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Cotton MSP for Marketing Season 2025-26

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"Shanmugha Manram,
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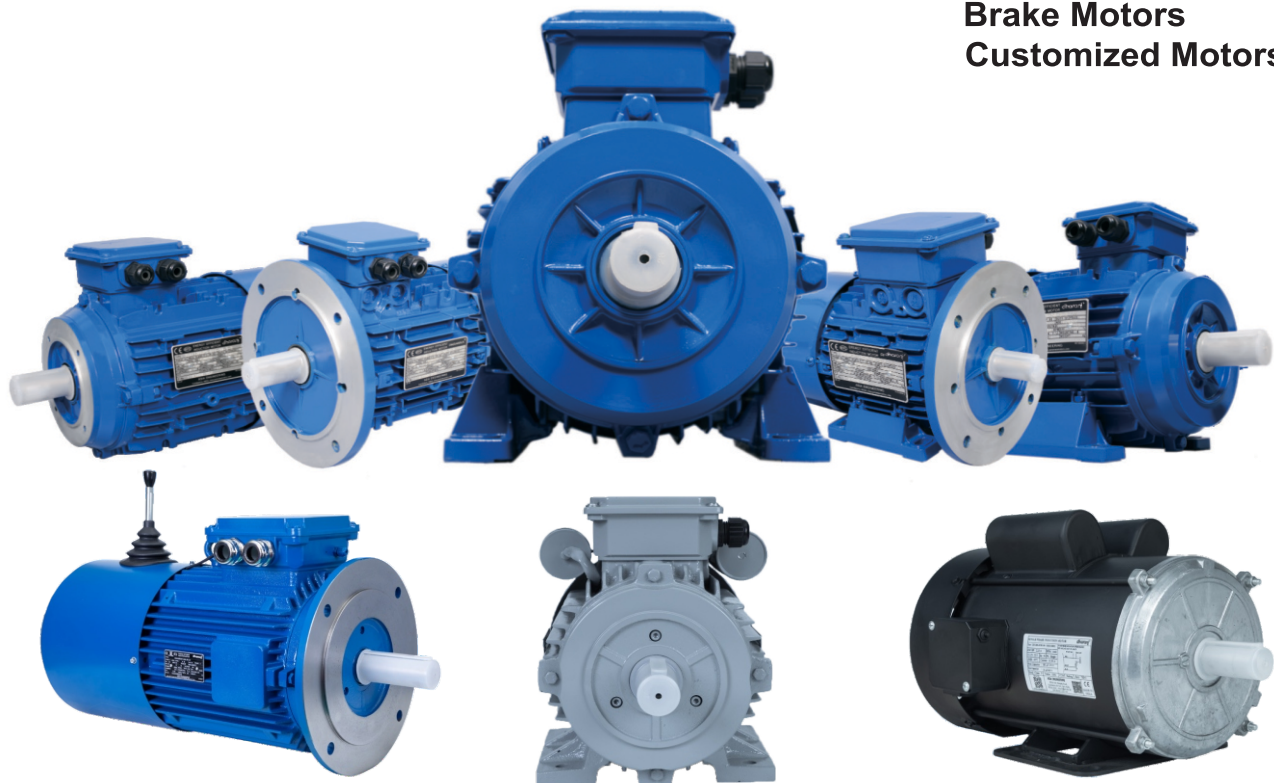
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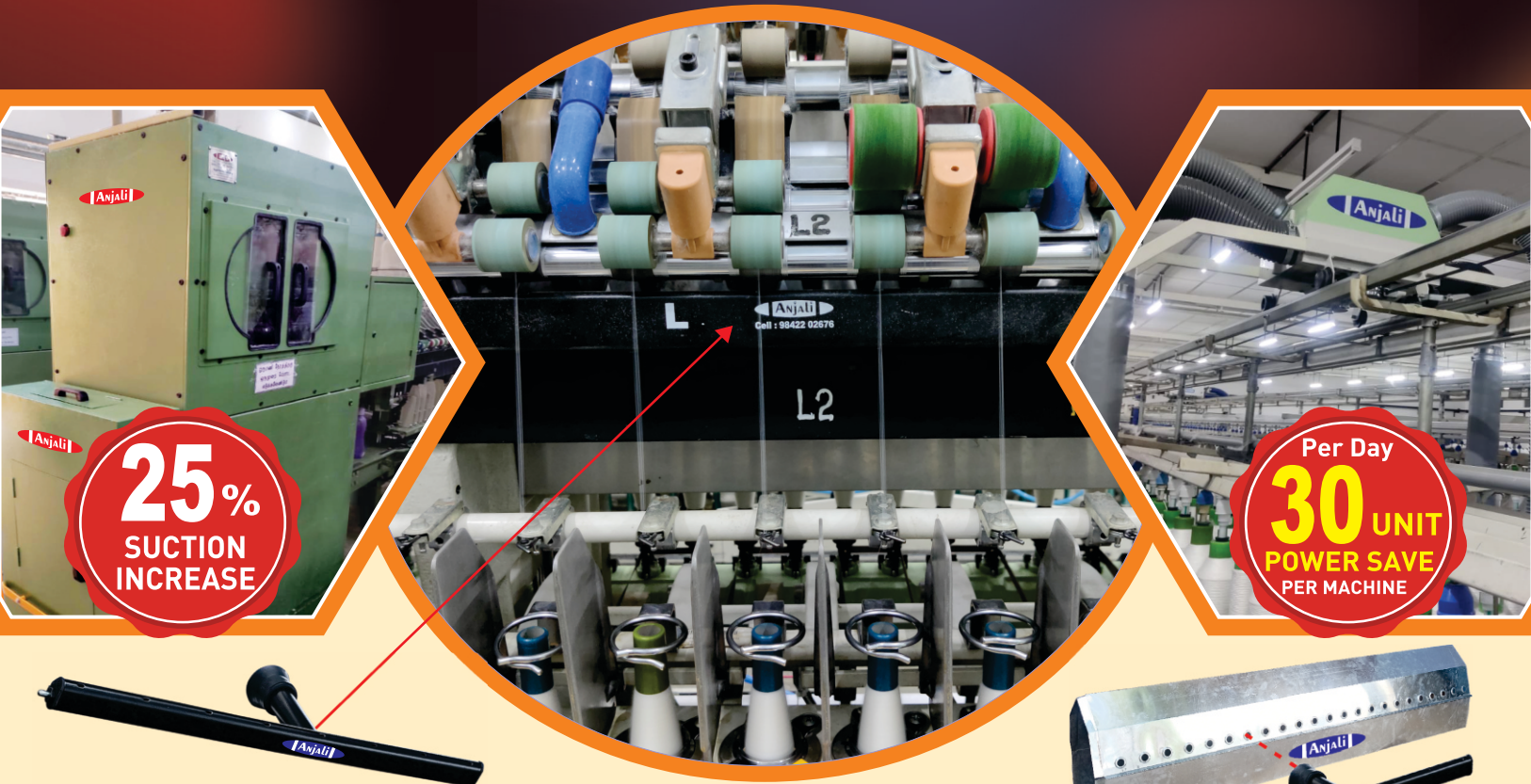
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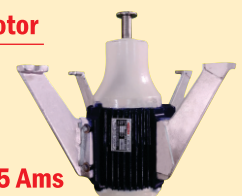
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From the Chairman

Friends,

India's economy remained stable, with steady GST collections, moderate industrial growth and a marginal appreciation of the rupee supporting trade sentiment. India's cotton fibre imports rose sharply due to competitive global rates. Overall, the sector remains cautiously optimistic, with stable input costs and export incentives being key to sustaining momentum.

Cotton prices have shown notable improvement, with the December ICE futures contract rising steadily. The supply-side factors like shrinking U.S. crop and weather conditions will heavily influence price direction, the potential for a price increase hinges largely on production shortfalls in key regions such as India and Pakistan. Demand from Central Asia and poor crop conditions in Pakistan may support U.S. export prospects, although recent export sales have been modest and in line with seasonal trends according to the analysts. In summary, while short-term price prospects look firmer, long-term recovery still hinges on both production risk and a renewed consumer push for cotton.

The Kasturi Cotton Bharat programme, implemented during 2023, has so far certified 1,14,000 bales, with a pass rate of only 38%. The primary parameter leading to non-certification is excessive trash content, accounting for 84% of the failures. In light of this, the Hon'ble Minister of Textiles has expressed a strong intent to scale up Kasturi Cotton production, urging the industry to create a demand-pull mechanism that incentivizes farmers and supply chain stakeholders to adopt best practices aligned with Kasturi Cotton quality standards.

Exports of textile and apparel (T&A) rose by 5.36% to \$6.180 billion during the first two months of the current fiscal 2025-26. Of the total, apparel exports achieved double-digit growth, increasing by 12.80% to \$2.882 billion, while textile exports eased by 0.39% to \$3.297 billion in April-May 2025. The trend continued in May 2025, with apparel and textile exports showing similar patterns.

Imports of raw cotton and waste surged by 131.30% to \$189.18 million in April-May 2025, compared to \$81.79 million during the same period last fiscal. Imports of textile yarn, fabrics, and made-ups rose by 18.92%, increasing from \$347.97 million to \$413.81 million.

In April, the U.S. trade deficit saw a record decline due to a sharp 16% drop in imports, followed by a surge as businesses rushed to beat new tariffs. Retailers are cautious about restocking due to tariff uncertainty and consumer spending concerns. A recent ruling by the U.S. Court of International Trade declared President Trump's use of emergency powers to impose sweeping tariffs unlawful. However, a Federal Appeals court quickly paused that decision, allowing the tariffs to remain in place for now. This legal limbo is forcing companies into a cautious "wait-and-see" mode, delaying investments, hiring, and supply chain decisions.

It has been reported that the U.S. manufacturers are struggling with rising costs due to President Trump's 10% base tariff, forcing many to raise prices or absorb losses. While the tariffs aim to revive domestic manufacturing, companies report that reshoring is often unfeasible due to high costs, limited

From the Chairman

infrastructure, and lack of advanced capabilities. Surveys conclude that most firms find it cheaper to relocate to lower-tariff countries than to build U.S.-based supply chains. Despite claims of increased investment, experts warn that policy uncertainty and slow infrastructure development are hindering meaningful reshoring and job growth.

The Government of Tamil Nadu has amended the Tamil Nadu Hostels and Homes for Women and Children (Regulation) Rules, 2015, to strengthen safety, hygiene, and operational standards. Key changes include mandatory registration, stricter infrastructure and safety norms and a digitalized approach for registration and reporting. Managements may kindly note and take appropriate action. On the global front, the International Labour Organization (ILO) has invoked Article 33 of its Constitution, its most powerful enforcement tool, against Myanmar for failing to uphold international conventions on Freedom of Association and forced labour, including wage theft, unsafe working conditions and suppression of union rights.

A new report from United Nations Children's Fund (UNICEF) and the International Labor Organization (ILO) reveals that while global child labor has declined by 20 million in the past five years, 138 million children are still engaged in work-many in hazardous conditions, poverty being the primary driver. Asia has made significant progress by investing in education and poverty reduction, cutting child labor rates from 13% in 2008 to 3% in 2024. On the sustainability front, the International Apparel Federation and International Textile Manufacturers' Federation have launched the Apparel and Textile Transformation Initiative (ATTI) to reduce the environmental impact of the global textile industry, focussing on energy efficiency, water use, emissions, and sustainable production practices. ATTI will establish country-specific chapters, starting with pilot programs in Bangladesh and Turkey.

Pakistan and Bangladesh are exploring stronger Textile Trade ties by enhancing cooperation in the textile and ready-made garment sectors, with both sides. Key proposals included Pakistan importing textile waste and jute fiber from Bangladesh, in addition to initiatives like knowledge exchange, business delegations, and joint exhibitions to boost bilateral trade.

In today's increasing digital trade environment, staying connected with global buyers and market trends is more important than ever, especially for our textile and clothing exporters. The Trade Connect e-Platform, an initiative by DGFT, enables direct access to global buyers, trade events and scheme updates through a single, interactive platform. I encourage all members to make full use of this initiative to strengthen their global presence and stay competitive in a rapidly evolving market. Let us embrace this digital channel as a gateway to new possibilities.



Dr S K Sundararaman
Chairman

Foreign Trade Performance

Textiles & Clothing Sector Report FY 2024-25

The export data for the textile sector in FY25 indicates a moderate overall recovery, with total exports increasing by 6% over the full year and showing a 2% growth in Q4 FY25 compared to the same period last year. This growth, however, is largely driven by value-added segments, while raw material exports continue to decline.

Fibre exports witnessed a significant contraction, falling by 30% in Q4 and 11% on a full-year basis. This suggests weakening global demand for Indian raw cotton due to price disadvantage. Similarly, spun yarn exports remained flat in Q4 and declined by 5% over the year, indicating competitiveness challenges in global markets. Filament exports also declined in Q4 by 16%, but showed a 5% increase for the full year.

Fabric exports declined by 6% in Q4 but improved

by 5% over the full year, reflecting stable demand for semi-finished products, particularly from garment-exporting countries. Apparel exports, the largest component of the textile basket, grew by 6% in Q4 and 10% on a full-year basis, indicating a healthy rebound in global retail demand and better positioning of Indian garments in international markets.

Overall, FY25 export trends reveal a shift toward greater value addition and product diversification. While traditional raw material exports are under pressure, the performance of apparel, home textiles and emerging categories suggests that India is gradually strengthening its position in the higher end of the textile value chain. Table-1 shows India's export statistics of textiles and apparel during FY25 compared to a year ago.

Table - 1 : India's Export Statistics of Textiles & Apparels

Values in US\$ Mn

Category	Q4 FY 24	Q4 FY 25	% Growth	FY 24	FY 25	% Change
Fibre	713	501	-30%	1,876	1,678	-11%
Filament	244	205	-16%	875	923	5%
Spun Yarn	1,110	1,113	0%	4,567	4,330	-5%
Fabric	1,311	1,233	-6%	4,291	4,501	5%
Apparel	4,392	4,675	6%	14,545	16,007	10%
Home Textiles	1,578	1,649	4%	5,992	6,501	8%
Others	550	765	39%	2,690	3,020	12%
Total	9,898	10,141	2%	34,837	36,960	6%

Foreign Trade Performance

The import data for the textile and apparel sector shows a significant shift in dynamics between FY24 and FY25, particularly in Q4. Total textile imports grew by 24% in Q4 FY25 compared to the same quarter of the previous year, while full-year imports increased by 10%, indicating rising reliance on certain textile inputs and finished goods.

Among the categories, fibre imports surged by 45% in Q4 and 38% over the full year, reflecting domestic shortfalls in availability. Similarly, spun yarn imports rose by 27% in Q4, but full-year imports declined by 13%. Filament imports increased by 14% in Q4, but showed a 15% decline on a yearly basis, indicating improved domestic production or lower consumption in earlier quarters.

In the fabric segment, Q4 imports fell by 13%, though the full-year imports increased by 14%, suggesting a recovery in demand and increased reliance on imported fabrics in certain value chains. Apparel imports rose by 26% in Q4 and 10% for the full year, pointing to growing demand for imported garments.

In summary, the import data suggests a sharp rise in dependency on certain raw materials and high-end finished goods in the last quarter of FY25. While some product categories are becoming more import-intensive, others like filament yarn show signs of domestic substitution. The overall 10% increase in imports for FY25 highlights the need to review domestic capacity gaps and address competitiveness in upstream segments. Table-2 shows India's Import statistics of textiles and apparel during FY25 compared to a year ago.

Table - 2 : India's Import Statistics of Textiles & Apparels

Values in US\$ Mn

Category	Q4 FY 24	Q4 FY 25	% Growth	FY 24	FY 25	% Change
Fibre	384	555	45%	1,758	2,421	38%
Filament	263	299	14%	1,361	1,161	-15%
Spun Yarn	98	124	27%	591	517	-13%
Fabric	604	523	-13%	1,715	1,949	14%
Apparel	323	406	26%	1,488	1,644	10%
Home Textiles	72	79	10%	306	332	8%
Others	204	436	114%	1,675	1,754	5%
Total	1,948	2,422	24%	8,895	9,778	10%

Foreign Trade Performance

- ❖ Export of cotton fibre from India declined by -20.05% (from 573.10 million kg to 458.16 million kg). However, export value fell more significantly by -27.48% (from USD 1116.52 million to USD 809.72 million).
- ❖ Export of cotton yarn in quantity exports declined by -5.33% (from 1,214.71 million kg to 1,150.02 million kg). Export value also dropped by -6.01% (from USD 3,780.23 million to USD 3,553.19 million).
- ❖ Export of cotton fabrics grew by 5.34% and cotton madeups grew by 5.64% during the fiscal year April - March 2024-25 in dollar terms.
- ❖ Overall Performance (Fibre, Yarn, Fabrics, Made-ups) showed a slight decline of (-) 1.35% during the period April - March 2024-25. Table-3 shows India's export statistics of cotton textiles during FY25 compared to a year ago.

Table - 3 : India's Export Statistics of Cotton Textiles (April 2024 – March 2025)

Values in US\$ Mn

Product	Unit	Quantity in (Million)		% Growth	Value (Million USD)		% Growth
		2023-24	2024-25		2023-24	2024-25	
Fibre	Kgs	573.10	458.16	-20.05	1,116.52	809.72	-27.48
Yarn	Kgs.	1,214.71	1,150.02	-5.33	3,780.23	3,553.19	-6.01
Fabrics	Sqm	2,188.59	2,305.45	5.34	1,888.28	1,978.64	4.79

Source of Data: DGCIIS, Ministry of Commerce

- ❖ Total exports recorded a slight growth of 1.45% from \$10,410.41 million in 2023-24 to \$10,561.75 million in 2024-25.
- ❖ The top 10 markets accounted for 66.08% of total exports, showing increased market consolidation.
- ❖ **USA:** Largest importer with a 26. 03% share, showing robust growth of 4.53%.
- ❖ **Bangladesh and Peru:** Achieved the highest growth (27.48% and 22.31%) among top markets.
- ❖ Sri Lanka, UK , UAE and Vietnam showing positive growth during this period.
- ❖ Declines: China dropped sharply (-67.04%), with its share plummeting to 2.23%. Table-4 shows country wise India's export statistics of cotton textiles during FY25 compared to a year ago.

Export performance of MMF Textiles

- ❖ Exports of Indian Man-made Fibre (MMF) Textiles have reached US\$ 6 Bn. During FY 2025 as against exports of US\$ 5.7 Bn. during the FY 2024

Foreign Trade Performance

- ❖ The overall MMF Textiles exports from India have grown by 5.2% during FY 2025 as compared to FY 2024.
- ❖ During FY 2025, MMF Fabrics were the largest exported commodity, representing 37% of the exports share, followed by MMF Made-ups 30%, MMF Yarns 26% and Man-made Fibres 7%.
- ❖ Polyester Staple Fibre (PSF) was the largest exported Man-made Fibres from India representing 68% of the exports share, followed by Viscose Staple Fibre (VSF) with 23% share and Polypropylene Staple Fibre (PPSF) with 4% share, during FY 2025.
- ❖ Polyester Filament Yarns (PFY) was the largest exported MMF Yarns from India representing 47% of the total MMF Yarn's exports from India, followed by Poly- Cotton (PC) Spun Yarn (12%), Viscose Spun Yarn (7%), Polyester Spun Yarn (6%) and Poly-Viscose Spun Yarn (6%) during FY 2025.
- ❖ Polyester Filament Woven Fabrics was the largest exported MMF Fabrics from India, representing 21% of the MMF Fabric's exports share, followed by PV Fabrics (15%) and Nonwoven Fabrics (11%) during FY 2025.
- ❖ Leading Markets: USA was the leading market for Indian MMF Textiles during FY 2025, accounting for 17.1% exports share, followed by Bangladesh (6%), UAE (6%), and Turkey (5.5%).
- ❖ Emerging Markets: Chile, Kenya, Russia and Israel were perceived as emerging markets, with above 20% growth for Indian MMF Textiles during FY 2025 as compared to FY 2024.

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.

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Foreign Trade Performance

Table - 4 : India's Export Statistics of Cotton Textiles

Values in Million US\$

Rank	Partner	April - March		% Share		% Growth
		2023-24	2024-25	2023-24	2024-25	
	World	10,410.41	10,561.75	100.00	100.00	1.45
1	U S A	2,630.10	2,749.16	25.26	26.03	4.53
2	Bangladesh	1,784.36	2,274.72	17.14	21.54	27.48
3	Sri Lanka	415.46	470.65	3.99	4.46	13.28
4	U K	219.86	236.00	2.11	2.23	7.34
5	China	714.22	235.42	6.86	2.23	-67.04
6	UAE	221.00	221.40	2.12	2.10	0.18
7	Germany	224.99	215.57	2.16	2.04	-4.19
8	Vietnam	195.93	206.50	1.88	1.96	5.39
9	Egypt	218.87	196.04	2.10	1.86	-10.43
10	Peru	142.00	173.68	1.36	1.64	22.31
	Total of Top 10	6,766.79	6,979.15	65.00	66.08	3.14

Source of Data: DGCIS, Ministry of Commerce

5 shows country wise India's export statistics of cotton madeups during FY25 compared to a year ago.

- ❖ Cotton Madeups exports grew by 5.64%, reaching \$4,622.00 million in 2024-25.
- ❖ The top 10 markets represented 79.21% of total exports, up from 79.10%.
- ❖ USA: Dominated the sector with 55.65% share and 4.48% growth.
- ❖ Australia and France: Showed impressive growth at 18.60% and 21.02%, respectively.
- ❖ Germany, Canada, Spain and Mexico showed positive growth during this period.
- ❖ Declines: UAE declined significantly (-) 19.05%, with its share falling to 1.69%. Table-

News Snippets

Government of India extends export obligation for QCO- free VSF imports to 18 months

- ❖ Government of India has extended the export obligation period for QCO exempt viscose staple fibre (VSF) imports to 18 months, restoring the original timeline after industry appeals.
- ❖ This move benefits EOUs, SEZs and Advance Authorisation holders by easing pressure on re-export requirements.

Foreign Trade Performance

Table - 5 : India's Export Statistics of Cotton Madeups

Values in Million US\$

Rank	Partner	April - March		% Share		% Growth
		2023-24	2024-25	2023-24	2024-25	
	World	4,375.13	4,622.00	100	100	5.64
1	USA	2,461.81	2,572.18	56.27	55.65	4.48
2	UK	199.89	212.31	4.57	4.59	6.21
3	Germany	156.42	164.39	3.58	3.56	5.1
4	Australia	132.18	156.77	3.02	3.39	18.6
5	France	117.78	142.52	2.69	3.08	21.01
6	Canada	116.33	136.34	2.66	2.95	17.2
7	Spain	67.32	78.13	1.54	1.69	16.06
8	UAE	96.45	78.08	2.2	1.69	-19.05
9	Italy	68.8	68.49	1.57	1.48	-0.45
10	Mexico	43.88	51.95	1	1.12	18.39
	Total of Top 10	3,460.86	3,661.16	79.1	79.21	5.79

Source of Data: DGCIS, Ministry of Commerce

- ❖ Exports of cotton fabrics grew by 5.83%, totaling \$2,386.56 million.
- ❖ Top 10 markets accounted for 68.09% of total exports, up from 65.06%.
- ❖ Bangladesh and Sri Lanka: Leading growth markets with increases of 23.84% and 16.16%.
- ❖ **Declines:** Senegal (-27.01%) and South Korea (-17.50%). Table-6 shows country wise India's export statistics of cotton fabrics during FY25 compared to a year ago.

SIMA Placement Services

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Foreign Trade Performance

Table - 6 : India's Export Statistics of Cotton Fabrics

Values in Million US\$

Rank	Partner	April - March		% Share		% Growth
		2023-24	2024-25	2023-24	2024-25	
	World	2,255.05	2,386.56	100.00	100.00	5.83
1	Bangladesh	422.93	523.75	18.75	21.95	23.84
2	Sri Lanka	307.97	357.74	13.66	14.99	16.16
3	USA	151.98	160.61	6.74	6.73	5.68
4	Nigeria	122.03	144.57	5.41	6.06	18.47
5	UAE	113.66	135.01	5.04	5.66	18.78
6	Senegal	142.07	103.70	6.30	4.35	-27.01
7	S Korea	69.01	56.93	3.06	2.39	-17.50
8	Nepal	54.17	51.73	2.40	2.17	-4.50
9	Thailand	52.77	45.58	2.34	1.91	-13.63
10	Colombia	30.57	45.42	1.36	1.90	48.58
	Total of Top 10	1,467.16	1,625.04	65.06	68.09	10.76

Source of Data: DGCIS, Ministry of Commerce

- ❖ Export quantities declined by (-)5.33%, from 1214.71 million kg to 1150.02 million kg.
- ❖ Top 10 markets accounted for 83.32% of total exports.
- ❖ Bangladesh: Grew by 33.20%, solidifying its position with a 49.58% share.

China and Egypt: Sharp declines of -66.31% and -14.30%, respectively.

- ❖ Emerging Players: Colombia (14.72%) and Peru (21.44%) show increasing demand. Table-7 shows country wise India's export statistics of cotton yarn during FY25 compared to a year ago.

News Snippets

India bans land entry of flax, jute fabrics from Bangladesh

- ❖ India has imposed new restrictions on importing nine categories 530130, 530230, 530390, 530610, 530710, 530720, 530919, 530929, 530010 of textile products from Bangladesh via land ports, effective immediately.
- ❖ Items such as flax (linen) yarn, jute fibre and woven fabrics must now enter only through Mumbai's Nhava Sheva port.

Foreign Trade Performance

Table - 7 : India's Export Statistics of Cotton Yarn

Million Kilograms

Rank	Partner	April - March		% Share		% Growth
		2023-24	2024-25	2023-24	2024-25	
	World	1,214.71	1,150.02	100	100	-5.33
1	Bangladesh	428.05	570.17	35.24	49.58	33.20
2	China	256.34	86.37	21.1	7.51	-66.31
3	Egypt	67.34	57.71	5.54	5.02	-14.3
4	Peru	45.41	55.15	3.74	4.80	21.44
5	Vietnam	54.85	55.01	4.52	4.78	0.28
6	Portugal	42.53	38.76	3.50	3.37	-8.87
7	Colombia	25.73	29.52	2.12	2.57	14.72
8	Sri Lanka	24.56	26.37	2.02	2.29	7.35
9	South Korea	26.16	25.25	2.15	2.20	-3.46
10	Turkey	37.16	13.95	3.06	1.21	-62.45
	Total of Top 10	1,008.13	958.25	82.99	83.32	-4.95

Source of Data: DGCIS, Ministry of Commerce

- ❖ Export quantities of raw cotton declined by (-) 20.05%.
- ❖ Top 10 markets accounted for 99.17%, up from 97.62%.
- ❖ Bangladesh and Vietnam: Grew by 0.44% and 11.36%, respectively.
China: Decline of -93.29% highlights significant challenges.
- ❖ Thailand: Strong recovery with growth of 53.55%. Table-8 shows country wise India's export statistics of cotton yarn during FY25 compared to a year ago.

News Snippets

India approves \$221.25-mn plan for PM MITRA Park in Tamil Nadu State

- ❖ The Indian Textiles Ministry announced the approval of a \$221.25-million plan for setting up a PM MITRA Park in Tamil Nadu's Virudhunagar.
- ❖ The park will house an advanced textile manufacturing complex focused on technical textiles and integrated processing units. Completion target is Sept 2026.

Foreign Trade Performance

India's textile & apparel exports rise 5% to \$6.1 bn in Apr-May 2025

- ❖ India's textile and apparel exports rose by 5.36 per cent to \$6.18 billion in April-May 2025, driven by a 12.80 per cent jump in apparel exports.
- ❖ Textile exports edged down by 0.39 per cent. Cotton imports surged over 130 per cent.
- ❖ The T&A sector's share in total exports grew to 8.25 per cent, reflecting robust apparel performance amid global pricing challenges.

India's textile and apparel (T&A) exports rose by 5.36 per cent to \$6.180 billion during the first two months of the current fiscal 2025-26. Of the total, apparel exports achieved double-digit growth,

increasing by 12.80 per cent to \$2.882 billion, while textile exports eased by 0.39 per cent to \$3.297 billion in April-May 2025. The trend continued in May 2025, with apparel and textile exports showing similar patterns.

The country's T&A exports had increased by 5.36 per cent from \$5.866 billion during the first two months of the previous fiscal 2024-25. Apparel exports rose by 12.80 per cent from \$2.555 billion during the corresponding period, while textile exports declined slightly by 0.39 per cent from \$3.310 billion.

In May 2025, apparel exports increased by 11.35 per cent to \$1.511 billion from \$1.357 billion in

Table - 8 : India's Export Statistics of Raw Cotton (Including waste)

Million Kilograms

Rank	Partner	April - March		% Share		% Growth
		2023-24	2024-25	2023-24	2024-25	
	World	573.1	458.16	100	100	-20.05
1	Bangladesh	298.94	300.27	52.16	65.54	0.44
2	Vietnam	88.45	98.50	15.43	21.50	11.36
3	Taiwan	19.86	17.03	3.46	3.72	-14.23
4	Indonesia	11.90	11.29	2.08	2.46	-5.12
5	China	113.94	7.64	19.88	1.67	-93.29
6	Thailand	4.31	6.62	0.75	1.44	53.55
7	UAE	10.30	5.82	1.80	1.27	-43.53
8	Germany	8.16	3.63	1.42	0.79	-55.48
9	Nepal	2.47	2.20	0.43	0.48	-11.16
10	Japan	1.14	1.39	0.20	0.30	22.20
	Total of Top 10	559.46	454.38	97.62	99.17	-18.78

Source of Data: DGCIIS, Ministry of Commerce

Foreign Trade Performance

May 2024, whereas textile exports declined by 2.71 per cent to \$1.685 billion from \$1.732 billion.

The share of T&A in India's total merchandise exports rose to 8 per cent during April-May 2025 and to 8.25 per cent in May 2025, according to the Ministry of Commerce and Industry.

Within the textile segment, exports of cotton yarn, fabrics, made-ups, and handloom products declined by 1.39 per cent to \$1.929 billion in the first two months of FY26. Exports of man-made yarn, fabrics, and made-ups rose by 1.41 per cent to \$793.27 million, while carpet exports saw a notable increase of 2.07 per cent to \$246.93 million. In the month of May, exports of cotton yarn, fabrics, made-ups, and handloom products dropped by 4.29 per cent to \$966.75 million, while exports of man-made yarn, fabrics, and made-ups

decreased by 1.05 per cent to \$409.48 million. Carpet exports, however, grew by 1.01 per cent to \$132.74 million.

Imports of raw cotton and waste surged by 131.30 per cent to \$189.18 million in April-May 2025, compared to \$81.79 million during the same period last fiscal. Imports of textile yarn, fabrics, and made-ups rose by 18.92 per cent, increasing from \$347.97 million to \$413.81 million. In May, imports of raw cotton and waste surged by 133.14 per cent, from \$43.88 million to \$102.3 million. Similarly, imports of textile yarn, fabrics, and made-ups rose by 18.68 per cent to \$220.69 million in the latest month.

Table - 9 shows the quick estimates of the export and import of selected major commodities during May 2025 compared to a year ago.

Table - 9 : Quick Estimates for Selected Major Commodities

Exports (Million USD)	May '24	May '25	% Change
Cotton Yarn/Fabs/made-ups, Handloom Products etc	1010.10	966.75	-4.29
Man-made Yarn/ Fabs/ made-ups etc.	413.81	409.48	-1.05
RMG of all Textiles	1357.42	1511.51	11.35
Jute Mfg. Floor Covering	28.80	31.54	9.50
Carpet	130.74	132.06	1.00
Handicrafts excl. handmade carpet	148.56	145.28	-2.21

Imports (Million USD)	May '24	May '25	% Change
Cotton Raw & Waste	43.88	102.30	133.16
Textile yarn Fabric, made-up articles	185.96	220.69	18.68

Source: DGCIS/MOC

Cotton MSP - A Decade in Review

Increase in MSP for Cotton: A Decadal Analysis

The Minimum Support Price (MSP) for cotton in India has seen a steady increase over the past decade, reflecting government efforts to safeguard farmer incomes and stabilize cotton

production. This article presents a statistical analysis of MSP trends from 2014-15 to 2025-26, evaluates the implications for stakeholders, and highlights key insights.

Table - 1 : MSP Trends Over the Last Decade (Rs/Qtl)

Crop Year	Medium Staple	%Increase over previous year	Long Staple	%Increase over previous year
2015-16	3800	1.30	4100	1.20
2016-17	3860	1.60	4160	1.50
2017-18	4020	4.10	4320	3.80
2018-19	5150	28.10	5450	26.20
2019-20	5255	2.00	5550	1.80
2020-21	5515	4.95	5825	4.95
2021-22	5726	3.83	6025	3.43
2022-23	6080	6.18	6380	5.89
2023-24	6620	8.88	7020	10.03
2024-25	7121	7.57	7521	7.14
2025-26	7710	8.27	8110	7.83

Source: Office of the Textiles Commissioner

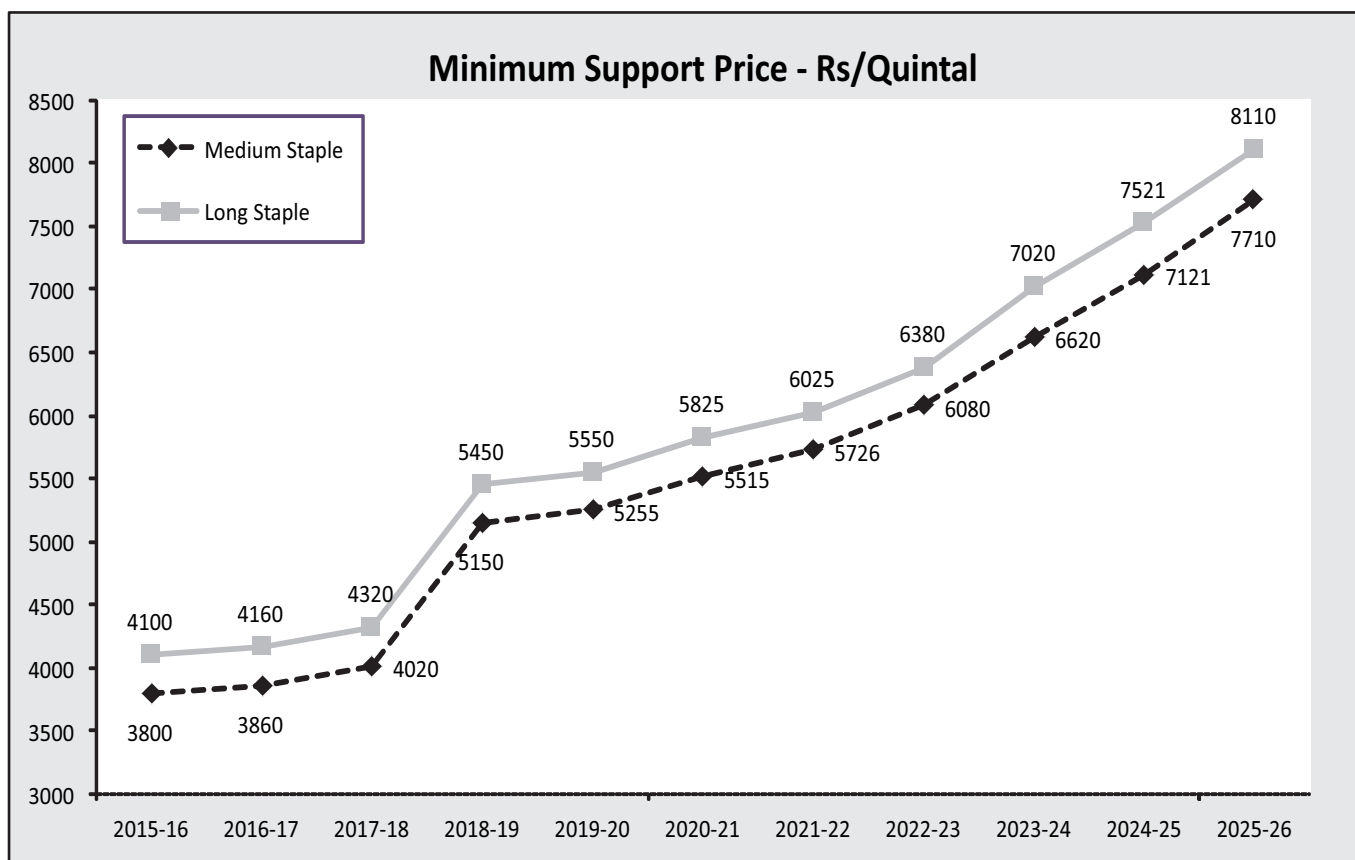
News Snippets

India emerges as key player in 'China +1' manufacturing shift: Report

- ❖ India is poised to outpace G7 economies, driven by manufacturing gains from the 'China +1' shift, rising public investment and stable macroeconomic conditions, as per Equirus.
- ❖ It forecasts India will contribute over 15 per cent to global GDP growth (2025-2030).
- ❖ With global firms shifting production and supportive fiscal measures, India is emerging as a key player in reconfigured supply chains.

Cotton MSP - A Decade in Review

Chart - 1 : Depicts the MSP of Medium and Long staple cotton from 2015-16 onwards



Over the past decade, cotton MSPs in India have nearly doubled, largely in response to political commitments, farmer advocacy, and cost inflation. While MSP serves as a critical tool for rural welfare, its cascading effects on the textile value chain must be carefully managed. A holistic approach - balancing farmer support, market dynamics, and export competitiveness - is the need of the hour.

Stock-to-use Ratio

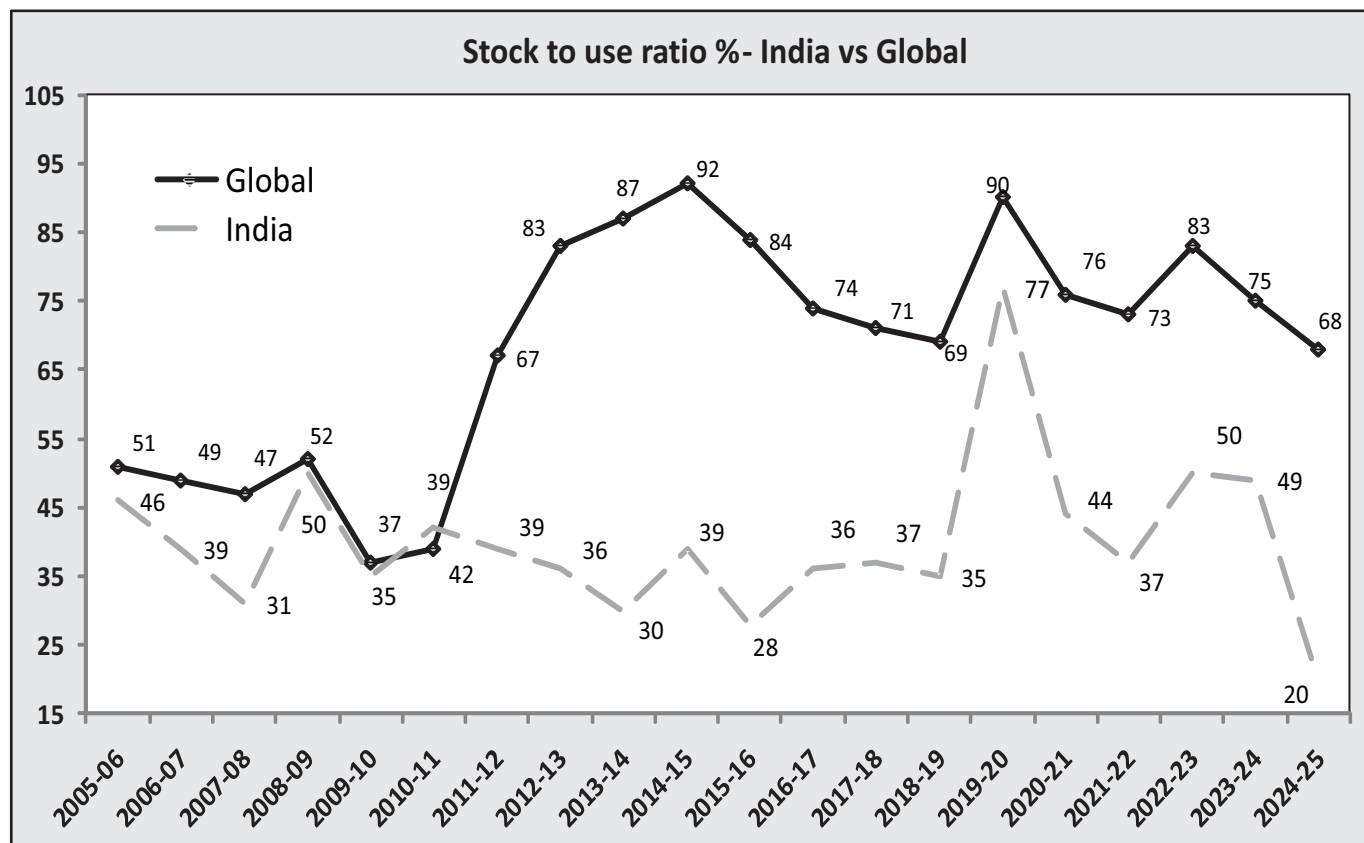
It is distressing to note that the country housing the second largest number yarn spinning machines in the world holding the lowest stocks, though the country is the second largest producer of cotton in the world. The country's stock-to-use ratio for 2024-25 season works out to 19%, lowest in more than a decade. The following chart shows the stock-to-use ratio of India Vs Global.

Summary Table

Metric	Medium Staple	Long Staple
Mean	5532	5860
Standard Deviation	1247	1282
Co-Efficient of variation	22.53%	21.88%

Cotton MSP - A Decade in Review

Aspect	MSP Volatility	Market Price Volatility	Interpretation
Magnitude of volatility	22.53%	12.60%	MSP is more volatile than market prices.
Price Stability	Higher fluctuations in in MSP yearly increases	Market prices more stable despite MSP rises.	Suggests MSP adjustments are done in steps with significant increments, while market prices fluctuate less annually.
Market Influence	Fixed by government, revised yearly or less frequently	Influenced by supply - demand, global prices, weather	Market prices respond more smoothly; MSP acts as a floor but can jump sharply when revised.
Price Floor Effect	MSP forms a minimum guaranteed price	Market prices often hover above MSP but can drop near MSP	Indicates MSP provides a safety net, but market prices may have lower volatility due to multiple factors.



Index of Industrial Production

Performance Analysis of India's Textiles and Wearing Apparels Sector FY2024-25

The period from April 2024 to March 2025 India's textiles and wearing apparels sector exhibited distinct and varied growth patterns, as reflected in the monthly index trends. This analysis grounded statistical tools such as trend observation, mean comparison, variability analysis and inter monthly volatility brings forward meaningful insights into sectoral performance. The textiles segment remained relatively steady throughout the year, whereas the wearing apparels sector displayed significant sensitivity to market dynamics. These divergent trends highlight the growing need for agile strategies to navigate the fast evolving industry dynamics.

General Trends and Growth Performance

Textiles sector

- ❖ The index varied from a low of 105.3 in April 2024 to a peak of 114.2 in December 2024
- ❖ The average index across the 12 month period was 109.3, indicating moderate and consistent growth
- ❖ Notable surges were seen in December 2024 (+7.5% from November), suggesting strong end of year production or demand cycle

Wearing Apparels Sector:

- ❖ The index showed more volatility, ranging from 103.7 in September 2024 to a sharp rise of 144.8 in March 2025.
- ❖ The average for the year was 116.7, significantly higher than the Textiles sector.

- ❖ The largest month-on-month increase occurred between February and March 2025 (from 121.4 to 144.8, a +19.3% jump), possibly indicating a surge in export orders or domestic festival-season demand.

Statistical Insights

Metric	Textiles	Wearing Apparels
Mean	109.3	116.7
Median	109.2	115.8
Standard Deviation	3.1	11.6
Minimum	105.3	103.7
Maximum	114.2	144.8

Variability:

The standard deviation is considerably higher for Wearing Apparels (11.6) than Textiles (3.1), indicating that the apparels segment experienced more volatility and demand swings during the year.

Stability:

The Textiles index showed relatively stable and consistent growth, reflective of a more resilient base industry.

Skewness:

The Wearing Apparels data shows positive skewness due to the March 2025 spike, which is substantially higher than the rest.

Index of Industrial Production

Key Observations

Correlation:

There is a weak-to-moderate correlation between the two sectors; while both exhibit growth, the apparel sector reacts more sharply to seasonal or market changes.

Demand Cycle Effects:

Peaks in December-January likely coincide with winter and festive season demand, both domestically and internationally.

Short-Term IIP Trends and Insights (Jan-Apr 2025)

IIP growth slows to an 8-month low of 2.7% in April 2025

In April 2025, the Index of Industrial Production (IIP) grew by 2.7%, which is an eight-month low. This growth is lower than the previous month's (March 2025) revised estimate of 3.9%. The slowdown is attributed to a contraction in

mining output and a deceleration in electricity production.

- ❖ The growth rates of the three sectors, Mining, Manufacturing and Electricity for the month of April 2025 are (-) 0.2%, 3.4% and 1.1% respectively.
- ❖ The Quick Estimates of IIP stands at 152.0 against 148.0 in April 2024. The Indices of Industrial Production for the Mining, Manufacturing and Electricity sectors for the month of April 2025 stand at 130.6, 149.5 and 214.4 respectively.
- ❖ Within the manufacturing sector, 16 out of 23 industry groups at NIC 2 digit-level have recorded a positive growth in April 2025 over April 2024. The top three positive contributors for the month of April 2025 are "Manufacture of basic metals" (4.9%), "Manufacture of motor vehicles, trailers and semi-trailers" (15.4%) and "Manufacture of machinery and equipment n.e.c." (17.0%).

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

The IIP data for the first four months of 2025 reveals fluctuations in both sectors, with Wearing Apparels showing high volatility and Textiles witnessing milder, cyclical changes.

Textiles Sector Performance

- ❖ January 2025 recorded the highest index at 113.7, reflecting strong export-driven demand.
- ❖ A significant decline of 6.2% followed in February (106.7)
- ❖ March saw a recovery to 113.0, In April, the index again dropped to 107.1, suggesting a correction phase after the March rebound.

The Textiles sector is exhibiting a cyclical pattern with alternate months of rise and fall, potentially tied to inventory cycles or export order fulfillment timelines.

Wearing Apparels Sector Performance

- ❖ From January to February, the index remained stable (~121), indicating steady demand.
- ❖ In March, the index surged to 144.8, a remarkable 19.3% jump, likely driven by export push.

- ❖ April witnessed a sharp correction to 116.5, down 19.5%, almost offsetting the March spike.
- ❖ Wearing Apparels shows higher volatility than Textiles, with a standard deviation nearly 3x that of Textiles over the four months.

Table-1 shows Index of Industrial production for the month of April 2025 compared a year ago.

Conclusion

The Indian textiles and clothing sector has shown resilient baseline performance in textiles and dynamic demand driven growth in wearing apparels. The IIP data for early 2025 underscores a divergent pattern between the textiles and apparel segments. The statistical analysis reveals that while textiles remain relatively stable, apparels are highly reactive highlighting the importance of adaptive strategies and robust forecasting tools to navigate the fast evolving industry dynamics. Going forward, a nuanced approach that blends stability in production with agility in market response will be key to harnessing the sector's full potential.

News Snippets

Global trade to enter a period of slower, sustained growth: UK Government

- ❖ Global growth is expected to slow progressively till 2050, as maturing emerging markets, slowing population growth and rising uncertainty weigh on growth prospects, a UK business and trade department report said.
- ❖ Global trade is likely to break with the exponential growth of past decades, to enter a period of slower, sustained growth; complicated by a threatened fragmentation among key markets.

Index of Industrial Production

Table - 1 : Index of Industrial Production (Base 2011-12=100)

NIC 2008	Description	Weights	April 2024	April 2025	% Change
10	Manufacture of food products	5.3025	119.8	121.3	1.3
11	Manufacture of beverages	1.0354	123.8	122.1	-1.4
12	Manufacture of tobacco products	0.7985	61.1	76.9	25.9
13	Manufacture of textiles	3.2913	105.3	107.1	1.7
14	Manufacture of wearing apparel	1.3225	105.1	116.5	10.8
15	Manufacture of leather and related products	0.5021	89.3	88.1	-1.3
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.1930	84.3	104.9	24.4
17	Manufacture of paper and paper products	0.8724	75.6	73.8	-2.4
18	Printing and reproduction of recorded media	0.6798	82.1	82.2	0.1
19	Manufacture of coke and refined petroleum products	11.7749	135.4	132.5	-2.1
20	Manufacture of chemicals and chemical products	7.8730	127.0	122.4	-3.6
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	4.9810	244.4	234.9	-3.9
22	Manufacture of rubber and plastics products	2.4222	108.9	117.2	7.6
23	Manufacture of other non-metallic mineral products	4.0853	148.7	157	5.6
24	Manufacture of basic metals	12.8043	220.7	231.6	4.9
25	Manufacture of fabricated metal products, except machinery and equipment	2.6549	85.0	95.8	12.7
26	Manufacture of computer, electronic and optical products	1.5704	114.2	126.2	10.5
27	Manufacture of electrical equipment	2.9983	110.4	127.2	15.2
28	Manufacture of machinery and equipment n.e.c.	4.7653	108.0	126.4	17.0
29	Manufacture of motor vehicles, trailers and semi-trailers	4.8573	126.5	146	15.4
30	Manufacture of other transport equipment	1.7763	140.3	143.6	2.4
31	Manufacture of furniture	0.1311	220.8	223.7	1.3
32	Other manufacturing	0.9415	96.5	76.9	-20.3
	Mining	14.3725	130.9	130.6	-0.2
	Manufacturing	77.6332	144.6	149.5	3.4
	Electricity	7.9943	212.0	214.4	1.1
	General	100.0000	148.0	152	2.7

Global 2025 -26 Cotton Ending Stocks Decline as Mill Use Outpaces Production

World Cotton Production Projected Lower in 2025-26

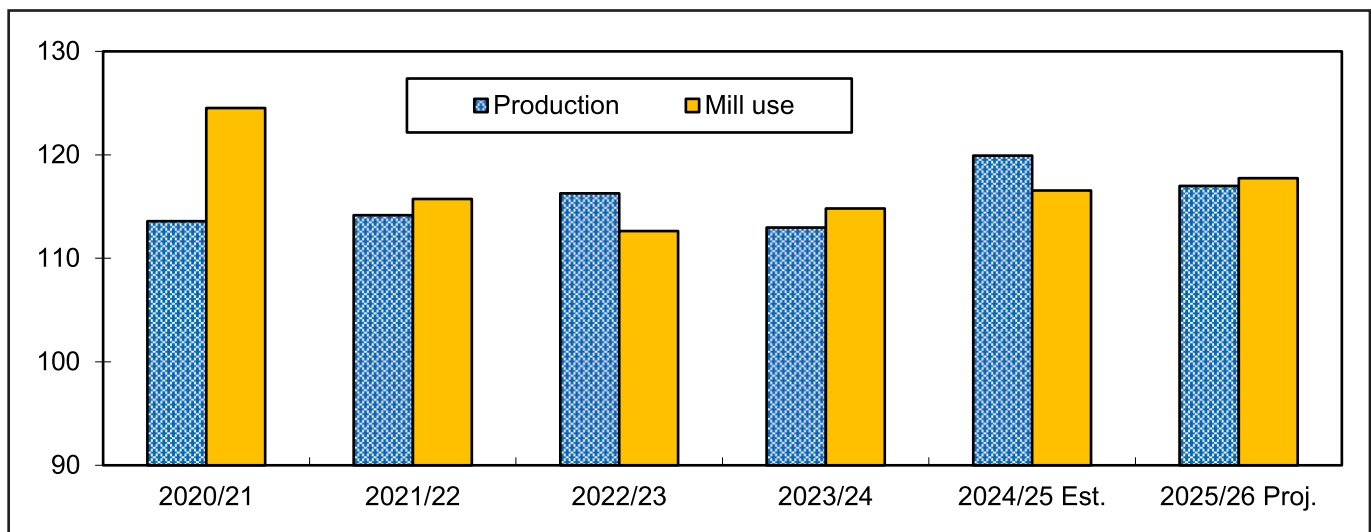
Global cotton production in 2025-26 is projected at 25.47 million tonnes nearly 2.5 per cent below the previous year. For 2025-26, cotton production prospects for the major producing countries are mixed with the majority of countries showing decreases. Production in Brazil and Pakistan are projected to increase slightly but are more than offset by declines from China, Australia, India and the United States. World 2025-26 cotton harvested area is forecast at 30.2 million hectares,

down slightly from 2024-25. The 2025-26 global cotton yield is forecast at 843 kilograms (kg) per hectare (752 pounds per acre), 2 per cent below last year's record high.

World cotton production is concentrated among a few countries, with the top 4 countries accounting for 73 per cent of total expected production in 2025-26, similar to 2024-25. China and India are forecast to remain the leading global cotton producers in 2025-26, accounting for 26 per cent and 20 per cent, respectively.

Figure - 1 : Global cotton production and mill use

Million bales



1 bale = 480 pounds | Source : USDA

For Pakistan, 2025-26 cotton production is forecast to increase 4 per cent from the previous year to 1.13 million tonnes. Harvested area is projected to remain unchanged from 2024-25 at 2.0 million hectares while the national yield is expected to increase 22 kg per hectare to 566 kg

per hectare in 2025-26. Brazil is forecast to reach its third consecutive record-high cotton production 3.97 million tonnes in 2025-26. The gain is a result of higher area harvested with a nearly unchanged yield from last year. Area harvested is forecast to increase about 8 per cent

Raw Material Scenario

to 2.1 million hectares while yield is expected to decline less than 1 per cent to 1,892 kg per hectare. Australia, in contrast, is forecast to decrease production by 27 per cent in 2025-26. Switching to alternative crops, less than ideal growing conditions, and water availability account for a lower estimate for harvested area and yield.

World Cotton Mill Use Growth Forecast in 2025-26

Global cotton mill use is projected to increase 1 per cent in 2025-26 to 25.63 million tonnes, the highest in 5 years. Lower world cotton fibre prices and the need to replenish yarn and fabric inventories are expected to support the higher mill use forecast for 2025-26. Each major country's cotton mill use is projected to rise in 2025-26 from its year-ago level, with China and Pakistan the exceptions. China and India remain the leading cotton consuming countries and together are forecast to account for approximately 53 per cent of the global total.

With cotton mill use growth below the world average for China and Pakistan, several other

countries India, Bangladesh, Vietnam and Turkey are forecast to experience growth that exceeds the global average in 2025-26. India's cotton mill use is forecast at 5.55 million tonnes (+2.0 per cent) in 2025-26. Mill use in Bangladesh is forecast to improve slightly 1.82 million tonnes in 2025-26, reaching its highest since 2021-22. Bangladesh is forecast to contribute 7 per cent of the global total. Vietnam's cotton use expands for a third consecutive year, it is forecast to account for nearly 7 per cent of the world total in 2025-26. Cotton mill use in Turkey is projected to experience the largest percentage growth of any major consumer in 2025-26, rising nearly 3 per cent.

World cotton trade to rise year over year in 2025-26; Stocks to decrease marginally

Despite only a slight gain expected in world cotton mill use, global cotton trade in 2025-26 is projected to increase 5 per cent to its largest since 2020-21's record. World cotton trade is forecast at 9.75 million tonnes in 2025-26. Higher exports are largely projected for the leading cotton exporters

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

Brazil and the United States as cotton supplies expand in each country. Brazil's cotton exports in 2025-26 are projected at a record 3.11 million tonnes, 10 per cent above 2024-25. Brazil is expected to account for 32 per cent of global trade in 2025-26. The United States is expected to contribute 28 per cent of world cotton trade in 2025-26.

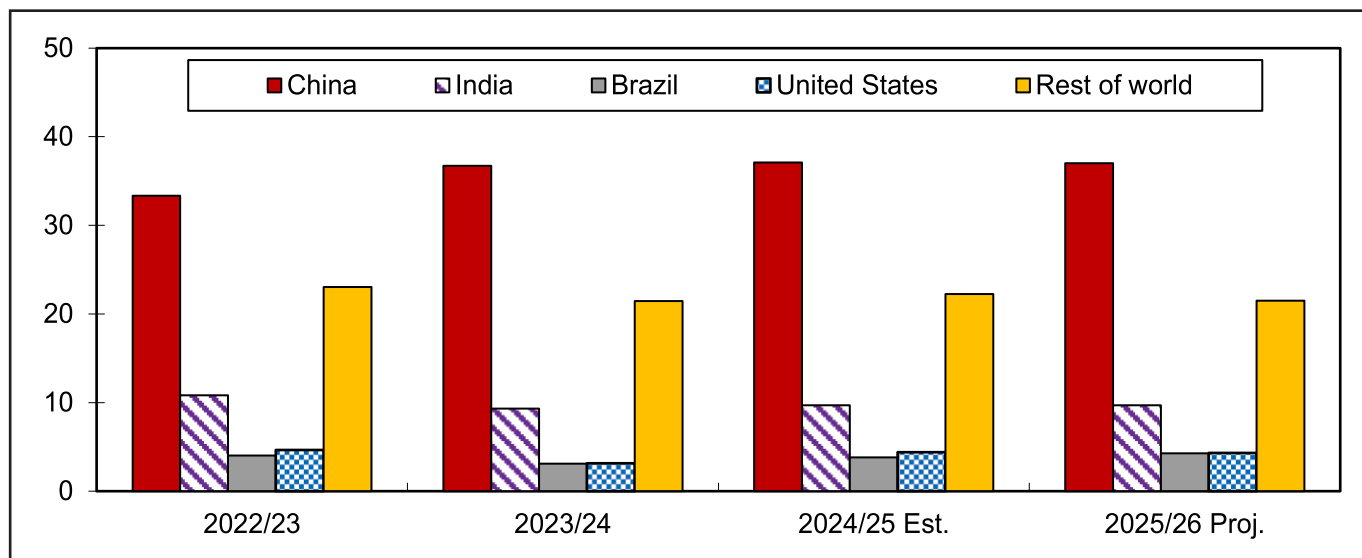
Bangladesh is expected to be the leading cotton importer once again in 2025-26 as imports are projected to increase 2.5 per cent. Bangladesh is forecast to account for 19 per cent of global

imports in 2025-26. Vietnam's cotton imports are also projected to expand. For China, cotton imports are projected to remain relatively flat in 2025-26 and account for 14.5 per cent of the world total.

Stocks in China are projected 8.06 million tonnes for 2025-26, compared with 8.08 million tonnes during the previous season. At the end of 2025-26, China is projected to hold 48 per cent of the global supplies. In India, ending stocks are forecast unchanged at 2.11 million tonnes, or approximately 12.5 per cent of the global total.

Figure - 2 : Global cotton ending stocks

Million bales



1 bale = 480 pounds | Source : USDA

News Snippets

Middle East apparel imports up 6.6% to \$2.57 bn in Jan-Apr 2025

- ❖ Apparel imports into the Middle East rose 6.58 per cent year-on-year to \$2.572 billion in January-April 2025, despite ongoing regional conflict.
- ❖ China remained the top supplier, followed by Bangladesh and Turkiye.
- ❖ The region's imports also saw a 15.40 per cent rise in 2024.
- ❖ Countries like Vietnam, India, Egypt and Italy were among key exporters, reflecting resilient demand across Middle East.

Why a Responsible Recruitment Initiative is Critical for India's Spinning Mills Sector?

Author - Mclaud Emmanuel (Consultant - Business & Human Rights)

India's spinning mills sector, a cornerstone of the country's textile industry, is grappling with two interlinked crises: a deepening labour shortage in several states and with this attendant pressures, the growing exposure to risks associated with forced labour, bonded labour, and human trafficking. As global buyers increasingly demand transparency and human rights due diligence in their supply chains, solution-building for India's spinning mills must shift from informal and opaque recruitment practices to a structured, sustainable and rights-respecting model. And therefore, a **Responsible Recruitment Initiative (RRI)**, tailored to the specific realities of the sector, offers a path forward-ensuring the promise of a steady labour supply while upholding the dignity, rights and protection of workers, many of whom are young women and inter-state migrants.

A robust RRI must begin with cleaning up the labour supply chain, starting from the very first point of worker engagement - i.e. at the time of recruitment. This includes addressing the role of manpower providers, brokers, and sub-agents who often operate without oversight, facilitating the recruitment of vulnerable workers through informal and frequently exploitative channels. Central to this effort is the **setting up of a mandatory training and certification of manpower providers and their intermediaries**. These trainings must not

be limited to administrative procedures, but should focus deeply on sensitizing recruiters to the legal and unethical dimensions of bonded labour, deceptive recruitment practices, coercion, and trafficking. The curriculum should cover gender-sensitive recruitment protocols, the rights of adolescent and young female workers, and the importance of clear documentation and record-keeping. Additionally, recruiters must be trained to inform workers of their rights and available grievance mechanisms. Such training should be regularly updated and tied to formal certification, serving as a prerequisite for manpower providers to be eligible to supply labour to spinning mills.

In this context, working with State Governments to design and deliver a training and certification program on Ethical Recruitment could be a game-changing strategic move. State governments occupy a unique position as both regulators and facilitators. Their direct link to labour departments, rural skilling missions, welfare boards, and law enforcement agencies enables them to institutionalize standards, build compliance pathways, and scale solutions across districts. Modules on ethical recruitment could cover transparency in employment contracts, understanding the indicators of bonded labour and human trafficking for labour exploitation, Indian legal frameworks and risks,

Ethical Hiring

ensuring that they avoid illegal or exploitative practices. Moreover, **leveraging state-backed training platforms ensures that both recruiters and workers can be reached at scale with quality-assured content.** When a state government endorses and enforces ethical recruitment certification, it moves the needle from voluntary initiatives toward systemic accountability-backed by law, policy, and public legitimacy.

Another important structural reform could be to **enhance supply chain transparency** of recruitment channels through the establishment of a **state-supported registry of labour contractors and their intermediaries.** This registry would provide traceability by capturing key data on who recruits workers, their geographic areas of operation, licensing status, certification records, and any history of labour or human rights violations.

For buyers and mills, it would serve as a due diligence tool to verify whether recruiters are compliant with legal and ethical standards, or have any established links with organised crime networks-essential for meeting ESG and human rights obligations. For regulators, it offers a means to flag high-risk recruiters, monitor recruitment flows, and identify patterns of exploitation and abuse. Practical implementation could involve integrating the registry with existing platforms or state-run labour information systems, with interoperability across source and destination states to track inter-state migration. Access tiers could be designed to allow public visibility of

verified contractors while reserving sensitive compliance data for labour departments and buyer consortia. Linking registry status to mandatory training, ethical recruitment certification, and grievance response mechanisms would further institutionalize accountability and embed responsible recruitment practices across the sector.

The success of such a framework also depends on how incentives are structured. Incentives must appeal to the economic logic of businesses while upholding worker welfare. Mills can play a vital role by offering long-term sourcing commitments to labour contractors that comply with responsible recruitment practices and norms, whereas brands and buyers reflect the same strategy with mills. Such **business continuity, combined with improved reputational standing, is often a more powerful incentive than short-term financial subsidies.** Visibility through industry-endorsed certification labels can also offer mills a competitive edge in global markets increasingly governed by environmental and social governance (ESG) criteria.

However, not all incentives are effective. One-time cash rewards or sporadic subsidies, while attractive in theory, rarely lead to sustainable behavioural change. These can be gamed or misused, especially in sectors with historically weak oversight. Similarly, punitive approaches-such as aggressive inspections and penalties-may backfire if implemented without first building capacity and trust. And relying solely on self-regulation or voluntary disclosures by

Ethical Hiring

manpower providers in such an informal ecosystem is unlikely to produce real accountability or change.

To function effectively, a Responsible Recruitment Initiative must also define and enforce non-negotiable minimum compliance standards. These include a clear prohibition on charging recruitment fees to workers, with all associated costs borne by the employer / contractor - also reflected in the Occupational Safety, Health and Working Conditions Code, 2020 (OSH Code) which expressly prohibits contractors from collecting any form of fee, commission, or cost from contract labourers- either directly or indirectly - with the critical insight recognising that bonded labour in India frequently begins under the guise of recruitment advances or deductions. Written contracts must be issued in languages workers understand, both prior to departure and upon arrival and that transparency across the labour supply chain must be established through proper registration of intermediaries, documentation of worker movement, and third-party verification systems that include **direct worker feedback**.

The spinning mills sector stands at a critical inflection point. While the pressure to meet production deadlines amidst labour shortages is undeniable, continuing to rely on opaque and exploitative recruitment practices only deepens the sector's legal, operational, and reputational vulnerabilities. A well-designed and government-endorsed Responsible Recruitment Initiative can provide the

framework needed to address these challenges comprehensively. By embedding ethical standards into training systems, legal compliance, and business incentives- and by collaborating strategically with State Governments to scale such systems- the sector can move towards a future where competitiveness is grounded in respect for workers, rule of law, and sustainable growth. In a global market increasingly shaped by human rights due diligence and emerging supply chain legislations around forced labour import bans etc, **responsible recruitment is not just a moral imperative- it is a core strategic business necessity.**

News Snippets

Bangladesh targets \$65 bn from exports in FY26, \$56.5 bn from goods

- ❖ Bangladesh has proposed an export target of \$65 billion for FY26- \$56.5 billion from goods and \$8.5 billion from services.
- ❖ The RMG sector is expected to fetch \$44.49 billion from exports- up by 13.07 per cent YoY.
- ❖ The knitwear sub-sector is projected to earn \$23.7 billion- a 12.01-per cent YoY growth, while woven garments are expected to generate \$20.79 billion, growing by 14.31 per cent YoY.

Global Textile Machinery Shipments

Global Textile Machinery Shipments Show Mixed Performance In 2024

During 2024, Global shipments of new short-staple spindles and open-end rotors decreased by -40% and -39%, respectively (year-on-year). Deliveries of long-staple spindles increased by +62%. The number of draw-texturing spindles improved by +77% and shipped shuttle-less looms grew by +32%. Shipments of large circular knitting machines deteriorated by -15% and shipped flat knitting machines registered a 16%-increase. The sum of all deliveries in the finishing segment slightly rose by +6%.

These are the main results of the 47th annual International Textile Machinery Shipment Statistics (ITMSS) released by the International Textile Manufacturers Federation (ITMF). The report covers six segments of textile machinery, viz., spinning, drawtexturing, weaving, large circular knitting, flat knitting and finishing. A summary of the findings for each category is presented below. The 2024 survey has been compiled in cooperation with more than 200 textile machinery manufacturers representing a comprehensive measure of world production.

Spinning Machinery

The total number of shipped short-staple spindles decreased by 3.8 million units in 2024 to a level of 5.92 million. Most of the new shipments went to Asia & Oceania (90%) where deliveries decreased by -36% compared to 2023. Shipment to Africa, Europe (incl. Türkiye), North and Central America decreased by -64%, -56%, and -90%, respectively. Deliveries only increased for destinations in South

America (+1.7% to 82.6 thousand) and Eastern Europe (+12% to 10.5 thousand). The six largest investors in the short-staple segment were China, India, Türkiye, Bangladesh, Egypt and Indonesia.

623 thousand open-end rotors were shipped worldwide in 2024. This represents about 390 thousand units less than recorded in 2023. 89% of global shipments went to Asia & Oceania where deliveries decreased by -35% to 557 thousand. China, India and Türkiye were the world's 3 largest investors in rotors but saw investments drop by -32%, -57% and -56%, respectively. Deliveries decreased in all major destination countries except for Vietnam and Bangladesh, the 4th and 6th largest destinations in 2024, where shipment rose by +214% and +44% compared to 2023.

Global shipments of long-staple (wool) spindles increased to 600 thousand unit in 2024 (+60%). This positive effect was driven by a rise in deliveries to Asia and Oceania and Eastern Europe where 138 and 15 thousand units were shipped, respectively. 40% of total deliveries were shipped to Iran, 30% to China, and 13% to Vietnam.

Texturing Machinery

Global shipments of single heater draw-texturing spindles (mainly used for polyamide filaments) increased by +95% from nearly 43 thousand units in 2023 to 84 thousand units in 2024. With a share of 98.5%, Asia & Oceania remained the strongest destination for single heater draw-texturing spindles in 2024. China, Vietnam, and India were the 3 main investors in this segment with shares of

Global Textile Machinery Shipments

global deliveries of 95%, 1.01%, and 0.97%, respectively.

In the category of double heater draw-texturing spindles (mainly used for polyester filaments), global shipments increased by +80% to a level of 960 thousand units. Asia's share of worldwide shipments increased to 98% and China continued to be the world's largest investor, accounting for 95% of global shipments.

Weaving Machinery

In 2024, global shipments of shuttle-less looms increased by +32% to 226 thousand units. Deliveries in the categories "air-jet" and "water-jet" grew by +10% and +56% to 58 and 143 thousand looms, respectively. The number of "rapier and projectile" looms dropped by -7% to 25 thousand units. The main destination for shuttle-less looms was Asia & Oceania with 97% of worldwide deliveries. 97%, 87%, and 99% of global air-jet, rapier/projectile, and water-jet looms were shipped to the region, respectively. The main investor in all loom categories was China where shipment grew by 30% (air-jet), 38% (rapier and projectile) and 63% (water-jet).

Circular & Flat Knitting Machinery

Global shipments of large circular knitting machines decreased by -15% to 28 thousand units in 2024. Asia & Oceania was the world's leading investor in this category with 81% of global

shipments. China was the favoured destination with 45% of all deliveries (10'786 units), a decrease of -42% compared to 2023. India and Vietnam ranked second and third destinations with 3'899 and 2'559 shipped units, respectively.

The number of shipped electronic flat knitting machines increased by +16% to 135 thousand machines in 2024. The growth was driven by Asia & Oceania which received 96% of world shipments. Deliveries to all other regions decreased. China remained the world's largest investor with an 82%-share of total shipments.

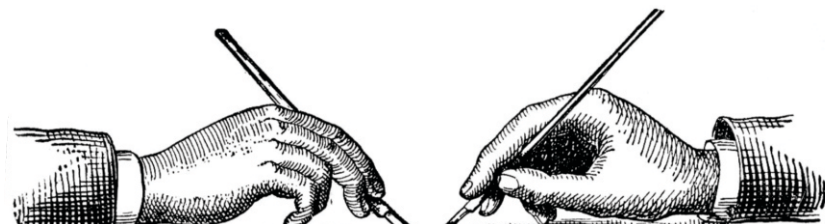
Finishing Machinery

In the "fabrics continuous" segment, the number of shipped stenters increased by +22% from 1'833 units in 2023 to 2'230 units in 2024. This number includes an estimate for the total number of stenters shipped by companies which have not participated to the ITMF survey. Participating companies reported mixed results for all other machines in this category (between a decrease of -53% for Dyeing - Line, CPB and an increase of +390% for Dyeing - Line, Hotflue). In the "fabrics discontinuous" segment, the number of "jigger dyeing / beam dyeing" shipped in 2024 dropped by -44% to 371 units. Deliveries of "air jet dyeing" and "overflow dyeing" rose by +18% to 907 units and 5% to 2'221 units, respectively.

Source: *International Textile Manufacturers Federation (ITMF).*

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Editorials



India-EU Free Trade Agreement Could Be Concluded Before Year End: Piyush Goyal

Commerce and Industry Minister Shri Piyush Goyal said that negotiations for the proposed comprehensive free trade agreement (FTA) between India and the European Union (EU) are progressing at a rapid pace and the deal could be concluded before the year end. He also said that India will raise its concerns over certain EU's regulations such as carbon tax and deforestation rules in the trade talks. We have certain concerns about EU practices and regulations, likewise they have certain areas which they would like to discuss. All issues are on the table and we will negotiate a fair, balanced and equitable FTA," Goyal told reporters. He added that all of these issues will come up for discussions, so that both sides can come up with a robust agreement that will support market access and promote easier trade.

There are discussions for an early harvest or an interim trade agreement between the two sides that could include issues like intellectual property rights (IPRs), government procurement, tariffs, and non-tariff barriers. Besides demanding significant duty cuts in

automobiles and medical devices, the EU wants tax reduction in products like wines, spirits, meat, poultry and a strong intellectual property regime. Indian goods exports to the EU, such as ready-made garments, pharmaceuticals, steel, petroleum products, and electrical machinery, can become more competitive if the pact is concluded successfully

The EU market accounts for about 17 per cent of India's total exports, while the EU's exports to India make up 9 per cent of its total overseas shipments. In addition, the bilateral trade in services, in 2023, between India and the EU was estimated at USD 51.45 billion.

Business Standard 01.06.2025

India seeks WTO consultations with Indonesia on cotton yarn safeguard measures

India has started discussions with Indonesia at the WTO about Indonesia's safeguards on cotton yarn imports. Although Indonesia and India are not formally in the WTO dispute resolution process, both countries agreed to have consultations at the WTO to allow for dialogue and an information exchange concerning Indonesia's safeguards on cotton yarn imports.

Gleanings from the Press

Indonesia justified the extension of the safeguard measures by pointing to "unforeseen developments," especially the augmentation in global Indian cotton yarn exports, which resulted in a "significant increase" for shipments to Indonesia. At present, roughly 11.85 per cent of Indonesia's cotton yarn imports come from India, a clear trade interest for India. As an affected party, it is reasonable for India to utilize provisions of the WTO's Agreement on Safeguards and bring their concerns forward for greater transparency in Indonesia's review process. In a written letter, India made a proposal for virtual consultations between 10th June and 13th June 2025, or at a mutually agreeable time. This may signal that India intends to take a more proactive approach to protect its textile exports against increasing global protectionism, particularly in cotton yarn, in which India is reasonably competitive.

The Economic Times 02.06.2025

Raw Materials

ICAC holds world cotton production at 26 MT, consumption at 25.7 MT

The International Cotton Advisory Committee (ICAC) has projected that world cotton production and consumption will remain steady in 2025-26, according to its July 2025 report. Global cotton production and consumption are forecast to reach approximately 26 million tonnes (MT) and 25.7 million tonnes, respectively, while cotton trade is expected to rebound to 9.7 million tonnes. In 2024-25,

global production and consumption stood at 25.687 million tonnes and 25.526 million tonnes, respectively. Regionally, the ICAC has revised production estimates upward for Brazil, the US and West Africa. However, these gains are likely to be offset by a slight decline in China's output in 2025-26. Following record yields of 2,257 kg/ha the highest ever recorded the ICAC projects that China will produce around 6.3 million tonnes, slightly less than the current season but still the highest globally.

World cotton consumption is expected to remain under pressure due to anticipated tariff hikes, regulatory challenges, and competition from other fibres. Global cotton trade is projected to rise by 2 per cent to 9.65 million tonnes, driven by increased stock levels from the current season and projected mill demand. However, trade agreements and tariffs could influence next season's trade outlook.

Government urged to address structural issues faced by textile/apparel sector

The government should address the structural challenges faced by the Indian textile and apparel industry to achieve \$100 billion in exports by 2030, according to stakeholders of the industry. At a meeting held in Coimbatore on 6th June 2025 to discuss the challenges faced by the textile and apparel exporters, they discussed the reasons for the nil growth in textile and apparel exports for almost a decade. The exports are stagnant at \$37 billion to \$42 billion in value. The volume of exports has shrunk, which is a matter of concern, they said.

Gleanings from the Press

The exports should grow at 17% CAGR to achieve the target of \$100 billion by 2030. The industry needs to invest \$100 billion to achieve overall market size of \$350 billion, including the \$100 billion exports (10% of global textile and apparel trade). Since the return on investment is not viable, the industry is not ready to invest in expansion projects and build capacities

The meeting discussed about structural issues, including raw material prices and high labour costs, that are a major hurdle apart from cost of capital, power tariff and relatively higher lead time to deliver orders.

The fundamental issue is raw material prices and there should be no restriction on imports and exports. As an immediate measure, the import duty on cotton should be removed, they said. According to the stakeholders, for every Rs.1 crore investment, the sector generates 60 direct jobs. It has achieved global scale in segments such as spinning, home textiles, technical textiles and denim. For the industry to leverage the strengths, tap opportunities in the international market and register growth, the basic challenges need to be addressed, they said.

The Hindu 07.06.2025

CCI buys 100 lakh cotton bales at MSP due to low mill demand

The Cotton Corporation of India (CCI) has bought almost 100 lakh bales of cotton at Minimum Support Price (MSP) from farmers in the current cotton season, which began in October 2024. CCI has sold 35 lakh bales in the domestic market already. Mr Lalit Kumar Gupta,

CCI, Chairman and Managing Director said over 500 procurement centres were set up to facilitate their procurement operations in the major cotton-producing states because of the lower mill demand. He indicated that continued weakness in the local market could prolong the procurement at MSP stage next season.

Firstly, government sources indicated that the overall cost incurred by MSP operations was Rs. 37,500 crore (USD 4.5 billion) so far. Also, if the market does not improve in any reasonable time frame, the costs will remain high. Government-backed MSP moves into its second stage for the 2025-26 season with an 8% hike which will further increase costs to procure cotton at MSP.

At the same time, cotton imports skyrocketed. May 2025 had an import volume 133% higher than a year previously, with the value of imports up 131% in April-May 2025 compared to April-May 2024. Representatives of the industry cited that international cotton prices are nearly 8% lower than Indian domestic prices, indicating that cotton can be imported even with an 11% duty and benefit manufacturers in the short term with only a marginal cost higher than if it were sourced domestically.

However, industry representatives said that benefit does not reflect improved competitiveness for exports. Official representatives claim the 11% cut in import duty is the aspect of the cost structure that has the most significant impact across the global positioning of the Indian textile manufacturer.

The Hindu 17.06.2025

Gleanings from the Press

India-Vietnam textile trade falls in Jan-Apr 2025

Insights

- ❖ India's textile trade with Vietnam declined in early 2025, with exports falling 32.60 per cent and imports easing 15.99 per cent year-on-year.
- ❖ Yarn and fibre exports dropped, but fabric exports rose nearly 28 per cent. Imports of yarn and fabric grew, while fibre imports fell.
- ❖ For full-year 2024, India's textile exports rose 33.33 per cent, while imports declined 4.85 per cent.

India and Vietnam are mutually dependent on each other for textile products based on their respective industry requirements. However, India's exports and imports of yarn, fabric, and fibre from Vietnam declined during the first four months of the current year. Exports fell by 32.60 per cent to \$124.128 million, while imports of these products eased by 15.99 per cent to \$82.412 million in the same period. Nonetheless, India recorded growth in fabric exports and in fabric and yarn imports during this timeframe.

Between January and April 2025, India's yarn exports stood at \$56.474 million, accounting for 45.50 per cent of its total textile exports. Fibre and fabric exports were \$34.956 million (28.97 per cent) and \$31.698 million (25.54 per cent), respectively. Yarn exports declined 28.49 per cent compared to \$78.968 million in the same period last year, while fibre exports dropped sharply by

55.25 per cent from \$80.345 million. In contrast, fabric exports increased by 27.76 per cent in the first four months of 2025, rising from \$24.811 million in January-April 2024.

India's textile exports and imports during the corresponding period in 2024 were \$184.124 million and \$71.046 million, respectively.

In January-April 2025, India's textile imports of \$82.412 million included fabric imports worth \$29.909 million (36.29 per cent), yarn imports of \$27.677 million (33.58 per cent), and fibre imports of \$24.825 million (30.12 per cent). Fabric and yarn imports rose 12.49 per cent and 46.76 per cent year on year, respectively, while fibre imports declined by 3.02 per cent.

In the full year 2024, India exported textile products worth \$436.181 million and imported \$235.738 million, compared to exports of \$327.281 million and imports of \$247.306 million in 2023. Thus, exports increased by 33.33 per cent, while imports declined by 4.85 per cent year on year.

India's yarn exports in 2024 amounted to \$188.700 million, 24.49 per cent higher than in 2023. Fibre and fabric exports reached \$173.582 million and \$73.898 million, up 66.10 per cent and 3.79 per cent year on year, respectively. Textile imports consisted of fibre imports worth \$88.534 million, fabric imports of \$83.728 million, and yarn imports of \$63.930 million. Fibre and yarn imports declined by 8.86 per cent and 14.57 per cent, respectively, while fabric imports rose by 10.36 per cent in 2024.

Gleanings from the Press

World trade vol up 5.3% in Q1 2025 as imports up in North America: WTO

Insights

- ❖ The volume of world merchandise trade rose by 3.6 per cent quarter on quarter (QoQ) and 5.3 per cent YoY in Q1 2025 as imports surged in North America in anticipation of higher tariffs in the US, latest WTO data show.
- ❖ North America saw the strongest QoQ import growth of any region at 13.4 per cent.
- ❖ The value of such trade as measured by non-seasonally-adjusted exports-was up by 4 per cent YoY in Q1.

The volume of world merchandise trade rose by 3.6 per cent quarter on quarter (QoQ) and 5.3 per cent year on year (YoY) in the first quarter (Q1) this year as imports surged in North America in anticipation of higher tariffs in the United States, latest data from the World Trade Organization (WTO) show.

The growth was stronger than the WTO's most recent forecast, but WTO economists expect the pace of expansion to slow later in the year as fully stocked inventories and higher tariffs weigh on import demand. WTO's Global Trade Outlook and Statistics report on April 16 had projected a baseline forecast of 2.7-per cent growth in world trade in 2025.



REVIEW

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Gleanings from the Press

Meanwhile, the US dollar value of world merchandise trade-as measured by non-seasonally-adjusted exports-was up by 4 per cent YoY in Q1 2025, reflecting strong growth in volume terms and declining prices, a WTO release said.

The value of trade in the first quarter was down compared to the previous quarter due to regular seasonal variation, but seasonally adjusted figures continued to rise. There were significant disparities across regions in merchandise trade volume growth in the first quarter, especially on the import side.

North America recorded the strongest QoQ import growth of any region by far at 13.4 per cent, followed by Africa at 5.1 per cent, South and Central America and the Caribbean at 3.6 per cent, the Middle East at 3 per cent, Europe at 1.3 per cent and Asia at 1.1 per cent.

The Commonwealth of Independent States (CIS), including certain associate and former member states, was the only region to record a 0.5-per cent decline in Q1 2025.

On the export side, the Middle East recorded the strongest QoQ growth at 6.3 per cent, followed by Asia at 5.6 per cent, South America at 3.2 per cent, Africa at 2.5 per cent, Europe at 1.9 per cent and North America at 1.8 per cent. The CIS region also registered an export decline of 1 per cent in the first quarter.

Africa had the strongest merchandise export growth of any region in value terms in Q1 2025-up by 9 per cent YoY. It was followed by Asia up by 5 per cent YoY, and South and Central America-up by 4 per cent YoY.

Among the WTO regions, only the CIS saw its exports decline in value, by 6 per cent YoY.

On the import side, strong YoY increases in dollar value were observed in North America (plus 19 per cent YoY) and South America (plus 12 per cent YoY).

Asia's first quarter merchandise imports increased the least amongst the regions (1 per cent), apart from the 0.1-per cent decline in the CIS region.

News Snippets

China's textile & garment exports rise to \$143.977 bn in H1 2025

- ❖ China's exports of textiles, garments, and accessories rose slightly to \$143.98 billion in January-June 2025, up 0.75 per cent year on year.
- ❖ Textile exports grew 1.8 per cent, while garment exports dipped 0.2 per cent.
- ❖ Imports of textile yarn and fabric fell 14.6 per cent.
- ❖ In 2024, total exports rose 2.7 per cent to \$301.1 billion, reversing an 8.05 per cent decline recorded in 2023.

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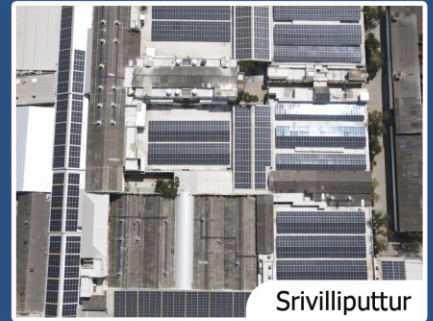


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