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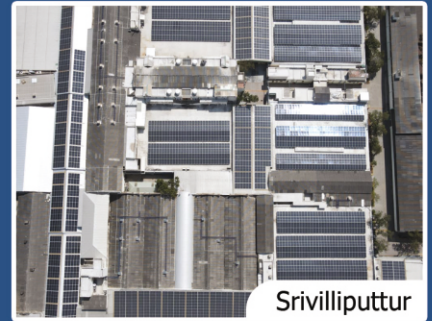
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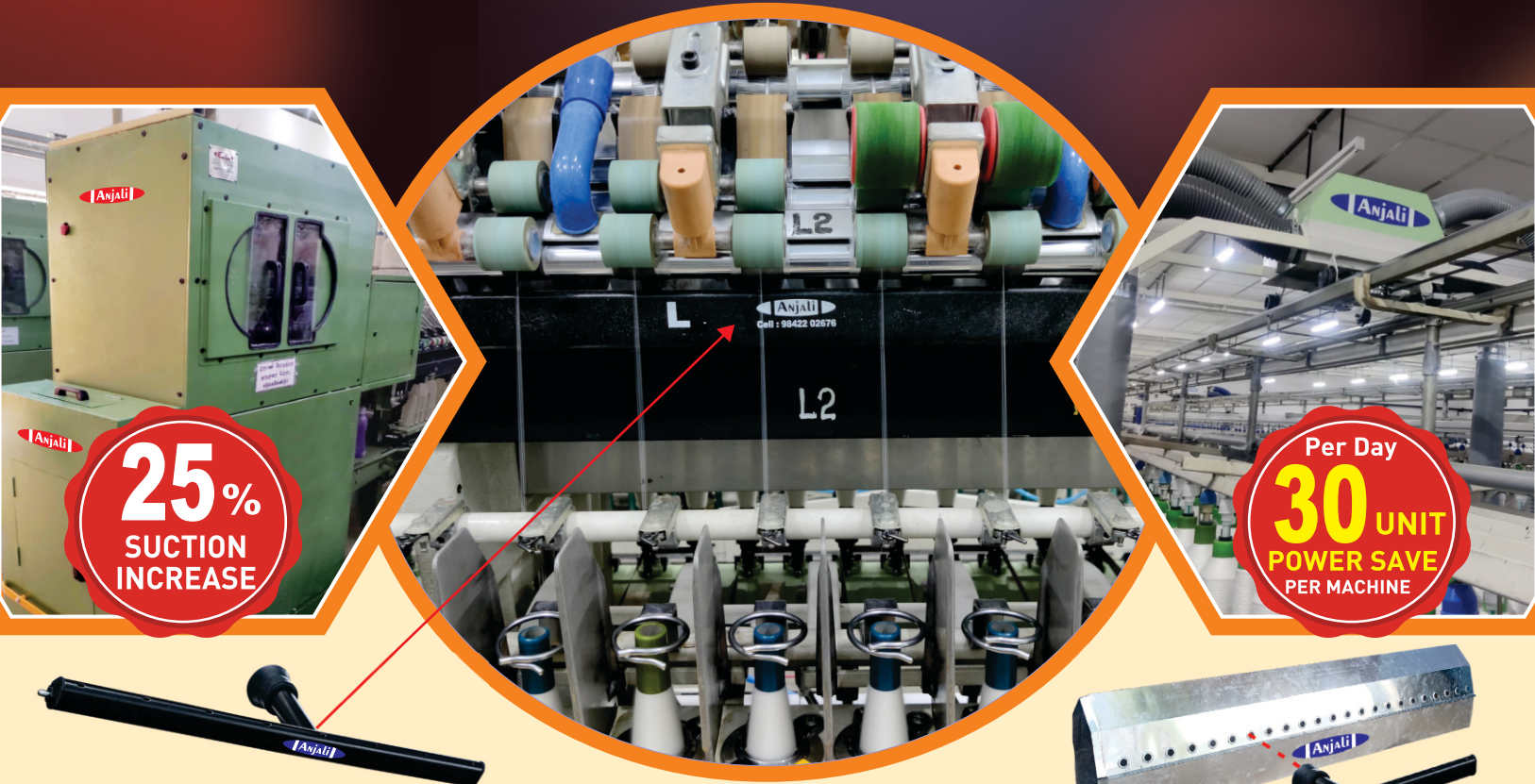
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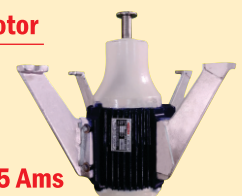
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EndApr22	76.3275	3475 76.	30-Apr-2022
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17May22	76.5150	5350 76.	17-May-2022
EndJun22	76.8525	8725 76.	30-Jun-2022

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From the Chairman

Friends,

India's rise from the 10th largest economy in 2014 to the 4th largest in just 11 years is no mean feat, it reflects the nation's rapid economic transformation and resilience. The textile and clothing industry stands out as a key pillar of this achievement contributing significantly to GDP, exports and employment. With strong government support, rising global demand and a push towards sustainability and technology, Indian textiles are well positioned to drive inclusive growth and global competitiveness in the years ahead.

The 10th meeting of Cotton TAG and 6th meeting of MMF TAG was held on 27th May 2025, under the chairmanship of Hon'ble Union Minister of Textiles, Shri Giriraj Singh to review the progress of initiatives aimed at strengthening the entire textile value chain. The Hon'ble Minister Shri Giriraj Singh highlighted the critical need to enhance cotton productivity & quality and underscored the need for effective implementation of the Mission for Cotton Productivity. He also suggested that data mapping will ensure a more targeted and data-driven approach to policy interventions. At MMF TAG meeting detailed deliberations were held to strengthen the value chain and boost MMF exports and domestic consumption, thereby achieve USD 350 Billion business size by 2030. The Hon'ble Union Minister of Textiles, also called upon all stakeholders to conduct a comprehensive gap analysis across the demand-supply spectrum of the industry.

Exports of textile and apparel (T&A) rose by 7% to \$2.983 Billion during the first month of the new fiscal 2025-26 (FY26). Of the total, apparel exports increased by 14% to \$1.371 Billion, while textile exports grew by 2% to \$1.612 Billion in April 2025. Within the textile sector, exports of cotton yarn, fabrics, made-ups and handloom products increased modestly by 2% to \$962.97 Million in April 2025. Exports of man-made yarn, fabrics and made-ups rose by 4% to \$383.8 Million. The restoration of RoDTEP benefits to Advance Authorization holders, SEZs and EOUs effective from 1st June 2025, comes at a crucial time, providing much needed support amid intensifying global competition and uncertain demand. This policy move is expected to significantly enhance the global competitiveness of Indian exporters.

On raw material front, According to ICAC, the 2025-26 cotton season appears stable, with global cotton production and consumption projected to be around 26 Million tonnes and 25.7 Million tonnes respectively. Consumption may remain subdued due to looming tariff escalations, regulatory uncertainties and intensifying competition from other fibres. Global cotton trade is expected to rebound by 2% to 9.65 Million tonnes, driven by higher carryover stocks.

Amidst these dynamics including the persistent US-China tariff tensions and political instability in key competing countries like Bangladesh and Pakistan, India has a strategic opportunity to strengthen its

From the Chairman

position in the global cotton textile market. In this context, we once again urge the Hon'ble Union Finance Minister, Smt. Nirmala Sitharaman, to remove the 11% import duty on all cotton varieties. This step is vital to alleviate raw material shortages, avoid potential export disruptions and help Indian exporters sustain their buyer base in a highly competitive global environment.

On the power front, the State of Tamil Nadu is in the course of framing an "Integrated Renewable Energy (RE) Policy" to promote all renewables including battery storage system, the core objective being to achieve the target of 50% RE Generation in Tamil Nadu by the year 2029-30.

To enhance ease of doing business and streamline transactions, the Cotton Corporation of India has introduced the COTBIZ portal, an integrated digital platform for cotton bales procurement through e-auctions. The portal aims to streamline the buying process and subsequent transactions through a completely digital interface and enhance ease of doing business with CCI. I request all stakeholders to complete the registration process to ensure uninterrupted access to trading and related services with CCI.

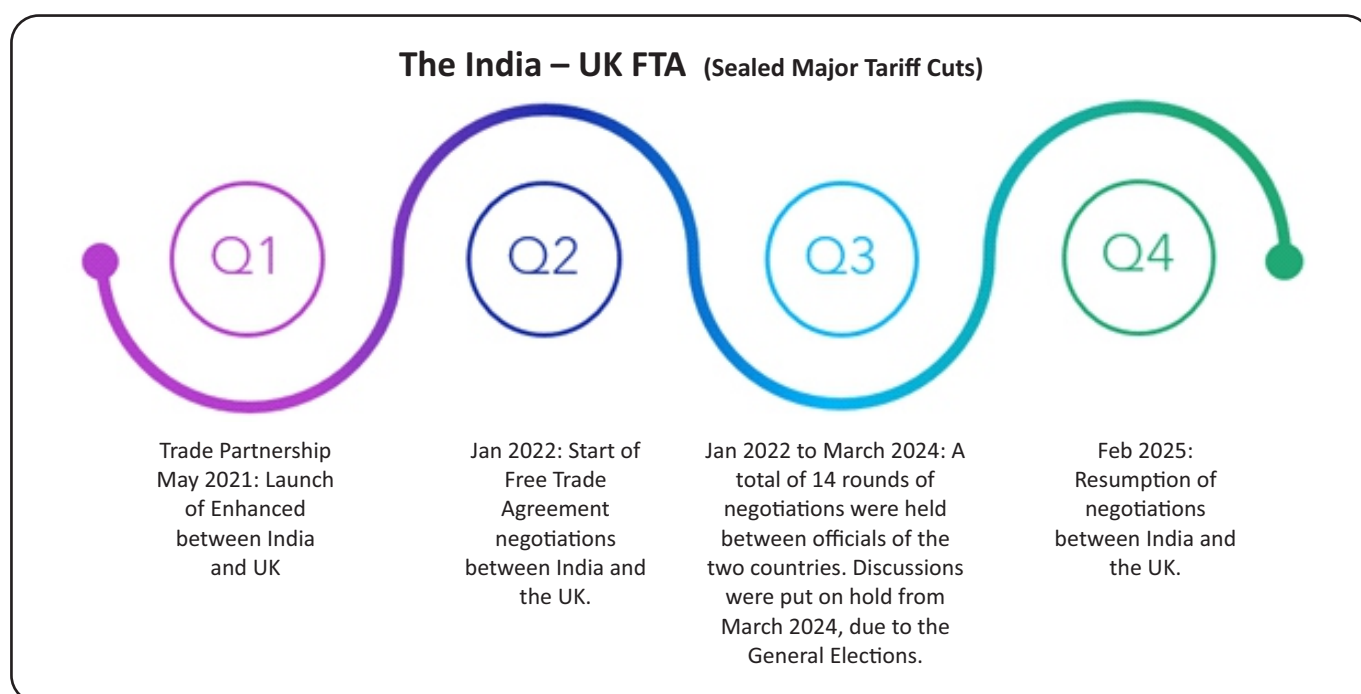
Exporting members availing the benefit of RoDTEP may be aware that the filing of Annual Return Report (ARR) for RoDTEP benefits availed during the financial year 2023-24 is mandatory and the extended deadline to file the same is 30th June 2025, with a grace period up to 30th September 2025, subject to payment of a composition fee of Rs 10,000/- Rs 20,000/- or possible denial of scroll generation. In this regard, I request all the exporting mills to comply with the same and if required avail the services of TEXPROCIL, to complete the Return within the prescribed time frame.

On the international negotiation front, our Union Commerce and Industry Minister Shri Piyush Goyal, on the sidelines of FTA conclusions, has been discussing ways to strengthen the multilateral trading systems, WTO reforms and work towards open & expansive international trade. A much needed effort to meet the growing import needs of the country and increase the country's stable presence in the export market.

With the momentum of growth in the textile industry translating into promising future, the entire industry is on the path to embracing the recent economic development and all set to achieve a faster growth during this fiscal.

Dr S K Sundararaman
Chairman

Decoding The India – UK FTA



May 6, 2025: Announcement of conclusion of around three years of negotiations for FTA between the UK and India.

On 6th May 2025 Hon'ble Prime Minister of India Shri Narendra Modi and Hon'ble Prime Minister of the United Kingdom Sir Keir Starmer have announced the successful conclusion of a mutually beneficial India - UK Free Trade Agreement (FTA), marks a significant milestone in the bilateral relations between the two nations. This comprehensive deal aims to enhance trade, investment, and economic cooperation and paving the way for unprecedented growth in Indian exports and cementing our nation's position as a global trade leader.

Geo-Political Impact

Global trade uncertainties: With US tariffs and geopolitical instability, the FTA provides a more stable and predictable trade relationship.

China Plus on Policy: Western nations are reducing dependence on Chinese supply chains, seeking diversified trade ties

Post -Brexit Strategy: The UK needed new trade partnerships after exiting EU and India's large and growing economy offers a viable alternative

India's Global Trade Realignment: The FTA support India's strategy to diversify trade ties and reduce reliance on China and blocks like RCEP

India's apparel exports to the UK are currently valued at US\$1.2 billion, compared to Bangladesh's US\$4 billion and China's US\$5 billion. The FTA presents a unique opportunity for India to close this gap, especially with key competitors like Bangladesh, Pakistan, and Vietnam, who already

Decoding The India – UK FTA

benefit from zero-duty access, also, the FTA allows India to become a stronger player in that market, potentially shifting buyer sourcing strategies. Retailers looking to diversify suppliers away from China may now turn to India, significantly boosting the country's apparel exports.

Table 1: Apparel export values (\$ mn) to the UK

Countries	UK Import values		
	2022	2023	2024
China	6201.76	4886.04	5003.64
Bangladesh	4530.92	3969.16	3924.23
Türkiye	2241.30	1751.75	1556.54
India	1416.90	1244.74	1198.38
Cambodia	1135.22	983.83	1083.71
Vietnam	1190.41	1020.40	1067.24

Source: ITC TradeMap

Key Highlights of the India-UK FTA:

- ❖ A key benefit of the FTA is the removal of the 8-12% UK import duty on Indian textiles and garments. Under the FTA, Indian T&A products will have Zero Duty access to UK market. This makes Indian products more competitive against exports from Bangladesh, Vietnam, and China. Indian apparel exporters will now enjoy tariff parity with Bangladesh and a 12% advantage over China.
- ❖ Trade analysis shows that UK is one of the major markets for T&A products. During 2024, UK imported T&A products worth about US\$ 27 bn from the world of which about

83% is apparel and made-ups. With about 25% share in total T&A imports, China was the leading supplier to UK followed by Bangladesh and Türkiye with about 15% and 8.5% share respectively.

- ❖ India is the 4th largest supplier of T&A products to UK accounting to about 6.6% share in UK's total T&A imports.
- ❖ One of the primary reasons for India's relatively lower share has been the disadvantageous duty structure, as competitors like Bangladesh and Türkiye already enjoyed preferential access to the UK market.
- ❖ An analysis of the top 20 T&A commodities imported by the UK (at the HS-6 digit level) reveals that Bangladesh leads with a 23% share, followed by China (22.6%), Türkiye (10%), and India (4%).
- ❖ With the signing of this FTA, Indian exporters now have a level playing field, enabling them to significantly improve their market share, not only in these top 20 product categories but across the broader T&A segment as well.

The India-UK FTA undoubtedly presents a significant opportunity for the Indian textile sector to increase its market share, boost exports, and enhance competitiveness. Tariff removal is a key catalyst, enabling firms to secure larger UK orders without sacrificing margins. However, success depends on the implementation of FTA, global demand, supply-chain efficiency, and meeting UK market requirements.

India's textile & apparel exports rise 7% to \$2.9 bn in Apr 2025

- ❖ India's textile and apparel exports rose by 7.45 per cent to \$2.983 billion in April 2025, with apparel exports surging 14.43 per cent.
- ❖ However, T&A's share in total merchandise exports fell to 7.8 per cent.
- ❖ Imports of raw cotton jumped by 129 per cent due to lower global prices.
- ❖ Industry experts noted that garment exports show a short-term growth trend, while foreign cotton drives higher imports.

India's textile and apparel (T&A) exports rose by 7.45 per cent to \$2.983 billion during the first month of the new fiscal 2025-26 (FY26). Of the total, apparel exports increased by 14.43 per cent to \$1.371 billion, while textile exports grew by 2.16 per cent to \$1.612 billion in April 2025. The country's T&A exports had increased by 6.32 per cent to \$36.606 billion in fiscal 2024-25 (FY25).

It is noteworthy that the United States announced reciprocal tariffs at the beginning of April 2025, but these were paused for three months, with floor tariffs of 10 per cent remaining in place.

Apparel exports reached \$1.371 billion in April 2025, compared to \$1.198 billion in the same month of the previous fiscal. Textile exports rose by 2.16 per cent to \$1.612 billion, up from \$1.578 billion.

India's overall goods exports edged up by 9.02 per cent to \$38.487 billion in April 2025. However, the share of T&A in the country's total merchandise

exports declined to 7.8 per cent during the 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 1.71 per cent to \$962.97 million in April 2025. Exports of man-made yarn, fabrics, and made-ups rose by 4.18 per cent to \$383.8 million, while carpet exports increased by 3.32 per cent to \$114.87 million.

Imports of raw cotton and waste surged by 129.17 per cent to \$86.88 million in April 2025, compared to \$37.91 million in the same month of the previous fiscal. Imports of textile yarn, fabrics, and made-ups rose by 19.20 per cent, from \$162.01 million to \$193.12 million.

In FY25, the country's apparel exports increased by 10.03 per cent to \$15.989 billion, while textile exports grew by 3.61 per cent to \$20.617 billion. Imports of raw cotton and waste surged by 103.67 per cent to \$1.219 billion, and imports of textile yarn, fabrics, and made-ups rose by 8.69 per cent to \$2.476 billion.

In FY24, India's T&A exports stood at \$34.430 billion, marking a 3.24 per cent decline from \$35.581 billion in FY23. Imports of raw cotton and waste were valued at \$598.63 million in FY24, down 58.39 per cent from \$1.439 billion in FY23. Imports of textile yarn, fabrics, and made-ups also fell by 12.98 per cent to \$2.277 billion.

Table 2 shows the quick estimates of the export and import of selected major commodities during April 2025 compared to a year ago.

Foreign Trade Performance

Table - 1 : Quick Estimates for Selected Major Commodities

Exports (Million USD)	Apr '24	Apr '25	% Change
Cotton Yarn/Fabs/made-ups, Handloom Products etc	946.77	962.97	1.71
Man-made Yarn/ Fabs/ made-ups etc.	368.40	383.80	4.18
RMG of all Textiles	1198.40	1371.34	14.43
Jute Mfg. Floor Covering	27.11	28.35	4.58
Carpet	111.18	114.87	3.32
Handicrafts excl. handmade carpet	125.09	122.60	-1.99

Imports (Million USD)	Apr '24	Apr '25	% Change
Cotton Raw & Waste	37.91	86.88	129.17
Textile yarn Fabric, made-up articles	162.01	193.12	19.20

Source: DGCIS/MOC

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 amounted to USD 38.54 billion. Among various commodity groups, export of textiles and allied products stood at USD 3 billion, 7 per cent higher than the previous year same time

export level of USD 2.8 billion. The country's imports during April 2025 amounted to USD 64.91 billion, 19 per cent higher than previous year same time import level of USD 54.48 billion.

Table-2 shows the export and import performance of major commodity groups in April 2025 compared with the previous year same period performance.

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Foreign Trade Performance

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

Commodity	Export			Import		
	Apr 2024	Apr 2025 (P)	% Growth	Apr 2024	Apr 2025 (P)	% Growth
1. Plantation	197.70	273.14	38.15	94.08	127.29	35.29
2. Agri & Allied Products	3236.54	3637.41	12.39	2722.06	2473.31	-9.14
3. Marine Products	494.19	582.19	17.81	20.04	25.42	26.81
4. Ores & Minerals	331.14	415.84	25.58	3659.05	3775.50	3.18
5. Leather & LeatherManufactures	316.49	332.04	4.91	64.00	61.49	-3.93
6. Gems & Jewellery	2257.89	2500.27	10.73	5093.46	5263.51	3.34
7. Sports Goods	23.89	26.57	11.23	26.46	35.47	34.04
8. Chemicals & Related Products	5055.76	4921.63	-2.65	4629.91	6045.76	30.58
9. Plastic & Rubber Articles	734.21	769.98	4.87	1965.42	2282.93	16.15
10. Articles of Stone, Plaster, Cement, Asbestos, Mica or Similar Materials; Ceramic Products; Glass and Glassware	544.01	555.54	2.12	268.79	364.30	35.53
11. Paper & Related Products	362.98	353.98	-2.48	653.02	738.46	13.08
12. Base Metals	2437.02	2523.72	3.56	3349.31	4080.09	21.82
13. Optical, Medical & Surgical Instruments	279.42	329.63	17.97	709.28	835.32	17.77
14. Electronics Items	2646.21	3691.26	39.49	7051.45	9250.79	31.19
15. Machinery	3446.78	3890.84	12.88	4387.18	5451.14	24.25
16. Office Equipments	18.58	24.28	30.68	6.63	3.16	-52.39
17. Transport Equipments	2314.49	2699.63	16.64	2230.50	2022.06	-9.35
18. Project Goods	0.11	0.06	-49.34	37.73	93.30	147.28
19. Textiles & Allied Products	2812.90	3002.59	6.74	522.22	672.95	28.86
20. Petroleum Crude & Products	7045.12	7374.49	4.68	16493.40	20715.57	25.60
21. Others	748.17	639.73	-14.49	504.03	593.88	17.83
Total	35303.60	38544.81	9.18	54488.05	64911.68	19.13

Foreign Trade Performance

Export of cotton yarn during the period April 2025 stood at USD 277.98 million, 8 per cent lower than previous year same time export level of USD 300.86 million, export of cotton fabrics, made-ups etc stood at USD 556.96 million, 6 per cent higher than previous year same time export level of USD 527.74 million. Export of man-made staple fibre during the period stood at USD 32.55 million, a drop of 20 per cent compared to previous year export level of USD 40.69 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 during the period. Table-3 shows export of various commodities under the textiles and allied products in April 2025 compared with the previous year corresponding period export in dollar terms along with percentage growth.

At the same time import of raw cotton including waste during the period stood at USD 86.88 million an increase of 129 per cent as against previous

year import level of USD 37.91 million; cotton yarn imports during the period April has increased by 25 per cent to USD 2.25 million, also, import of cotton fabrics, made-ups etc., group registered a positive growth of 10 per cent, at the same time export of RMG of Cotton Including accessories declined by 5 per cent to USD 44.40 million as against previous year same time import level of USD 46.77 million.

On the MMF front, import of manmade staple fibres during the period stood at USD 40.81 million, 7 per cent lower than previous year same time import level of USD 43.90 million. Import of manmade yarn, fabrics, madeups group registered a positive growth of 34 per cent to USD 225.77 million as against its previous year import level of USD 168.50 million.

Table -4 shows import of various commodities under the textiles & allied products group during April 2025 compared with previous year corresponding period import in dollar terms along with percentage growth.

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

Foreign Trade Performance

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

Commodity	April 2024	April 2025	% Growth
Textiles & Allied Products	2,812.90	3,002.59	6.74
- Manmade Staple Fibre	40.69	32.55	-20.01
- Cotton Yarn	300.86	277.98	-7.60
- Cotton Fabrics, Made-ups Etc.	527.74	556.96	5.54
- Other Textile Yarn, Fabric Made-up Articles	65.94	79.93	21.22
- Silk, Raw	0.69	0.01	-99.14
- Natural Silk Yarn, Fabrics, Made-ups	10.12	20.38	101.37
- Manmade Yarn, Fabrics, Made-ups	368.40	383.80	4.18
- Wool, Raw	0.08	0.00	-97.22
- Wollen Yarn, Fabrics, Made-ups, etc.	12.74	13.78	8.15
- RMG Cotton Including Accessories	693.67	826.49	19.15
- RMG Silk	5.69	5.64	-0.83
- RMG Manmade Fibres	219.61	223.23	1.65
- RMG Wool	6.94	10.55	52.03
- RMG of Other Textile Material	272.49	305.43	12.09
- Coir And Coir Manufactures	39.69	53.78	35.49
- Handloom Products	11.55	15.58	34.97
- Silk Waste	2.46	2.34	-4.75
- Jute, Raw	0.96	1.71	77.53
- Jute Yarn	1.16	2.04	76.20
- Jute Hessian	8.16	9.49	16.28
- Floor Covering of Jute	6.98	6.89	-1.31
- Other Jute Manufactures	10.81	9.94	-8.11
- Carpet (Excluding Silk) Handmade	107.55	110.16	2.43
- Silk Carpet	3.63	4.71	29.71
- Cotton Raw Including Waste	94.29	49.22	-47.80

Foreign Trade Performance

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

Commodity	April 2024	April 2025	% Growth
Textiles & Allied Products	522.22	672.95	28.86
- Manmade Staple Fibre	43.90	40.81	-7.05
- Cotton Yarn	1.80	2.25	25.12
- Cotton Fabrics, Made-ups Etc.	42.05	46.31	10.12
- Other Textile Yarn, Fabric Made-up Articles	74.26	103.75	39.72
- Silk, Raw	8.50	9.33	9.79
- Natural Silk Yarn, Fabrics, Made-ups	3.72	4.35	16.94
- Manmade Yarn, Fabrics, Made-ups	168.50	225.77	33.99
- Wool, Raw	16.76	19.54	16.58
- Wollen Yarn, Fabrics, Made-ups, etc.	9.48	9.39	-0.98
- RMG Cotton Including Accessories	46.77	44.40	-5.07
- RMG Silk	0.61	0.42	-31.43
- RMG Manmade Fibres	25.60	35.70	39.47
- RMG Wool	0.92	1.01	9.85
- RMG of Other Textile Material	16.79	14.99	-10.70
- Coir And Coir Manufactures	0.20	0.19	-4.39
- Handloom Products	0.17	0.13	-21.00
- Silk Waste	0.13	0.28	111.93
- Jute, Raw	8.14	7.51	-7.80
- Jute Yarn	4.40	6.75	53.18
- Jute Hessian	3.02	4.70	55.75
- Floor Covering of Jute	0.06	0.03	-53.46
- Other Jute Manufactures	5.96	6.70	12.41
- Carpet (Excluding Silk) Handmade	2.54	1.75	-31.11
- Silk Carpet	0.04	0.02	-55.87
- Cotton Raw Including Waste	37.91	86.88	129.17

Foreign Trade Performance

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

- ❖ India's export of cotton products covered under HS Codes 52 during MArch 2025 registered a negative growth of 13 per cent and stood at USD 579.74 million, as against the previous year same time export level of USD 669.93 million.
- ❖ At the same time, export of Man-made filaments during the period stood at USD 154.20 million, a drop of 6 per cent as against previous year export level of USD 163.63 million.
- ❖ Manmade staple fibres covered under HS Codes 55 declined by 11 per cent to USD 145.51 million as against its previous year export level of USD 163.21 million
- ❖ Exports of garments covered under HS Codes 61 & 62 during the period stood at USD 659.02 million and 874.83 million, which is higher by 8% and 1% respectively when compared to previous year same time export level of USD 608.49 million and USD 865.08 million respectively.
- ❖ Made-ups exports covered under HS Code 63 increased by 6 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 March 2025 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 March 2025 stood at USD 92.93 million, an increase of 46 per cent compared to previous year same time import level of USD 63.49 million.
- ❖ Import of man-made filaments during the period stood at USD 129.37 million which is higher by 20 per cent when compared with previous year same time import level of USD 107.50 million.
- ❖ Import of garments covered under HS Codes 62 during the period registered a growth of 31%
- ❖ Import of made ups covered under HS Code 63 stood at USD 48.70 million, which is higher by 5 per cent when compared to previous year same time import level of USD 46.54 million.

Table - 6 shows India's import of textile items covered under HS Codes 50 to 63 in USD million during March 2025 compared with same period of the previous year.

News Snippets

India to restore RoDTEP benefits for AA, EOU & SEZ exports from June 1

- ❖ The Government of India has reinstated RoDTEP benefits for AA holders, EOUs and SEZ units from June 1.
- ❖ The move aims to enhance export competitiveness and ensure parity across exporter categories.

Foreign Trade Performance

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

HS Code	Commodity	March 2024	March 2025	% Growth
50	Silk	12.81	14.81	15.61
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	13.74	12.8	-6.84
52	Cotton.	669.93	579.74	-13.46
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	58.65	80.77	37.72
54	Man-Made Filaments.	163.63	154.2	-5.76
55	Man-Made Staple Fibres.	163.21	145.51	-10.84
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	57.75	59.16	2.45
57	Carpets and other textile floor coverings.	174.29	184.47	5.84
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	32.54	34.41	5.75
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	46.56	45.61	-2.05
60	Knitted or crocheted fabrics.	45.43	53.18	17.08
61	Articles of apparel and clothing accessories, knitted or crocheted.	608.49	659.02	8.30
62	Articles of apparel and clothing accessories, not knitted or crocheted.	865.08	874.83	1.13
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	516.31	548.75	6.28

Foreign Trade Performance

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

HS Code	Commodity	January 2024	January 2025	% Growth
50	Silk	9.69	13.61	40.48
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	19.49	21.56	10.63
52	Cotton.	63.49	92.96	46.41
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	54.22	40.88	-24.61
54	Man-Made Filaments.	107.5	129.37	20.35
55	Man-Made Staple Fibres.	63.11	61.61	-2.38
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	30.8	40.75	32.3
57	Carpets and other textile floor coverings.	12.14	15.25	25.63
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	14.74	16.77	13.77
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	58.79	67.46	14.74
60	Knitted or crocheted fabrics.	46.03	72.46	57.41
61	Articles of apparel and clothing accessories, knitted or crocheted.	39.00	54.25	39.09
62	Articles of apparel and clothing accessories, not knitted or crocheted.	59.66	78.11	30.93
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	46.54	48.70	4.65

Foreign Trade Performance

HS Code wise Performance

Export & Import Quantum April - January 2025

- ❖ Export of cotton covered under HS Codes 5201-5203 during the period March 2025 stood at 41.34 million kgs, a decline of 44 per cent as against previous year same time export level of 73.36 million kgs, At the same time, its imports during the period stood at 37.40 million kgs, 92 per cent higher than previous year same time import level of 19.52 million kgs.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 106.79 million kgs, which is lower by 5 per cent than previous year same time export level of 111.99 million kgs.
- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period stood at 220.50 million square metres.

Export and Import Value - March 2025

- ❖ Export of cotton in all forms covered under HS Codes 5201 to 5203 during March 2025 declined by 52% to USD 69.51 as against its previous year export level of USD 144.48 million. At the same time its import during the period stood at USD 79.04 million which is higher by 62% as against the previous year import level of USD 48.80 million.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the

period was valued at USD 321.4 million, 6 per cent lower than previous year same time export level of USD 341.40 million. Its import stood at USD 2.58 million during March 2025.

- ❖ Export of woven fabrics of containing cotton covered under HS Codes 5208 to 5212 during the period was valued at USD 188.01 million as against previous year export level of USD 184.04 million. At the same time its import stood at USD 11.32 million, a decline of 1 per cent compared to a year ago.

Table - 7 shows export and import of HS Codes 5201 to 5212 during March 2025 compared with the corresponding period export and import in quantitative terms.

Table - 8 shows export and import of HS Codes 5201 to 5212 during March 2025 compared with the corresponding period export and import in dollar terms.

News Snippets

Brazil's cotton exports to China drop as Pakistan becomes top buyer

- ❖ Brazil's cotton exports to China plunged 78 per cent to \$215.75 million in January-April 2025, dropping China to fifth place among top buyers.
- ❖ Meanwhile, exports to Pakistan surged 318 per cent to \$435.80 million, making it Brazil's largest cotton market.
- ❖ Overall cotton exports rose slightly to \$1.96 billion.
- ❖ Vietnam, Bangladesh and Turkiye also remained key markets.

Foreign Trade Performance

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

HS Code	Description	Export			Import		
		January 2024	January 2025	% Growth	January 2024	January 2025	% Growth
5201	Cotton, Not Carded or Combed	64.441	29.98	-53.47	16.76	34.15	104
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	5.92	5.29	-10.68	2.66	3.22	21.17
5203	Cotton, Carded or Combed	3.00	6.07	102.58	0.09	0.03	-69.74
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	0.09	0.10	16.28	0.00	0.00	-67.32
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	104.57	100.23	-4.14	0.78	0.83	6.96
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	7.28	6.35	-12.74	0.06	0.12	112.19
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	0.06	0.10	63.11	0.01	0.00	-78.59
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	165.61	156.26	-5.64	8.91	1269.76	14146.42
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	32.92	41.52	26.12	0.87	4.62	428.99
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.00	4.74	-5.20	0.68	0.65	-5.21
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	14.21	14.95	5.18	0.71	0.82	14.11
5212	Other Woven Fabrics of Cotton	2.01	3.02	50.59	0.14	0.22	57.04
	Cotton (HS 5201-5203)	73.36	41.34	-43.65	19.52	37.40	91.66
	Cotton Yarn (HS 5204-5207)	111.99	106.79	-4.65	0.85	0.96	13.31
	Woven Fabrics of Cotton (HS 5208-5212)	219.75	220.50	0.34	11.32	1276.06	11169.69

Foreign Trade Performance

Table - 9 : Export / Import– USD Million

HS Code	Description	Export			Import		
		January 2024	January 2025	% Growth	January 2024	January 2025	% Growth
5201	Cotton, Not Carded or Combed	132.33	55.37	-58.16	47.41	77.10	62.63
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	8.11	6.45	-20.44	1.23	1.76	42.90
5203	Cotton, Carded or Combed	4.04	7.69	90.39	0.16	0.18	12.51
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	0.88	1.13	28.03	0.02	0.01	-18.65
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	321.31	302.45	-5.87	3.09	2.29	-25.75
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	18.71	17.05	-8.87	0.11	0.27	141.18
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	0.50	0.80	58.76	0.01	0.01	-44.74
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	114.52	110.06	-3.90	6.25	6.51	4.05
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	43.33	52.37	20.88	2.33	1.76	-24.22
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.22	4.62	-11.47	1.00	0.85	-14.85
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	18.71	18.83	0.63	1.52	1.68	10.93
5212	Other Woven Fabrics of Cotton	2.26	2.92	28.98	0.36	0.52	45.72
	Cotton (HS 5201-5203)	144.48	69.51	-51.88	48.80	79.04	61.92
	Cotton Yarn (HS 5204-5207)	341.40	321.43	-5.84	3.23	2.58	-20.12
	Woven Fabrics of Cotton (HS 5208-5212)	184.04	188.01	-2.58	11.46	11.32	-1.22

Index of Industrial Production

Industrial Production Slows to 6 - Month Low of 2.9% in February 2025

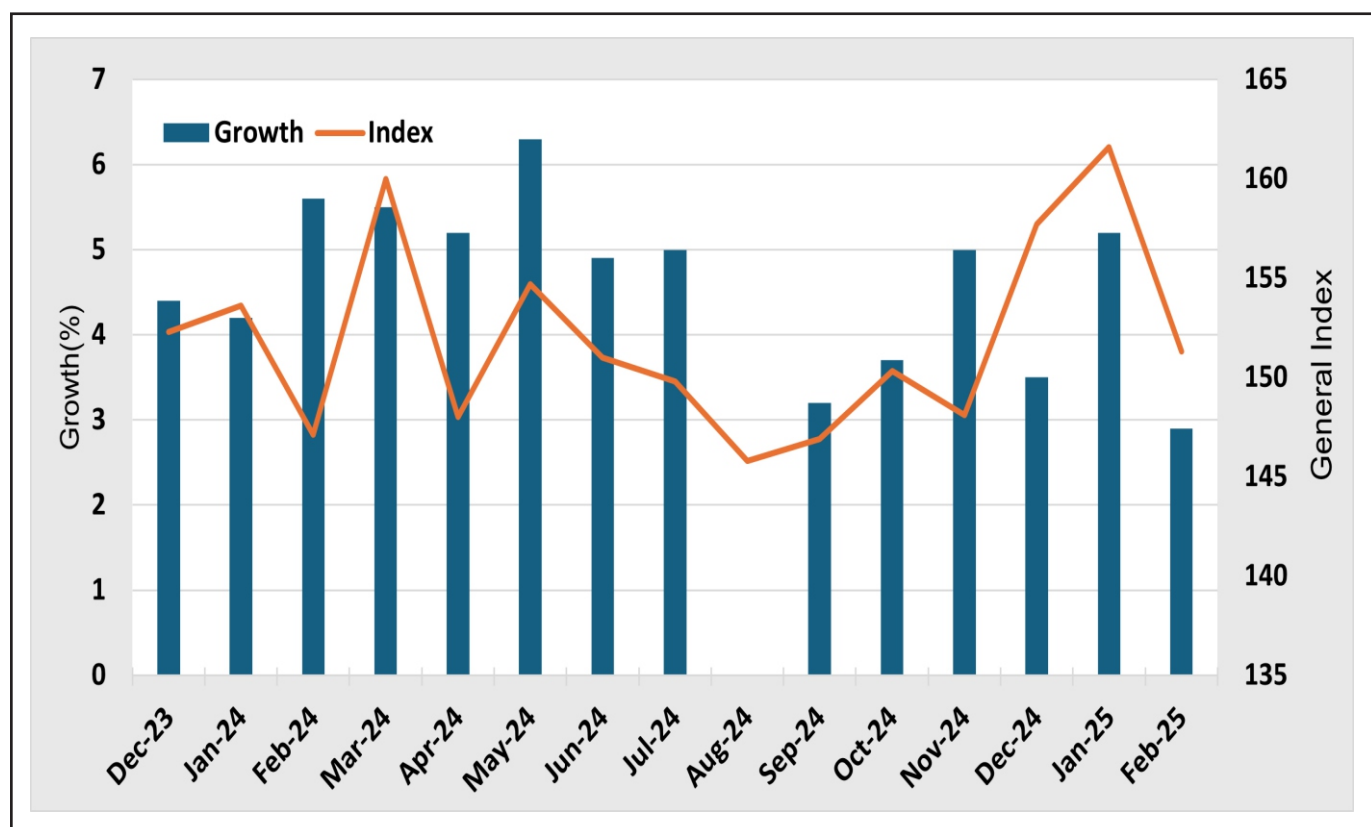
India's industrial sector encountered a notable dip in momentum in February 2025, with the Index of Industrial Production (IIP) expanding by just 2.9% its weakest pace in six months. The decline stemmed from a broad-based slowdown across mining, manufacturing and electricity sectors.

The IIP stood at 151.3 in February 2025, up from 147.1 in the same month last year. The growth was led by the manufacturing sector, which expanded by 2.9 per cent, while mining and electricity recorded growth rates of 1.6 per cent and 3.6 per cent, respectively. Among the 23 manufacturing industry groups, 14 reported positive growth. Leading contributors included

the manufacture of basic metals (5.8 per cent), motor vehicles, trailers and semi-trailers (8.9 per cent), and other non-metallic mineral products (8.0 per cent). Products such as alloy steel flat products, steel pipes and rods, cement, auto components, and commercial vehicles played a significant role in this performance.

From a use-based perspective, capital goods recorded the highest growth at 8.2 per cent, followed by infrastructure/construction goods at 6.6 per cent, and primary goods at 2.8 per cent. However, consumer non-durables declined by 2.1 per cent, suggesting weak demand in fast-moving goods. Based on use-based classification, top three positive

Chart - 1 : All India Index of Industrial Production



Index of Industrial Production

contributors to the growth of IIP for the month were infrastructure/construction goods, primary goods, and capital goods.

In February 2025, the sector-specific indices reflected notable trends across key areas of the industrial landscape. The Mining sector index stood at 141.9, indicating moderate growth in mineral extraction activities.

The Manufacturing sector showed robust performance with an index of 148.6, underscoring the resilience and expansion of industrial production. Meanwhile, the Electricity sector posted the highest index at 194.0, highlighting strong demand and consistent output in power generation and distribution. These figures collectively signal a

positive trajectory in industrial activity, driven largely by manufacturing momentum and sustained energy production.

The data also shows that the cumulative IIP growth for the April-February period of FY2024-25 stands at 4.1 per cent, a decline from 6.0 per cent recorded in the same period the previous year. Sector-wise, cumulative growth was recorded at 3.2 per cent in mining, 4.1 per cent in manufacturing, and 5.0 per cent in electricity during this eleven-month period. Chart-1 depicts monthly indices and growth rate (%) of IIP. Manufacturing of Textiles Index for the month of February 2025 stood at 106.6 points, an increase of 2.4% than previous year index level of 104.1 points

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.

News Snippets

India's viscose & polyester yarn down on weak demand, high imports

- ❖ Viscose yarn prices in Surat and Mumbai eased by ₹2-3 per kg due to higher imports and weak demand. Polyester yarn also fell in Surat, driven by the crude oil slump.
- ❖ Traders expect further declines. Despite the cut, polyester yarn prices remained steady in Ludhiana.
- ❖ Meanwhile, north India's cotton prices rose slightly as arrivals dwindled.

Index of Industrial Production

Manufacturing of wearing apparel Index for the month of February 2025 stood at 120.1 points.

The table - 2 captures comparative IIP growth for last 3 months, with respective component weights. Overall numbers for mining, manufacturing, and electricity are segregated.

Table - 1 : Textiles and Wearing Apparels IIP

Month	Manufacture of Textiles			Manufacturing of Wearing Apparels		
	2023 - 24	2024 - 25	Growth Rate %	2023 - 24	2024 - 25	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	109.4	2.15	97.8	112.5	15.03
September	108.4	109.3	0.83	102.4	103.7	1.27
October	110.2	111.1	0.82	97.8	104	6.34
November	102.7	106.2	3.41	92.9	110.3	18.73
December	112.3	113.9	1.42	113.1	119.1	5.31
January'25	109.7	113.7	3.65	117.3	120.2	2.47
February	104.1	106.6	2.40	125.6	120.1	-4.38

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)

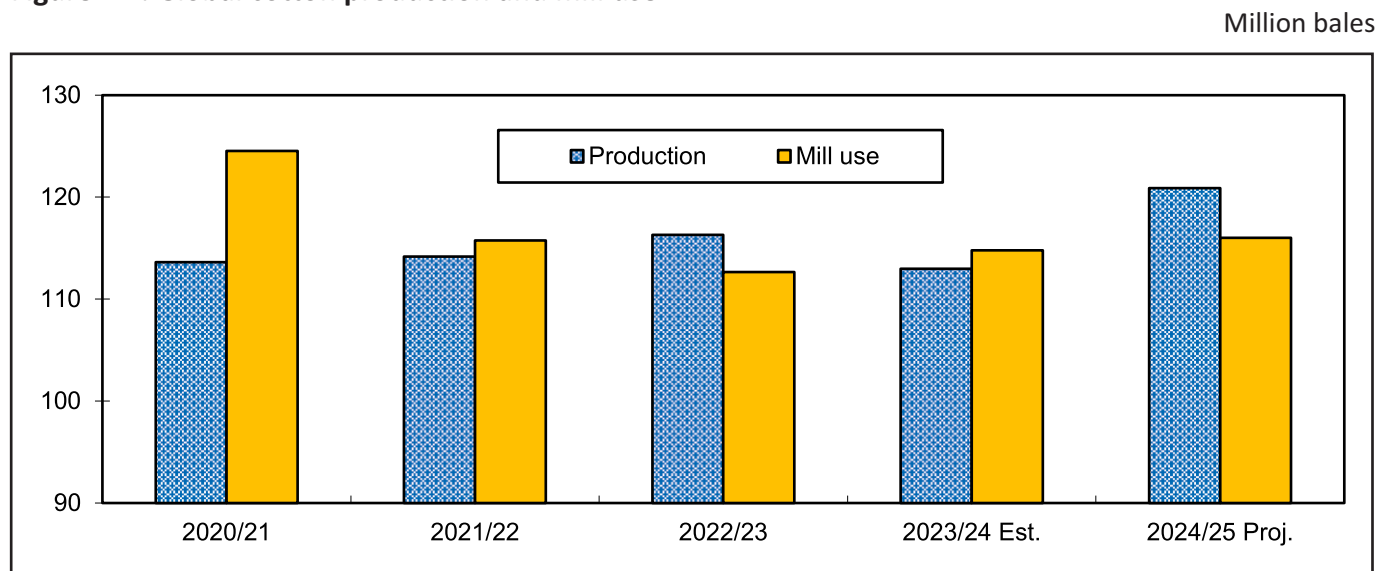
NIC 2008	Description	Weights	December 2024	January 2025	February 2025
10	Manufacture of food products	5.3025	152.8	159.0	142.6
11	Manufacture of beverages	1.0354	104.3	115.4	114.8
12	Manufacture of tobacco products	0.7985	89.0	98.4	76.1
13	Manufacture of textiles	3.2913	113.9	113.7	106.6
14	Manufacture of wearing apparel	1.3225	119.1	120.2	120.1
15	Manufacture of leather and related products	0.5021	89.2	93.9	87.7
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.1930	115.0	104.4	106.6
17	Manufacture of paper and paper products	0.8724	76.7	76.7	72.0
18	Printing and reproduction of recorded media	0.6798	90.0	83.3	81.2
19	Manufacture of coke and refined petroleum products	11.7749	147.4	146.3	131.8
20	Manufacture of chemicals and chemical products	7.8730	131.0	130.9	121.8
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	4.9810	258.6	244.3	212.0
22	Manufacture of rubber and plastics products	2.4222	107.0	118.7	115.2
23	Manufacture of other non-metallic mineral products	4.0853	151.9	162.7	159.5
24	Manufacture of basic metals	12.8043	237.0	242.2	225.6
25	Manufacture of fabricated metal products, except machinery and equipment	2.6549	106.9	104.2	102.1
26	Manufacture of computer, electronic and optical products	1.5704	115.1	126.2	139.1
27	Manufacture of electrical equipment	2.9983	163.8	131.4	121.9
28	Manufacture of machinery and equipment n.e.c.	4.7653	127.7	122.0	124.7
29	Manufacture of motor vehicles, trailers and semi-trailers	4.8573	116.3	148.3	142.0
30	Manufacture of other transport equipment	1.7763	142.2	180.0	157.8
31	Manufacture of furniture	0.1311	239.1	232.9	240.8
32	Other manufacturing	0.9415	77.8	76.7	71.6
	Mining	14.3725	143.2	150.7	141.9
	Manufacturing	77.6332	156.8	159.5	148.6
	Electricity	7.9943	192.8	201.9	194.0
	General	100.0000	157.7	161.6	151.3

Global Cotton Production Forecast at 7-Year High

The United States Department of Agriculture (USDA) forecast global production for 2024-25 season at 26.32 million tonnes, down slightly month over month but a 7-percent increase from 2023-24 and the highest total since 2017-18 (figure 1). The major producing countries are projected to be mixed in 2024-25, as declines in India and Pakistan are offset by larger year over year increases in China, Brazil, the United States, and Australia.

Global mill use is projected to increase slightly in 2024-25 to 25.26 million tonnes an increase of 1.1 percent from 2023-24. Among the top spinning countries, however, only China is projected lower this season. World production in 2024-25 exceeds the mill use estimate, with global ending stocks rising nearly 7 percent. World cotton stocks are projected 17.17 million tonnes, the second-highest level since 2015-16.

Figure - 1 : Global cotton production and mill use



Note : 1 bale = 480 pounds; Source: USDA

Global Cotton Production Higher in 2024 - 25

World cotton production in 2024 - 25 is forecast at 26.32 million tonnes, slightly below last month's estimate but still 7 percent above last year. An 8-percent increase in the global yield is expected to negate the small decrease of 1 per cent in harvested area this season. World cotton area is forecast at 30.8 million hectares in 2024-25. The

world cotton yield is projected at a record 854 kilograms (kg) per hectare.

Cotton production for the major-producing countries is mixed in 2024-25, although the majority are estimated to increase (figure 2). Year over year increases in China, Brazil, the United States and Australia more than offset reductions for Pakistan and India. Production in China the

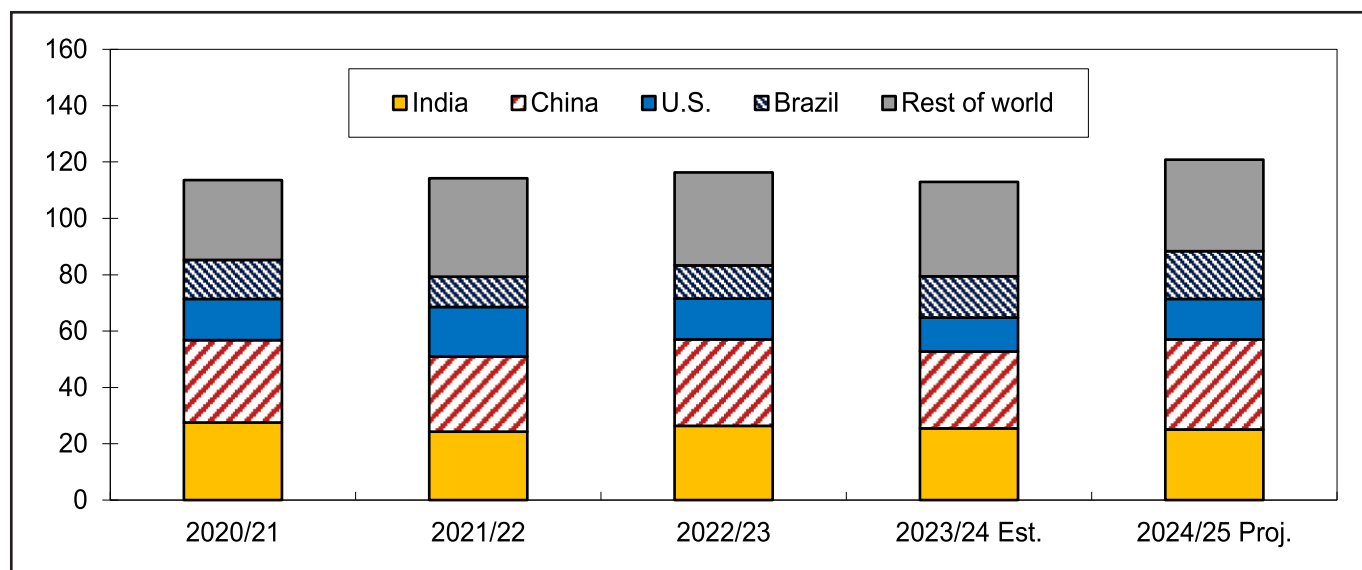
Raw Material Scenario

leading global cotton producer in 2024-25 is forecast at 6.96 million tonnes, a 17-percent increase above 2023-24. Harvest area in China is estimated to increase nearly 2 percent from 2023-24 to 2.9 million hectares in 2024-25, while yield is projected at a record 2,402 kg per hectare,

surpassing the 2022-23 record of 2,160 kg per hectare as excellent growing conditions prevailed this season. China's crop grown mainly in the high-yielding Xinjiang region is expected to account for 26.5 percent of global production this season, compared with 24 percent in 2023-24.

Figure-2: Leading global cotton consumers

Million bales



Note: 1 bale = 480 pounds; Source: USDA

Global cotton mill use forecast reduced in April but slightly higher over year

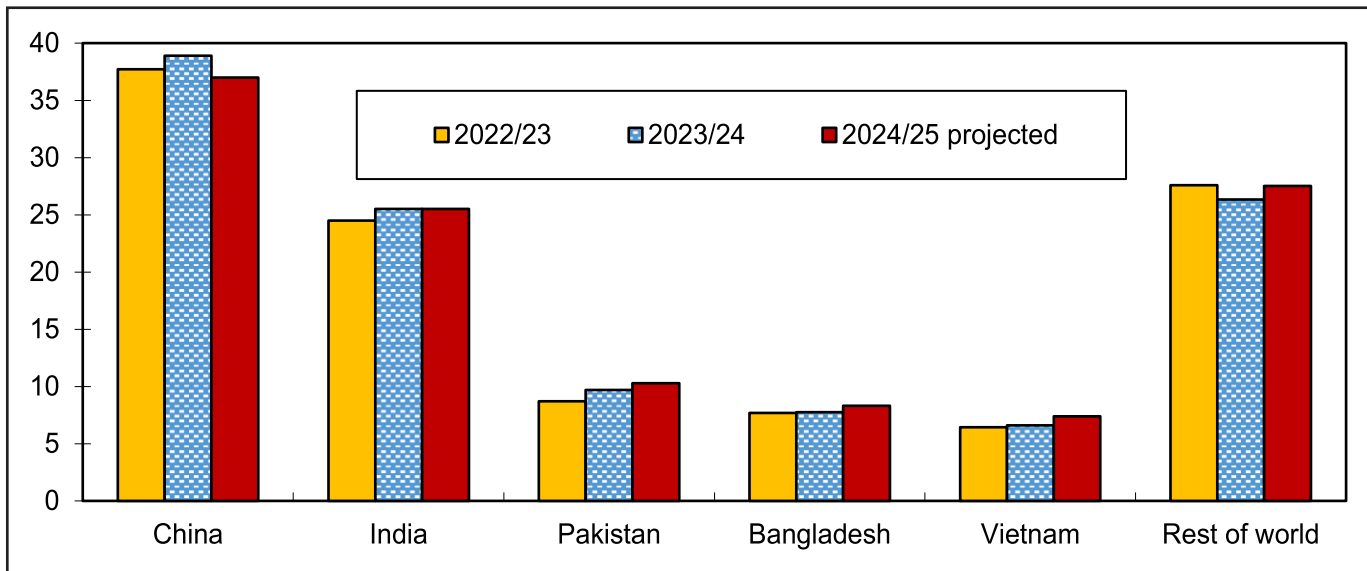
World cotton mill use in 2024-25 is projected at 25.26 million tonnes as against previous month forecast level of 25.375 million tonnes. The decline is mainly the result of lower projected use by China, the largest supplier of cotton products to the United States. With considerably higher U.S. import tariffs in place, cotton mill use by China is expected to decrease. Nevertheless, global cotton mill use in 2024-25 is forecast 1.1 percent above last season.

The top five consuming countries are again projected to account for more than 70 percent of global cotton mill use in 2024-25. China and India remain the largest users, combining for 54 percent of the total, despite lower or flat use this season (figure 3). Moderate increases are expected for the other major cotton-spinning countries, which also includes Turkey. For China, cotton mill use is forecast at 8.05 million tonnes 2024-25, 5 percent down from 2023-24. Despite the decline, China is expected to account for 32 percent of global cotton mill use this season.

Raw Material Scenario

Figure - 3 : Leading global cotton consumers

Million bales



Note: 1 bale = 480 pounds; Source: USDA

Higher cotton mill use is forecast for Pakistan, Bangladesh, Vietnam and Turkey in 2024-25. For Pakistan the third-largest cotton user is forecast at 2.24 million tonnes, a 6 percent increase over 2023-24. Cotton mill use in Bangladesh is forecast at 1.80 million tonnes in 2024-25. As the fourth largest user of raw cotton, Bangladesh accounts for 7 percent of the global total. Vietnam and Turkey are expected to use 1.61 and 1.54 million tonnes of cotton, respectively, in 2024-25.

World Cotton Trade Forecast Lower; Stocks Rise in 2024-25

Global cotton trade for 2024-25 is forecast to decline 5 percent from 2023-24, largely the result of a considerable decrease in cotton imports by China. Global cotton imports are led by Bangladesh, Vietnam, China and Pakistan in 2024-25 and account for a combined 65 percent of

the total. Bangladesh's imports are forecast to rise 8 percent to 1.78 million tonnes. For Vietnam and Pakistan, cotton imports are projected to increase by 12 percent and 72 percent respectively. In contrast, China's 2024-25 cotton imports are expected to decline by more than 50 percent to 1.41 million tonnes as China restocked its national reserve last season and mill use is forecast to decline.

World cotton exports in 2024-25 are projected at 9.21 million tonnes a reduction of 5 percent as against previous year export level of 9.71 million tonnes. Reduced global import demand associated with lower world cotton mill use provides mixed results for the major exporters this season. While a record crop in Brazil has boosted export opportunities, cotton shipment estimates for most other major exporters are constrained in 2024-25. For Brazil, cotton exports are forecast at a record

Raw Material Scenario

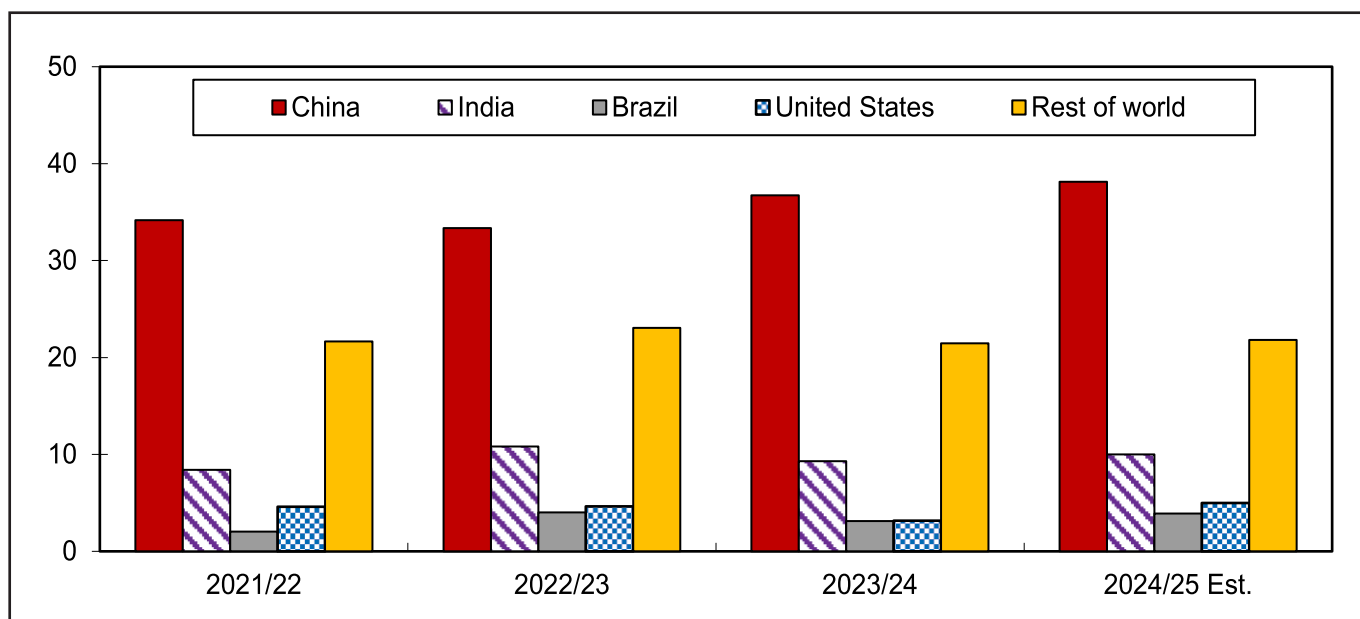
2.80 million tonnes in 2024-25, nearly 5 percent above the previous year. Brazil remains the largest global exporter for a second consecutive year in 2024-25, as its share of world trade surpasses 30 percent.

Based on these global cotton supply and demand projections, 2024-25 world stocks are forecast to increase nearly 7 percent from the previous year to 17.17 million tonnes. Ending stocks in China the

largest holder of cotton are forecast to rise this season as are stocks in all other major producing countries (figure 4). In China, cotton stocks at the end of 2024-25 are forecast at 8.30 million tonnes, nearly 4 percent higher, accounting for 48 percent of the global total. Ending stocks in Brazil are forecast 26 percent higher as the record crop more than offsets larger exports. Brazil is expected to account for 5 percent of the world total in 2024-25.

Figure - 4 : Global Cotton Ending Stocks

Million bales



Note: 1 bale = 480 pounds; Source: USDA

News Snippets

Bangladesh apparel exporters likely to pay \$250 mn US tariff a month

- ❖ Concerned over the tariff on garment exports to the US, apparel exporters in Bangladesh recently cautioned that the sector could face an average monthly duty burden of \$250 million unless the duty is permanently withdrawn.
- ❖ Close to 1,000 factories may struggle to survive, industry leaders say.
- ❖ Meanwhile, north India's cotton prices rose slightly as arrivals dwindled.
- ❖ While buyers are traditionally responsible for tariffs, many are now passing the cost onto suppliers.

Bangladesh notifies ban on yarn imports from India through land ports

- ❖ Bangladesh has banned yarn imports from India through five land ports, with immediate effect, according to an NBR notification.
- ❖ The move is aimed at protecting the domestic industry, but it would disrupt fast, low-cost supply chains from India.
- ❖ Industry insiders warn it may raise costs, slow production, and shift sourcing to China despite higher freight and lead times.

The National Board of Revenue (NBR) has issued notification withdrawing the facility to import yarn through the land ports of Benapole, Bhomra, Sonamasjid, Banglabandha, and Burimari all located along the India-Bangladesh border. A fresh notification was issued on April 15, 2025, amending an earlier order dated August 27, 2024. The decision has been implemented with immediate effect.

Sources in the Indian textile industry said that yarn was primarily imported into Bangladesh from India via these ports. Traditionally, India has been the largest yarn supplier to Bangladesh's garment and textile industry, also supplying a substantial volume of fabric. However, bilateral trade has been significantly affected since the Interim regime was set up in Bangladesh in August last year.

The latest ban is expected to promote Bangladesh's yarn imports from other countries, primarily from China. However,

importing from China or other countries via seaports typically takes 2 to 3 weeks and involves higher freight costs. In contrast, Indian yarn imports reached Bangladesh in just 2 to 5 days through land routes. Several Indian textile companies had also set up their warehouses in Kolkata, enabling faster and more cost-effective deliveries.

Bangladesh has stated that the ban aims to protect its domestic textile industry. However, local manufacturers warn that it will disrupt production and harm the competitiveness of the industry in the global market.

Source : Fibre 2 Fashion

Brazil cotton prices rise on tight supplies & trade uncertainty

- ❖ Trade tensions between the US and China weighed on global cotton sentiment in April, while Brazil faced limited spot market activity due to quality and price mismatches.
- ❖ Globally, production is set to exceed consumption by 4.2 per cent, according to USDA projections.

Trade tensions between the US and China disrupted global market sentiment in early April, slowing spot market activity amid volatile futures. In Brazil, a mismatch in product quality and pricing continued to limit negotiations during the offseason. Most 2023-24 inventories have already been sold, with remaining sellers holding firm on prices. Buyers with urgent or high-quality requirements are paying a

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premium, as per the Centre for Advanced Studies on Applied Economics (CEPEA).

Globally, the USDA projects cotton production at 26.32 million tonnes for 2024-25, a 7 per cent rise from the previous year, with consumption seen at 25.26 million tonnes, leaving supply 4.2 per cent above demand.

Source : Fibre 2 Fashion

India reimposes MIP on 4 synthetic knitted fabric codes

- ❖ India has reimposed a minimum import price (MIP) of \$3.5/kg on four HSN codes covering synthetic knitted fabrics, effective until March 31, 2026.
- ❖ The move follows a 22-day gap in April that likely led to a surge in imports.
- ❖ While nine other codes are now subject to a fixed Rs 115/kg basic duty, over three dozen codes remain unrestricted, prompting concerns of diversion to avoid MIP and customs duties.

India has reimposed a minimum import price (MIP) on four HSN codes under Chapter 60, which covers synthetic knitted fabrics. The MIP initially ended on March 31 this year. The Directorate General of Foreign Trade (DGFT), under the Ministry of Commerce and Industry, issued a notification on April 23 in this regard. As a result, there was a 22-day period without the MIP, during which industry experts anticipate a significant increase in imports of the product.

According to the notification, DGFT has reimposed an MIP of \$3.5 per kg on HSN codes 60019200, 60053600, 60053790, and 60053900 for synthetic knitted fabric. These codes cover products made from man-made or synthetic fibres (unbleached or bleached). Synthetic knitted fabrics attract a 20 per cent duty on their value. Following the imposition of the MIP, the duty will be based on the determined minimum import value or the actual import value (whichever is higher).

The MIP was initially imposed on March 16, 2024, and extended over time, ending on March 31, 2025. Industry sources stated that the latest notification caused a 22-day blackout period when the MIP was not effective, creating a strong possibility of significant imports of synthetic knitted fabrics during that time.

The import of synthetic knitted fabrics under ITC (HS) codes 60019200, 60053600, 60053790, and 60053900 is 'restricted' until March 31, 2026, according to the notification. However, imports are 'free' if the CIF value is \$3.5 per kilogram or higher. Additionally, inputs imported by Advance Authorization holders, Export Oriented Units (EOUs), and units in Special Economic Zones (SEZs) will be exempt from the MIP condition.

It is worth noting that the MIP on synthetic knitted fabric under nine other codes (60041000, 60049000, 60062200, 60063100, 60063200, 60063300, 60063400, 60064200, and 60069000) ended on March 31, 2025. However, the government had imposed a fixed

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basic customs duty of Rs 115 per kg in the Union Budget for FY 2025-26. This means that imports of synthetic knitted yarn under these codes will attract a duty of either 20 per cent or Rs 115 per kg (whichever is higher). This change came into effect immediately following the government's announcement on February 1, 2025.

However, more than three dozen codes for synthetic knitted fabrics remain unrestricted. Industry stakeholders are concerned that imports may be diverted under non-MIP and non-BCD codes. There are 55 codes under Chapter 60, of which 45 are active, according to industry sources.

Source : Fibre 2 Fashion

China seizes India's yarn & fabric market share in Bangladesh

- ❖ India's textile exports to Bangladesh have sharply declined amid strained ties and the March 2025 border closure.
- ❖ In January-February 2025, China fully replaced India as the top supplier of yarn and fabric, capturing over 95 per cent of yarn imports and 92 per cent of fabric imports.
- ❖ Once the leading supplier, India's market share has now dropped to negligible levels in both categories.

Strained diplomatic ties between Bangladesh and India culminated in the closure of land ports along their shared border in late March.

However, trade data suggests that India's textile exports to Bangladesh had already suffered a severe blow earlier in the year. In January-February 2025, China fully replaced India as the top supplier of yarn and fabric to Bangladesh, seizing the latter's market share and establishing a near-monopoly in both segments.

China supplied 95.61 per cent of the yarn in Bangladesh's total imports worth \$257.492 million in January-February 2025. Imports from China were valued at \$246.183 million during the same period. India was no longer among the leading suppliers. In contrast, India had been the top yarn supplier in 2024, accounting for 53.66 per cent of Bangladesh's total yarn imports, which were valued at \$3,264.805 million. Imports from India during that year stood at \$1,751.959 million, while China supplied yarn worth \$1,224.864 million, representing a 37.52 per cent share, according to Fibre2Fashion's market insight tool TexPro.

Bangladesh witnessed a regime change in August 2024, ousting the Sheikh Hasina government. During the third quarter of 2024 (July-September), India was the top supplier with a 59.08 per cent share. China's share was 31.11 per cent during the same quarter, when Bangladesh's total yarn imports stood at \$761.362 million. India retained its leading position in the following quarter (October-December 2024), supplying \$492.650 million worth of yarn (59.81 per cent) out of total imports of \$823.632 million. Imports from

Market Watch

China during this period were valued at \$276.774 million (33.60 per cent). However, India has lost the entire yarn export market share to China in the first two months of the current year.

As per TexPro, India was the second-largest fabric supplier to Bangladesh in 2024, with a market share of 8.47 per cent. But China seized this share, taking full control of the trade in the current year. Bangladesh imported fabric worth \$1,121.632 million in the first two months of 2025, of which shipments from China accounted for \$1,034.819 million (92.26 per cent). Imports from India during this period were negligible.

In 2024, Bangladesh imported fabric worth \$6,951.199 million from China (78.46 per cent share) and \$750.566 million from India (8.47 per cent share). The country had imported \$2,120.308 million worth of fabric in July-September 2024 and \$2,555.364 million in October-December 2024. China's share in fabric imports increased from 76.48 per cent in the third quarter to 82.33 per cent in the fourth quarter, and further to 92.26 per cent in the first two months of 2025. India's share was 8.20 per cent in the third quarter and rose slightly to 8.47 per cent in the fourth quarter. However, India's penetration has declined to negligible levels so far in 2025.

Source : Fibre 2 Fashion

Bangladesh overtakes China in Turkiye's apparel market

Bangladesh surpassed China to become the largest apparel supplier for Turkiye in 2024. Although Turkiye is a major apparel-exporting nation, it also imports apparel in significant volumes. Its apparel imports from Bangladesh surged to \$692.226 million last year. Interestingly, Turkiye's imports from partner countries have increased 3.5-fold over the past four years

Turkiye's apparel imports from Bangladesh rose by 50 per cent to \$692.226 million in 2024, up from \$460.884 million in 2023. Bangladesh's share in Turkiye's total apparel imports also grew to 18.73 per cent, with total apparel imports reaching \$3,695.179 million in 2024. In 2023, Bangladesh held a 15.58 per cent share of Turkiye's total apparel imports, which stood at \$2,958.582 million, according to Fibre2Fashion's market insight tool TexPro.

Turkiye's apparel imports from Bangladesh were valued at \$190.726 million in 2021, rising to \$381.323 million in 2022 and \$460.884 million in 2023. Bangladesh's share in Turkiye's total apparel imports was 12.72 per cent in 2021, increased to 16.06 per cent in 2022, eased slightly to 15.58 per cent in 2023, and then climbed to 18.05 per cent in 2024.

China fell behind Bangladesh as Turkiye's top

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apparel supplier due to slower import growth from the former in 2024. Türkiye's apparel imports from China increased by 28.07 per cent to \$666.904 million in 2024, accounting for an 18.05 per cent share of total apparel imports.

Türkiye's apparel imports from China rose by 130 per cent since 2021, when imports were recorded at \$289.384 million. The value increased to \$478.048 million in 2022 and further to \$520.945 million in 2023. China's share in Türkiye's apparel imports was 19.30 per cent in 2021, 20.14 per cent in 2022, 17.61 per cent in 2023, and 18.05 per cent in 2024, according to TexPro. Türkiye's total apparel imports rebounded to \$2,373.725 million in 2022 from \$1,499.024 million in 2021. They further rose to \$2,958.582 million in 2023 and \$3,695.179 million in 2024. The country exported apparel worth \$17.444 billion in 2024.

Source : Fibre 2 Fashion

News Snippets

Cotton yarn demand weakens in South India amid export uncertainty

- ❖ Cotton yarn demand in Mumbai and Tiruppur markets remained sluggish due to export uncertainty owing to Israel's attack on Iran.
- ❖ Despite stable prices, mills are open to offer discounts for bulk purchases.
- ❖ Gujarat saw limited cotton trade with buyers turning to CCI amid low availability.
- ❖ Ongoing liquidity issues and global concerns continue to impact the textile value chain.

China ships 20x more garments to US than India across many categories

Amid US tariff imposition, India is looking to turn the challenge into an opportunity. Despite a decline in recent years, China remains the dominant supplier of garments and textiles to the US, accounting for approximately 25 per cent of total imports in this category.

An analysis shows that India could gain a significant opportunity if it manages to capture even a small portion of China's share in the US garment and textile market. Six- and eight-digit HS code-wise trade data indicates that China's exports to the US are more than twenty times greater than India's in several product categories.

For example, the US imported made-up articles of textile materials, including dress patterns (HS code 630790), worth \$3,453 million from China in 2024. The total US imports of these items stood at \$5,170 million. China supplied 66.8 per cent of total US imports in this category. Furthermore, 53 per cent of China's total exports under this code-valued at \$6,507 million-were directed to the US during the same period.

Looking at India's position in the US market, the country exported these products worth \$150 million to the US in 2024, securing just a 2.9 per cent market share. China's shipment to the US was approximately 23 times larger than India's. India's total exports of these products stood at \$405 million, meaning the US accounted for 37 per cent of India's exports in this category

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The analysis was conducted by the Confederation of Indian Textile Industries (CITI) under the guidance of its past chairman, Sanjay Jain. He told Fibre2Fashion, "The analysis will help identify HS code-wise products for a more focused approach. We have identified the top 20 HS codes where China holds a strong position in the US market."

Jain, who is also chairman of the ICC National Textile Committee at the Indian Chamber of Commerce and managing director of TT Limited, said that following the imposition of high tariffs on Chinese products, India could gain a substantial advantage in the US market if it manages to secure even a moderate share of China's exports. He added that India's share was minuscule across the top 20 textile and apparel items imported by the US from China last year, which presents a huge opportunity for India.

Another product category is blankets and travelling rugs of synthetic fibres-including electric blankets, table covers, and bedspreads (HS code 630140). The US imported \$1,261 million (91.9 per cent) worth of such products from China out of total imports of \$1,374 million in 2024. In contrast, US imports from India were recorded at just \$29 million (2.2 per cent) during the same period. China's shipment of this item was 42 times greater than India's.

CITI has identified items that ranked highest in terms of value among US imports from China. Among the top 10 items were full-length or kneelength stockings, socks and other hosiery (code 611596); jerseys, pullovers, cardigans,

and waistcoats of cotton, knitted (code 611020); jerseys, pullovers, cardigans, and waistcoats of man-made fibre (code 611030); women's trousers and bib-and-brace overalls (code 620462); bedlinen of man-made fibres (code 630232); brassieres made from all types of textile materials (code 621210); curtains, including drapes, interior blinds, and bed valances of synthetic fibre (code 630392); and women's dresses of synthetic fibres (code 620443).

Source : Fibre 2 Fashion

Labour crunch hits textile output in Gujarat & Maharashtra

Textile hubs in Gujarat and Maharashtra, including Surat and Ichalkaranji, are experiencing a sharp decline in production upto 50 per cent, due to an annual labour migration, as many workers from Uttar Pradesh and Bihar return home during summer.

Despite the disruption, fabric prices are expected to remain stable due to steady-to-slow demand and pre-planned production.

Global trade war to slow world & European growth, warns Fitch

The US-led trade war will curb global and European growth, cutting Eurozone growth forecasts to 0.6 per cent for 2025, according to Fitch Ratings.

Inflation and policy rates are projected to decline, while banks and insurers face risks from financial market volatility and deteriorating economic conditions.

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The substantial tariff reductions beneficial to cotton linter imports from U.S.?

Recent developments show that China and the U.S. have significantly reduced bilateral tariffs, alleviating global market concerns. Specifically, U.S. tariffs on Chinese goods dropped from 145% to 30%, while China's retaliatory tariffs on U.S. imports decreased from 125% to 10%. The substantial progress achieved during the two-day high-level economic talks exceeded expectations and injected confidence into global markets. U.S. is one of China's imported cotton linter origins, what about the import situation this year?

The China-U.S. high-level economic talks held on May 10-11 achieved substantial progress, with both sides agreeing to significantly reduce bilateral tariffs (each canceling 91% of imposed tariffs and suspending 24% of "reciprocal tariffs"). This breakthrough marks a pivotal step in resolving trade tensions, injecting greater certainty and stability into the global economy while mitigating risks of "decoupling". Previously delayed orders are expected to resume or restart as trade barriers ease.

However, due to multiple rounds of "tariff wars" and shifts in downstream demand, U.S. imports of cotton linter have experienced extreme volatility this year. Customs data reveals that the imports of U.S. cotton linter in Mar declined by 91% y-o-y to 39.9 tons. The cumulative imports

in JanMar this year reached historically low level of 80.1 tons, down 93.4% y-o-y. With the recent sharp reduction in U.S.-China tariffs, cotton linter imports are expected to rebound in the coming months as trade barriers ease and supply chains stabilize.

In terms of import pricing, U.S. cotton linter has long been favored by downstream refined cotton and nitrocellulose manufacturers due to its product quality and end-user demand.

Historically, its import prices have remained notably higher than the national average and those of competitors like Turkey and Brazil. In Mar, the average import price of U.S. cotton linter was 88.6% above the national average at \$838.1/mt. In Jan-Mar, it was 91.2% higher than the national average at \$841.1/mt.

The breakthrough progress achieved during the two-day China-U.S. highlevel economic talks far exceeded expectations. This outcome stemmed from China's resolute stance against U.S. maximum pressure tactics, coupled with Washington's urgent need to address record-high inflation and impending political-economic risks, including \$6 trillion in maturing treasury debt by Jun. The consensus achieved in the recent high-level China-U.S. economic talks is interim, underscoring that "the only certainty in today's world is uncertainty". The path ahead remains fraught with challenges, with the true test lying in whether the 20% U.S. tariffs on

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fentanyl-related goods can be lifted, the commitments could be implemented, promoting China-U.S. relationship to move beyond zerosum dynamics toward cooperative symbiosis.

Historically, U.S. has been one of China's primary sources for cotton linter imports. Despite its relatively higher average import price, about \$653/mt over the past decade (2015-2024), which is 49.2% above the national average. U.S. cotton linter remains favored by downstream industries due to its superior quality and alignment with end-user demand. The import volume share typically fluctuated between 5%-15% historically. Affected by U.S.-China

geopolitical tensions, the share dropped below 5% in recent years, with imports in Mar and Q1 2025 accounting for less than 1%. With the recent substantial tariff reductions between China and the U.S., there is cautious optimism for a stabilized recovery in cotton linter trade volumes.

Source: CCF Group

Global cotton production projected at 117.8 mn bales in 2024-25: WASDE

For 2024-25, the United States Department of Agriculture (USDA) has projected a decrease in global cotton production by 3.08 million bales, bringing the total to 117.81 million bales (each weighing 480 pounds), according to its May



REVIEW

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2025 World Supply and Demand Estimates (WASDE) report. Global cotton production for 2025-26 is expected to increase by nearly 1.5 per cent from 2024-25, as higher beginning stocks offset the decline in production.

Global consumption is projected to rise by 1.2 per cent to 118.08 million bales, as increases in Bangladesh, India, Türkiye, and Vietnam (collectively a 1.40 million bale increase) more than offset a 500,000-bale decline in China, with smaller changes elsewhere. Global trade is expected to rise by over 5 per cent to 44.83 million bales, as both the United States and Brazil are projected to increase exports by over 1 million bales each. Ending stocks are essentially unchanged from 2024-25 at 78.38 million bales.

In the 2024-25 world balance sheet, production, consumption, and trade have been revised upward from the April forecasts, with beginning stocks virtually unchanged and ending stocks revised downward. Due to excellent early harvest yields, Australia's projected crop has been raised by 200,000 bales, accounting for much of the increase in production.

Consumption and imports have each been raised by 300,000 bales for both Pakistan and Vietnam, while imports by China have been reduced by 500,000 bales. As a result, ending stocks have been reduced by over 450,000 bales to 78.40 million, for an ending stocks-to-use ratio of 67.1 per cent.

The forecast for the current season for US cotton shows a small increase in production, higher exports, higher beginning and ending stocks, and unchanged consumption compared to 2024-25. Planted area is expected to be 9.87 million acres based on the March 31 Prospective Plantings report. With recent precipitation in the Southwest, abandonment is projected to be lower than average, resulting in a US harvested area of 8.37 million acres, higher than the 7.81 million acres harvested in 2024-25. The national average yield for 2025-26 in the US is projected at 832 pounds per harvested acre.

Source: Fibre2Fashion

US trade court says Trump overstepped authority, blocks prez's tariffs

- ❖ The US Court of International Trade on 29th May 2025, ruled that President Trump lacks the authority to impose, using emergency powers, broad tariffs on imports from nations that sell more to the US than they buy.
- ❖ The court said the US constitution gives Congress exclusive authority to regulate external commerce that is not overridden by the president's emergency powers to safeguard the US economy.

Indian govt raises cotton MSP up to 11.84% for 2025-26 season

- ❖ India has raised the Minimum Support Price (MSP) for cotton by up to 8 per cent for

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the 2025-26 season, with medium staple at Rs. 7,710 and long staple at Rs. 8,110 per quintal.

- ❖ While aimed at supporting farmers, traders argue the hike makes Indian cotton less competitive globally, with domestic prices now higher than Brazilian cotton on a CIF basis.

India's loom QCO faces industry pushback ahead of deadline

- ❖ India plans to enforce QCO on weaving and embroidery machines from August 28, 2025.
- ❖ The Southern Gujarat Chamber of Commerce and Industry (SGCCI) has urged the government to withdraw the QCO, citing heavy reliance on imported machinery and potential financial losses.
- ❖ SGCCI argues that the regulation could hinder the textile sector's growth and technological advancement, particularly as India targets a \$350 billion market by 2030.

India-Bangladesh trade faces shake-up amid port restrictions

- ❖ India's new port restrictions on select imports from Bangladesh, including garments, threaten to disrupt bilateral textile trade worth \$2.5 billion.
- ❖ With 76 per cent of Bangladeshi RMG exports routed via Petrapole land port, rerouting to only Kolkata and Nhava Sheva

seaports raises transit costs, delays and supply chain risks.

- ❖ The move could strain diplomatic ties and open trade opportunities for others.

Global businesses rethink strategy, investments as costs, tariffs up: HSBC

- ❖ Hit by rising costs, supply chain disruptions, tariffs and shifting trade policies, global businesses are rethinking their strategy and planned investments, an HSBC survey found.
- ❖ Businesses expect an average 18-per cent drop in revenues due to supply chain delays.
- ❖ Despite headwinds, optimism about expanding trade is strong, while 78 per cent of firms is rethinking long-term business model.

India world's 4th largest economy, overtakes Japan: NITI Aayog CEO

- ❖ India has turned the fourth largest economy, overtaking Japan, NITI Aayog CEO BVR Subrahmanyam has said.
- ❖ Overall geopolitical and economic environment is favourable for India, a \$4-trillion economy, he said.
- ❖ It is only US, China, Germany, which are larger than India and if we stick to what is being planned and what is being thought through, in 2-3 years, we will be the third largest economy.

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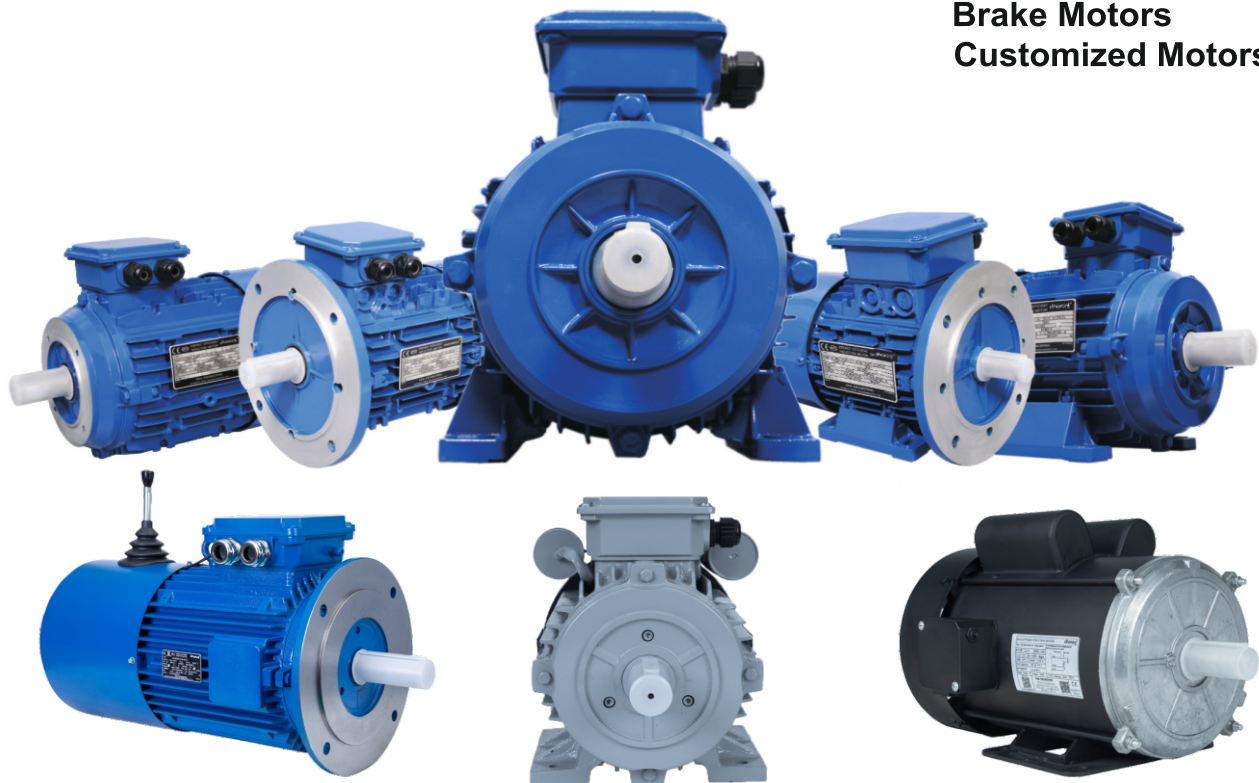
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