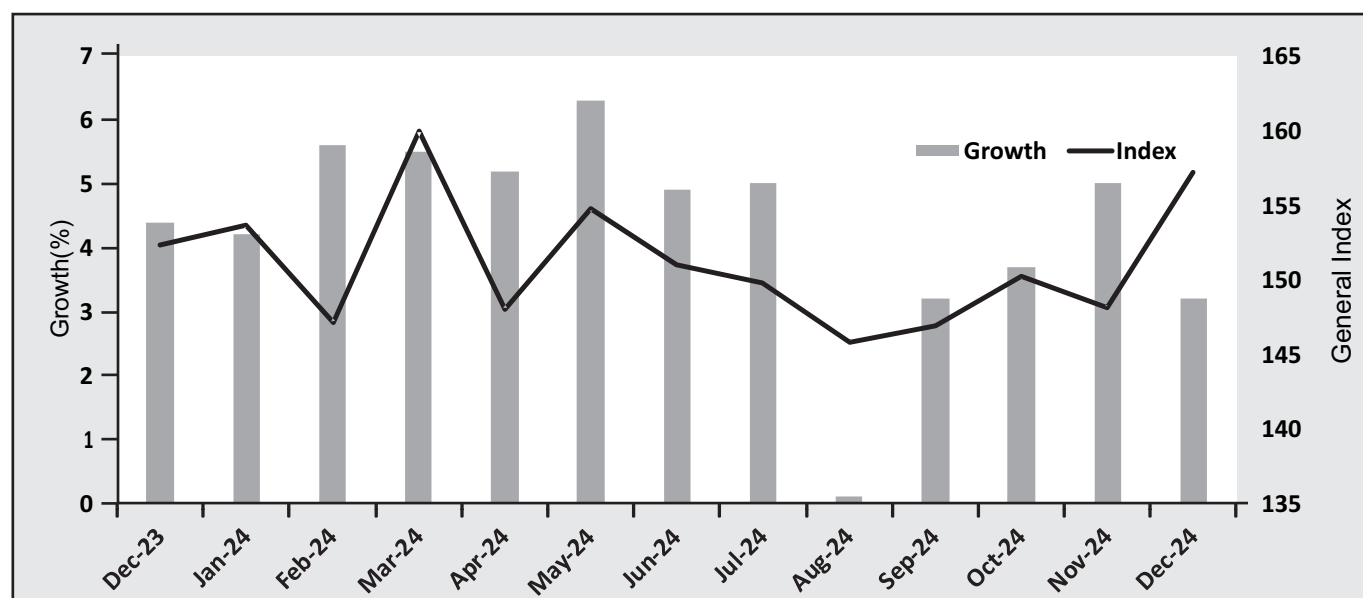
Within the manufacturing sector, 16 out of 23 industry groups at NIC 2 digit-level have recorded a positive growth in December 2024 over December 2023. The top three positive contributors for December 2024 are - "Manufacture of basic metals" (6.7 per cent), "Manufacture of electrical equipment" (40.1 per

cent) and "Manufacture of coke and refined petroleum products" (3.9 per cent).

As per the use base classification, the indices stand at 157.7 for Primary Goods, 114.5 for Capital Goods, 169.3 for Intermediate Goods and 191.7 for Infrastructure/ Construction Goods for December 2024. Further, the indices for Consumer durables and Consumer non-durables stand at 124.0 and 166.0 respectively. Chart-1 depicts monthly indices and growth rate (%) of IIP.

- ❖ Manufacturing of Textiles Index for the month of December 2024 stood at 113.8 points, an increase of 1.33% than previous year index level of 112.3 points.
- ❖ Manufacturing of wearing apparel Index for the month of December 2024 stood at 119.2 points an increase of 5.39% as

Chart - 1 : All India Index of Industrial Production



Index of Industrial Production

compared to December 2023 index level of 113.1 points.

December 2024 IIP:

The table -2 captures comparative IIP growth

Table - 1 : Textiles and Wearing Apparels IIP

Month	Manufacture of Textiles			Manufacturing of Wearing Apparels		
	2023	2024	Growth Rate %	2023	2024	Growth Rate %
April	105.6	105.3	-0.28	92.1	105.1	14.12
May	107.4	107.0	-0.37	112.2	123.6	10.16
June	107.8	106.2	-1.48	120.1	122.6	2.08
July	108.5	109.1	0.55	103.9	111.7	7.51
August	107.1	109.5	2.24	97.8	112.5	15.03
September	108.4	109.6	1.11	102.4	103.7	1.27
October	110.2	111.2	0.91	97.8	104.0	6.34
November	102.7	106.4	3.60	92.9	110.2	18.62
December	112.3	113.8	1.34	113.1	119.2	5.39

Cost Control Study

SIMA Conducts “Cost Control Study” and works out cost of production of yarn for individual counts by critically analyzing shop floor performance, details of yarn realization, waste level in different departments, machine productivity, spindle utilization, labour engagement, units per kilogram, etc collected from mills.

The report would identify areas for cost reduction and ways and means of reducing the cost. The report would also give information on various textile industry standards on productivity and productivity levels possible for the mills to attain along with data on mills with high productivity.

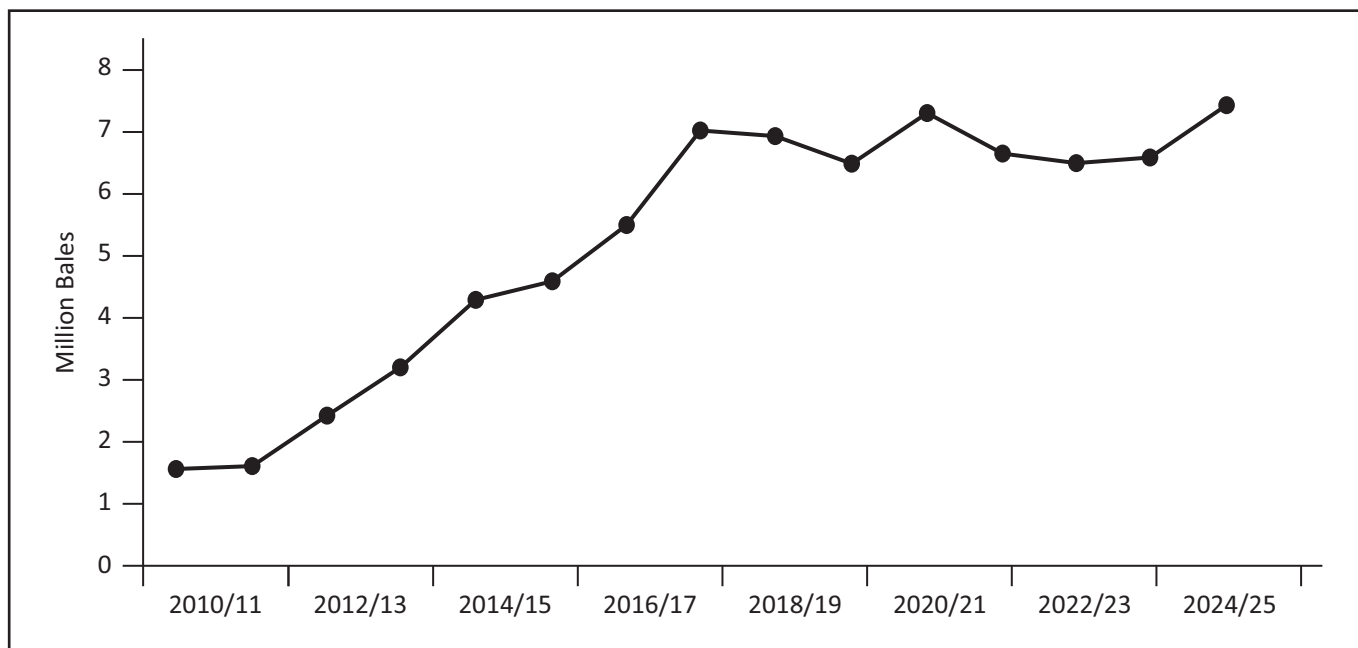
Interested mills are requested to contact the Association for more details.

Index of Industrial Production

Table - 2 : Index of Industrial Production (Base 2011 - 12 = 100)

NIC 2008	Description	Weights	October 2023	November 2024	December Change
10	Manufacture of food products	5.3025	129.5	136.5	151.9
11	Manufacture of beverages	1.0354	103.2	99.4	104.0
12	Manufacture of tobacco products	0.7985	92.3	80.4	89.1
13	Manufacture of textiles	3.2913	111.2	106.4	113.8
14	Manufacture of wearing apparel	1.3225	104.0	110.2	119.2
15	Manufacture of leather and related products	0.5021	87.6	76.1	89.2
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.1930	103.1	98.2	114.5
17	Manufacture of paper and paper products	0.8724	78.3	74.9	76.5
18	Printing and reproduction of recorded media	0.6798	78.6	77.3	86.7
19	Manufacture of coke and refined petroleum products	11.7749	132.8	135.6	147.4
20	Manufacture of chemicals and chemical products	7.8730	129.2	123.3	130.3
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	4.9810	216.8	251.4	259.2
22	Manufacture of rubber and plastics products	2.4222	116.6	103.5	106.6
23	Manufacture of other non-metallic mineral products	4.0853	144.8	137.1	151.2
24	Manufacture of basic metals	12.8043	227.9	222.1	234.9
25	Manufacture of fabricated metal products, except machinery and equipment	2.6549	100.3	95.0	107.3
26	Manufacture of computer, electronic and optical products	1.5704	123.8	115.9	114.5
27	Manufacture of electrical equipment	2.9983	126.2	121.1	163.3
28	Manufacture of machinery and equipment n.e.c.	4.7653	120.3	117.7	127.6
29	Manufacture of motor vehicles, trailers and semi-trailers	4.8573	133.4	134.4	116.4
30	Manufacture of other transport equipment	1.7763	184.5	159.4	142.0
31	Manufacture of furniture	0.1311	227.8	201.9	241.1
32	Other manufacturing	0.9415	91.8	56.9	77.6
	Mining	14.3725	128.5	133.8	143.1
	Manufacturing	77.6332	148.3	147.0	156.2
	Electricity	7.9943	207.8	184.1	192.8
	General	100.0000	150.2	148.1	157.2

2024/25 Vietnam Cotton Imports Forecast at a Record



Source : USDA

Vietnam's 2024/25 (Aug. - Jul.) cotton imports and consumption are expected to surpass the previous year by more than 10 percent. Imports account for practically all cotton consumed in the country. Several factors are expected to drive record demand, including a record pace of garment exports and an increasing pace of foreign-direct investment (FDI).

Vietnam's fabric and garment exports are a pivotal engine for economic growth and typically account for roughly 10 percent of annual export values. From August to December 2024, fabric and garment exports totalled a record \$16.7 billion, more than 17 percent above the previous year. Yarn exports (predominantly cotton fiber) were slightly above the previous year and are further supporting greater cotton demand. The United

States remained Vietnam's largest destination for fabric and garment exports in the last calendar year.

World Cotton Production Forecast at 5-year high

Global cotton production for the cotton season 2024-25 is projected at 26.22 million tonnes a 7% increase from last season's 24.59 million tonnes. The 2024-25 production estimate is the highest since 2019-20 and includes larger crops for the United States, Brazil and China, offset slightly by decreases in Pakistan and India. World cotton harvested area is forecast at 30.84 million hectares in 2024-25, a 1% decline from last season. A higher global cotton yield is responsible for the production increase in 2024-25 and is projected at a record 850 kilograms (kg) per hectare an

Raw Material Scenario

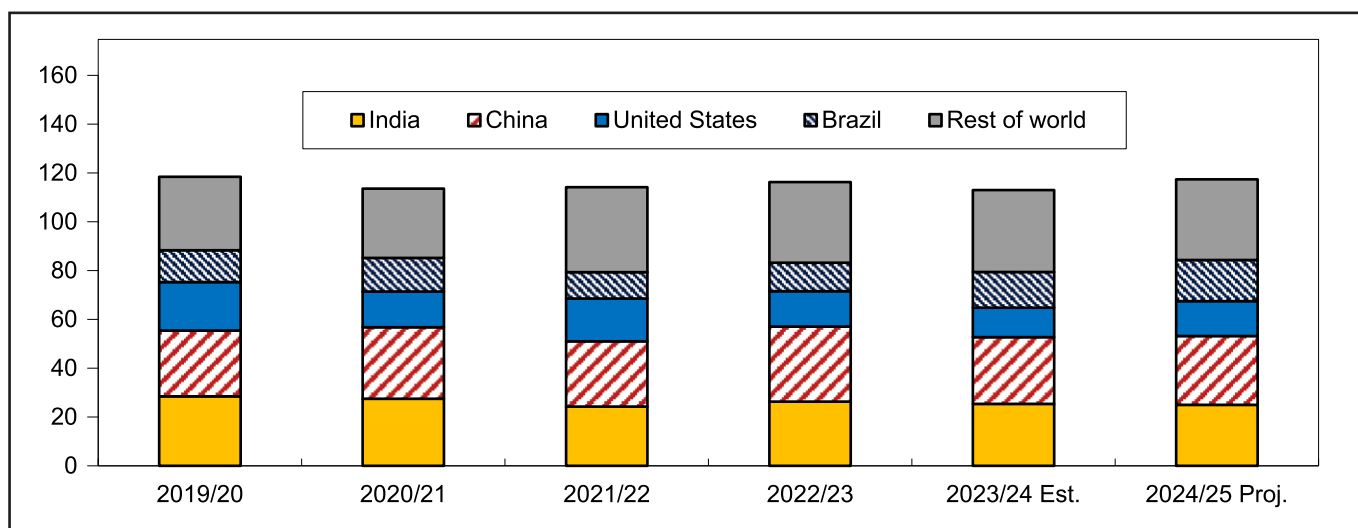
increase of 8% from last season's estimate of 789 kg per hectare.

Cotton production prospects for the major producing countries in 2024-25 are estimated to

increase except for Pakistan and India. Production in China the leading cotton producer is forecast at 6.75 million tonnes this season, as yield increases with area unchanged. China is expected to account for 24 percent of global production in 2024-25.

Figure - 1 : World Cotton Production

Million bales



Source: USDA (1 bale =480 pounds)

India is expected to account for 21% of world production this season, down 1% from 2023-24. Cotton production in Pakistan is expected to decrease significantly from last season to 1.13 million tonnes, a drop of 26%. Pakistan's forecast

production decrease is due to a decline in both area harvested and yield. Cotton production in Brazil is estimated at a record 3.70 million tonnes in 2024-25, a 17% increase as estimated harvested area of nearly 2.0 million hectares is the highest in

Productivity Audit Services

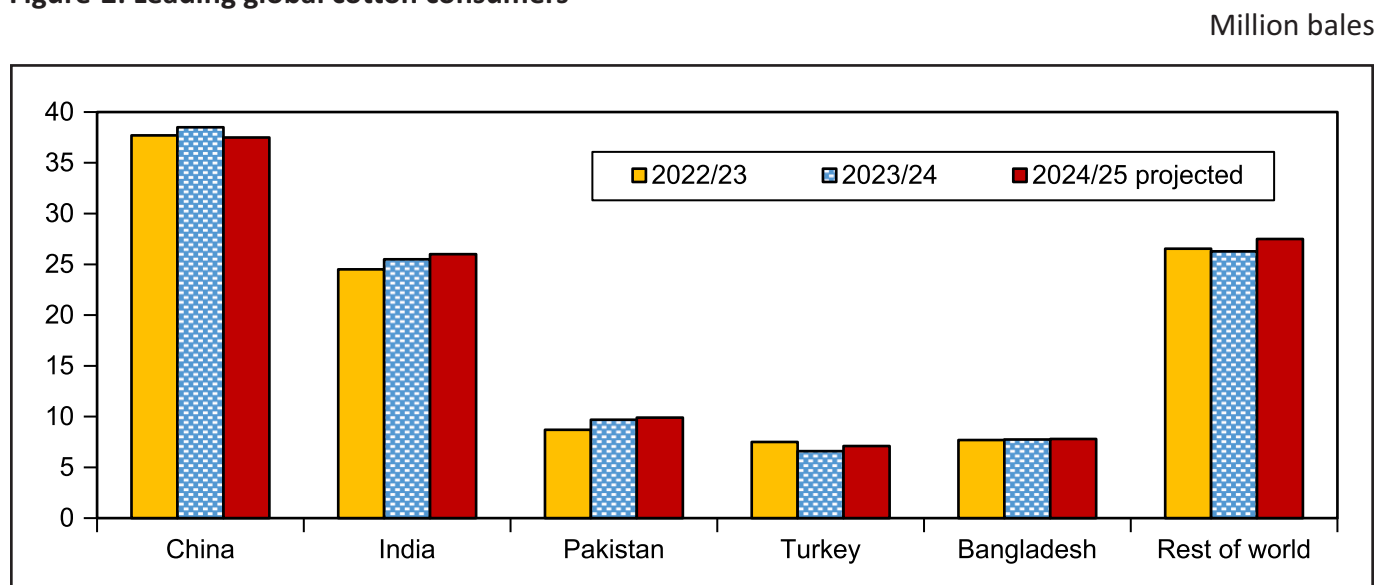
SIMA Industrial Engineering Division offers tailor-made Productivity Audit services to textile mills to improve quality and to optimise productivity and cost of production by observing the working conditions and data collected from them. Productivity Audit Report would identify and suggest ways and means of improvement in various systems and procedures to optimise the utilisation of resources like manpower, machinery, materials and also identify the training needs. Interested member mills are requested to contact the Industrial Engineering Division of the Association.

Raw Material Scenario

three decades. Brazil remains the third largest producer in 2024-25 behind China and India.

Global cotton mill use in 2024-25 is forecast to increase 1.3% from the year before to 25.21 million tonnes.

Figure-2: Leading global cotton consumers



Global Cotton Trade Lower; Stocks Higher in 2024-25

World cotton trade in 2024-25 is projected lower this season, largely the result of a reduced import projection for China. Cotton imports by China are forecast to decline from an 11-year high that helped replenish stocks in the national reserve. Global imports are forecast at 9.24 million tonnes in 2024-25, slightly below the 5-year average. Bangladesh, China and Vietnam are projected to be the leading cotton importers again this season.

World cotton exports are also forecast lower in 2024-25, with reduced exports by the United States, Australia, India and others more than offset expected gains for Brazil and Benin this season. Based on the latest cotton supply and demand

projections, global ending stocks are forecast to increase 2.5% as the global production gain exceeds the mill use increase this season. With continued global economic uncertainty affecting cotton demand for textile and apparel products, world stocks-to-use ratio (66%) are projected slightly higher in 2024-25.

Recent price movement

Cotton benchmarks were either flat or slightly lower over the past month

- ❖ The nearby March ICE/NY futures contract set new life-of-contract lows after slipping through support around 67 cents/lb. Prices briefly touched levels near 65 cents/lb, but then recovered somewhat. Current values for the March contract are only about one cent

Raw Material Scenario

lower than they were one month ago. Open interest has been moving out of March and into the May contract. Prices for the May ICE/NY futures contract are trading about one cent/lb higher than those for March.

- ❖ The A Index drifted marginally lower over the past month, easing from 78 to 77 cents/lb.
- ❖ The Chinese Cotton Index (CC Index 3128B) was generally stable, holding between 90 and 93 cents/lb. In domestic terms, prices were between 14,600 and 14,900 RMB/ton. The

RMB traded between 7.24 to 7.33 RMB/USD over the past month.

- ❖ Indian spot prices (Shankar-6 quality) decreased from 81 to 77 cents/lb. In domestic terms, values eased from 54,300 to 53,000 INR/candy. The INR weakened slightly, from levels near 85 to those over 87 INR/USD.
- ❖ Pakistani spot prices decreased from 81 to 78 cents/lb over the past month. In domestic terms, values fell from 18,500 to 17,800 PKR/maund. The PKR was steady at around 279 PKR/USD.

World Cotton Production

Million Metric Tonnes			
	2023 - 2024	2024 - 25	
		January	February
China	5955	6532	6750
India	5530	5443	5443
Brazil	3172	3680	3701
United States	2627	3138	3138
Australia	1089	1176	1176
Pakistan	1524	1132	1132
Turkey	697	871	871
Other	4005	4035	4016
Total	24599	26007	26228

World Cotton Consumption

Million Metric Tonnes			
	2023 - 2024	2024 - 25	
		January	February
China	8382	8274	8165
India	5552	5552	5661
Pakistan	2112	2068	2155
Bangladesh	1687	1698	1698
Turkey	1437	1546	1546
Vietnam	1437	1502	1524
Brazil	689	718	718
Others	3595	3728	3743
Total	24892	25087	25211

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European apparel imports drop 7.24% in 2024 amid geopolitical tensions

- ❖ In 2024, Europe's apparel imports fell by 7.24 per cent to \$208.525 billion amid geopolitical unrest.
- ❖ China and Bangladesh increased their market shares in apparel, while shares for Turkiye, Germany, and Italy declined.
- ❖ Home textile imports also decreased, but China expanded its market share.
- ❖ Fabric imports dropped, with China again boosting its share.

Europe's apparel imports decreased by 7.24 per cent in 2024. The continent, comprised mostly of developed countries, is facing economic turmoil due to geopolitical unrest on fronts such as the Russia-Ukraine and Israel-Hamas wars. Apparel imports in the bloc decreased to \$208.525 billion in 2024.

Apparel imports were noted at \$224.808 billion in 2023. However, the top two suppliers, China and Bangladesh, successfully managed to increase their shares in the inbound shipments. The Chinese share increased to 19.50 per cent, and Bangladesh's to 14.84 per cent in the last year. The market shares of both nations were recorded at 18.89 per cent and 13.98 per cent respectively in 2023.

However, the market shares of Turkiye, Germany, and Italy, the next three largest suppliers, shrunk in 2024. The share of Turkiye was 7.68 per cent, Germany 6.57 per cent, and Italy 5.40 per cent last year. In 2023, these countries stood at market shares of 8.07 per

cent, 6.94 per cent, and 5.64 per cent, respectively.

European imports of home textiles also dipped to \$26.942 billion in 2024 from \$28.954 billion in 2023. However, top supplier China managed to increase its share from 24.96 per cent to 26.87 per cent. During 2024, Pakistan, India, Turkiye, and Germany were other nations among the top five largest suppliers.

The inbound shipment of fabric also eased to \$16.288 billion in 2024 from \$19.286 billion in the preceding year. China was the largest supplier for this trade as well. Its share rose to 21.30 per cent from 18.99 per cent. Among the top 5 suppliers, Italy, Turkiye, Germany, and Pakistan maintained their rankings in 2024 as in the preceding year.

Source: Fibre2Fashion

India strengthens textile trade with Vietnam as exports outpace import

- ❖ India's textile exports to Vietnam in Jan-Nov 2024 were double its imports, reaching \$404.446 million.
- ❖ Yarn exports increased over the past three years, accounting for 42.88 per cent of total textile exports.
- ❖ Fibre remained the dominant imported product, making up 37.54 per cent of total imports.
- ❖ Overall, India's textile trade with Vietnam showed a rising trend in exports while imports declined.

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As major garment-exporting countries, India and Vietnam engage in bilateral trade of textile products based on their industry's requirements. During January-November 2024, India's textile exports, including fabric, yarn, and fibre, to Vietnam were double its imports of the same products. India exported textiles worth \$404.446 million, while its imports were valued at \$212.760 million during the same period.

India's textile exports to Vietnam amounted to \$404.446 million in the first 11 months of 2024, compared to \$327.282 million in 2023 and \$333.884 million in 2022. Trade data suggests that India's yarn exports have increased over the past three years. The shipment was valued at \$118.367 million in 2022, rising to \$151.578 million in 2023, and reaching \$173.408 million in January-November 2024. Yarn exports accounted for 42.88 per cent of total textile exports in the first 11 months of 2024, compared to 35.45 per cent in 2022 and 46.31 per cent in 2023.

During January-November 2024, India exported fibre worth \$163.719 million (40.48per cent) and fabric worth \$67.319 million (16.63per cent) to Vietnam. Fibre exports amounted to \$104.505 million (31.93per cent) and fabric exports to \$71.198 million (21.75per cent) in 2023, while fibre exports stood at \$137.589 million (41.45per cent) and fabric exports at \$77.928 million (23.34per cent) in 2022.

India's textile imports from Vietnam were valued at \$212.760 million in January-

November 2024, compared to \$247.306 million in 2023 and \$302.204 million in 2022. Fibre remained the dominant imported textile product over the past three years. India imported fibre worth \$79.866 million in January-November 2024, accounting for 37.54 per cent of total textile imports. Fibre imports were valued at \$97.143 million (39.28per cent) in 2023 and \$112.320 million (37.17per cent) in 2022.

India's imports of fabric were valued at \$76.984 million (36.18per cent) and yarn at \$55.908 million (26.28per cent) in the first 11 months of 2024. Fabric imports were worth \$75.865 million (30.68per cent) and yarn imports \$74.298 million (30.04per cent) in 2023, while fabric imports stood at \$106.976 million (35.40per cent) and yarn imports at \$82.907 million (27.43per cent) in 2022.

Source: Fibre2Fashion

US textiles & apparel exports dip 2.9% to \$22.6 bn in 2024

- ❖ In 2024, the United States witnessed a 2.98 per cent decline in textile and apparel exports, totalling \$22.617 billion, down from \$23.617 billion the previous year.
- ❖ The exports to Mexico bucked the trend with a 1.88 per cent increase, reaching \$6.949 billion.
- ❖ However, this was an exception as other major markets such as Canada, China, and the Dominican Republic saw significant drops.

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The United States' textile and apparel exports decreased by 2.98 per cent to \$22.617 billion in 2024, compared to \$23.617 billion in 2023, according to data from the Office of Textiles and Apparel (OTEXA), a division of the US Department of Commerce. Among the top ten export markets, shipments to Mexico increased by 1.88 per cent, reaching \$6.949 billion in 2024.

In contrast, exports to Guatemala, the Dominican Republic, China, Nicaragua, Canada, Honduras, the United Kingdom, the Netherlands, Japan, and other top 10 markets recorded declines of up to 16.23 per cent. During this period, the US exported \$5.288 billion worth of textiles and apparel to Canada, \$1.186 billion to Honduras, \$713.340 million to China, and \$621.143 million to the Dominican Republic.

By category, apparel exports experienced a modest decline of 3.79 per cent year-on-year, totalling \$7.084 billion. Fabric exports fell by 2.87 per cent to \$8.049 billion, while yarn exports dropped by 2.43 per cent to \$4.005 billion. Exports of made-up articles and miscellaneous items saw a slight decrease of 2.23 per cent, amounting to \$3.775 billion.

In 2023, US textile and apparel exports dropped by 5.02 per cent to \$23.617 billion, following a 9.77 per cent increase in 2022, which had reached \$24.866 billion compared to \$22.652 billion in 2021. Over the past decade, annual exports have generally ranged between \$22 billion and \$25 billion, with significant figures including \$24.418 billion in 2014, \$23.622 billion in 2015, \$22.124 billion in 2016, \$22.671

billion in 2017, \$23.467 billion in 2018, \$22.905 billion in 2019, and \$19.330 billion in 2020.

Source: Fibre2Fashion

Bangladesh's RMG exports surge 12% in first 7 months of FY 24 – 25

- ❖ Between July 2024 and January 2025, Bangladesh's ready-made garment exports grew by 12 per cent to \$23.552 billion, indicating a robust increase from the previous fiscal year.
- ❖ Knitted and woven garments led this growth, which represents 83 per cent of the country's total exports, as per the EPB.
- ❖ Exports of home textiles and cotton products also showed notable increases.

Ready-made garment (RMG) exports (Chapters 61 and 62) from Bangladesh increased by 12.00 per cent to \$23.552 billion between July 2024 and January 2025, the first seven months of fiscal 2024-25 (July-June), according to provisional data from the Export Promotion Bureau (EPB). This marks an increase from \$21.027 billion during the same period in fiscal 2023-24.

Knitted garment exports marginally outpaced woven garment exports in growth. During the first seven months of the current fiscal, exports of knitwear (Chapter 61) rose by 12.03 per cent to \$12.687 billion, compared to \$11.325 billion in the corresponding period of fiscal 2023-24. On the other hand, woven apparel exports (Chapter 62) increased by 11.97 per cent,

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totalling \$10.864 billion, compared to \$9.702 billion during the same period of the last fiscal, according to EPB data.

Home textile exports (Chapter 63, excluding 630510) experienced growth, increasing by 6.22 per cent to \$493.86 million, compared to \$464.93 million during the same period in the last fiscal. Collectively, exports of woven and knitted apparel, clothing accessories, and home textiles constituted 83.00 per cent of Bangladesh's total exports, amounting to \$28.969 billion for the period.

Exports of cotton and cotton products, including yarn, waste, and fabrics (Chapter 52), rose by 13.74 per cent to \$369.39 million during the period under review, compared to \$324.78 million in the same period of the last fiscal.

During January 2025, ready-made garment exports reached \$3.664 billion, a 5.57 per cent rise from \$3.471 billion in the same month of the previous year. Knitwear garment exports rose by 6.62 per cent to \$1.850 billion, and woven garments increased by 4.52 per cent to \$1.814 billion in the same month. The outbound shipment of home textiles (Chapter 63, excluding 630510) eased by 1.17 per cent to \$83.05 million in January 2025. Exports of cotton and cotton products slipped by 0.32 per cent to \$50.33 million from \$50.49 million.

The new regime in Bangladesh had earlier revised export data downwards, according to which RMG exports from the country decreased by 5.22 per cent to \$36.151 billion in fiscal 2023-24 (July 2023 to June 2024).

According to the EPB, RMG exports in fiscal 2022-23 amounted to \$38.142 billion, compared to the previously reported figure of \$46.991 billion. RMG exports were recorded at \$42.613 billion in fiscal 2021-22 and \$31.456 billion in fiscal 2020-21.

Source: Fibre2Fashion

Brazilian cotton exports surge to record levels in January

- ❖ Brazilian cotton exports hit record highs in January, with shipments reaching 415.6 thousand tons and revenue exceeding (~\$733 million).
- ❖ Despite a drop in USD prices, local currency values rose.
- ❖ Domestic trading remained slow, while 82.66 per cent of the 2024-25 crop was planted.
- ❖ Global cotton output is forecast to rise 5.91 per cent to 25.548 million tons, per ICAC.

Brazilian cotton exports have reached record volumes, driven by a substantial surplus from the 2023-24 season and strategic sales timed with favourable currency movements. In January, revenue from cotton shipments exceeded (~\$733 million), setting a new milestone for the sector, according to a report from the Center for Advanced Studies on Applied Economics (CEPEA).

Brazil exported 415.6 thousand tons of cotton in January, the highest volume ever recorded

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for the month, according to data from the Secretariat of Foreign Trade (Secex). Over the past 12 months (February 2024 to January 2025), total exports surpassed 2.9 million tons, another all-time high for the period.

Despite this strong performance, the average price of exported cotton stood at \$0.7756 per pound, marking a 2.6 per cent decline from the previous month and an 11.2 per cent drop year-on-year. However, in local currency terms, the price reached BRL 4.6653 per pound, 12.2 per cent higher than the domestic market value, CEPEA said in its latest fortnightly report on the Brazilian cotton market.

While exports thrived, domestic trading remained sluggish in early February. Between January 31 and February 14, the CEPEA/ESALQ Cotton Index (with payment in eight days) recorded only a slight increase of 0.11 per cent, closing at BRL 4.1187 per pound on February 14.

The latest data from the Brazilian Cotton Producers Association (Abrapa) indicates that 82.66 per cent of the projected cotton planting area for the 2024-25 season had been cultivated as of February 6. According to the International Cotton Advisory Committee (ICAC), global cotton production for the 2024/25 season is expected to reach 25.548 million tons, a 5.91 per cent increase from the previous season.

Source : Fibre2Fashion

Vietnam expected to grow at 6-7% annually for next decade : S & P Global

- ❖ Vietnam may grow at 6-7 per cent annually for the next decade and perhaps even beyond, S&P Global Ratings has projected.
- ❖ The epicentre of this is the rapidly expanding export-oriented manufacturing base, which anchors Vietnam's trade balance and attraction to FDI, it noted.
- ❖ Surplus labour in rural areas and other lower income areas and sectors can be tapped for jobs for urban or industrial areas.
- ❖ Vietnam is expected to grow at 6-7 per cent annually for the next decade and perhaps even beyond, according to projections by S&P Global Ratings.

The epicentre of this momentum is the rapidly expanding export-oriented manufacturing base, which anchors Vietnam's trade balance and attraction to foreign direct investment (FDI), it noted.

Thanks in part to diversification of supply chains outside of China, Vietnam and its corporate partners, which include major global multinationals, are making swift investments in capital stock.

As the country's economy jumped 7.1 per cent last year in a broad-based recovery from a

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recent property crash, S&P Global Ratings thinks this is testament to its dynamism and potential to continue taking market share in global supply chains.

FDI reached \$38 billion, or 8 per cent of gross domestic product (GDP), in 2024; it has averaged 10 per cent of GDP since 2010.

A key enabler of this growth driver is the Vietnamese labour force. The availability of surplus labour in rural areas and other lower income areas and sectors can be tapped for jobs for urban or industrial areas. This serves as the bedrock for labour-intensive and low-cost manufacturing, S&P Global noted.

The workforce has shown itself to be trainable and high in quality, contributing to foreign investor confidence in the ability of the economy to absorb further investment, it said.

New wealth and the resulting impetus to domestic demand is an additional benefit of rising urban employment and rapid growth, it added.

US apparel imports from Bangladesh surge 27% in Q4 2024 despite unrest

- ❖ In 2024, US apparel imports from Bangladesh rose by 2.15 per cent to \$7.404 billion, despite political turmoil in August.
- ❖ Imports surged 27.7 per cent year-on-year in Q4, reaching \$1.940 billion.
- ❖ The US imported 164.112 million dozen of garments at an average price of \$45 per unit.

- ❖ While trade saw quarterly fluctuations, annual growth remained steady, indicating resilience.

The United States' apparel imports from Bangladesh inched up by 2.15 per cent to \$7.404 billion in 2024. Although the country faced political turmoil in August 2024, imports were not negatively affected in the following quarter. Inbound trade surged by 27.7 per cent year-on-year to \$1.940 billion in October-December 2024.

It is important to note that Bangladesh experienced political turmoil in August 2024 when Sheikh Hasina's government was overthrown following violent student protests. The regime change led to serious lawlessness and disruptions in business activities. However, trade data reveals that the momentum in US apparel imports from the country remained intact in the subsequent quarter.

US imported apparel worth \$1.518 billion from Bangladesh during October-December 2023. The trade saw an impressive growth of 27.7 per cent in the quarter. Annually, US apparel imports rose to \$7.404 billion in 2024, compared to \$7.248 billion in 2023.

US imports from Bangladesh were slightly lower in the fourth quarter of 2024 compared to the third quarter of the same year. Imports stood at \$2.053 billion in Q3 2024. However, the decline in the fourth quarter compared to the third quarter was more significant in 2023, as trade dropped to \$1.518 billion in Q4 from \$1.971 billion in Q3.

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US imported apparel worth \$1.656 billion in the second quarter and \$1.754 billion in the first quarter of 2024. In 2023, trade was recorded at \$1.672 billion in the second quarter and \$2.085 billion in the first quarter.

In 2024, the US imported 164.112 million dozen of garments, 2.716 million dozen pairs, and 111,735 individual garments at an average unit price of \$45, \$5.96, and \$25.77, respectively. Garment quantities are recorded in different ways depending on size and value. In 2023, imports in quantity were 147.334 million dozen, 2.953 million dozen pairs, and 213,129 individual garments. The average import price per unit was \$49, \$7.48, and \$31.59, respectively.

Vietnam's textile & garment exports inch up to \$3.1 bn in Jan 2025

- ❖ Vietnam's textile and garment exports (excluding yarn and fibre) rose 1.8 per cent YoY to \$3.189 billion in January 2025, with the US as the top market.
- ❖ Yarn exports fell 19.5 per cent to \$301.313 million.
- ❖ Cotton imports dropped 22 per cent to \$225.833 million.
- ❖ In 2024, exports reached \$37.036 billion.
- ❖ VITAS raised the 2025 export target to \$47-48 billion.

Vietnam's textile and garment exports (excluding yarn and fibre) grew by 1.8 per cent year-on-year (YoY), reaching \$3.189 billion

during January 2025, according to the Customs IT and Statistics Department of the General Department of Customs under Vietnam's Ministry of Finance. The country's exports of these products had reached \$37.036 billion in 2024.

The United States remained the largest market for Vietnam's textile and garment exports, accounting for 43.86 per cent of the total, equivalent to \$1.399 billion in the first month of 2025. Japan and South Korea were also key markets, with exports amounting to \$378.631 million and \$297.860 billion, respectively.

During January 2025, Vietnam's yarn exports dropped by 19.5 per cent year-on-year to \$301.313 million. In volume terms, yarn exports decreased by 16.7 per cent, with the country exporting 131,358 tonnes of yarn in the first month of 2025. On a month-on-month basis, yarn exports eased by 21.8 per cent in value and 23.5 per cent in volume in January 2025.

For Vietnam's yarn exports, China was the largest buyer, accounting for 38.87 per cent of the country's total yarn shipments, valued at \$117.790 million. Yarn exports to India were valued at \$6.463 million during January 2025.

On the import side, Vietnam's cotton imports fell 22.0 per cent year-on-year to \$225.833 million in January 2025. The volume of imported cotton eased 11.7 per cent to 129,187 tonnes year-on-year. The country also imported 92,643 tonnes of yarn, valued at \$193.458 million, reflecting a 12.9 per cent decrease in value and volume. Fabric imports totalled \$1.080 billion, down 7.9

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per cent year-on-year. During 2024, Vietnam had exported textile and garment worth \$37.036 billion, 11.2 per cent up from the shipment of the previous year 2023. It had also exported 1.873-million-ton yarn valued at \$4.407 billion in the last year. Yarn exports gained 1.2 per cent in value and 5.0 per cent in volume. The country also imported 1.503-million-ton cotton, valued at \$2.884 million. The value and volume grew 1.8 per cent and 12.3 per cent year-on-year respectively. It also imported 1.243 million tonnes of yarn, valued at \$2.713 billion, reflecting a 23.8 per cent increase in value and 18.1 per cent rise in volume. Fabric imports reached \$14.905 billion, up 14.5 per cent year-on-year.

Vietnam could not meet out a target of \$36.23 billion exports of textile and garment in 2023. In 2022, the sector's exports grew by 14.7 per cent to \$37.5 billion, still falling short of the \$43 billion target. After encouraging shipment, the Vietnam Textile and Apparel Association (VITAS) has increased its export target for textiles, garments, and yarn to \$47-48 billion for 2025. The country posted higher exports of these products at \$41.443 billion in 2024, which was lower than the target of \$44 billion.

Fibre 2 Fashion

Raw Material

CCI purchases 86 lakh bales of cotton as traders stay away

The Cotton Corporation of India (CCI) has asked farmers not to resort to any distress sale of their

produce even as prices are ruling around Minimum Support Price (MSP) levels. It assured that it will purchase all of the produce that is brought to the designated CCI yards.

Trade sources said the bulk of purchases, up to 80 per cent, are being handled by the CCI, with traders involving in purchase of smaller lots. For example, traders purchased 630 quintals of cotton, while the CCI purchased 6,837 quintals at the Warangal Market Yard. CCI assures all the cotton farmers of the States that it will continue to procure all fair grade cotton till last arrival. The farmers need not make any distress sale of their produce, the Chief General Manager (Marketing) of CCI, said in a communication to farmers.

L K Gupta, Chairman and Managing Director of CCI, told businessline that the corporation has so far procured 86 lakh bales of cotton across the country. The 86 lakh bales procured this season are significantly higher than the 32.84 lakh bales procured during the entire last season. The farmer's MSP was increased by 7.5 per cent. Prices for lint cotton were at or even below last year's levels but seed cotton prices have increased by 7.5 per cent compared to last year. "This increase in MSP has increased our role in supporting the country's cotton farmers," Gupta said.

Purchases are ongoing and are likely to continue until March 15. We will remain in the market as long as farmers are offering cotton at the MSP, he said. "We have a history of never stopping procurement. There were temporary

suspensions in a few areas due to a lack of space, but these were only for two to four days. By the end of this week, all centres across the country should be functioning normally," he said.

There were some gaps in certain areas, particularly in Maharashtra, where a few factories were closed in the last week of January due to high arrivals. "However, this is routine," he said. Till last week, the CCI purchased 38.5 lakh bales in the State.

Business Line 04.02.2025

Textile industry welcomes announcement of Mission on Cotton Productivity

The textile and apparel sector has welcomed the announcements in the Union budget, especially the announcement of Mission on Cotton Productivity.

Vijay Agarwal, chairman of The Cotton Textiles Export Promotion Council, said the proposal to set up an Export Promotion Mission, with sectoral and ministerial targets, will provide the much needed inter-ministerial co-ordination. The Council remains confident in achieving the goal of USD 25 billion in cotton textile exports by 2030, he added.

According to Sudhir Sekhri, chairman AEPC, the budget seeks to create a foundation for robust export growth encouraging innovation and competitiveness, particularly for the MSME sector. The measures announced will help the apparel sector compete globally by promoting Five F vision and "Make in India, Make for the World" initiative. A. Sakthivel, chairman of the Apparel, Made Ups, and Home Textiles Sector

Skill Council, said the budget will be impactful and will bring growth.

Chairman of the Manmade and Technical Textiles Export Promotion Council Bhadresh Dodhia said the increased fund allocation for key government schemes such as RoDTEP (Remission of Duties and Taxes on Exported Goods), RoSCTL (Rebate on State and Central Taxes and Levies), and Production-Linked Incentive scheme for textiles will boost the export potential of manmade fibre textiles and technical textiles.

The Confederation of Indian Textile Industry chairman Rakesh Mehra said the introduction of the new Income Tax regime will increase disposable income with people and enhance domestic consumption of textiles and clothing.

S.K. Sundararaman, chairman of the Southern India Mills' Association, said the cotton is the growth engine and strength of Indian textile industry accounting for almost 80% of the textile exports. The industry has been demanding for a Cotton Technology Mission supporting high yielding seed technology, adoption of global best agronomy practices, producing clean cotton and branding Indian cotton to benefit the farmers and the industry. The announcement of Rs 600 crore to improve productivity and sustainability of cotton, promote ELS cotton and best of science and technology to cotton farmer on a mission mode approach will give a thrust to the cotton sector.

According to K.M. Subramanian, president of the Tiruppur Exporters' Association, higher import duty on knitted fabrics will curb the influx of

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undervalued fabrics and benefit the local manmade fibre-based industry.

The South India Hosiery Manufacturers Association president A.C. Eswaran said the Mission on Cotton will benefit the cotton-based textile sector in the long run. Sanjay K. Jain, chairman of the ICC National Textiles Committee, said the overall impact of the budget on the textile sector will be positive and textiles is pre-dominantly in the MSME segment with many women entrepreneurs. Hence, all schemes announced for the MSMEs will benefit the sector.

Manish Daga of CottonGuru said promotion of extra long staple cotton through the Mission will increase the global competitiveness of the

cotton sector and increase in kisan credit card limit will give farmers better access to funds. Convenor of the Indian Texpreneurs Federation Prabhu Dhamodharan said the Mission on Cotton is a vital initiative for the textile sector as it will increase cotton productivity and boost farmers' income.

G. Arulmozhi, president of the Openend Spinning Mills Association, said the removal of Customs Duty on two types of shuttleless looms is a welcome move for the technical textiles sector. M.P. Muthurathinam, President, Tirupur Exporters and Manufacturers Association, expressed disappointment for lack of measures to control imports from Bangladesh.

The Hindu 03.02.2025



REVIEW

In-house Journal - Rate Card

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