

# sima REVIEW

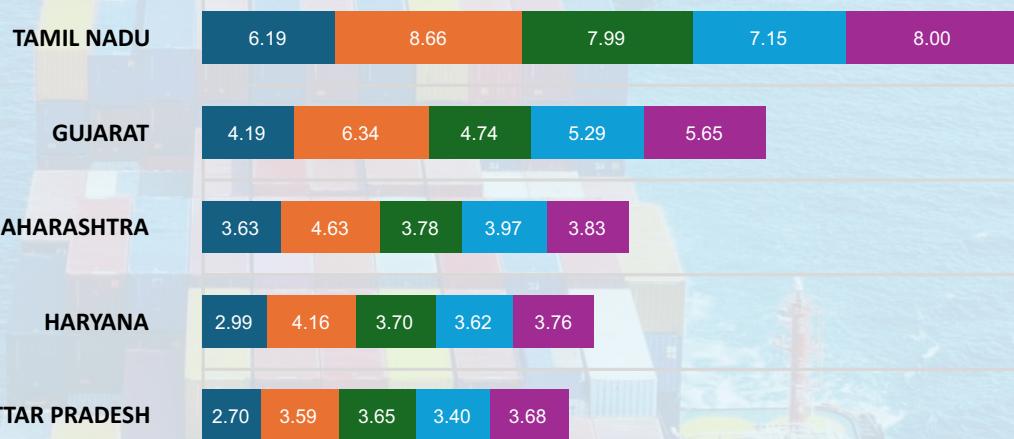
Vol. - XXX No. 9



## In this Issue...

### TOP EXPORTING STATES Textiles & Clothing

■ 2020 - 21 ■ 2021 - 22 ■ 2022 - 23 ■ 2023 - 24 ■ 2024 - 25 (in \$Bn)



State-wise export of T&C



Foreign Trade Performance | 11

Index of Industrial Production | 23

Raw Material Scenario | 27

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# CONTENTS

Volume : XXX

Issue No : 9

Month & Year : September 2025

Editor :

Dr K Selvaraju, Secretary General  
The Southern India Mills' Association  
"Shanmuga Manram,  
41 Race Course  
Coimbatore - 641018

11 Foreign Trade Performance

23 Index of Industrial Production

27 Raw Material Scenario

30 ESG Principles

36 Gleanings from the Press

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Anjali

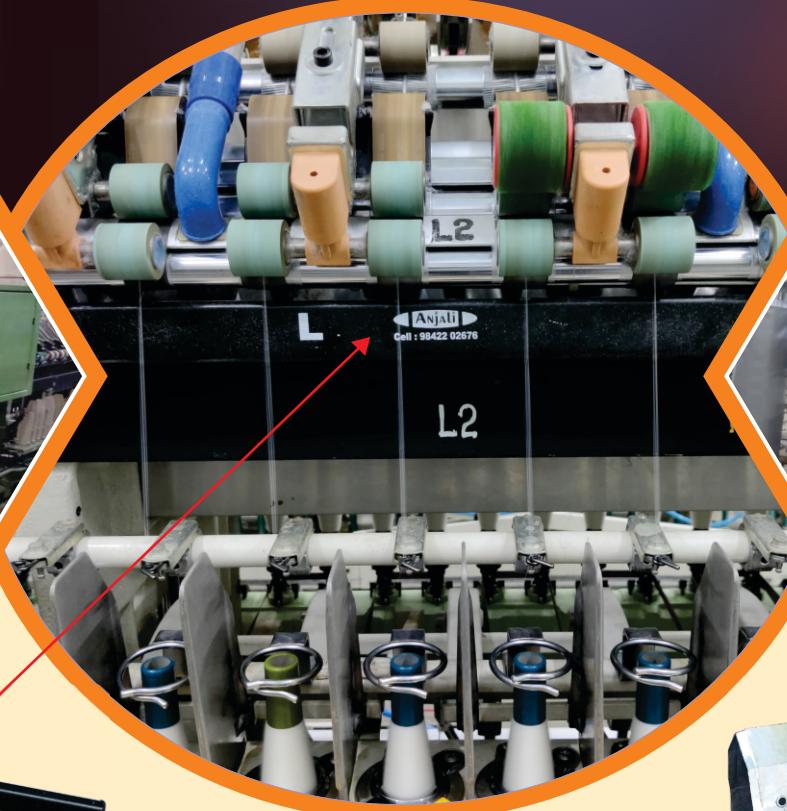
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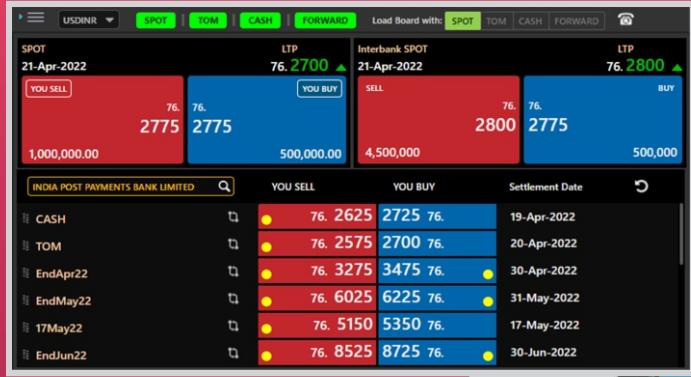
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# From the Chairman



Friends,

At the outset, I would like to express my sincere thanks to all the Member Mills and Committee Members for electing me as the Chairman of this prestigious Association on September 11, 2025. With the guidance of my predecessors and with the support of my fellow Office-Bearers, I will strive to discharge my duties to the satisfaction of all Member Mills and the stakeholders of the entire textile industry in South India. I have assumed office at a time when our industry is facing an unprecedented crisis. As I firmly believe in the power of collective effort, I look forward to the active participation of all Member Mills and the continued support of every stakeholder in our endeavour to make the Indian textile industry globally competitive and vibrant.

We thank the Hon'ble Prime Minister Shri Narendra Modi, for the rollout of GST 2.0- a bold and progressive reform that resonates with the Vision of Atma Nirbhar Bharat and paves the way for new growth opportunities in the textiles and clothing industry.

On the export front, exports of textile and apparel (T&A) rose by 3% to \$15 Billion during April-August of the current fiscal 2025-26. Of the total, apparel exports increased by 6% per cent to \$6.7 Billion. It is pertinent to mention that the US had increased reciprocal tariff on Indian goods from 10 per cent to 25 per cent from August 7. After 20 days, it had imposed another 25 per cent as penal tariff on Indian goods. It has made Indian goods costlier in the US market, rendering them less competitive compared to products from other exporting countries.

However, India maintained milder growth in textile and apparel exports during the period, compared to \$14.74 Billion during the first five months of the previous fiscal year 2024-25, when apparel exports stood at \$6.39 Billion and textile exports stood at \$8.34 Billion. In August 2025, the shipments of both segments, textiles and apparel, noticed mild decreases.

India's textile landscape is undergoing significant transformation, shaped by evolving trade dynamics and new growth frontiers. Long-standing trade relations with Bangladesh are being tested by port restrictions and logistical realignments that have disrupted traditional supply routes. Even so, both nations are exploring multimodal transport options to sustain the vital textile partnership. Simultaneously, sustainability imperatives are driving Indian mills to innovate with recycled and biodegradable yarns to meet global ESG expectations.

At the same time, rising production costs in urban centers are prompting the industry to expand into rural and semi-urban regions, with Bihar emerging as a promising hub. Supported by affordable labour, strategic

# From the Chairman

connectivity and progressive industrial policies. With growing infrastructure and policy incentives, Bihar is positioning itself as a cost-effective and sustainable node in India's textile value chain reflecting the industry's resilience and readiness to adapt to a changing global landscape.

The Government of Tamil Nadu is also making active efforts to support the industry during this challenging period. To ensure a coordinated approach, a Technical Advisory Committee has been constituted under the chairmanship of the Hon'ble Minister for Handlooms and Textiles, with representatives from all segments of the industry (including SIMA) and senior department officials as members.

The ongoing FTA negotiations with the EU and other partner countries are expected to open additional avenues, signaling a strategic realignment of India's textile trade landscape. These measures reaffirm India's ability to capture a greater share in the global arena. The Government has started outreach programmes in 40 key markets, including the UK, Japan, South Korea, Germany, France and Australia. While India exports to several hundred countries, these 40 markets are critical as they collectively import over \$590 Bn worth of textiles and apparel annually against which India's market share is only 5-6%.

We thank the Hon'ble Union Textiles Minister, Shri Giriraj Singh, for the amended version of PLI Scheme for Textiles. The revisions made in the PLI Scheme will inject huge momentum to the Indian textile and apparel sector in its journey towards becoming more globally competitive. The expanded coverage of the PLI Scheme 2.0 following the addition of 8 new HSN (Harmonised System of Nomenclature) codes for MMF (manmade fibre) apparel and 9 new HSN codes for MMF Fabrics will provide tremendous impetus to the MMF segment in India. The move would spur the production of high value MMF apparel and fabrics in India. Currently, the textile ecosystem worldwide is dominated by man-made fibre. In India, though, cotton still dominates. The flexibility introduced under PLI 2.0, allowing units to be established within existing companies, would significantly enhance the ease of doing business.

Friends, having gone through yet another deep crisis, we are hopeful that the Government's policy initiatives and anticipated upturn in demand and sentiment will help us target growth and profitability for our industry in the near future. I once again assure all the Member Mills and stakeholders across the value chain that the Association would strive hard to address all the pending issues at the earliest and closely work with the State and Central Governments to fuel the growth of the industry. I once again seek your continued support and valuable cooperation to enable me to do justice for the confidence reposed in me and entrusting the pleasant task of leading the textile value chain in South India.



**DURAI PALANISAMY**  
Chairman

# Foreign Trade Performance

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## India's textile & apparel exports dip 2.73% to \$2.93 bn in August 2025

- \* India's textile and apparel exports declined 2.73 per cent to \$2.93 billion in August 2025, with apparel down 2.65 per cent and textiles 2.8 per cent.
- \* August saw apparel and textile drops.
- \* Imports of raw cotton and waste surged by 21.33 per cent in August 2025.
- \* T & A share in India's exports climbed to 8.21 per cent in April - August 2025.

India's textile and apparel (T&A) exports rose by 2.52 per cent to \$15.113 billion during the first five months of the current fiscal. Of the total, apparel exports increased by 5.78 per cent to \$6.765 billion, while textile exports stood at \$8.348 billion in April-August 2025.

In August 2025, apparel exports declined by 2.65 per cent to \$1.234 billion from \$1.268 billion in August 2024, whereas textile exports fell by 2.79 per cent to \$1.696 billion from \$1.745 billion. The share of T&A in India's total merchandise exports rose to 8.21 per cent during April-August 2025, according to the latest trade data released by the Ministry of Commerce and Industry.

Within the textile segment, exports of cotton yarn, fabrics, made-ups, and handloom products eased by 0.62 per cent to \$4.865 billion in the first five months of FY26. Exports of man-made yarn, fabrics, and made-ups rose marginally by 0.24 per cent to \$1,994.99 million, while carpet exports increased by 1.32 per cent to \$623.08 million. In August 2025, exports of cotton yarn, fabrics,

made-ups, and handloom products fell by 2.32 per cent to \$985.18 million. Exports of man-made yarn, fabrics, and made-ups declined by 3.08 per cent to \$406.15 million.

Imports of raw cotton and waste surged by 48.75 per cent to \$510.48 million during April-August 2025, compared to \$343.18 million in the same period of the previous fiscal. Imports of textile yarn, fabrics, and made-ups rose by 8.67 per cent, from \$994.21 million to \$1080.45 million. In August 2025, imports of raw cotton and waste increased by 21.33 per cent, from \$104.89 million to \$127.25 million. Imports of textile yarn, fabrics, and made-ups eased by 0.60 per cent to \$227.35 million.

### Commodity Group wise Performance (FTPA)

According to the Foreign Trade Performance Analysis of principal commodities data released by the Department of Commerce, the country's total exports stood at USD 184 billion during April - August 2025, 2 per cent higher than corresponding period of the previous fiscal of USD 180 billion. At the same time, the country's import had increased at a faster rate during the period. Country's total import during the period has been estimated at USD 306 billion, 6 per cent higher than corresponding period import of USD 300 billion in the previous fiscal.

As far as the export of textile & allied products are concerned, while their export during first five months of the 2025-26 had increased by

## Foreign Trade Performance

**Table - 1 : Quick Estimates for Selected Major Commodities**

Exports (Million USD)	Aug '24	Aug '25	% Change
Cotton Yarn / Fabrics / made-ups, Handloom Products etc	1008.61	985.18	-2.32
Man-made Yarn / Fabrics / made-ups etc.	419.05	406.15	-3.08
RMG of all Textiles	1268.17	1234.57	-2.65
Jute Manufacturing Floor Covering	37.26	34.15	-8.34
Carpet	128.48	119.21	-7.22
Handicrafts excluding handmade carpet	152.19	152.13	-0.04

Imports (Million USD)	Aug '24	Aug '25	% Change
Cotton Raw & Waste	104.89	127.25	21.33
Textile yarn Fabric, made-up articles	228.71	227.35	-0.60

Source: DGCIS/MOC

3 per cent, their import increased by 17 per cent over previous year corresponding period export and import.

Table - 2 shows comparison of provisional on item wise export of commodities under textiles & allied products category during April - August

2025 with corresponding period export in the previous year.

Table - 3 shows comparison of provisional on item wise import of commodities under textiles & allied products category during April-August 2025 with corresponding period Import in the previous year.

### News Snippets

#### **Global export growth eases in Q2 2025 amid US tariff pressures: Fitch**

- ❖ The global trade volumes fell in Q2 2025 after a Q1 surge driven by importers front-loading ahead of US tariffs, according to Fitch Ratings.
- ❖ US import growth slowed from 30 per cent YoY in March to 2.8 per cent in June, with the average effective US tariff at 16 per cent.
- ❖ Exports weakened in advanced economies and China, while India's imports rebounded 11 per cent after a sharp Q1 decline.

## Foreign Trade Performance

**Table-2: Export of commodities under Textiles & Allied Products Group (USD Million)**

Commodity	Apr - Aug 2024	Apr - Aug 2025	% Growth
<b>Textiles &amp; Allied Products</b>	<b>14,694.32</b>	<b>15,091.71</b>	<b>2.70</b>
Manmade Staple Fibre	187.21	162.46	-13.22
Cotton Yarn	1,475.54	1,353.50	-8.27
Cotton Fabrics, Made-ups Etc.	2,804.95	2,883.91	2.81
Other Textile Yarn, Fabric Made-up Articles	369.36	398.82	7.98
Silk, Raw	Neg	Neg	Neg
Natural Silk Yarn, Fabrics, Made-ups	50.09	93.70	87.07
Manmade Yarn, Fabrics, Made-ups	1,990.31	1,995.22	0.25
Wool, Raw	Neg	Neg	Neg
Wollen Yarn, Fabrics, Made-ups, etc.	67.78	71.61	5.65
RMG Cotton Including Accessories	3,720.30	4,016.91	7.97
RMG Silk	30.22	32.70	8.20
RMG Manmade Fibres	1,157.23	1,125.70	-2.72
RMG Wool	74.26	86.18	16.05
RMG of Other Textile Material	1,413.98	1,504.15	6.38
Coir And Coir Manufactures	157.54	264.71	68.03
Handloom Products	59.03	67.14	13.74
Silk Waste	15.90	16.39	3.13
Jute, Raw	3.94	4.41	11.94
Jute Yarn	5.19	11.09	113.61
Jute Hessian	40.77	47.67	16.91
Floor Covering of Jute	37.61	34.09	-9.37
Other Jute Manufactures	62.61	67.52	7.83
Carpet (Excluding Silk) Handmade	599.09	602.38	0.55
Silk Carpet	15.88	20.66	30.05
Cotton Raw Including Waste	353.26	230.35	-34.79

Source: MOC

## Foreign Trade Performance

**Table-3: Import of commodities under Textiles & Allied Products Group** (USD Million)

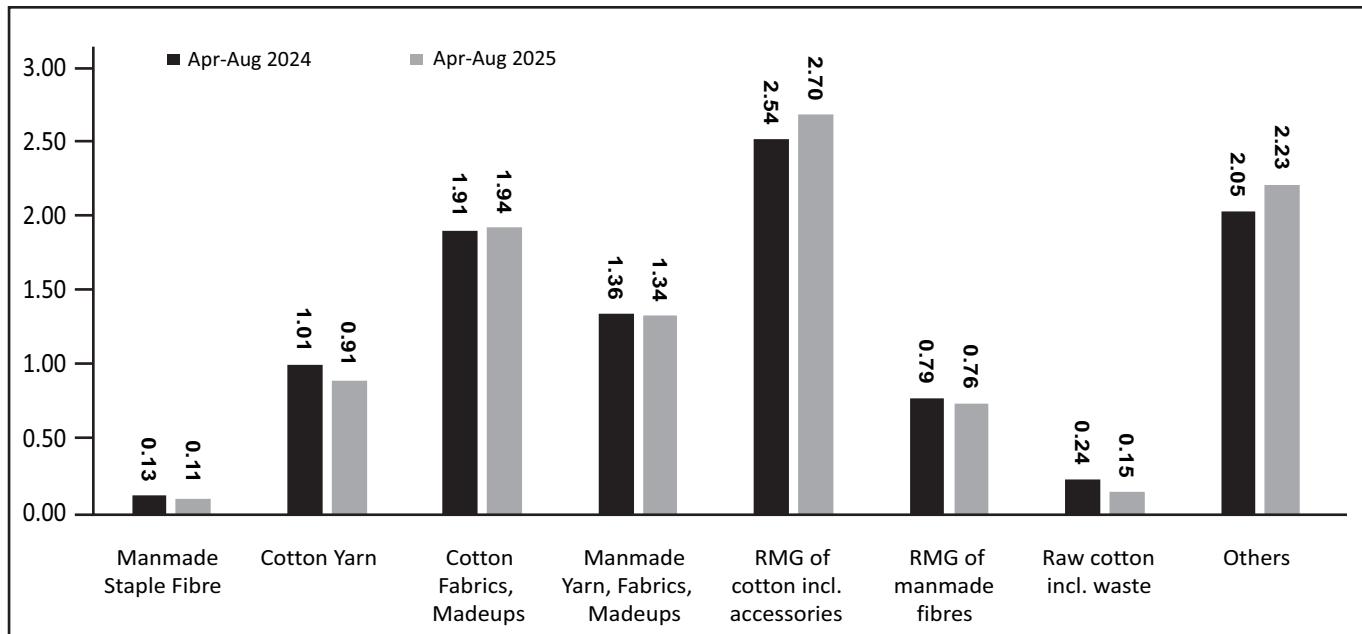
Commodity	Apr - Aug 2024	Apr - Aug 2025	% Growth
<b>Textiles &amp; Allied Products</b>	<b>3,354.31</b>	<b>3,935.10</b>	<b>17.31</b>
Manmade Staple Fibre	205.30	219.84	7.08
Cotton Yarn	10.68	8.44	-21.00
Cotton Fabrics, Made-ups Etc.	260.57	264.93	1.67
Other Textile Yarn, Fabric Made-up Articles	517.66	587.26	13.45
Silk, Raw	48.13	59.96	24.59
Natural Silk Yarn, Fabrics, Made-ups	21.41	24.57	14.79
Manmade Yarn, Fabrics, Made-ups	1,102.57	1,364.21	23.73
Wool, Raw	96.49	102.24	5.96
Wollen Yarn, Fabrics, Made-ups, etc.	45.53	54.27	19.19
RMG Cotton Including Accessories	311.30	300.37	-3.51
RMG Silk	2.87	2.87	0.02
RMG Manmade Fibres	172.39	226.86	31.59
RMG Wool	9.45	7.93	-16.06
RMG of Other Textile Material	90.26	84.17	-6.75
Coir And Coir Manufactures	Neg	Neg	Neg
Handloom Products	0.74	1.07	44.09
Silk Waste	0.93	0.92	-1.54
Jute, Raw	35.50	29.85	-15.91
Jute Yarn	22.04	20.28	-7.99
Jute Hessian	14.76	22.10	49.79
Floor Covering of Jute	0.29	0.13	-53.56
Other Jute Manufactures	30.14	29.20	-3.13
Carpet (Excluding Silk) Handmade	11.24	11.46	1.92
Silk Carpet	Neg	Neg	Neg
Cotton Raw Including Waste	343.18	510.48	48.75

Source: MOC

## Foreign Trade Performance

The export share of textile and allied products during April-August 2025, had increased to 8.21 per cent from previous year corresponding period share of 8.18 per cent. At the same time import share had also increased to 1.28 per cent from previous year share of 1.12 per cent.

Chart - 1 : % Share of Export of T & C



Charts 1 and 2 show per cent share of major textile allied products in the country's export and import during the first five months of 2025-26 compared with the corresponding period share in the previous fiscal.

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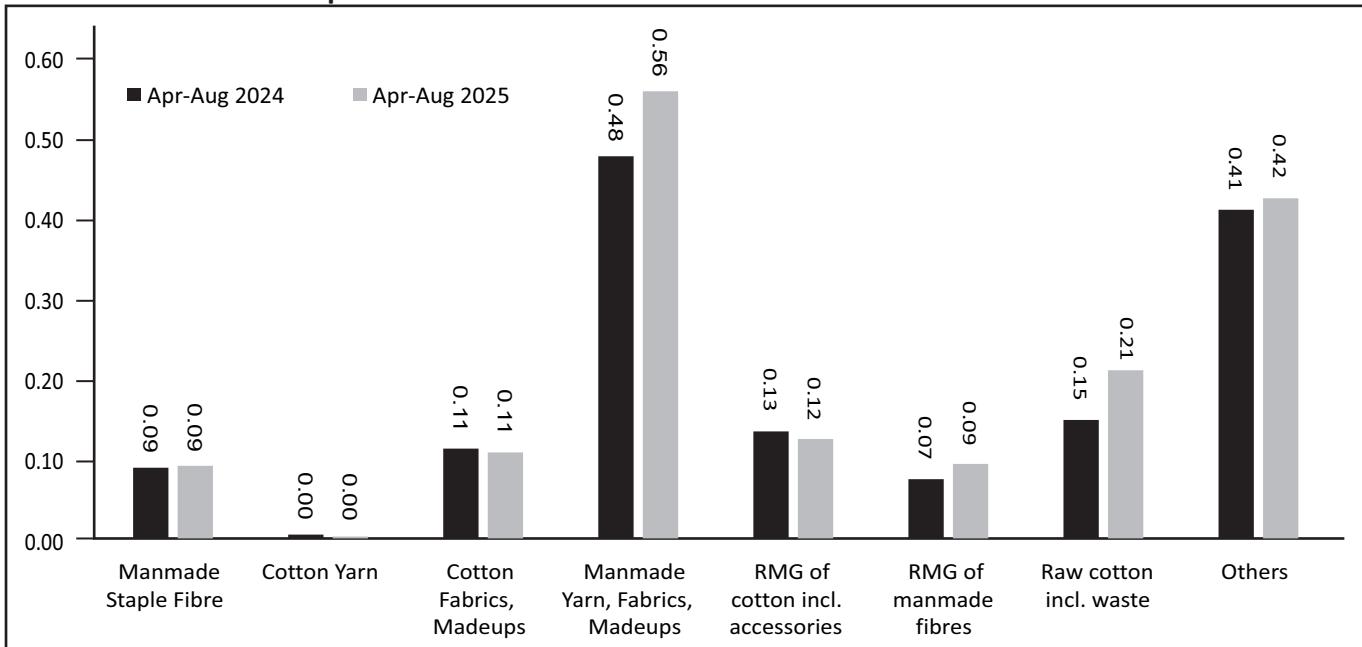
### News Snippets

#### FTA may boost Bangladesh's growth in Singapore garment market

- ❖ Singapore and Bangladesh are set to sign an FTA aimed at boosting garment trade, after Singapore's imports from Bangladesh fell 46.12 per cent to \$45.982 million in January-July 2025.
- ❖ Bangladesh's share slipped to 4.04 per cent. Imports have fluctuated over the past four years, with Bangladesh's share ranging between 4-7 per cent, highlighting the FTA's potential to stabilise trade.

## Foreign Trade Performance

Chart - 2 : % Share of Import of T & C



### India's export of items covered under HS Codes

#### 50 to 63

- ❖ India's export of cotton products covered under HS Codes 52 during July 2025 stood at USD 483.16 million, as against the previous year same time export level of USD 487.79 million.
- ❖ At the same time, export of Man-made filaments during the period stood at USD 142.86 million, a drop of 4 per cent as against previous year export level of USD 149.49 million.
- ❖ Manmade staple fibres covered under HS Codes 55 down to USD 128.99 million as against its previous year export level of USD 129.38 million
- ❖ Exports of garments covered under HS Codes 61 & 62 during the period stood at

USD 729.96 million and 610.29 million, which is higher by 8% and 1% respectively when compared to previous year same time export level of USD 675.07 million and USD 605.01 million respectively.

- ❖ Made-ups exports covered under HS Code 63 increased by 15 per cent during the period.

Table - 4 shows India's export of textile items covered under HS Codes 50 to 63 in USD million during July 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 July 2025 stood at USD 140.16 million, an increase of 40 per cent compared to previous year same time import level of USD 99.91 million.

## Foreign Trade Performance

**Table - 4 : Export of Textile items covered under HS Codes – USD Million**

HS Code	Commodity	July 2024	July 2025	% Growth
50	Silk	14.18	21.62	52.48
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	11.55	13.68	18.43
52	Cotton.	487.79	483.16	-0.95
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	36.69	65.87	79.55
54	Man-Made Filaments.	149.49	142.86	-4.44
55	Man-Made Staple Fibres.	129.38	128.99	-0.30
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	54.22	55.58	2.52
57	Carpets and other textile floor coverings.	170.82	181.70	6.37
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	31.59	35.26	11.60
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	43.13	39.38	-8.68
60	Knitted or crocheted fabrics.	45.80	40.21	-12.19
61	Articles of apparel and clothing accessories, knitted or crocheted.	675.07	729.96	8.13
62	Articles of apparel and clothing accessories, not knitted or crocheted.	605.01	610.29	0.87
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	502.11	578.39	15.19

## Foreign Trade Performance

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- ❖ Import of man-made filaments during the period stood at USD 158.66 million which is higher by 26 per cent when compared with previous year same time import level of USD 125.67 million.
- ❖ Import of garments covered under HS Codes 62 during the period registered a growth of 15%.
- ❖ Import of made ups covered under HS Code 63 stood at USD 55.63 million, which is higher by 3 per cent when compared to previous year same time import level of USD 53.87 million.

Table - 5 shows India's import of textile items covered under HS Codes 50 to 63 in USD million during July 2025 compared with same period of the previous year.

### HS Code wise Performance

#### Export & Import Quantum - July 2025

- ❖ Export of cotton covered under HS Codes 5201-5203 during the period July 2025 stood at 27.38 million kgs, rose by 6 per cent as against previous year same time export level of 25.93 million kgs, At the same time, its imports during the period stood at 64.45 million kgs, 69 per cent higher than previous year same time import level of 38.18 million kgs.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 91.14 million kgs, which is lower by 4 per cent than previous year same time export level of 94.70 million kgs.

- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period stood at 200.75million square metres.

#### Export and Import Value - July 2025

- ❖ Export of cotton in all forms covered under HS Codes 5201 to 5203 during July 2025 stood at USD 45.49 million as same as its previous year export level . At the same time its import during the period stood at USD 120.31 million which is higher by 39% as against the previous year import level of USD 86.29 million.

- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period was valued at USD 274.62 million, 7 per cent lower than previous year same time export level of USD 296.54 million. Its import stood at USD 1.25 million during July 2025.

- ❖ Export of woven fabrics of containing cotton covered under HS Codes 5208 to 5212 during the period was valued at USD 163.04 million as against previous year export level of USD 146.14 million. At the same time its import stood at USD 18.59 million.

Table - 6 shows export and import of HS Codes 5201 to 5212 during July 2025 compared with the corresponding period export and import in quantitative terms.

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

## Foreign Trade Performance

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

HS Code	Commodity	July 2024	July 2025	% Growth
50	Silk	17.63	18.37	4.22
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	27.60	32.79	18.83
52	Cotton.	99.91	140.16	40.28
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	50.54	34.23	-32.27
54	Man-Made Filaments.	125.67	158.66	26.25
55	Man-Made Staple Fibres.	68.87	101.26	47.03
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	41.75	49.65	18.92
57	Carpets and other textile floor coverings.	16.16	13.83	-14.46
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	20.56	21.78	5.92
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	71.65	83.85	17.02
60	Knitted or crocheted fabrics.	86.16	115.27	33.79
61	Articles of apparel and clothing accessories, knitted or crocheted.	57.29	72.06	25.77
62	Articles of apparel and clothing accessories, not knitted or crocheted.	70.71	81.71	15.57
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	53.87	55.63	3.27

## Foreign Trade Performance

**Table - 6 : Export / Import– Million kgs / sq.mtrs**

HS Code	Description	Export			Import		
		July 2024	July 2025	% Growth	July 2024	July 2025	% Growth
5201	Cotton, Not Carded or Combed	17.39	18.25	4.95	35.62	58.09	63.07
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	5.15	3.83	-25.60	2.56	6.36	148.59
5203	Cotton, Carded or Combed	3.39	5.30	56.34	Neg	Neg	Neg
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	Neg	Neg	Neg	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	88.42	85.79	-2.98	Neg	Neg	Neg
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	6.13	5.19	-15.30	Neg	Neg	Neg
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	Neg	Neg	Neg	Neg	Neg	Neg
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	131.32	149.41	13.78	7.31	17.05	133.22
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	28.15	34.46	22.42	Neg	Neg	Neg
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.34	4.47	-16.30	1.26	1.11	-12.10
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	14.04	11.12	-20.80	1.01	1.65	62.80
5212	Other Woven Fabrics of Cotton	1.34	1.29	-3.51	Neg	Neg	Neg
	<b>Cotton (HS 5201-5203)</b>	<b>25.93</b>	<b>27.38</b>	<b>5.59</b>	<b>38.18</b>	<b>64.45</b>	<b>68.81</b>
	<b>Cotton Yarn (HS 5204-5207)</b>	<b>94.70</b>	<b>91.14</b>	<b>-3.77</b>	<b>Neg</b>	<b>Neg</b>	<b>Neg</b>
	<b>Woven Fabrics of Cotton (HS 5208-5212)</b>	<b>180.18</b>	<b>200.75</b>	<b>11.42</b>	<b>10.56</b>	<b>21.96</b>	<b>107.97</b>

## Foreign Trade Performance

**Table - 7 : Export / Import - USD Million**

HS Code	Description	Export			Import		
		July 2024	July 2025	% Growth	July 2024	July 2025	% Growth
5201	Cotton, Not Carded or Combed	34.09	34.02	-0.19	85.09	117.41	37.98
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	6.52	4.85	-25.64	1.17	2.82	140.16
5203	Cotton, Carded or Combed	4.50	6.62	46.89	Neg	Neg	Neg
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	0.98	1.16	18.87	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	277.93	258.87	-6.86	Neg	Neg	Neg
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	17.07	14.10	-17.39	Neg	Neg	Neg
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	0.56	0.49	-11.94	Neg	Neg	Neg
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	85.68	100.6	17.42	7.03	10.18	44.76
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	34.68	42.55	22.70	2.12	4.17	96.52
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	6.49	4.09	-36.98	1.28	0.79	-38.57
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	17.66	13.83	-21.69	2.15	3.13	45.83
5212	Other Woven Fabrics of Cotton  <b>Cotton (HS 5201-5203)</b>  <b>Cotton Yarn (HS 5204-5207)</b>  <b>Woven Fabrics of Cotton (HS 5208-5212)</b>	1.63  <b>45.11</b>  <b>296.54</b>  <b>146.14</b>	1.97  <b>45.49</b>  <b>274.62</b>  <b>163.04</b>	20.41  <b>0.84</b>  <b>-7.39</b>  <b>11.56</b>	Neg  <b>86.29</b>  <b>0.69</b>  <b>12.92</b>	Neg  <b>120.31</b>  <b>1.25</b>  <b>18.59</b>	Neg  <b>39.43</b>  <b>81.16</b>  <b>43.89</b>

## Foreign Trade Performance

### State-wise Export of Textiles and Clothing

*(Values in \$Mn)*

States	2020 - 21	2021 - 22	2022 - 23	2023 - 24	2024 - 25
Tamil Nadu	6,193.39	8,656.46	7,989.56	7,152.03	7,997.17
Gujarat	4,193.64	6,336.72	4,738.00	5,287.98	5,646.01
Maharashtra	3,628.78	4,634.97	3,783.59	3,971.00	3,831.28
Haryana	2,989.38	4,161.37	3,704.74	3,620.99	3,763.54
Uttar Pradesh	2,700.16	3,593.03	3,654.24	3,396.20	3,679.50
Others	10,648.68	15,532.99	11,489.27	11,002.80	11,525.23
<b>Total</b>	<b>30,354.03</b>	<b>42,915.54</b>	<b>35,359.40</b>	<b>34,431.84</b>	<b>36,442.73</b>

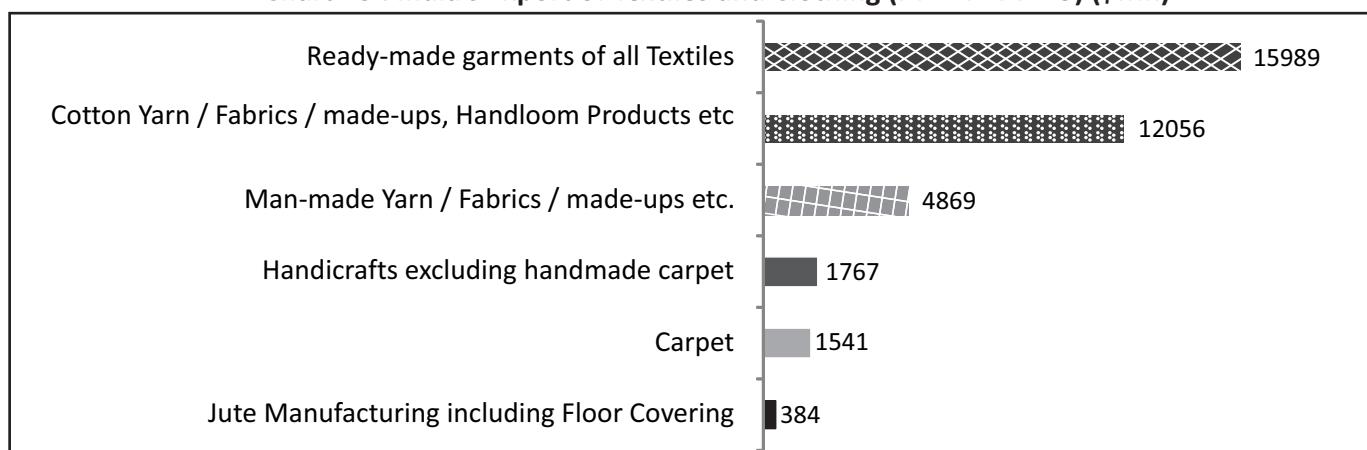
Source : NIRYAT

Between FY '21 and FY '25 Tamil Nadu consistently led in exports among the listed States, peaking at \$8,656.46 Mn in 2021-22 and reaching \$7,997.17 Mn in 2024-25. Gujarat followed as the second-largest exporter, recovering from a dip in 2022-23 to \$5,646.01 Mn by 2024-25. Maharashtra maintained moderate performance with exports balanced around \$3,800 to \$4,600 Mn, showing stability. Haryana saw similar trends, with minor fluctuations and a slight increase to \$3,763.54 Mn in 2024-25. Uttar Pradesh exhibited steady growth, rising from \$2,700.16 Mn in 2020-21 to \$3,679.50 Mn in 2024-25. Overall,

Tamil Nadu and Gujarat dominate the export landscape, while other States show stable or modest upward trends.

Despite fluctuations, all five States maintained export levels close to or above pre-pandemic values. The dip seen in 2023-24 for some states, like Tamil Nadu, Haryana and Uttar Pradesh was followed by a rebound in 2024-25. Gujarat showed resilience with consistent recovery after 2022-23. This overall trend suggests gradual stabilization and renewed growth in key export-performing states.

**Chart - 3 : India's Export of Textiles and Clothing (FY '24 - FY '25) (\$Mn)**



# Index of Industrial Production

## India's IIP Growth Moderates to 4% in August 2025

India's industrial production growth in August 2025 registered a 4% year-on-year increase according to data released by the Ministry of Statistics and Programme Implementation (MoSPI), slightly lower than the 4.3% growth recorded in July 2025. While the 4% growth in August remains positive, the marginal dip of 0.3 percentage points suggests a slight cooling in the pace of industrial expansion compared to the previous month. The 4% growth indicates steady industrial momentum, demonstrating resilience in the face of these challenges, even though the dip suggests a brief cooling in growth.

The mining sector was a major contributor to this growth, recording a solid 6% year-over-year increase. Additionally, electricity generation experienced notable growth of 4.1%, while manufacturing saw a more modest rise of 3.8% during the same period.

The General Index of Industrial Production (IIP) for August 2025 stood at 151.7, compared to 145.8 in August 2024. Sector-wise, the indices were recorded at 113.5 for Mining, 151.6 for Manufacturing, and 221.1 for Electricity. These figures demonstrate robust performance across all sectors, with mining maintaining strength, manufacturing delivering solid growth, and electricity generation showing consistent gains.

Within the manufacturing sector, 10 out of the 23 industry groups posted positive year-on-year growth. Major contributors included the manufacture of tobacco products,

which saw a 23.4% increase. The manufacture of basic metals followed with a 12.2% rise, while the manufacture of electrical equipment grew by 11.4%.

Despite the overall growth in manufacturing, certain segments reported declines of which the index of manufacturing of textiles stood at 107.8 points during the month, reflecting a rise of 0.5% comparing to previous month index of 107.3. At the same time, the manufacture of wearing apparel fell by 5.5%, with the index falling to 106.5 points from 112.7 points in July 2025 index.

The manufacture of textiles showed a slight year-on-year decline, with the index falling to 107.8 from 109.4 in August 2024, reflecting a contraction of 1.5%. The manufacture of wearing apparel registered a decline of 5.3%, with the index fell to 106.5 from 112.5 in the same period last year. The relatively modest decline of 1.5% in textile manufacturing compared to the sharper 5.3% drop in wearing apparel suggests that the textile sector is demonstrating greater resilience, indicating potential for quicker recovery and sustained growth in the near future.

India's industrial production increased steadily in August 2025 compared to previous year same month, while it slightly decreased from the month before. Manufacturing growth was more moderate, but industries like mining and electricity generation performed well. Despite a little downturn, the textile industry in

## Index of Industrial Production

manufacturing demonstrated resilience, indicating the possibility of a quicker recovery. Conversely, the apparel business encountered more formidable obstacles. The data shows a

balanced industrial landscape overall, with certain regions seeing strong growth and others possibly needing more focus to keep up the trend.

**Table - 1 : Component-wise breakup of IIP Growth (%)**

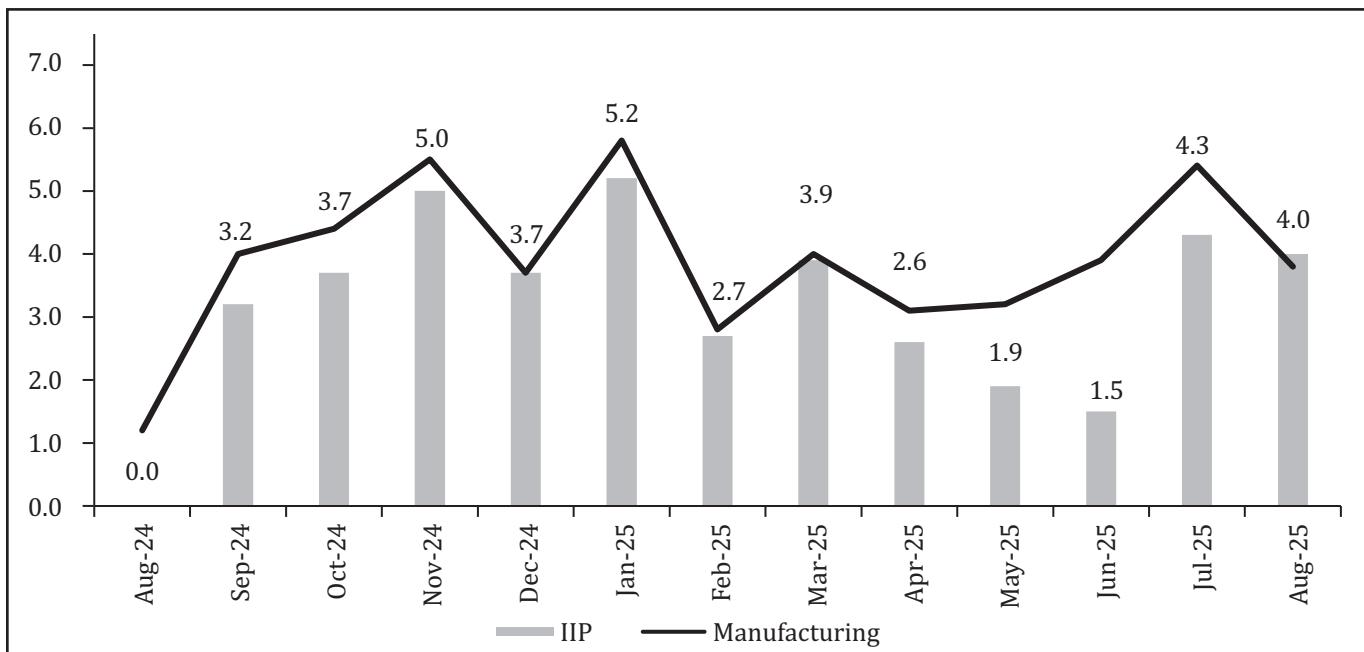
Sectoral	Apr '25	May '25	Jun '25	Jul '25	Aug '25
Mining & quarrying	-0.2	-0.1	-8.7	-7.2	6
Manufacturing	3.1	3.2	3.9	5.4	3.8
Electricity	1.7	-4.7	-2.6	0.6	4.1
Primary goods	-0.2	-1.4	-3.0	-1.7	5.2
Capital goods	14.0	13.3	3.5	5	4.4
Intermediate goods	4.9	4.7	5.5	5.8	5
Infrastructure/construction goods	4.7	6.7	7.2	11.9	10.6
Consumer durables	6.2	-0.9	2.9	7.7	3.5
Consumer non-durables	-2.7	-1.0	-0.4	0.5	-6.3
Overall IIP	2.6	1.9	1.5	4.3	4

### 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.

## Index of Industrial Production

### Exhibit 1 : Index of Industrial Production (Y-o-Y%)



# REVIEW

sima

In-house Journal - Rate Card

### Mechanical Details

Overall Size (with Bleed)	: 21.5 cm x 28.0 cm
Printed Page (without Bleed)	: 18.0 cm x 25.0 cm
No. of Columns	: Two
Width of Columns	: 8.5 cms x 2 Columns
Printing Process	: Offset
Advertisement Material	: PDF file (Resolution 300 dpi)
Black & White Advertisement	: Original Artwork

### Advertisement Rates / Insertion

Back Cover	: Rs. 10,000/- (Four Colours)
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**The Southern India Mills' Association**

Post Box No. 3783, 41, Race Course, Coimbatore - 641 018.

Phone : 0422 - 4225333 E-mail : [info@simamills.org](mailto:info@simamills.org)

## Index of Industrial Production

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

NIC 2008	Description	Weights	Aug 2024	Aug 2025	% Change
10	Manufacture of food products	5.3025	122.3	116.4	-4.8
11	Manufacture of beverages	1.0354	100.3	99.8	-0.5
12	Manufacture of tobacco products	0.7985	78.5	96.9	23.4
13	Manufacture of textiles	3.2913	109.4	107.8	-1.5
14	Manufacture of wearing apparel	1.3225	112.5	106.5	-5.3
15	Manufacture of leather and related products	0.5021	94.3	85.5	-9.3
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.193	108.1	113.6	5.1
17	Manufacture of paper and paper products	0.8724	83.0	80.4	-3.1
18	Printing and reproduction of recorded media	0.6798	83.3	69.7	-16.3
19	Manufacture of coke and refined petroleum products	11.7749	130.8	137.8	5.4
20	Manufacture of chemicals and chemical products	7.873	129.5	127	-1.9
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	4.981	212.6	193.1	-9.2
22	Manufacture of rubber and plastics products	2.4222	115.5	111.2	-3.7
23	Manufacture of other non-metallic mineral products	4.0853	139.8	143.9	2.9
24	Manufacture of basic metals	12.8043	225.6	253.1	12.2
25	Manufacture of fabricated metal products, except machinery and equipment	2.6549	92.8	100.9	8.7
26	Manufacture of computer, electronic and optical products	1.5704	146.6	148.6	1.4
27	Manufacture of electrical equipment	2.9983	127.7	142.3	11.4
28	Manufacture of machinery and equipment n.e.c.	4.7653	122.9	122.5	-0.3
29	Manufacture of motor vehicles, trailers and semi-trailers	4.8573	129.2	141.8	9.8
30	Manufacture of other transport equipment	1.7763	156.4	172.8	10.5
31	Manufacture of furniture	0.1311	226.2	219.3	-3.1
32	Other manufacturing	0.9415	869	76.9	-11.5
	<b><i>Mining</i></b>	<b>14.3725</b>	<b>107.1</b>	<b>113.5</b>	<b>6.0</b>
	<b><i>Manufacturing</i></b>	<b>77.6332</b>	<b>146.1</b>	<b>151.6</b>	<b>3.8</b>
	<b><i>Electricity</i></b>	<b>7.9943</b>	<b>212.3</b>	<b>221.1</b>	<b>4.1</b>
	<b><i>General</i></b>	<b>100.0000</b>	<b>145.8</b>	<b>151.7</b>	<b>4.0</b>

## Global Cotton Stocks Reduced as Projected Production Declines

The latest U.S. Department of Agriculture (USDA) cotton projections for 2025-26 (August-July) indicate that world cotton ending stocks are expected to decrease by 1.2% from the previous year to 15.92 million tonnes. The stock decline results from a global production forecast that is below the mill use projection. Global cotton production in 2025-26 is projected at 25.62 million tonnes, about 1% below the previous year but 2% above the 5-year average. For 2025-26, cotton production prospects for most of the major producing countries are projected to increase, except for US decline by 8%. World 2025-26 cotton harvested area is forecast at 29.55 million hectares, 2% below the previous year. The 2025-26 global cotton yield is forecast at 867 kilograms (kg) per hectare, 7% above the 5-year average and the second highest on record.

World cotton production remains concentrated among a few countries, with the top four countries (China, India, Brazil and the United States) accounting for 74% of total expected production in 2025-26. China and India are expected to continue as the leading cotton producers in 2025-26, accounting for 27% and 20%, respectively, of the global total. China is projected to produce 7.07 million tonnes of cotton, gain 1.6% from 2024-25. China's harvested area is expected to increase slightly 1.7% in 2025-26 to 3.00 million hectares.

In 2025-26 cotton production is projected to decrease for the United States while increasing for

Brazil. Brazil's production is estimated to rise nearly 7.4% from the previous year to a record 3.97 million tonnes due to an 8% expansion in harvested area to 2.1 million hectares. The area increase more than offsets a marginal yield decline. Yield is forecast at 1,892 kg per hectare, compared with 1,903 kg per hectare realized in 2024-25 and 2023-24's record of 1,911 kg per hectare.

For Pakistan, 2025-26 cotton production is expected to remain unchanged from 2024-25 at 1.08 million tonnes. Harvested area in Pakistan is expected to decrease 2.5% to 1.95 million hectares in 2025-26, offset by an increase in yield that results in the unchanged production. Yield is expected to increase to 558 kg per hectare. Australia's cotton production is expected to decrease 20% in 2025-26, despite a increase in both harvested area and yield. Australia's harvested area is expected to increase 4% in 2025-26 while yield is forecast to increase 5% to 2,041 kg per hectare.

## World 2025-26 Cotton Mill Use Projected to Remain Flat

Global cotton mill use in 2025-26 is forecast at 25.87 million tonnes, marginally below the revised 2024-25 estimate. Steady global economic growth expectations and stable cotton fiber prices are projected to support world cotton mill use in 2025-26.

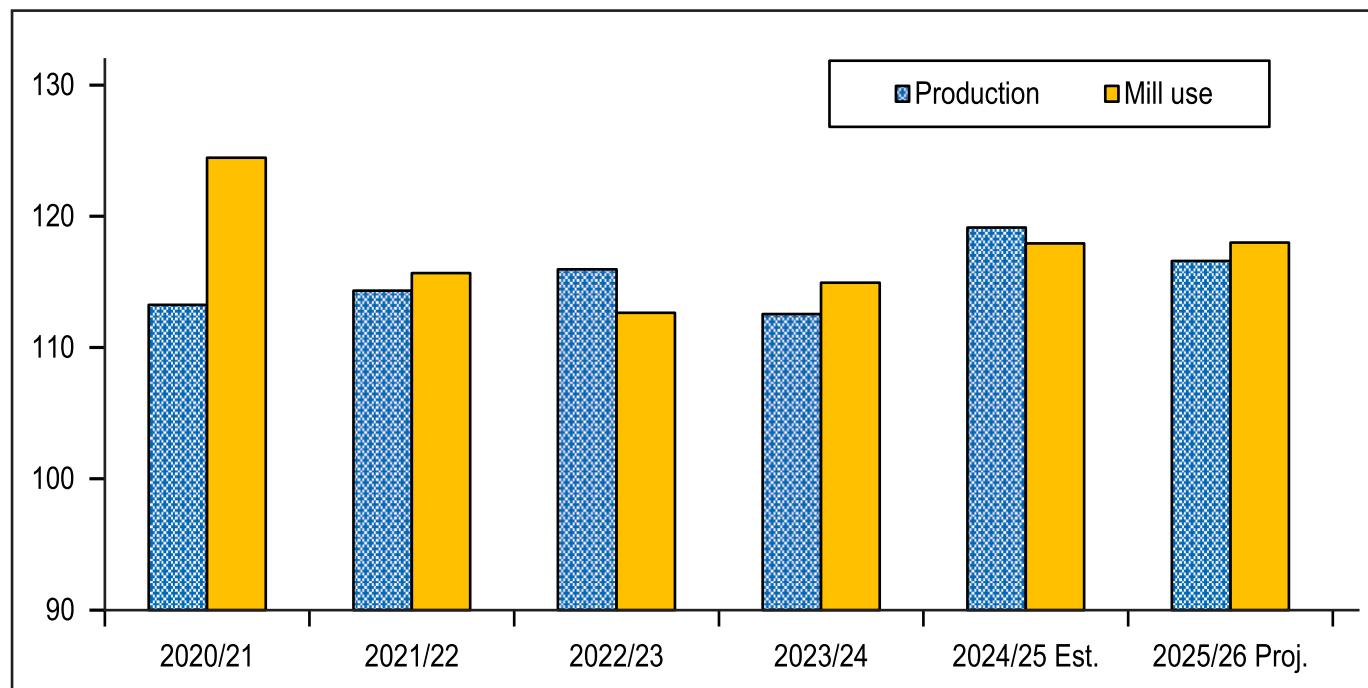
## Raw Material Scenario

Cotton mill use in China the leading cotton spinner is projected at 8.38 million tonnes in 2025-26, 2.6% above the previous year. China is forecast to account for 32% of global cotton mill use in 2025-26. Mill use in India is projected to remain at 5.44 million tonnes in 2025-26. India is expected to

account for 21% of the world mill use total in 2025-26. Pakistan's 2025-26 cotton mill use is forecast at 2.37 million tonnes, contributing 9% of the global total. Increased cotton mill use in 2025-26 is also projected for Vietnam, while Bangladesh's mill use is forecast remain unchanged.

Chart - 1 : Global Production and Mill use

(Million bales)



Source : USDA; 1 bale = 480 pounds

### Global Cotton Trade Expected Higher in 2025-26; Ending Stocks Forecast Lower

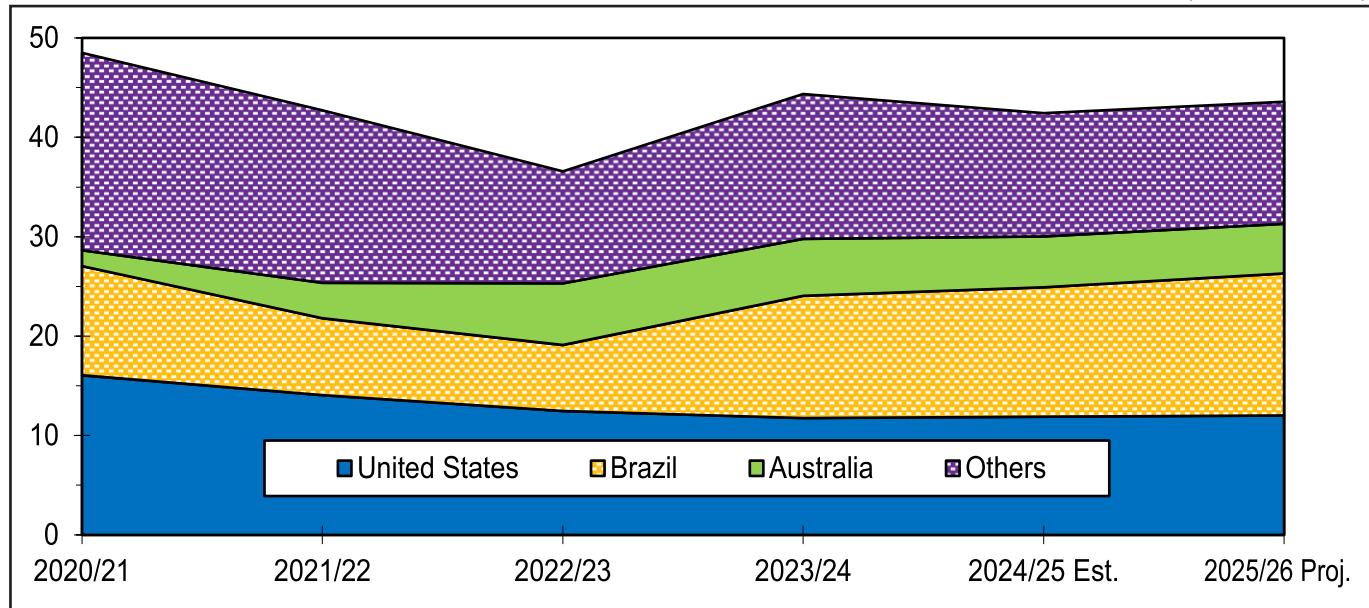
World cotton trade in 2025-26 is projected at 9.51 million tonnes, compared with 9.30 million tonnes in 2024-25. The export increase in 2025-26 is largely attributable to Brazil. Small export gains are seen for several other countries including the United States. Brazil and the United States are expected to account for a combined 60% of global cotton exports in 2025-26.

Australia's exports are projected at 1.11 million tonnes, modestly below last season as supplies are expected lower in 2025-26. Despite an unchanged global cotton mill use forecast for 2025-26, world cotton import demand is expected to increase 1%. Cotton imports are forecast unchanged for Bangladesh, the top importer in 2025-26, imports by Vietnam, China and Turkey are each expected to see small gains. On the other hand, modest cotton import reductions are forecast for Pakistan and India.

## Raw Material Scenario

Chart - 2 : Leading global cotton exporters

(Million bales)



Source: USDA; 1 bale = 480 pounds

World cotton ending stocks for 2025-26 are projected at 15.92 million tonnes, 1.2% below last season but near the average of the previous 4 years. The 2025-26 global stock decrease is led by China, Australia and the United States. Partially offsetting these reductions are higher stocks in India and Brazil.

In China, cotton ending stocks are estimated at 7.39 million tonnes in 2025-26, down 2.5% from last season. Cotton stocks in Australia are forecast 10% lower the lowest since 2023-24 and coinciding with the smallest crop in 5 years. The 2025-26

global cotton stocks-to-use ratio is projected to remain relatively flat for a third consecutive year despite reduced stock levels forecast at 63%. Ending stocks for the top four producing countries combined are projected to account for about 72% of the global total, slightly above the 5-year average.

China the largest stockholder is projected to hold approximately 46% of the global total in 2025-26. The United States and Brazil are each forecast to hold approximately 5% percent of the global cotton supplies at the end of 2025-26.

### News Snippets

#### US tariffs threaten India's cotton consumption in 2025-26 season

- ❖ India's cotton consumption could drop below 300 lakh bales in 2025-26 if US tariffs remain at 50 per cent.
- ❖ Higher MSP, duty-free imports till December 2025, and weak domestic demand may further pressure prices, with CCI procurement likely to surge.

# ESG Principles

## The future is sustainable - Is your business ready?

**ESG (Sustainability) - (Environmental, Social, and Governance) is a framework that helps organizations operate responsibly and sustainably.**

- ❖ Environmental- Caring for the Planet focuses on how a business manages its impact on natural resources - including energy use, waste management, water management, pollution control, and climate responsibility.
- ❖ Social- Caring for the people and society addresses how the business treats people ensuring fair labour practices, employee well-being, community engagement, supply chain engagement and human rights.
- ❖ Governance - Conducting the business ethically while making economic gains - including a strong and diverse board, transparency in disclosures, compliance, accountability, customer centricity and responsible decision-making.

### What happens when ESG principles are not followed by businesses?

Without responsible practices, businesses end up unintentionally harming the environment, putting employee well-being at risk, and losing the trust of the communities - over time this affects the business itself.

#### 1. Health (Pollution, Climate)- Environment

Factories that release untreated wastewater or harmful emissions can pollute rivers and air,

causing health issues like respiratory diseases, skin conditions, and long-term environmental damage. Textile dyeing units that discharge chemicals/harmful substances into rivers/water bodies can impact human life by being a source of waterborne diseases in nearby villages affecting human health and destroying aquatic life.

**Example:** Citarum River, Indonesia and Kasadi River, Maharashtra (India). These are just examples of rivers where textile factories have heavily polluted them with toxic dyes and chemicals, causing skin diseases and contaminating drinking water for nearby communities.

#### 2. Workplace (Fair Treatment, Safety) - Social

Lack of safety measures can lead to workplace accidents and attract legal trouble. Unfair wages or long working hours can in turn reduce employee morale and lead to increased employee turnover for businesses. Factories that pay low wages, have long working hours, and unsafe work conditions can be the source of harm not only to human health and worker unrest but also create reputational damage to the business- undermining both human rights and business sustainability.

**Example:** The Rana Plaza - a building which housed multiple garment factories collapsed

## ESG Principles

in Bangladesh in 2013 killing over 1,100 workers after they were forced into a visibly unsafe building, exposing severe neglect of worker safety. In addition to arrests and legal proceedings being initiated, hefty fines were also levied on the business owners.

### 3. Daily Operations (Trustworthy Companies)- Governance

Weak governance-such as inadequate maintenance of machinery, outdated technology, financial mismanagement, and poor enforcement of labour laws and safety standards risks worker safety, operational efficiency and profitability. A textile manufacturer who lacked strategic oversight in handling financial matters closed down operations highlighting the crucial role of proper documented processes and policies, two of the pillars of strong governance in sustaining growth and competitiveness in the textile industry.

**Example:** In 2015, Maggi, owned by Nestle, faced a nationwide ban over safety concerns, causing major trust loss. Nestlé rebuilt its reputation through stricter testing, third-party validation, transparent communication, consumer engagement, and CSR initiatives- showing how strong governance can restore trust.

### How do businesses gain by adopting ESG principles in business conduct?

When businesses adopt responsible ESG practices in the day to day conduct of the business, they not only protect the environment and ensure the well-being of their workers, but they also help build long-term trust with communities and stakeholders. Sustainable operations lead to resource efficiency, happier and more productive employees, and a stronger brand reputation. Over time, this creates a resilient business model that attracts investors, retains talent, and secures steady growth - benefiting people, the planet, and profits alike.

Given below are some of the areas where ESG principles can be easily adopted by businesses and the gains that can result out of such adoption.

Environmental - The More you DO, The More you GAIN...

#### Optimising electricity

Companies that shift from CFLs to LED lights, adopt renewable power to cut coal reliance, install energy efficient machines achieve over 60% energy savings and cost saving while reducing carbon emissions. Using renewable energy and energy efficient machinery also supports climate action and requires lesser maintenance thereby making it a sustainable long-term solution.

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## ESG Principles

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A textile manufacturing company by installing a 11.5 MW solar plant, adopting energy-efficient technology like LEDs and VFDs, and shifting to biogas and biomass fuels was able to cut energy use per fabric unit by 30% in addition to reducing emissions by around 18,400 metric tons.

Infosys implemented green building designs and energy-efficient systems (like LED lighting, smart HVAC, and motion-sensor lighting) across its campuses, reducing per capita electricity consumption by over 50% between 2008 and 2017.

### Saving water

Companies which reuse treated wastewater, install low-flow fixtures, promptly fix leaks, and adopt rainwater harvesting systems help conserve a vital natural resource—especially in water-scarce areas. These practices reduce utility costs, ease pressure on groundwater, and enhance resilience during water shortages. They also support long-term environmental health and sustainable operations. A fabric manufacturing entity implemented the Zero Liquid Discharge (ZLD) and Zero Solid Discharge (ZSD) principles and ensured almost no wastewater is released into the environment. This in turn helped them achieve less than 15 litres of water consumption per kilogram of fabric against an industry average of around 70 litres.

ITC Limited set up a Water Treatment and Recycling Plants at several of its factories, enabling nearly 100% reuse of wastewater for non-potable

purposes like cooling and gardening. This helped them drastically reduce their freshwater consumption—a vital natural resource.

### Afforestation and Reforestation

Companies which implement a monthly tree-planting drive or support local afforestation and reforestation efforts help improve air quality by absorbing CO<sub>2</sub> and releasing oxygen. Promoting biodiversity by providing habitats for birds, insects, and small animals, also help increase carbon sequestration. Doing such things enhances the company's ESG profile and boosts employee satisfaction by demonstrating a strong commitment to environmental responsibility.

A leading textile manufacturer who participated in large-scale tree plantation programs to plant over 260,000 trees demonstrated its support to sustainability through this initiative which promotes carbon capture and reduces CO<sub>2</sub> emissions.

Toyota Kirloskar created a dense Miyawaki forest near its factory in Bangalore, planting over 10,000 native trees. This improved local air quality, reduced noise pollution, and created a green buffer for employees and nearby communities, showcasing environmental stewardship and community well-being.

### Responsible Waste Management

Companies that manage waste by segregating it at source, replacing single-use plastics with reusable

## ESG Principles

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alternatives, and partnering with recyclers for composting and reusing of waste promote recycling and circular use of materials, improve cleanliness, and build a culture of responsibility while also lowering the carbon footprint by reducing plastic production and disposal.

Several textile companies are actively embracing circular fashion by repurposing fabric waste into new products like bags, accessories, or patchwork items, turning waste into value, thereby helping reduce landfill waste and promoting sustainability.

Raymond UCO Denim has implemented a "post-consumer waste" approach, shredding deconstructed denim garments into raw cotton, which is then blended and processed with natural dyes to create new denim products. This method not only recycles old garments but also uses 98% less water than producing denim from virgin cotton, and operates in a closed-loop system that reuses chemicals, minimizing pollution.

Social - Caring for the People...

### Human Rights & Equality

Employee well-being, human rights, and fair working conditions are supported through equal opportunity, gender-sensitive policies, and zero tolerance for discrimination or abuse. Policies aligning with international human rights standards, ensure pay equity, and respect employees' rights to express opinions and form associations.

A textile manufacturer has implemented equal opportunity for hiring, promoting gender diversity through women's advancement programs, and enforces zero-tolerance policies against harassment and discrimination and has been recognized for the same.

Unilever integrates human rights principles through zero discrimination, and gender-balanced leadership programs like "Opportunities for Women." It ensures living wages, protects personal data, and promotes inclusive workplace policies. These efforts have led to higher employee satisfaction, better ESG scores, and increased investor and consumer trust globally.

### Mandatory POSH Training & Awareness

A socially responsible workplace ensures safety through regular POSH training, visible policies, and clear complaint procedures. It extends protection to cover harassment, bullying, and abuse, with anonymous reporting channels including a process for whistle-blower complaints. Grievance redressal is transparent, time-bound, and regularly reviewed and policies should be easily accessible via intranet, email, or onboarding kits. With such large number of women forming part of the workforce, it is imperative that Textile manufacturing companies conducts regular POSH trainings and has strict guidelines on such violations.

A Textile manufacturing company conducted regular POSH training across its factories, with

## ESG Principles

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clear policies displayed and anonymous reporting systems in place. This led to improved worker morale, reduced complaints, and a safer, more inclusive work environment.

Tata Consultancy Services (TCS) has implemented a strong POSH framework with mandatory training, active Internal Committees, and anonymous reporting systems across all offices. These measures promote zero tolerance for harassment and create a safe, inclusive work environment. As a result, TCS has been able to build employee trust, ensured global compliance, and has been able to enhance its reputation as a responsible employer.

### Fair Labour Pay and Practices

A socially responsible company ensures fair compensation by offering competitive wages in line with industry standards while complying with national labour laws and international conventions. It maintains transparent grievance redressal systems and enforces strict zero-tolerance policies for child or forced labour through supplier screening, third-party audits and supply chain monitoring to uphold ethical labour practices.

A textile manufacturer demonstrated its social responsibility by offering competitive wages that meet or exceed industry benchmarks by doing an annual survey of the cost of basic items of food and livelihood to arrive at fair wages which are in excess of Indian labour laws and ILO conventions.

The company has also built robust grievance redressal mechanisms and has also enforced a strict no-child-labour policy.

Tata Steel adheres to international labour standards, ensures fair pay, and enforces strict anti-child labour policies across operations. This has strengthened its global reputation and improved workforce stability and trust.

### Ethical Supply Chain Standard

An ethical supply chain ensures that every stage of producing and delivering a product-from sourcing raw materials to final distribution is conducted in a socially responsible, environmentally sustainable, and legally compliant manner. It prioritizes fair wages, safe working conditions, no child or forced labour, and minimal environmental impact. Ethical supply chains help companies build trust, reduce reputational risk and support long-term sustainability.

A textile manufacturer has prioritized sustainable sourcing, fair labour practices, and transparent supply chains-ensuring fair wages, strict compliance with labour laws, and the prohibition of child labour through rigorous supplier audits. Additionally, it also actively worked on water and energy conservation, minimizing waste, and doing regular compliance checks of their supply chain which has helped them build a strong reputation for ethical sourcing, enhanced stakeholder trust, and long-term business resilience.

## ESG Principles

Patagonia is renowned for its strong commitment to fair labour practices, ensuring living wages across its global supply chain. The company actively participates in the Fair Labour Association and conducts regular third-party audits to maintain transparency and uphold high ethical standards in its operations.

### People first practices & policies

Companies that go beyond basic compliance by adopting employee-friendly policies—such as marriage leave, menstrual leave for women, paternity and adoption leave, mental health days, paid volunteering time, break out zones, designated rest areas and flexible or remote work options—witness higher employee retention, morale, and loyalty. These policies have also reaped benefits. By investing in people-first practices, they cultivate a more engaged, motivated, and productive workforce, driving long-term business resilience and a positive workplace culture. These policies

promote inclusion, work-life balance, and a culture of care.

A textile manufacturer has implemented progressive workforce policies such as paid maternity leave, flexible working hours, on-site childcare, and mental health support programs. It has also ensured transparent grievance mechanisms and safe reporting systems as part of its people practices.

Zomato has pioneered progressive employee policies in India by introducing 10 days of annual period leave for women and transgender employees, along with paternity leave and flexible work-from-home options. They also offer extended mental health breaks, reflecting a strong commitment to employee well-being. These forward-thinking policies have positioned Zomato as a leader in creating an inclusive and employee-first work culture.

*(To be continued on next edition)*

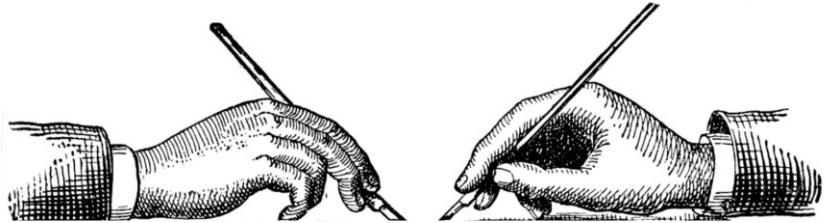
## Cost Control Study

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.

## Editorials



### Cotton Corp starts discount scheme to clear stocks

The Cotton Corporation of India (CCI) launched a bulk discount scheme to help the State-run entity liquidate its stocks ahead of the new harvest season.

The scheme evoked a good response with over 1.85 lakh bales sold. Traders picked up over 1.22 lakh bales, while mills bought some 63,600 bales of the 2024-25 crop. The CCI also reduced the floor price by Rs. 300 per candy (356 kg of ginned cotton). This is the fourth price cut by CCI since August 19. It has reduced its floor prices by Rs. 2,000 per candy till now since August 19, when the government announced the removal of 11 per cent import duty.

The Rs. 300 per candy discount was in addition to the Rs. 400 per candy it offered initially on its website for buyers such as KVIC units, co-operative spinning mills, MSME spinning mills and institutional mills purchasing a minimum quantity of 2,500-4,999 bales per day. Private textile mills, too, can avail themselves of the discount by purchasing 5,000- 9,999 bales and traders 10,000-24,999 bales.

The CCI also offered a higher discount of

Rs. 600 per candy for KVIC units, co-operative spinning mills, MSME spinning mills and institutional spinning mills purchasing over 5,000 bales, private textile mills purchasing over 10,000 bales, and traders purchasing over 25,000 bales. The discount scheme will be applicable for purchases made during the fortnight of September 1-15 for the crop year 2024-25.

The CCI having a stock of over 27 lakh bales. For the 2024-25 season, it had procured about one crore bales of 170 kg each at the minimum support price (MSP) from farmers. Till August 14 this year, it sold about 72 lakh bales of the procured quantity.

To help the Indian textiles sector deal with the US tariffs of 50 per cent, the government last month removed the 11 per cent import duty on cotton till the year-end, enabling access to cheaper fibre crop from countries such as Brazil, the US, Australia and Africa. Global prices of cotton are lower by 10-12 per cent compared to Indian prices.

The new cotton harvest was expected to start from the middle of September, and domestic prices are seen coming under pressure

## Gleanings from the Press

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following the removal of the import duty. Imports for the season ending September 2025 are seen at a record 40 lakh bales, more than double the previous year's 15 lakh bales. Trade expects the imports to touch around 20 lakh bales during the October-December quarter.

*Business Line 02.09.2025*

### **Committed to safeguarding interests of exporters: Goyal**

Commerce and Industry Minister Piyush Goyal assured exporters that the combination of 'ease of doing business initiatives', 'targeted trade support', and 'timely policy interventions' will be put in place to mitigate the impact of the 50 per cent tariff imposed by the US on several Indian products.

The minister chaired a meeting with export promotion councils and industry associations to address the rising global tariffs, explore solutions, and chart a path forward amid the shifting trade dynamics. Top officials from the department of commerce also attended the meeting.

The minister emphasised on the government's ongoing efforts to find long- term solutions to deal with the current scenario and urged exporters to upgrade product quality, align with global standards, diversify supply chains, and explore alternative markets.

"There was a broad consensus on the need for

alternative mechanisms, with the government committed to addressing sectoral concerns and driving sustained export growth," the department of commerce said in a statement.

"Goyal reaffirmed the government's unwavering commitment to safeguarding the interests of Indian exporters amidst the evolving global trade scenario. He assured industry representatives that the government is actively engaged in creating an enabling environment to help exporters navigate recent challenges," the statement said.

It is learnt that Indian exporters also urged the government to step in and share the burden of the additional cost due to the imposition of the 50 per cent tariff by the US.

Engineering Export Promotion Council of India Chairman Pankaj Chadha said that we have urged the government to roll out the Export Promotion Mission at the earliest and to also include schemes such as the interest subvention scheme and Market Access Initiative under the mission.

*Business Standard 04.09.25*

### **Tamil Nadu bags investment proposals in defence, RE, and textiles from UK**

Tamil Nadu attracted investment proposals in defence, aerospace, shipbuilding intelligence, renewable energy, textile technology and design from various players in United Kingdom. The

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## Gleanings from the Press

companies include aerospace major Rolls-Royce, maritime data firm Lloyd's List Intelligence, and Wilson Power & Distribution Technologies.

The UK visit was part of the second leg of the TN Rising European visit, led by Chief Minister MK Stalin. During the first leg in Germany, the state had received investment proposals to the tune of Rs.7,020 crore, creating 15,320 jobs. The MoUs signed represent long-term strategic steps for Tamil Nadu in sectors of high value and future relevance in positioning the state as a national and global leader across niche domains.

Rolls-Royce, one of the world's foremost aerospace and defence technology firms, expressed strong interest in expanding its operations in Tamil Nadu, with plans for an maintenance, repair and overhaul (MRO) facility, an research and development (R&D) and training centre, and a significant expansion of its IAMPL joint venture in Hosur. With Tamil Nadu being home to one of India's two Defence

Industrial Corridors, this engagement with Rolls- Royce illustrates the state's otential as a hub for advanced aerospace manufacturing.

Lloyd's List Intelligence (Sea- searcher) signed an MoU to expand its Global Capability Centre in Chennai, creating 200 jobs by FY 2026. As a world leader in maritime risk management, insurance and vessel tracking analytics, Lloyd's expansion will significantly bolster Tamil Nadu's capabilities in ship- building, port management, and maritime technology. Their flagship Sea searcher platform provides real-time visibility into global vessel movements, ownership structures, and port activities- insights that will be invaluable for unlocking Tamil Nadu's vast Blue Economy potential.

*Business Standard 04.09.2025*

**TN will require over 2 lakh crore investment across power sector in 5-7 years: Minister**

Over the next 5 to 7 years, Tamil Nadu will require over 2 lakh crore investments across power generation, transmission and

### 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**

## Gleanings from the Press

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distribution. To enable the investment, a new comprehensive debt restructuring scheme, with joint participation from the Union and State governments, is essential, said State Minister for Transport and Electricity.

The minister, speaking at the Group of Ministers meet on the financial viability of Electricity Distribution Companies in New Delhi, also emphasised the need for special grants to be provided under the 16th Finance Commission. The meeting was chaired by the Union Minister for Power, Housing and Urban Affairs, Manohar Lal, and the Union Minister of State for Power and New & Renewable Energy, Shripad Yesso Naik, said a State government release.

Tamil Nadu has emerged as a pioneer in the energy sector, implementing several significant achievements and reforms. He highlighted that, a Multi-Year Tariff regime linked to the Consumer Price Index (CPI), with automatic annual increases, has been introduced in Tamil Nadu.

The minister said TANGEDCO has been unbundled into separate companies for Generation, Green Energy and Distribution. Aggregate Technical and Commercial (AT&C) losses, which stood at 18.73 per cent in 2017-18, have been reduced to 10.73 per cent in 2024-25.

Artificial Intelligence is being employed for demand forecasting and power purchase planning. Through negotiations with REC and PFC, interest rates have been reduced by 0.5 per cent. The ACS-ARR gap has narrowed to just 0.04 per unit, and payable days have been

reduced from 146 to 49, he said. The minister urged that interest rates from REC and PFC be reduced by at least 1.5 per cent. Net metering for rooftop solar must transition to a net feed-in system. For open access consumers, banking charges should be aligned with the cost differentials between procurement and adjustment time slots, or settlement should be permitted within the same time slot.

Tamil Nadu has been heavily burdened by increased Inter-State Transmission System charges arising from exemptions for renewable energy, General Network Access-based sharing, and upcoming green hydrogen projects. To address this, the Minister recommended adoption of the "User Pays" principle and discontinuation of waivers for commercially mature renewable technologies. He urged that the Raigarh-Pugalur-Trissur High-Voltage Direct Current transmission line be recognised as a strategic national asset, with charges determined accordingly.

The minister also pressed for the reduction of SECI's trade margin, immediate notification of the Captive Generation Scrutiny procedure by State Regulators, and priority status for electricity dues under the IBC resolution process. Additionally, he called upon the Reserve Bank of India to permit extension of loan tenors to match asset life, increase the ECB limit under the automatic route to Rs.25,000 crore per year, and exempt capital gains tax on transmission asset monetisation transactions.

*Business Line 16.09.2025*

## Gleanings from the Press

### TN may get 100cr from Centre to boost cotton productivity

The Union government's Mission for Cotton Productivity is expected to be a game-changer for the textile industry in Tamil Nadu. Under the initiative, which aims to double the yield and farmers' income, and modernize ginning units, the state is likely to receive around Rs. 100 crore from the total allocation of Rs. 5,900 crore.

Industry stakeholders said the initiative, if effectively implemented, could help Tamil Nadu reduce its dependence on high-cost cotton from other states and become more competitive in global markets.

According to Dr. K Selvaraju, General Secretary, South India Mills Association, textile mills in Tamil Nadu require about 120 lakh bales of cotton a year. "However, the state produces only around five lakh bales a year. With proper interventions, production has the potential to touch 25 lakh bales.

The production should at least touch 15 lakh bales by 2030. Even if output increases to 10 lakh bales, it will only meet about 8% of the requirement."

He said one of the focus areas of the mission is seed development and agronomy research. "If implemented with the support of the Central Institute for Cotton Research (CICR) or private seed companies, production could be enhanced significantly. While farmers now plant 25,000 plants per hectare, adopting high-density planting technology could increase this to

60,000 plants. A pilot project was carried out in select regions over the past two years.

Pointing out that cotton is cultivated on about 1.75 lakh hectares in Tamil Nadu, he said the area under cotton cultivation could go up to two lakh hectares under the mission. "Tamil Nadu is also one of the few states cultivating cotton in both winter and summer, offering scope to introduce extra-long staple cotton."

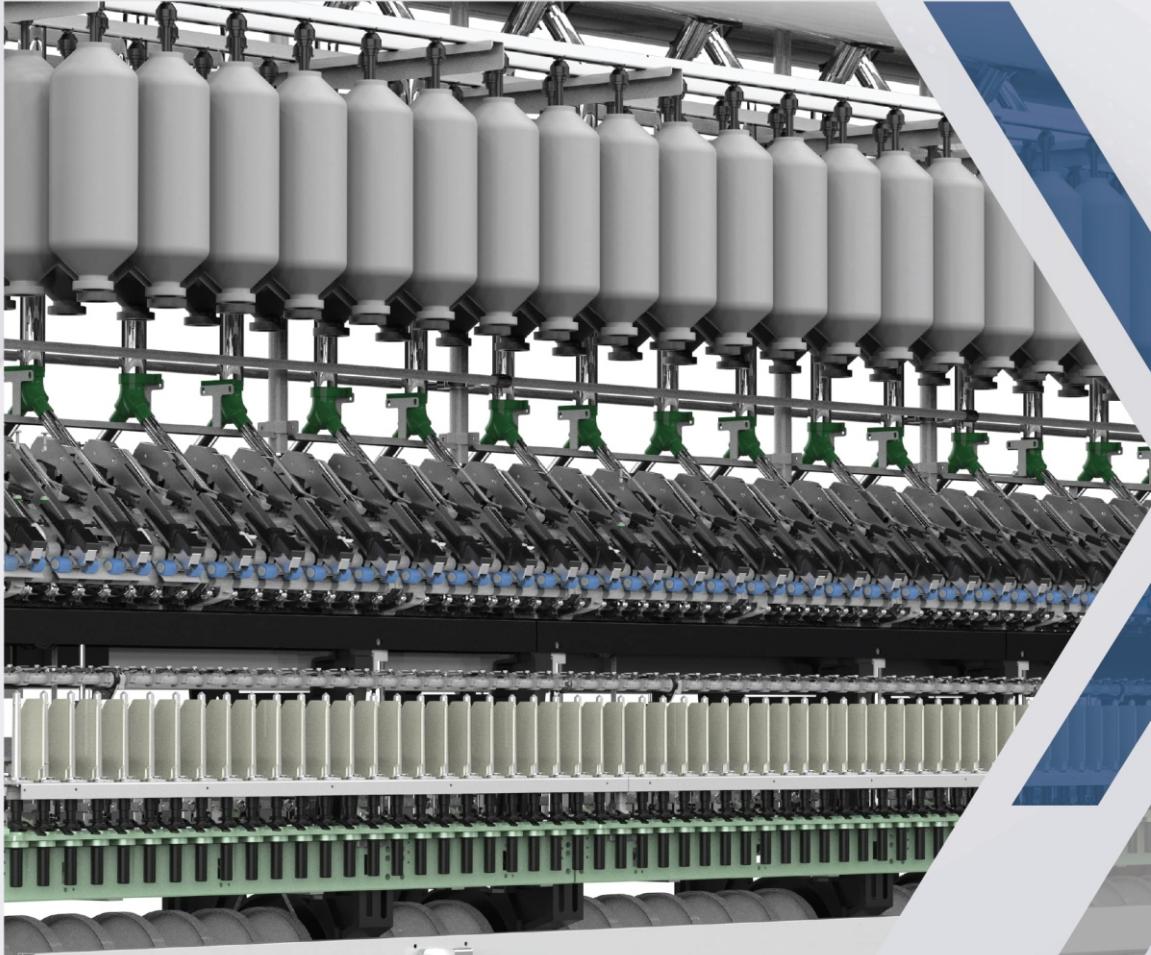
Labour shortage continues to be a major hurdle in cotton farming, making mechanization critical, says Selvaraju. Another focus area of the mission is the modernisation of machinery and cotton ginning the process of separating fibre from seeds and impurities. "Ginning in Tamil Nadu is outdated. Upgradation will improve quality and efficiency," he said.

Mr. J Thulasidharan, President, Indian Cotton Federation, welcomed the focus on research, pointing out that allocations were meagre over the past decade. "With soil and climate specific seed varieties, precision farming techniques, and better support for research institutions like CICR in Coimbatore, Tamil Nadu could increase its yield.

As productivity improves, the cost of production will come down, MSP pressure will reduce and Indian cotton will become globally competitive."

Cotton is grown in areas such as Kumbakonam, Perambalur, Manaparai, Ottanchathiram, Vasudevanallur and Kovilpatti in the state.

*Times of India 29.09.2025*



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