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### Tamil Nadu leads in Textile Exports 2025-26



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**Editor :**

Dr K Selvaraju, Secretary General  
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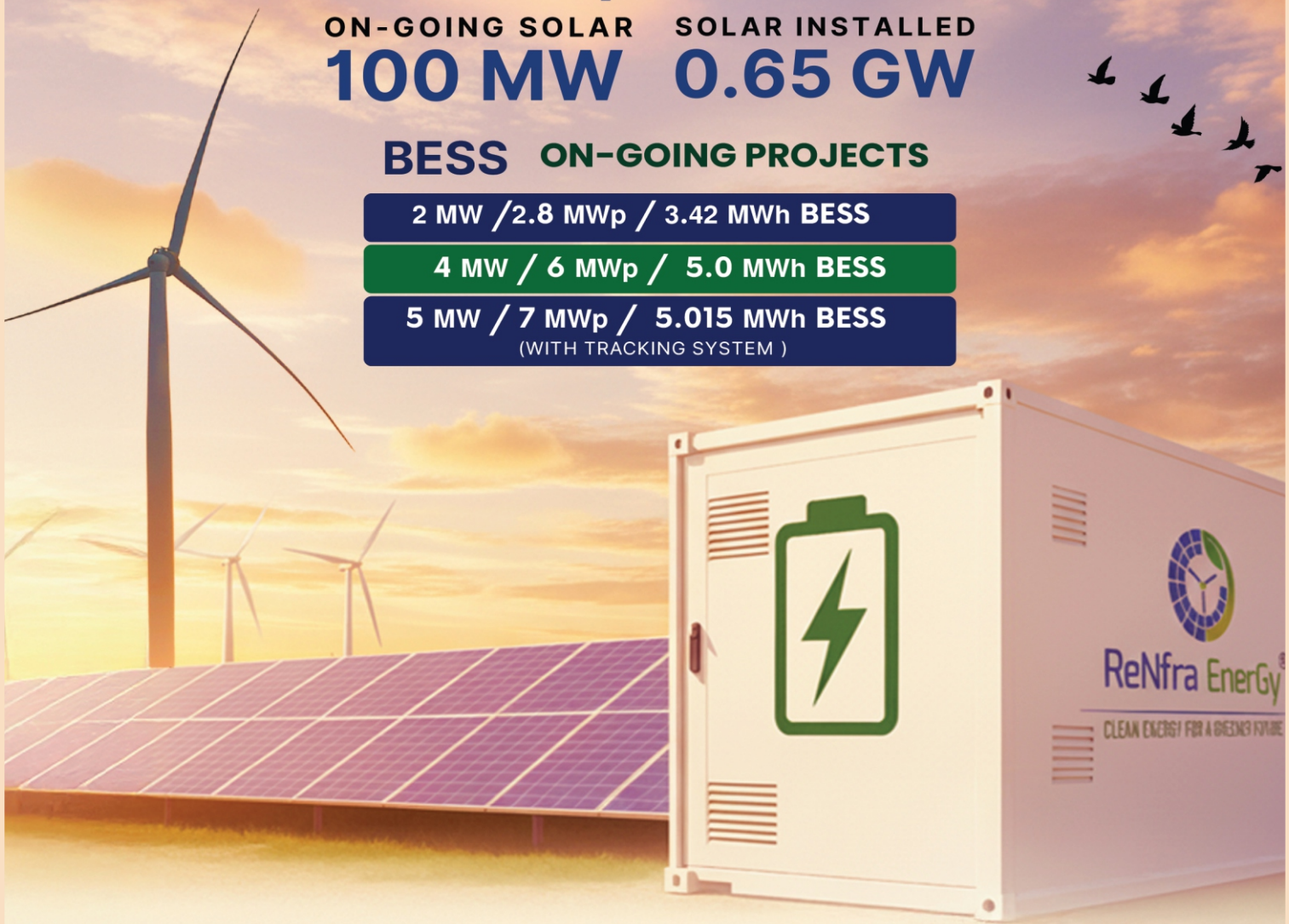
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Friends,

Amid the ongoing turmoil in export markets, particularly due to the Middle East crisis, the Government has introduced several timely supportive measures. One key step is the extension of benefits under the RoDTEP and RoSCTL schemes, providing refund of embedded taxes on export products, now continued up to September 2026, instead of the deadline of 31.03.2026. Earlier the Government had slashed the RoDTEP rates by half on February 23, 2026 and restored it a month later. Unfortunately, the Government did not consider giving retrospective effect for a period of one month, resulting in loss for all the exporters availing RoDTEP benefits. However, the continuation of the Scheme at this stage is certainly a welcome move as it provides immediate relief and reassurance to exporters. However, we appeal the Hon'ble Prime Minister for a greater policy stability and predictability to plan operations, pricing and market commitments effectively.

Also to ease the continuing geopolitical uncertainties and logistics related disruptions due to the West Asia Crisis, the Reserve Bank of India has extended the period of realisation of both pre-shipment and post-shipment export credit to 450 days, for disbursements made till June 30, 2026. Crucial chemicals for the manufacture of textile fibres have also been exempted from import duty from April 2, 2026 to June 30, 2026 including PTA, MEG, etc. In this context, the Association has been continuously representing the Government for the removal 11% import duty on cotton to safeguard the existing performance of Indian textile and clothing industry. It has also been represented to grant an interim exemption from Customs Duty on import of Manmade fibres and filaments.

The EU Digital Product Passport becomes mandatory for textiles in 2027. In this connection, the National Advanced Functional Fiber Innovation Center (NAFFIC) and AWARE™, unveiled the world's first China-Europe Digital Product Passport (DPP) for a textile product at the "Trace to Renew, Weave a Zero-Carbon Future" Summit in China. The fully EU-compliant passport traces a complete recycled polyester supply chain from post-consumer plastic bottles through yarn, fabric and finished garment, with every step verified on public blockchain and accessible to consumers, brands, and regulators worldwide via a single QR code.

Despite having a robust textile base and expanding digital infrastructure backed by the Ministry of Textiles, India's readiness remains inconsistent due to fragmented, MSME-dominated supply chains, weak end-to-end traceability and high costs associated with advanced tracking technologies; consequently, it is high time that the industry strengthens digitization, environmental compliance and standardized data systems to stay competitive in evolving European Union markets.

At the 14<sup>th</sup> WTO Ministerial Conference (MC14) held in Yaounde, India represented by Shri Piyush Goyal, Hon'ble Union Minister for Commerce and Industry, articulated a firm and balanced stance, emphasizing that transparency in global trade must not be "weaponised" to justify retaliation or undermine domestic policy frameworks. Responding to stricter disclosure proposals led by the United States, India reiterated the need for a fair, consensus driven reform of the World Trade Organization that safeguards development

# From the Chairman

priorities. For the textile sector deeply integrated into global value chains this stance underscored the importance of predictable trade rules for sustained growth.

As per the study by the Textiles Committee, India's textile market grew strongly from Rs.4.89 lakh crore in 2010 to Rs.14.95 lakh crore in 2024 (CAGR 8.3%), driven largely by rising household demand and higher per capita spending. Man-made and blended fibres lead with a 52.2% share, followed by cotton at 41.2%, with all segments (MMF, cotton, silk and wool) showing steady growth over the period. This also serves as a balanced response to concerns raised by the US Government regarding abnormal capacity expansion in countries including India and the resulting allegations of dumping in the US market.

On the Power front, TANGEDCO has been issuing Show Cause Notice to all the HT captive consumers (who were extended deemed demand benefit) directing to pay the deemed demand charges with 18% penal interest for 12 years (2013-2025). The Association has appealed to the Hon'ble Chief Minister to keep the collection of deemed demand charges levied on the captive HT consumers in abeyance for a period of atleast six months.

As the summer heatwave persists and temperatures continue to rise, it's crucial to prioritize the safety of our spinning mills during this challenging period. Remaining vigilant in identifying and addressing the potential fire hazards should be a priority.

India's credit landscape remains resilient, with ICRA Limited reporting a strong FY2026 credit ratio of 3.1x well above the 10-year average, supported by sustained upgrades, improved business & financial profiles and low default rates, thus reflecting high rating stability.

Looking ahead to FY2027, credit quality is expected to remain supported by domestic demand and easing tariff pressures, though global geopolitical and trade risks will continue to warrant close monitoring.

The new Financial Year has begun and both the Central and State Governments have also announced several Policy measures, with the objective of enhancing the manufacturing capacity of the country, with common infrastructure facilities and targeting exports to the tune of USD 100 Billion by 2030.

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

I wish all the industry players a successful financial year ahead, with strong hope that the new fiscal would bring predictable, profitable and sustainable business.



**Durai Palanisamy**  
Chairman

# Foreign Trade Performance

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 403 Billion during April-February 2026, 2 per cent higher than corresponding period of the previous fiscal of USD 396 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 715 Billion, 9 per cent higher than corresponding period import of USD 657 Billion in the previous fiscal.

As far as the export of textile & allied products are concerned, while their export during April-February 2026 had marginally declined by 0.67 per cent, their import increased by 18 per cent over previous year corresponding period.

Table - 1 shows comparison of provisional on item wise export of commodities under textiles & allied products category during April-February 2026 with corresponding period export in the previous year.

Table - 2 shows comparison of item wise import of commodities under textiles & allied products category during April-February 2026 with corresponding period Import in the previous year.

The export share of textiles and allied products during April - February 2026, had declined to 8.14 per cent from previous year corresponding period share of 8.35 per cent. At the same time import share had increased to 1.35 per cent from previous year share of 1.24 per cent.

Chart 1 and 2 shows per cent share of major textile allied products in the country's export and import during April - February 2026 compared with the corresponding period share in the previous fiscal. It may be observed that except share of RMG of cotton including accessories, other groups export share was lower than previous year. In the case of import the share of Manmade Yarn, Fabrics, Madeups, Raw Cotton and RMG of manmade fibres was higher than previous year's level.

## News Snippets

### PTA, MEG prices increase on war, impact downstream industries

- ❖ The price of Purified Terephthalic Acid (PTA) and Mono Ethylene Glycol (MEG), raw materials used to make synthetic fibres, filament and yarn, rose by Rs.20.48/kg. The sudden price rise is affecting downstream industries that use PTA and MEG as raw materials.
- ❖ Input costs surge over the past two weeks, raw material prices have climbed by about Rs.23/kg, moving from about Rs.80 a kg to about Rs.103 a kg.
- ❖ Oil prices shot up to \$118 a barrel on March 9 and slid to \$92 a barrel. Yet the producers of PTA and MEG hiked prices. Similarly, producers of man-made fibre and PET increased the prices by Rs.20 a kg from March 10. Synthetic filament makers increased the prices by Rs.6 a kg.

## Foreign Trade Performance

**Table - 1 : Export of commodities under Textiles & Allied Products Group** (USD Million)

Commodity	Apr - Feb 2025	Apr - Feb 2026	% Growth
<b>Textiles &amp; Allied Products</b>	<b>33,019.13</b>	<b>32,798.42</b>	<b>-0.67</b>
Manmade Staple Fibre	386.61	366.22	-5.28
Cotton Yarn	3,232.89	3,079.23	-4.75
Cotton Fabrics, Made-ups Etc.	6,352.82	6,133.97	-3.44
Other Textile Yarn, Fabric Made-up Articles	837.72	862.29	2.93
Silk, Raw	2.98	0.25	-91.70
Natural Silk Yarn, Fabrics, Made-ups	114.48	212.55	85.68
Manmade Yarn, Fabrics, Made-ups	4,433.85	4,452.95	0.43
Wool, Raw	Neg	Neg	Neg
Wollen Yarn, Fabrics, Made-ups, etc.	144.84	158.72	9.58
RMG Cotton Including Accessories	8,451.55	8,708.46	3.04
RMG Silk	76.63	70.53	-7.96
RMG Manmade Fibres	2,500.67	2,404.54	-3.84
RMG Wool	160.74	173.94	8.21
RMG of Other Textile Material	3,268.42	3,174.17	-2.88
Coir And Coir Manufactures	388.70	619.52	59.38
Handloom Products	128.38	142.23	10.78
Silk Waste	29.82	31.55	5.78
Jute, Raw	14.23	24.00	68.63
Jute Yarn	16.10	15.77	-2.05
Jute Hessian	93.02	104.98	12.85
Floor Covering of Jute	84.76	70.49	-16.83
Other Jute Manufactures	155.63	139.28	-10.51
Carpet (Excluding Silk) Handmade	1,364.66	1,285.50	-5.80
Silk Carpet	39.03	51.45	31.84
Cotton Raw Including Waste	740.19	515.26	-30.39

Source : MoC

## Foreign Trade Performance

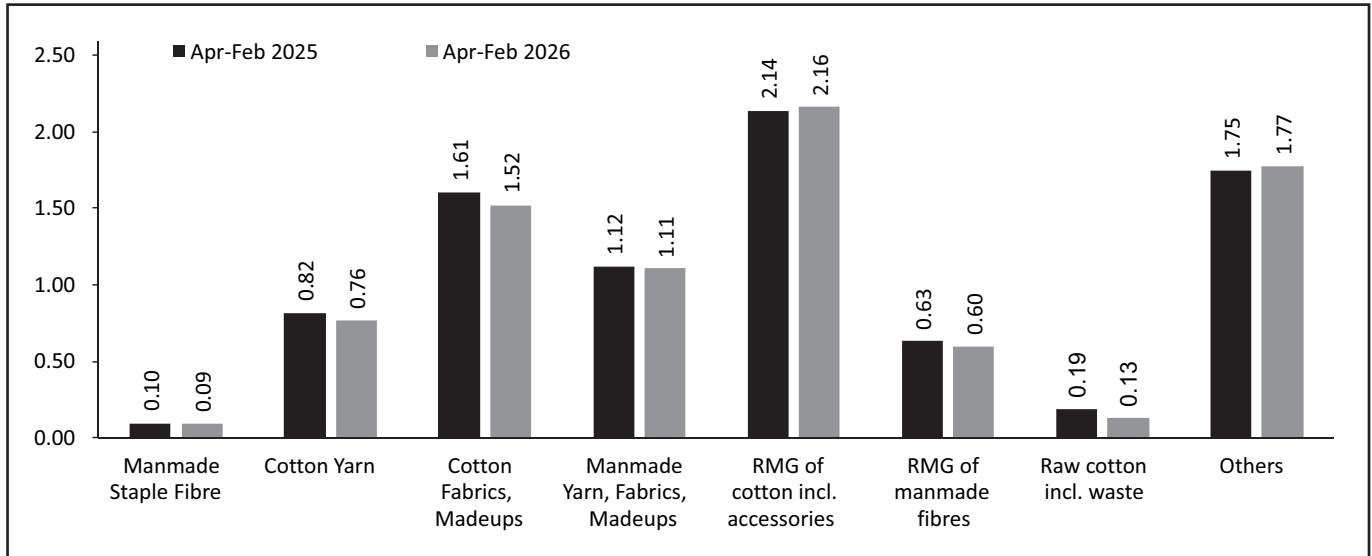
**Table - 2 : Import of commodities under Textiles & Allied Products Group** (USD Million)

Commodity	Apr - Feb 2025	Apr - Feb 2026	% Growth
<b>Textiles &amp; Allied Products</b>	<b>8,171.43</b>	<b>9,653.96</b>	<b>18.14</b>
Manmade Staple Fibre	444.38	533.49	20.05
Cotton Yarn	22.62	29.29	29.45
Cotton Fabrics, Made-ups Etc.	593.91	593.89	-
Other Textile Yarn, Fabric Made-up Articles	1,221.34	1,246.85	2.09
Silk, Raw	108.35	136.83	26.28
Natural Silk Yarn, Fabrics, Made-ups	53.54	55.03	2.79
Manmade Yarn, Fabrics, Made-ups	2,507.85	3,071.22	22.46
Wool, Raw	191.21	210.49	10.09
Wollen Yarn, Fabrics, Made-ups, etc.	100.01	117.14	17.13
RMG Cotton Including Accessories	724.00	700.08	-3.30
RMG Silk	5.75	7.12	23.67
RMG Manmade Fibres	531.77	646.23	21.53
RMG Wool	31.83	23.70	-25.53
RMG of Other Textile Material	217.02	202.64	-6.63
Coir And Coir Manufactures	4.37	5.95	36.06
Handloom Products	Neg	Neg	Neg
Silk Waste	1.49	1.53	2.30
Jute, Raw	74.21	40.1	-45.97
Jute Yarn	52.52	54.39	3.56
Jute Hessian	38.16	48.01	25.81
Floor Covering of Jute	Neg	Neg	Neg
Other Jute Manufactures	73.3	64.45	-12.08
Carpet (Excluding Silk) Handmade	31.03	27.25	-12.19
Silk Carpet	Neg	Neg	Neg
Cotton Raw Including Waste	1,140.28	1,833.76	60.82

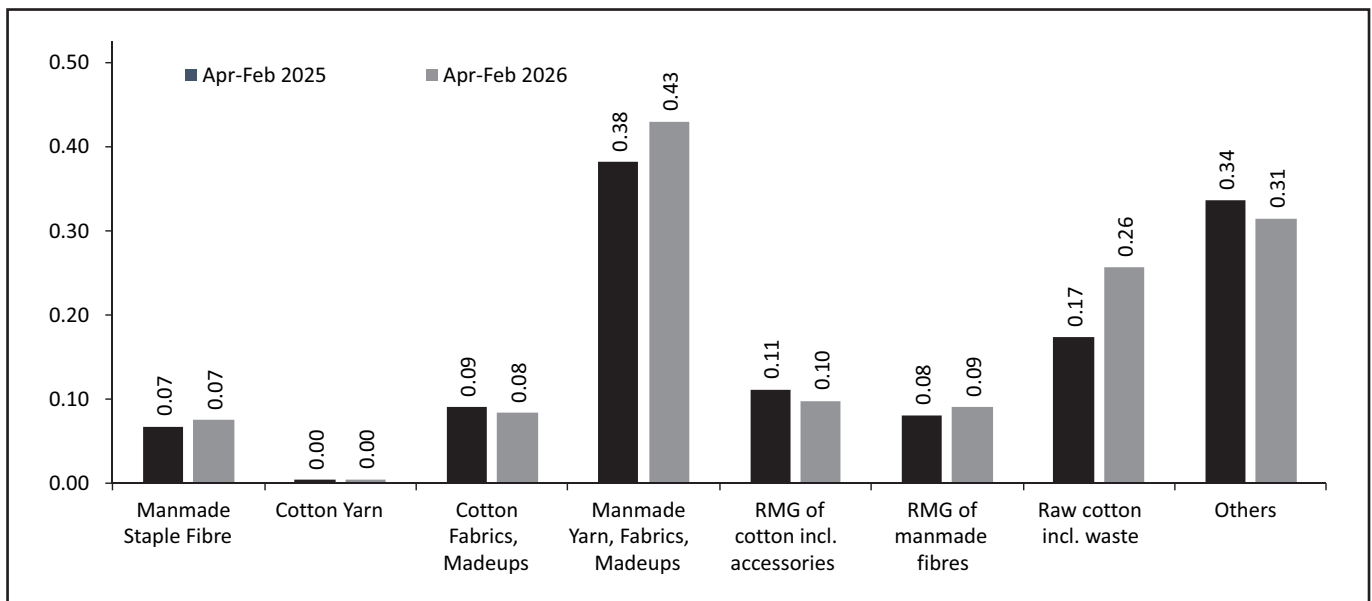
Source : MoC

## Foreign Trade Performance

**Chart - 1 : % Share of Country's Export**



**Chart - 2 : % Share of Country's Import**



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## Foreign Trade Performance

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

- ❖ India's export of cotton products covered under HS Code 52 during January 2026 stood at USD 533.26 Million, as against the previous year same time export level of USD 576.95 Million.
- ❖ At the same time, export of Man-made filaments during the period stood at USD 157.33 Million, rose by 4 per cent compared to previous year export level of USD 151.99 Million.
- ❖ Manmade staple fibres covered under HS Code 55 stood at USD 136.79 Million.
- ❖ Exports of garments covered under HS Code 62 during the period stood at USD 891.93 Million which is decreased by 2 per cent when compared to previous year same time export level of USD 905.72 Million.
- ❖ Made-ups exports covered under HS Code 63 stood at USD 492.04 Million, which is declined by 7 per cent when compared to previous year same time export level of USD 531.88 Million.

Table - 3 shows India's export of textile items covered under HS Codes 50 to 63 in USD Million during January 2026 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 Code 52 during January 2026 stood

at USD 161.77 Million, an increase of 13 per cent compared to previous year same time import level of USD 142.82 Million.

- ❖ Import of man-made filaments during the period stood at USD 202.03 Million which is higher by 36 per cent when compared with previous year same time import level of USD 148.39 Million.
- ❖ Import of garments covered under HS Code 62 during the period stood at USD 81.72 Million, registered a decline of 5 per cent.
- ❖ Import of made ups covered under HS Code 63 stood at USD 56.93 Million, which is marginally declined by 0.31 per cent when compared to previous year same time import level of USD 57.11 Million.

Table - 4 shows India's import of textile items covered under HS Codes 50 to 63 in USD Million during January 2026 compared with same period of the previous year.

### HS Code wise Performance

#### Export & Import Quantum - January 2026

- ❖ Export of cotton covered under HS Codes 5201-5203 during the period January 2026 stood at 24.28 Million kgs, declined by 51 per cent as against previous year same time export level of 49.34 Million kgs. At the same time, its imports during the period stood at 80.59 Million kgs, 27 per cent higher than previous year same time import level of 63.32 Million kgs.

## Foreign Trade Performance

**Table - 3 : Export of Textile items covered under HS Codes – USD Million**

HS Code	Commodity	January 2025	January 2026	% Growth
50	Silk	14.07	24.55	74.49
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	10.26	13.85	34.98
52	Cotton.	576.95	533.26	-7.57
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	62.38	82.60	32.40
54	Man-Made Filaments.	151.99	157.33	3.51
55	Man-Made Staple Fibres.	136.27	136.79	0.38
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	54.26	47.73	-12.03
57	Carpets and other textile floor coverings.	181.78	158.80	-12.64
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	32.90	36.06	9.62
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	39.60	37.59	-5.07
60	Knitted or crocheted fabrics.	46.69	35.61	-23.74
61	Articles of apparel and clothing accessories, knitted or crocheted.	700.88	656.57	-6.32
62	Articles of apparel and clothing accessories, not knitted or crocheted.	905.72	891.93	-1.52
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	531.88	492.04	-7.49

Source : MoC

## Foreign Trade Performance

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

HS Code	Commodity	January 2025	January 2026	% Growth
50	Silk	14.87	17.11	15.08
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	24.00	30.92	28.80
52	Cotton.	142.82	161.77	13.27
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	55.86	51.55	-7.72
54	Man-Made Filaments.	148.39	202.03	36.15
55	Man-Made Staple Fibres.	73.73	97.69	32.49
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	39.76	41.59	4.62
57	Carpets and other textile floor coverings.	17.41	17.31	-0.59
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	23.50	21.85	-7.06
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	72.45	83.29	14.96
60	Knitted or crocheted fabrics.	81.11	63.21	-22.07
61	Articles of apparel and clothing accessories, knitted or crocheted.	61.08	76.51	25.26
62	Articles of apparel and clothing accessories, not knitted or crocheted.	86.31	81.72	-5.33
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	57.11	56.93	-0.31

Source : MoC

## Foreign Trade Performance

- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 116.55 Million kgs, which is 16 per cent higher than the previous year same time export level of 100.65 Million kgs.
- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period stood at 209.11 Million square metres.

### Export and Import Value - January 2026

- ❖ Export of cotton in all forms covered under HS Codes 5201 to 5203 during January 2026 stood at USD 36.85 Million, fell by 57 per cent as against the previous year same time export level of USD 84.78 Million. At the same time its import during the period stood at USD 136.73 Million which is higher by 12 per cent as against the previous year import level of USD 121.73 Million.
- ❖ Export of cotton yarn of all types covered

under HS Codes 5204 to 5207 during the period was valued at USD 319.79 Million, 4 per cent higher than previous year same time export level of USD 306.63 Million. Its import stood at USD 3.76 Million during January 2026.

- ❖ Export of woven fabrics of containing cotton covered under HS Codes 5208 to 5212 during the period was valued at USD 176.62 Million as against previous year export level of USD 185.54 Million. At the same time its import stood at USD 21.28 Million.

Table - 5 shows export and import of HS Codes 5201 to 5212 during January 2026 compared with the corresponding period export and import in quantitative terms.

Table - 6 shows export and import of HS Codes 5201 to 5212 during January 2026 compared with the corresponding period export and import in dollar terms.

## 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.

## Foreign Trade Performance

**Table - 5 : Export / Import - Million kgs / sq.mtrs**

HS Code	Description	Export			Import		
		January 2025	January 2026	% Growth	January 2025	January 2026	% Growth
5201	Cotton, Not Carded or Combed	40.74	15.36	-62.29	59.00	75.20	27.45
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	4.85	2.50	-48.42	4.31	5.34	24.05
5203	Cotton, Carded or Combed	3.75	6.41	71.21	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	95.25	110.91	16.44	Neg	Neg	Neg
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	5.19	5.40	4.06	0.20	0.17	-13.30
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	164.50	160.37	-2.51	22.70	24.56	8.15
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	33.03	31.40	-4.92	6.04	0.95	-84.31
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.40	4.73	-12.50	1.57	1.78	13.71
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	13.91	11.25	-19.11	1.41	1.45	3.24
5212	Other Woven Fabrics of Cotton	2.56	1.36	-46.72	Neg	Neg	Neg
	<b>Cotton (HS 5201-5203)</b>	<b>49.34</b>	<b>24.28</b>	<b>-50.79</b>	<b>63.32</b>	<b>80.59</b>	<b>27.27</b>
	<b>Cotton Yarn (HS 5204-5207)</b>	<b>100.65</b>	<b>116.55</b>	<b>15.80</b>	<b>Neg</b>	<b>Neg</b>	<b>Neg</b>
	<b>Woven Fabrics of Cotton (HS 5208-5212)</b>	<b>219.40</b>	<b>209.11</b>	<b>-4.69</b>	<b>32.19</b>	<b>28.87</b>	<b>-10.29</b>

Source : MoC

## Foreign Trade Performance

**Table - 6 : Export / Import - USD Million**

HS Code	Description	Export			Import		
		January 2025	January 2026	% Growth	January 2025	January 2026	% Growth
5201	Cotton, Not Carded or Combed	74.49	25.97	-65.14	119.71	133.74	11.72
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	5.58	3.27	-41.45	1.94	2.73	40.78
5203	Cotton, Carded or Combed	4.71	7.61	61.53	Neg	Neg	Neg
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	1.19	1.11	-7.29	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	290.41	303.27	4.43	Neg	Neg	Neg
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	14.17	14.35	1.22	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	118.33	114.72	-3.05	10.84	13.92	28.34
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	41.15	39.75	-3.39	3.04	2.46	-18.92
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.94	5.67	-4.43	1.81	1.73	-4.23
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	17.85	14.57	-18.39	2.34	2.80	19.24
5212	Other Woven Fabrics of Cotton	2.27	1.91	-16.00	Neg	Neg	Neg
	<b>Cotton (HS 5201-5203)</b>	<b>84.78</b>	<b>36.85</b>	<b>-56.53</b>	<b>121.73</b>	<b>136.73</b>	<b>12.32</b>
	<b>Cotton Yarn (HS 5204-5207)</b>	<b>306.63</b>	<b>319.79</b>	<b>4.29</b>	<b>Neg</b>	<b>Neg</b>	<b>Neg</b>
	<b>Woven Fabrics of Cotton (HS 5208-5212)</b>	<b>185.54</b>	<b>176.62</b>	<b>-4.81</b>	<b>18.99</b>	<b>21.28</b>	<b>12.06</b>

Source : MoC

## Foreign Trade Performance

### India's export of Cotton - Top 5 Countries

- ❖ India's cotton exports observed a 24% decline during Apr-Jan 2026 compared to the same period in 2025.
- ❖ Bangladesh, the top export destination, saw a significant decline of 22%.
- ❖ Major declines were observed in:
- ❖ Vietnam (62%)

- ❖ Japan (55%)
- ❖ Nepal (37%)
- ❖ Indonesia (29%)
- ❖ Among the top 5, only China recorded massive growth.

Table - 7 shows the details of cotton export to major countries in quantitative terms.

**Table - 7 shows the details of cotton export to major countries in quantitative terms.**

*(Quantity)*

S.No.	Country	Apr - Jan 2025	Apr - Jan 2026	% Growth
1	Bangladesh PR	23,49,23,967	18,31,24,272	-22
2	China P RP	22,72,796	1,01,01,900	344
3	Vietnam Soc Rep	1,80,24,698	68,33,760	-62
4	Indonesia	93,80,732	66,60,121	-29
5	Thailand	7,20,260	6,99,740	-3
	<b>TOTAL</b>	<b>27,33,49,652</b>	<b>20,86,51,106</b>	<b>-24</b>

Source : MoC

### Cotton Yarn Export-Major Countries

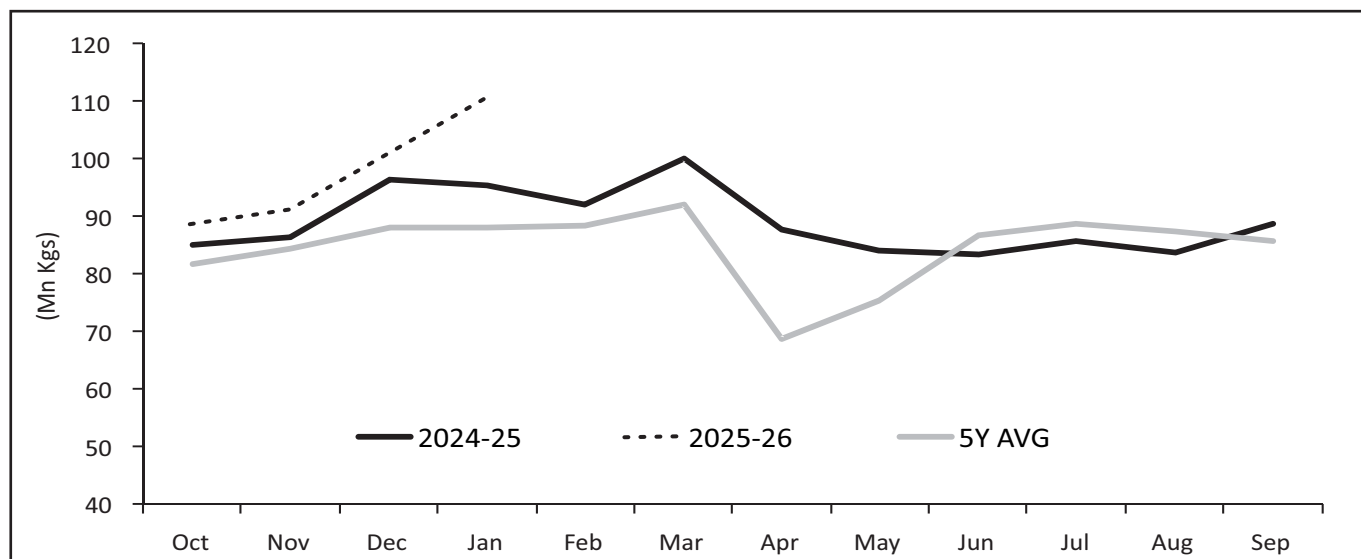
- ❖ India's cotton yarn exports recorded a growth of 2%, during Apr-Jan 2026 compared to the same period in 2025, rising from 888 Million kgs to 905 Million kgs.
- ❖ Bangladesh remained the largest importer, registering a decline of 11%.
- ❖ Strong growth was observed in:
- ❖ Egypt: up by 92%

- ❖ China P Rp: up by 76%
- ❖ Several Major markets witnessed sharp declines:
- ❖ Vietnam (19%)
- ❖ Turkey (15%)
- ❖ Sri Lanka Dsr (10%)
- ❖ Colombia (8%)

Chart - 3 shows the details of India's cotton yarn export performance.

## Foreign Trade Performance

**Chart - 3 : India's Export of Cotton Yarn**



### Cotton Import - Major Countries

- ❖ India's cotton imports surged expressively rising from 28 lakh bales in Apr - Jan 2025 to 57 lakh bales in Apr - Jan 2026.

- ❖ Brazil became the leading supplier of cotton.

Table - 8 shows the details of India's import of cotton from major countries in quantitative terms.

**Table - 8 : Import of Cotton (5201)**

*(Quantity)*

S.No.	Country	Apr - Jan 2025	Apr - Jan 2026
1	Brazil	7,06,35,438	22,49,98,088
2	Australia	11,69,91,894	21,25,03,551
3	U S A	6,61,47,412	17,76,16,690
4	Mali	2,74,94,988	8,83,36,282
5	Singapore	1,60,14,054	5,96,94,712
6	Switzerland	2,44,19,718	4,29,32,103
7	Tanzania Rep	1,52,78,228	3,02,28,389
8	Egypt A Rp	2,88,14,696	2,05,76,524
9	Cote D' Ivoire	2,73,85,266	1,88,97,350
10	Togo	1,57,96,176	1,39,14,028
	<b>Total</b>	<b>47,87,84,843</b>	<b>96,89,60,005</b>

Source : MoC

## India's IIP Growth records steady 5.2% growth in February 2026

India's industrial production growth in February 2026 registered a 5.2% year-on-year increase according to data released by the Ministry of Statistics and Programme Implementation (MoSPI).

The manufacturing sector was a major contributor to this growth, recording a 6% year-over-year increase. The mining sector experienced a rise of 3.1% and electricity generation saw a growth of 2.3%.

The General Index of Industrial Production (IIP) for February 2026 stood at 159 points, compared to 151.1 in February 2025. Sector-wise, the indices were recorded at 146.3 for Mining, 157.3 for Manufacturing, and 198.4 for Electricity. The manufacturing sector led overall industrial growth, highlighting its key role in economic expansion. The mining and electricity sectors also recorded steady gains that supported the overall upward trend.

Within the manufacturing sector, 14 out of the 23 industry groups posted positive year-on-year growth. The top three positive contributors for the month of February 2026 are - "Manufacture of other transport equipment" (20.7%), "Manufacture of motor vehicles, trailers and semi-trailers" (14.9%), "Manufacture of basic metals" (13.2%).

Despite the overall growth in manufacturing, certain segments reported declines of which the index of manufacturing of wearing apparel stood at 101.2 points during the month, reflecting a dip of 6.9% comparing to previous

month index of 108.7. The manufacture of textiles reflecting a decline of 2.4%, with the index dropping to 107.1 points from 109.7 points in January 2026.

The manufacture of wearing apparel showed a year-on-year decline and manufacturing of textiles recorded marginal growth. The Manufacture of textiles rose to 107.1 from 106.7 in February 2025 reflecting a growth of 0.4%. The manufacture of wearing apparel registered a decline of 16.6%, with the index fell to 101.2 from 121.4 in the same period last year.

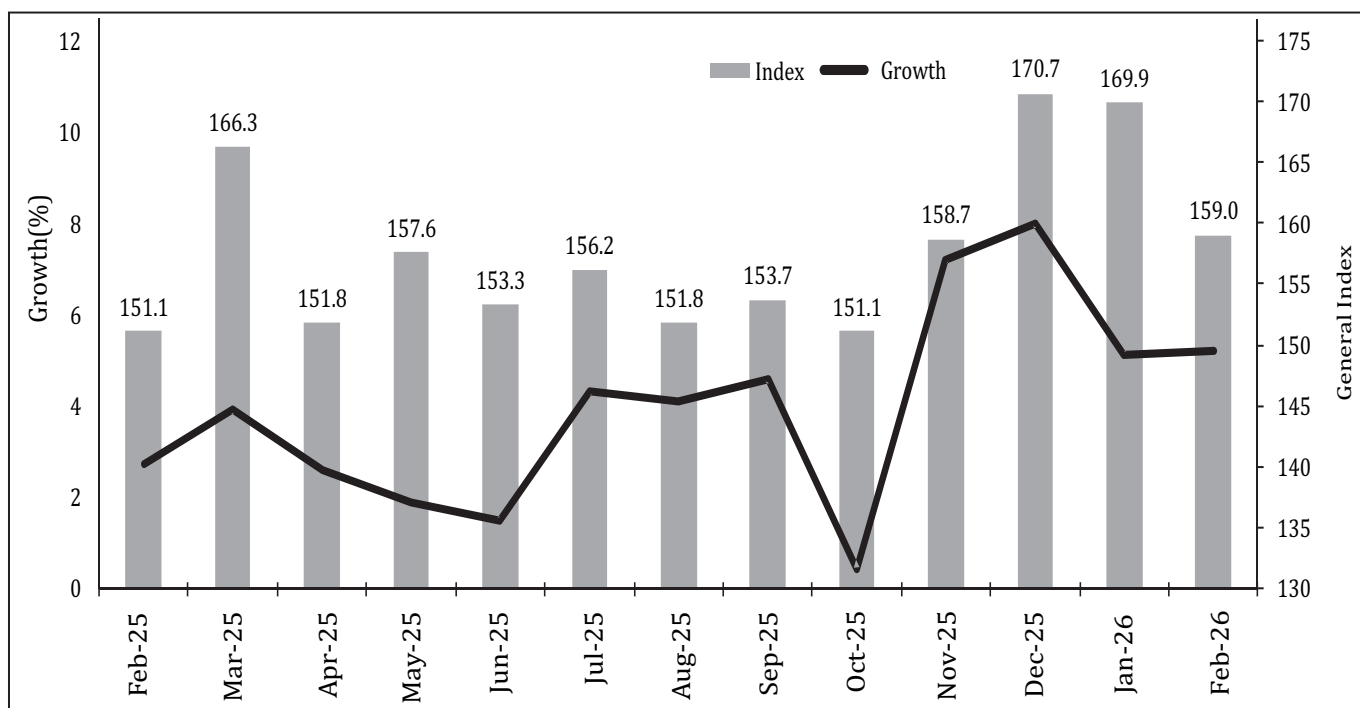
India's industrial production in February 2026 indicates a steady and broad-based expansion, led by the strong performance of the manufacturing sector, with additional support from mining and electricity. Despite this overall positive trend, certain labour-intensive segments such as textiles and wearing apparel showed weaker performance, with textiles recording only marginal growth and wearing apparel witnessing a notable decline. This contrast highlights that while industrial growth remains robust, some sectors continue to face challenges and require focused attention to achieve balanced and inclusive growth. Strengthening these segments will be important for sustaining momentum across the industrial landscape. Overall, maintaining growth across all sectors will be key to ensuring long-term stability and resilience in the industrial economy. Chart 1 depicts monthly indices and growth rate (%) of IIP.

## Index of Industrial Production

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

Sectoral	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26
Mining & quarrying	-1.8	5.8	6.9	4.3	3.1
Manufacturing	2.0	8.5	8.4	5.3	6.0
Electricity	-6.9	-1.5	6.3	5.1	2.3
Primary goods	-0.6	2.2	4.4	3.1	1.8
Capital goods	2.1	10.1	8.3	4.1	12.5
Intermediate goods	2.5	7.4	7.8	6.3	7.7
Infrastructure/construction goods	7.1	13.0	12.8	14.6	11.2
Consumer durables	-1.3	11.2	12.4	7.2	7.3
Consumer non-durables	-5.2	8.0	8.5	-2.3	-0.6
Overall IIP	0.5	7.2	8.0	5.1	5.2

**Chart - 1 : Index of Industrial Production**



## Index of Industrial Production

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

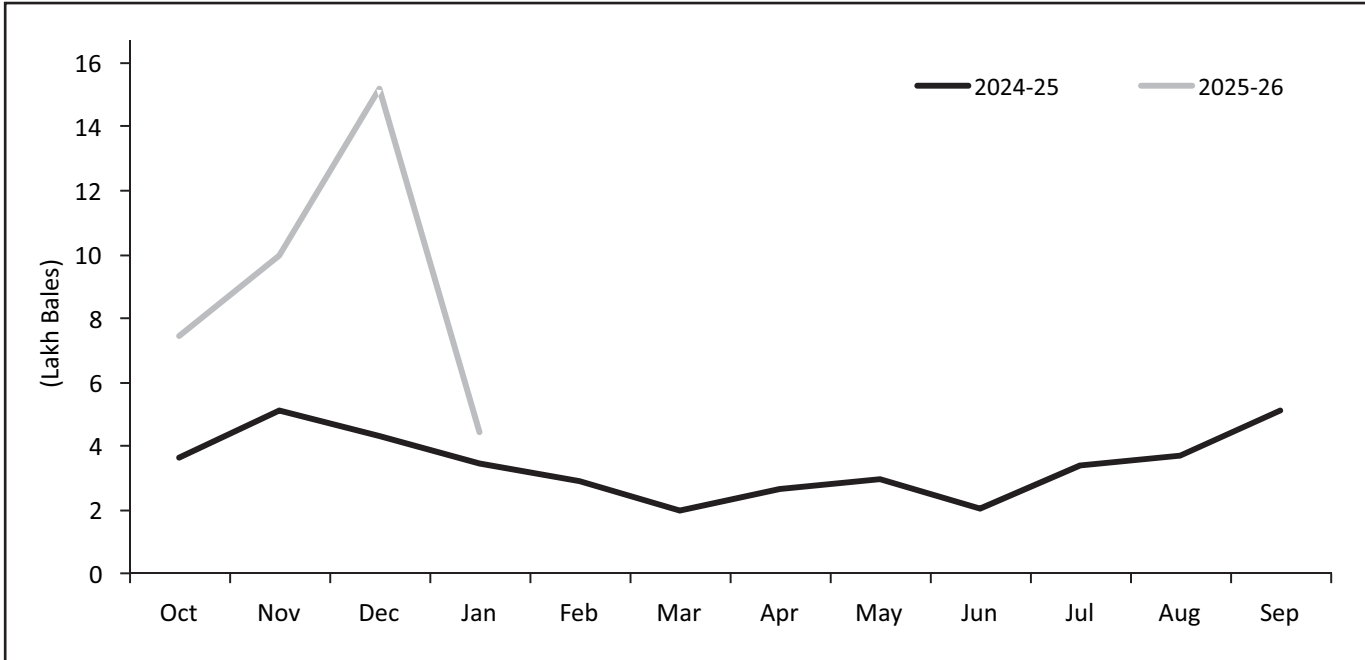
NIC 2008	Description	Weights	Feb. 2025	Feb. 2026	% Change
10	Manufacture of food products	5.3025	142.7	145.6	2.0
11	Manufacture of beverages	1.0354	116.9	115.0	-1.6
12	Manufacture of tobacco products	0.7985	76.3	63.3	-17.0
13	Manufacture of textiles	3.2913	106.7	107.1	0.4
14	Manufacture of wearing apparel	1.3225	121.4	101.2	-16.6
15	Manufacture of leather and related products	0.5021	88.1	88.6	0.6
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.1930	106.8	106.0	-0.7
17	Manufacture of paper and paper products	0.8724	72.2	78.4	8.6
18	Printing and reproduction of recorded media	0.6798	78.9	77.9	-1.3
19	Manufacture of coke and refined petroleum products	11.7749	131.8	131.4	-0.3
20	Manufacture of chemicals and chemical products	7.8730	121.9	127.4	4.5
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	4.9810	211.8	206.9	-2.3
22	Manufacture of rubber and plastics products	2.4222	114.6	113.0	-1.4
23	Manufacture of other non-metallic mineral products	4.0853	159.8	171.3	7.2
24	Manufacture of basic metals	12.8043	224.3	253.9	13.2
25	Manufacture of fabricated metal products, except machinery and equipment	2.6549	102.2	108.5	6.2
26	Manufacture of computer, electronic and optical products	1.5704	139.9	147.5	5.4
27	Manufacture of electrical equipment	2.9983	122.1	133.2	9.1
28	Manufacture of machinery and equipment n.e.c.	4.7653	124.4	137.1	10.2
29	Manufacture of motor vehicles, trailers and semi-trailers	4.8573	142.0	163.2	14.9
30	Manufacture of other transport equipment	1.7763	157.8	190.5	20.7
31	Manufacture of furniture	0.1311	233.8	236.4	1.1
32	Other manufacturing	0.9415	71.5	62.6	-12.4
	<b><i>Mining</i></b>	<b>14.3725</b>	<b>141.9</b>	<b>146.3</b>	<b>3.1</b>
	<b><i>Manufacturing</i></b>	<b>77.6332</b>	<b>148.4</b>	<b>157.3</b>	<b>6.0</b>
	<b><i>Electricity</i></b>	<b>7.9943</b>	<b>194.0</b>	<b>198.4</b>	<b>2.3</b>
	<b><i>General</i></b>	<b>100.0000</b>	<b>151.1</b>	<b>159.0</b>	<b>5.2</b>

# Raw Material Scenario

With the reinstatement of the 11 percent raw cotton import duty on long staple variety in January 2026 to protect domestic producers and stabilize local prices. Combined with the weakening rupee, higher freight and insurance costs and slowed vessel movements, the policy has further constrained raw cotton imports, resulting in higher input costs for mills and

limited access to cheaper foreign cotton. Industry continue relying on imports to supplement insufficient domestic supplies of machine-picked, contamination-free fiber by utilizing the duty-free provisions under the advance license scheme. In 2025-26 cotton season, Australia, Brazil and the United States were the top three cotton suppliers to India.

### India's Import of cotton



Major textile exporting countries competing with India including Bangladesh, Vietnam, Indonesia, Pakistan and Turkey allow duty free imports of cotton, enabling their spinning industries to procure raw materials at globally competitive prices. As a result, their textile sectors benefit from a structural cost advantage, while Indian mills face higher raw material costs due to import duties. Import policy comparison of major textile economies is shown below:

The price of Shankar-6, cotton a Gujarat-based variety and the most widely traded cotton in India, saw prices firm due stagnant yields across major growing States and the Government's reinstatement of import duties have further tightened supply and supported the price hike. Another factor influencing cotton prices is the rise in input costs such as fertilizers, pesticides, and agrochemicals driven by higher oil prices. Elevated oil prices tend to increase the cost of polyester

## Raw Material Scenario

### Import duties on Raw Cotton – International Comparison

Country	Customs Duty on Raw Cotton	Other Import Taxes
Bangladesh	0%	No VAT on Raw Cotton
Vietnam	0%	No VAT on Raw Cotton
Indonesia	0%	VAT applies (12%)
Pakistan	0%	GST 18%, Advance Tax 1%
Turkey	0%	VAT applies (10%)
China	1% in-quota tariff; 40% out-of-quota	VAT applies (9%)
India (2021-2025)	11%	IGST 5%

fiber, which can make cotton relatively more attractive and support cotton prices. India's crude oil import price increased significantly over the past month, rising from around USD 69 per barrel in late February 2026 to about USD 80 per

barrel in early March 2026, reflecting an increase of 16%. The rise driven primarily by geopolitical tensions in the Middle East and concerns over potential supply disruptions.

**Highlights of the study on Domestic Demand of Textiles  
"Market for Textiles & Clothing : National Household Survey 2024".**

The Hon'ble Union Minister of Textiles Shri Giriraj Singh released study report on Domestic Demand of Textiles "Market for Textiles and Clothing: National Household Survey 2024" in presence of Smt. Neelam Shami Rao, Secretary (Textiles) and the senior officers of the Ministry of Textiles on 6th April 2026. The survey estimates domestic demand for Textiles and Apparel (T&A) in the household sector.

As per the study conducted by the Textiles Committee under the Ministry, the domestic demand for textiles has experienced a robust growth during last 15 years. The market size of textiles has increased from Rs.4.89 lakh crores in

2010 to Rs.14.95 lakh crores in 2024 experiencing a Compound Annual Growth Rate (CAGR) growth of 8.3%. Out of total market size, the contribution of household has increased from Rs.4.18 lakh crores in 2010 to Rs.8.77 lakh crores in 2024 and played a pivotal role in driving the domestic demand of textiles in the country.

At the same time, the per capita demand increased from Rs.2,119 in 2010 to Rs.6,066 in 2024 experiencing a CAGR growth of 7.8%, reflecting a strong growth trajectory. The estimates show a robust growth in per capita demand in textiles by the individuals during the same period.

## Raw Material Scenario

Man Made Fibre (MMF) & blended fiber based products are contributing 52.2%, followed by 41.2% by cotton based products. On the other hand, Silk and Woollen fiber based products are contributing 5.2% and 1.3% respectively to the product basket.

In absolute terms, the demand for MMF & blended textiles recorded most significant growth, with demand increasing from Rs.1.47 lakh crores to Rs.4.47 lakh crores, with a CAGR of 8.28%.

Cotton maintained its position as the second most important fiber, with aggregate demand increasing from Rs.0.87 lakh crores to Rs.3.53 lakh crores with a CAGR of 10.53%.

The demand for Silk and Wool based products increased at CAGR of 8.93% and 7.02% respectively during same period.

### Key Highlights

- ❖ Market Size of Textiles Rs.14.95 lakh crores
- ❖ Domestic Market Size Rs.12.02 lakh crores
- ❖ Household Demand Rs.8.77 lakh crores
- ❖ Per Capita Demand Rs.6,066

One of the important findings of the study is the growing demand for the use/adoption of sustainable textile products among Indian consumers. The demand pattern indicates that Indian consumers have increasingly adopting sustainable textiles in addition opting for recycled /reprocessed/reused/retailored garments. The total demand for sustainable textiles including reused and retailed products estimated as Rs.37,000/- crores in 2024, out of which reused/retailored textiles account for around 58% to the consumption basket indicating growing role of reuse and recycling practices in promoting circularity in textile sector.

### 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**

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# Tamil Nadu - Leading Exporter of T&A in India

Tamil Nadu textile and clothing industry contributes over 25% of India's textile output, accounts 1/3<sup>rd</sup> of the textile business size in India, leading producer and exporter of textiles and clothing in the country, 40% of yarn production, 70% of knitwear production and provides employment of 28% of total employment in textile sector in India.

Tamil Nadu's apparel exports have continuously contributed the most to the State's textile trade. Exports increased from US\$4.53 Billion in 2017-18 to US\$4.74 Billion in 2018-19. There was a slight decrease in 2019-20 (US\$4.61 Billion) and a serious drop in 2020-21 (US\$3.95 Billion) during the pandemic. Apparel exports reached US\$5.26 Billion in 2021-2022 attributed to a robust rebound, which reflected growing demand worldwide. Although exports decreased slightly in 2022-2023 and 2023-2024, they surged to US\$5.41 Billion in 2024-2025, confirming Tamil Nadu's dominant position in the production and export of apparel.

A significant portion of Tamil Nadu's trade consists of textile exports, which comprise cotton textiles and man-made fabrics (MMF). Cotton textiles remain the backbone of Tamil Nadu's textile exports. Cotton textiles began at US\$1.88 Billion in 2017-18, increased to US\$2.00 Billion in 2018-19, and then declined to US\$1.81-1.84 Billion in 2019-21 as a result of pandemic disruptions and a downturn in global demand. Increased international orders, higher quality standards and greater supply chain efficiency were the main drivers of the strong

comeback to US\$ 2.82 Billion in 2021-2022. Then the export declined to US\$ 2.25 Billion in 2022-23 and US\$ 2.06 Billion in 2023-24 due to the weakening market conditions. In 2024-25, exports slightly recovered to US\$ 2.13 Billion suggests the beginning of recovery.

MMF exports began at US\$ 0.301 Billion in 2017-18 and progressively increased to US\$ 0.315 Billion in 2024-2025, demonstrating the state's increasing emphasis on synthetic textiles. In general, textile exports have demonstrated adaptation and durability, with potential for growth through product diversification, higher-value fabrics and tapping into emerging global markets. Growth in MMF reflects the state's strategic shift toward diversified fabrics.

The combined exports of apparel, cotton textiles and MMF reflect Tamil Nadu's overall performance in global trade. Total exports started at US\$ 6.95 Billion in 2017-18, increased to US\$ 7.28 Billion in 2018-19, but declined to US\$ 6.19 Billion in 2020-21 due to the pandemic. A sharp rebound occurred in 2021-22, with total exports peaking at US\$ 8.65 Billion, before moderating in 2022-23 and 2023-24. By 2024-25, total exports stabilized at US\$ 7.99 Billion, demonstrating resilience and recovery across all major segments, led by apparel, supported by cotton textiles and MMF. Table - 1 shows Tamil Nadu's Textile and Apparel export performance during 2017-18 to 2024-25.

## Tamil Nadu - Leading Exporter of T&A in India

**Table - 1 : Tamil Nadu's T&A Export Performance (US\$ Bn)**

Year	Apparel	Textile		Total Export	Growth %
		Cotton	MMF		
2017 - 18	4.53	1.88	0.30	6.95	
2018 - 19	4.74	2.00	0.31	7.28	4.7
2019 - 20	4.61	1.84	0.27	6.96	-4.4
2020 - 21	3.95	1.81	0.23	6.19	-11.1
2021 - 22	5.26	2.82	0.35	8.65	39.7
2022 - 23	5.30	2.25	0.28	7.98	-7.7
2023 - 24	4.69	2.06	0.29	7.15	-10.4
2024 - 25	5.41	2.13	0.32	7.99	11.7

### Textile & Apparel Export

India's Textile & Apparel (T&A) exports show a cyclical pattern over the period from 2017-18 to 2024-25. Exports declined from US\$ 35,382 Million in 2017-18 to a low of US\$ 29,477 Million in 2020-21, reflecting global disruptions. This was followed by a strong rebound to US\$ 41,142 Million in 2021-22. However, the recovery moderated in subsequent years, with exports stabilizing at US\$ 36,606 Million in 2024-25, reflecting a gradual stabilization alongside on-going global uncertainties.

### Tamil Nadu

Tamil Nadu consistently leads as the top T&A exporting State throughout the period. Its exports increased from US\$ 6,953 Million in 2017-18 to a peak of US\$ 8,656 Million in 2021-22, driven by its strong textile and

garment manufacturing base. Although exports dipped in 2022-23 and 2023-24, the State has demonstrated a strong and rapid recovery in 2024-25, reaching US\$ 7,997 Million. The overall trend highlights Tamil Nadu's resilience and its dominant role in India's T&A export landscape.

### Gujarat

Gujarat demonstrates a fluctuating yet moderately positive growth trend. Starting at S\$ 4,611 Million in 2017-18, exports rose to US\$ 6,337 Million in 2021-22, reflecting a strong post-pandemic rebound. This was followed by a dip in 2022-23, but exports gradually recovered to US\$ 5,646 Million in 2024-25. The State's performance underscores its strength in upstream textile segments such as fibre, yarn, and fabric, despite periodic volatility.

## Tamil Nadu - Leading Exporter of T&A in India

### Maharashtra

Maharashtra's export performance shows a gradual decline over the years with limited recovery. Exports fell from US\$ 4,419 Million in 2017-18 to US\$ 3,629 Million in 2020-21. Although there was a brief recovery in 2021-22, exports have since stabilized at lower levels, reaching US\$ 3,831 Million in 2024-25. This trend suggests structural challenges and relatively slower growth compared to other leading states.

### Uttar Pradesh

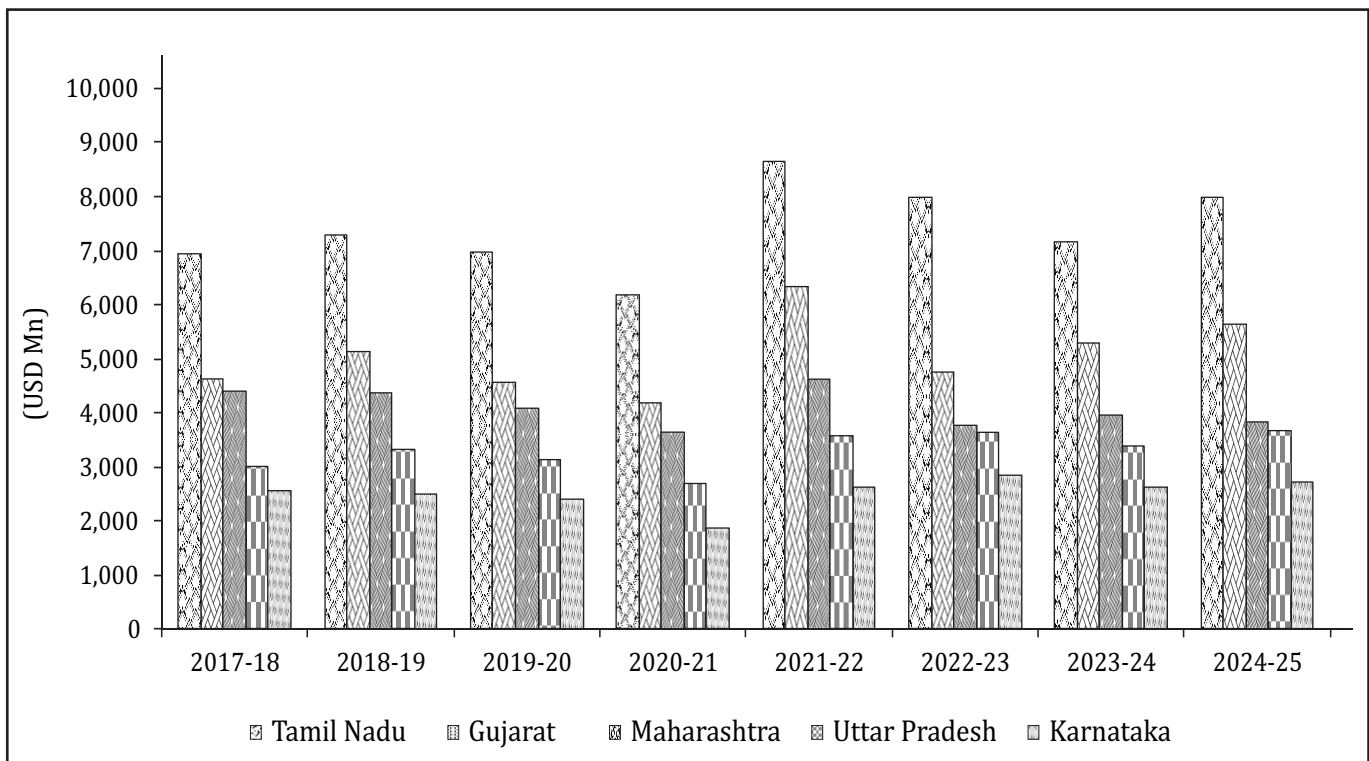
Uttar Pradesh exhibits a steady and improving export trajectory. After a dip to US\$ 2,700 Million in 2020-21, exports recovered

consistently, reaching US\$ 3,680 Million in 2024-25. The state's gradual upward trend reflects strengthening capabilities in apparel and handicraft exports, positioning it as an emerging competitor among the top exporting states.

### Karnataka

Karnataka shows moderate recovery with some fluctuations over the period. Exports declined significantly in 2020-21 to US\$ 1,857 Million but rebounded to US\$ 2,847 Million in 2022-23. While there were slight variations thereafter, exports reached US\$ 2,727 Million in 2024-25. The state's performance indicates gradual stabilization, supported by its apparel manufacturing sector.

**Chart - 1 : Top 5 T&A exporting States during 2017-18 to 2024-25**



## Tamil Nadu - Leading Exporter of T&A in India

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### Cotton yarn / Fabrics, made-ups, Handloom Export

India's exports of cotton yarn, fabrics, made-ups, and handloom products followed a fluctuating pattern over the period. Exports declined between 2019-20 and 2020-21, before witnessing a sharp recovery in 2021-22. In the subsequent years, exports moderated but remained stable, reaching US\$ 12,056 Million in 2024-25. This reflects a phase of recovery followed by gradual stabilization amid changing global demand.

### Gujarat

Gujarat maintained its position as the leading exporter throughout the period, with some year-to-year fluctuations. During 2017-18 to 2019-20, exports remained relatively stable around the US\$ 2,700-3,000 Million range, followed by a slight dip in 2020-21. A significant surge was observed in 2021-22, when exports peaked at US\$ 4,116 Million. In the following years, exports declined but gradually recovered, reaching US\$ 3,487 Million in 2024-25. The state's performance highlights its strong base in cotton production and spinning.

### Tamil Nadu

Tamil Nadu consistently ranked second, showing a stable and steady trend over the years. Exports remained around US\$ 1,800-2,000 Million from 2017-18 to 2019-20, followed by a minor dip in 2020-21. The state experienced strong growth in 2021-22, reaching a peak of US\$ 2,821 Million. However,

exports moderated in the subsequent years, settling at US\$ 2,136 Million in 2024-25. Its well-integrated textile ecosystem supports this steady performance.

- ❖ The dip post 2021-22 reflects broader global demand contraction, inflation and supply chain shifts.
- ❖ Tamil Nadu may need to invest in energy efficiency, ESG compliance and textile machinery modernization to sustain leadership.
- ❖ Tamil Nadu's export of cotton yarn, fabrics and made ups have remained largely stagnant over the past several years, recording a modest CAGR of 1.08% over the last seven years.
- ❖ Tamil Nadu strengthen value added cotton products (e.g. organic yarn, technical textiles)
- ❖ Enhance handloom export branding and digital market access.

### Maharashtra

Maharashtra displayed a relatively stable but slow-growing trend. Exports increased between 2017-18 and 2018-19, followed by a gradual decline up to 2020-21. A recovery was seen in 2021-22 with exports rising to US\$ 1,938 Million, but this was followed by stabilization at lower levels, reaching US\$ 1,503 Million in 2024-25. The state's performance indicates consistency but limited growth momentum compared to leading states.

## Tamil Nadu - Leading Exporter of T&A in India

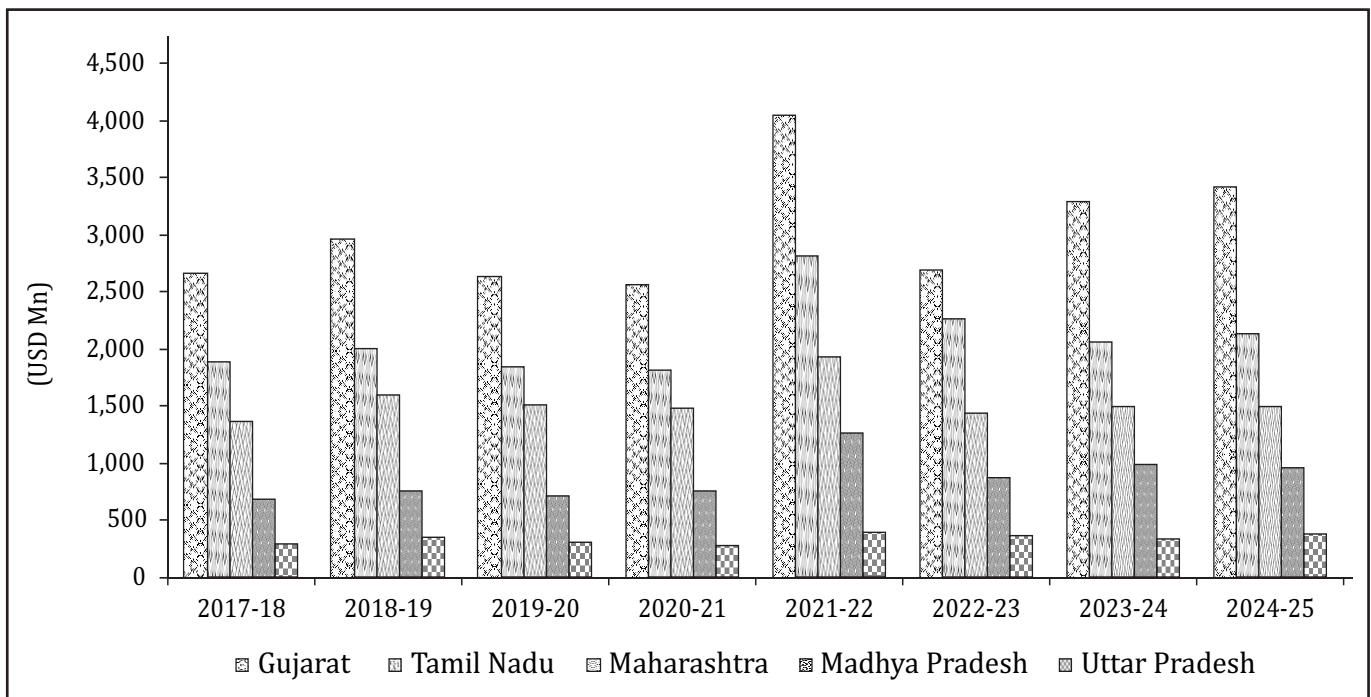
### Madhya Pradesh

Madhya Pradesh emerged as a growing exporter during the period, despite some fluctuations. Exports showed gradual improvement up to 2020-21, followed by a sharp increase in 2021-22 to US\$ 1,264 Million. After this peak, exports declined but stabilized around US\$ 956 Million in 2024-25. The state is gradually strengthening its position in cotton-based exports.

### Uttar Pradesh

Uttar Pradesh recorded relatively lower export values but demonstrated gradual improvement over time. Exports remained stable at lower levels until 2020-21, followed by a recovery in 2021-22. In the following years, exports fluctuated slightly but reached US\$ 384 Million in 2024-25. The state's growth is supported by its handloom and made-ups segment.

**Chart - 2 : Top 5 Cotton yarn/fabrics, made ups, Handloom exporting States during 2017-18 to 2024-25**



### Man-made yarn / fabrics, made-ups Export

India's exports of man-made yarn, fabrics, and made-ups exhibited a varying trend between 2017-18 and 2024-25. Exports started steadily around US\$ 4,800-5,000 Million during 2017-19, before declining to US\$ 3,806 Million

in 2020-21 due to global disruptions. A strong rebound followed in 2021-22, reaching US\$ 5,590 Million, but exports moderated in the following years, stabilizing at US\$ 4,869 Million in 2024-25, reflecting cautious recovery amid ongoing market uncertainties.

## Tamil Nadu - Leading Exporter of T&A in India

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### Gujarat

Gujarat consistently held the top position in man-made yarn and fabrics exports. Exports rose from US\$ 1,166 Million in 2017-18 to a peak of US\$ 1,445 Million in 2021-22, before moderating to US\$ 1,371 Million in 2024-25. The state's leadership is supported by strong industrial infrastructure, advanced production facilities, and quick recovery capabilities, making it the most resilient exporter in this segment.

### Maharashtra

Maharashtra started with exports of US\$ 1,017 Million in 2017-18, but faced a decline to US\$ 682 Million in 2020-21. A partial recovery occurred in 2021-22 with exports rising to US\$ 910 Million, though the state gradually declined to US\$ 850 Million in 2024-25. The slower growth reflects market challenges and underscores the need for diversification and modernization to regain pre-pandemic momentum.

### Tamil Nadu

Tamil Nadu's exports remained relatively stable, hovering around US\$ 300 Million in the pre-pandemic period, dipping to US\$ 233 Million in 2020-21, and rising to US\$ 348 Million in 2021-22. Exports later stabilized at US\$ 315 Million in 2024-25, reflecting a well-established man-made fiber sector capable of maintaining performance despite global volatility.

- ❖ The overall trend is stagnating, indicating competitive pressure from other countries, reduced global demand and need for the innovation in synthetic segment.
- ❖ Indicates revival in man-made fabric value chains and restructuring of traditional cotton focussed infrastructure to accommodate MMF.
- ❖ Low growth in Tamil Nadu and other southern states in MMF suggests need for capacity modernization and fiber diversification.

### Madhya Pradesh

Madhya Pradesh demonstrated consistent export performance, ranging from US\$ 267 Million in 2020-21 to a peak of US\$ 369 Million in 2021-22, before moderating to US\$ 284 Million in 2024-25. The state shows growing competitiveness with potential to expand its product range and strengthen infrastructure to increase its share in man-made yarn and fabric exports.

### Karnataka

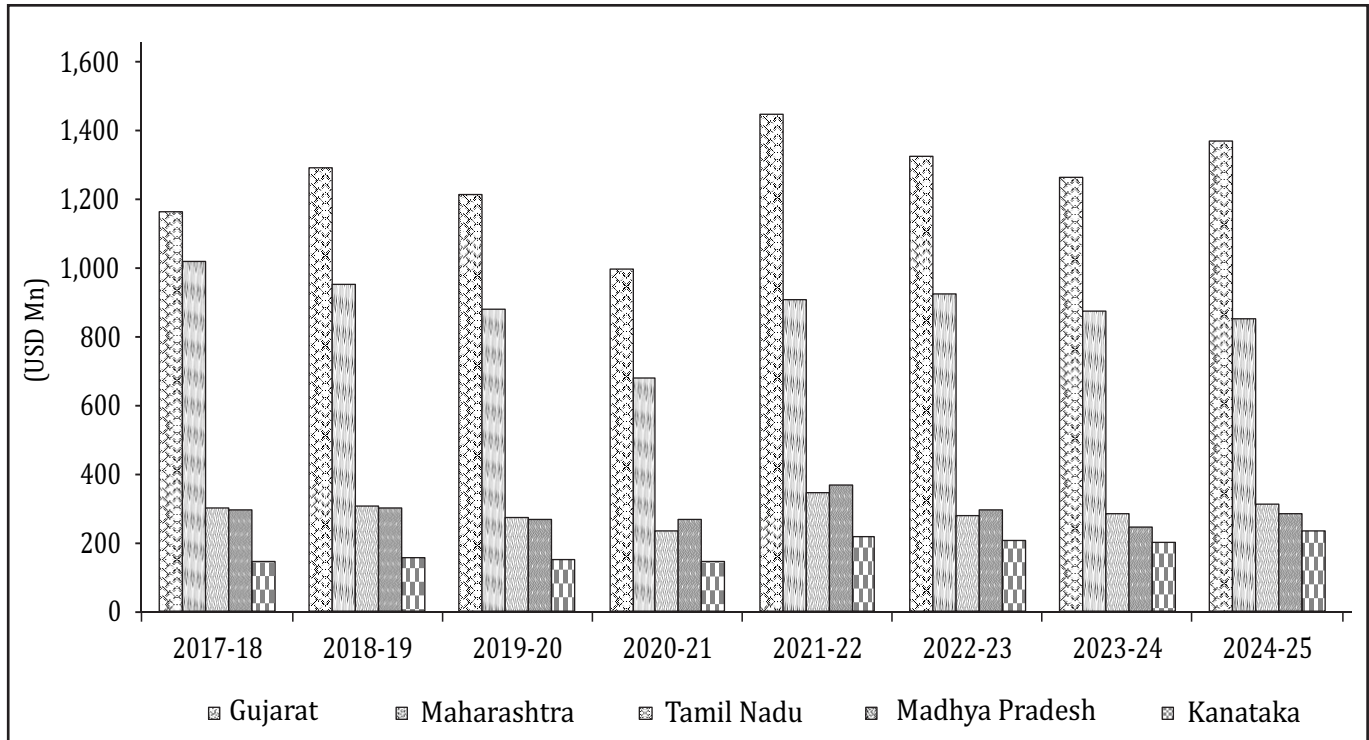
Karnataka's exports show a generally stable trend with some fluctuations over the years. Starting at US\$ 149 Million in 2017-18, exports increased slightly to US\$ 156 Million in 2018-19, before dipping marginally to US\$ 154 Million in 2019-20 and further to US\$ 147 Million in 2020-21. A significant rise is observed in 2021-22, where exports

## Tamil Nadu - Leading Exporter of T&A in India

reached US\$ 217 Million, followed by a slight decline to US\$ 206 Million in 2022-23 and US\$ 203 Million in 2023-24. The trend improves

again in 2024-25, with exports climbing to US\$ 235 Million, marking one of the higher values in the given period.

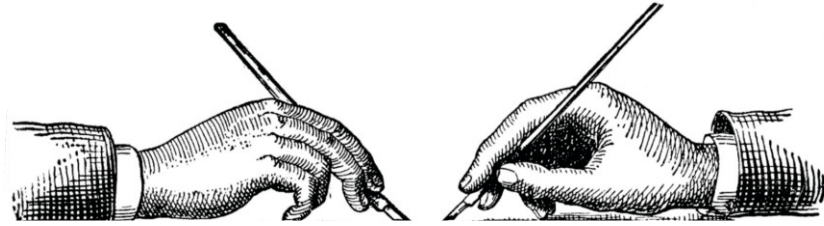
**Chart - 3 : Top 5 Man-made yarn/fabrics, made ups exporting States during 2017-18 to 2024-25**



### 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.

## Editorials



### **India displaces China as largest exporter of cotton products to US**

India has displaced China as the largest supplier of cotton products, such as apparel and home textiles, to the United States during 2025, according to the USDA's latest global market analysis. Factors such as higher tariffs and US firms' reducing dependence on China helped other suppliers, including India, gain market share in that country.

US cotton product imports were flat in calendar year 2025 at 3.3 Million tonnes (mt), equal to the 15-year average. Imports from China went down to about 0.5 mt in 2025, while imports from India were around 0.6 mt during the year.

The US had announced several rounds of tariffs on China that ranged from 10 to 125 per cent. While other countries also had varying levels of tariffs applied throughout the year, they were less than half of the highest rate applied on China. These conditions allowed India and other suppliers, such as Vietnam, Bangladesh, Pakistan, Mexico and Cambodia, to expand market share in the US, the USDA said.

Further, the USDA said India benefited from vertically integrated textile supply chains that

enhance firms' ability to comply with traceability standards.

In contrast, firms have been lessening their dependence on China due to the Uyghur Forced Labour Prevention Act (UFLPA) and the perception of increasing geopolitical risk, which has expanded to include tariff uncertainty. US cotton product imports from China have dropped 60 per cent since peaking in 2010.

The US is the largest importer of cotton products. Though imports were flat, the retail sales at clothing stores in the US are estimated to have risen 5 per cent to a new record, the USDA said. Despite strong consumer demand, flat imports suggest that retailers drew inventories lower to minimise costs related to the fluid tariff environment. During 2026, the imports of US cotton products are expected to rise because of low retailer inventories and stable consumer demand, the USDA said.

Changing trade policies will continue to influence where these products are sourced from. Further, the USDA said the global production for 2025-26 is forecast up 1.1 Million bales (of 480 pounds each) to 121 Million bales on higher crops in Brazil and China.

## Gleanings from the Press

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Global consumption is forecast down more than 0.1 Million bales to 118.6 Million as reduced demand in Pakistan, Bangladesh, Mexico and Vietnam more than offset the higher demand in China. Global trade was raised by 0.2 Million bales to 43.9 Million on higher exports from Australia. Higher imports by India offset the lower imports by Pakistan, Bangladesh and Vietnam. Global ending stocks were raised nearly 1.3 Million bales to 76.4 Million as higher ending stocks in India and Brazil more than offset the lower ending stocks in Australia and Argentina.

*Business Line 12.03.2026*

### **Nearly 190 acres allotted to 23 investors at PM MITRA Park in Virudhunagar**

Of the total area of 1,052 acres at the PM Mega Integrated Textile Regions and Apparel (PM MITRA) park at Virudhunagar that was inaugurated in 2023, 190.44 acres were allotted to 23 investors on February 27, 2026.

This would bring in Rs.2,192.21 crore investment and was likely to generate close to 15,000 jobs, an official press release from the Union Ministry of Textiles.

The industries that would come up would produce yarn, fabric, garments, and technical textiles. There would also be integrated plants, textile processing and finishing units.

The ninth meeting of the Board of Directors of PM MITRA Park, Tamil Nadu Limited, held under the chairpersonship of the Textiles Secretary Smt Neelam Shami Rao was attended by Mr Rohit Kansal, Additional Secretary,

Ministry of Textiles; Mr Arun Roy Vijayakrishnan, Secretary, Industries, Investment Promotion and Commerce Department, Tamil Nadu; and Mr Senthil Raj Krishnan, Managing Director of SIPCOT, Tamil Nadu.

A 20 Million litres a day zero liquid discharge plant at the park would enable clean and sustainable processing facilities to a number of processing units, including small and medium sized units. The Park would be developed at Rs.1,894 crore and includes provisions for a 15 Million litres a day common effluent treatment plant, a 20 MW solar power plant, centralised steam boilers, and nearly 13 lakh sq ft. ready to move plug and play units. Nearly Rs.550 crore of infrastructure works are already under execution in and around the park site and the development works will be completed by the end of next year, the press release said.

*The Hindu 02.03.2026*

### **China, Vietnam & Bangladesh begin buying Indian cotton yarn**

Demand for Indian cotton yarn has picked up from countries such as China, Bangladesh and Vietnam, among others, following the disruption in global logistics after the breakout of war in West Asia.

"There is a very good demand for cotton yarn from China. Due the disruption in the global supply chain, whatever cotton the Chinese buyers may have bought may not reach in time. So instead of buying cotton, they are buying cotton yarn from India to meet their immediate requirement," said Mr Vinay N Kotak, President,

## Gleanings from the Press

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Cotton Association of India (CAI). He said cotton imports were affected because of this disruption in the supply chain. The freight rates have gone up and also the prices have moved up. Also, the transit time has increased substantially, maybe by at least 10-15 days, he added.

To ease the cotton supply situation, China increased the quota for import compared to last year. The National Development and Reform Commission (NDRC) of China issued 3 lakh tonnes of cotton sliding-scale duty quota to ease the current tight supply situation. This year, the quota is higher by 1 lakh tonnes when compared with 2025.

A sourcing agent in Raichur, said that the demand for yarn is good from China and also from countries such as Bangladesh and Vietnam. Yarn prices have improved by Rs.10-15 per kg on rising demand. Also, the domestic prices are seen improving on firming demand and tracking the global market. "There is good demand for cotton due to the better yarn prices," he said.

Taking into account the emerging developments in the markets, the CAI has revised upwards the domestic off-take of cotton by 10 lakh bales (of 170 kg each) to 315 lakh bales as of end-February, compared to the end-January projections of 305 lakh bales.

*Business Line 18.03.2026*

### **Textile exporters welcome RELIEF scheme**

The Confederation of Indian Textile Industry (CITI) has said that the Resilience & Logistics Intervention for Export Facilitation (RELIEF)

scheme under the Export Promotion Mission will offer a dose of relief to the MSME-dominated textiles and apparel sector, for which the 2025-26 financial year was hugely challenging.

Mr Ashwin Chandran, CITI chairman, said that the scheme aims to alleviate the challenges faced by exporters due to the ongoing turbulence in West Asia. The package announced under RELIEF should be implemented quickly. A significant portion of India's textile and apparel exports is for west Asia with the UAE being one of the largest markets for Indian textile and apparel exporters. In 2024, the UAE was the fourth largest market for India's textile and apparel exports, after the US, the EU and Bangladesh.

Any increase in the cost of logistics and insurance adds to the challenges of the exporters with significant increase in operating costs. The textiles and apparel exports were severely impacted in the second half of 2025 due to the steep 50% US tariff on Indian goods, which was in place from late August 2025 to early February 2026.

*The Hindu 20.03.2026*

### **Rise in raw material costs pinches Tiruppur textile industry**

Textile exporters and processing units in Tamil Nadu are grappling with a fresh challenge now - a sharp increase in raw material prices triggered by the ongoing West Asia crisis. Industry sources said the surge in the costs of key inputs used in textile processing and garment manufacturing are already beginning to ripple

## Gleanings from the Press

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across the supply chain in Tiruppur, India's largest textile cluster.

Mr Rajkumar Ramasamy of Best Corporation said the spike in raw material costs could affect the global competitiveness of the Tiruppur knitwear industry. "Polyester supply itself is affected, which in turn impacts synthetic fabrics, sewing threads and other inputs," he said.

Mr Kumar Duraisamy, MD, Tiruppur-based Eastern Global Clothing, said the cost of polyester fibres had increased about 6 per cent and the prices of textile dyes, finishing chemicals, solvents and auxiliaries had also moved up. Prices of coal used by textile processing units have increased 30-35 per cent, he said, adding that these had pushed up garment manufacturing costs nearly 5 per cent.

The Tiruppur dyeing industry has announced an increase in charges following a steep rise in the prices of essential chemicals and fuels used in textile processing. According to industry representatives, polyester prices had also increased sharply following a rise in yarn costs, with prices going up by about 14 per kg or 20 per cent.

Mr P Gandhirajan, President of the Tiruppur Dyers Association and MD of Tiruppur-based Atul Process, said the conflict had disrupted supply chains and pushed up prices of major raw materials used in dyeing and processing.

Consequently, units had been forced to increase processing charges Rs.10 per kg for bleaching and light colours, Rs.15 per kg for medium colours and Rs.20 per kg for dark colours, he said. He said the suspension of commercial and

industrial gas supply and a rise in the cost of firewood used by dyeing units had added to the burden.

However, exporters said passing on costs to international buyers will be difficult. "It is very difficult to increase prices. However, due to the crisis' global impact, buyers may consider a small increase," he said.

Open-end spinning mills have been severely affected by polyester price hike. Nearly half of the open-end mills use polyester fibre as the main raw material. In March, polyester firms raised polyester cost four times. Normally, they fix price on the 1st and 15th of every month. However, due to West Asia crisis, they increased once in every two days, said Mr G Arulmozhi, President, Open End Spinning Mills Association.

### **Include apparel export industry in commercial LPG cylinder allotments**

Apparel Export Promotion Council (AEPC) has urged the Tamil Nadu Govt to include the apparel export industry within the 20% commercial LPG cylinder allotment permitted during the current LPG shortage. In a representation addressed to State Ministers Mr R Sakkarapani and Mr TRB Rajaa, AEPC chairman Dr A Sakthivel highlighted the urgent need to ensure uninterrupted LPG supply to the apparel export industry. He said the LPG shortage has severely impacted the manufacturing process in industries.

LPG is a critical fuel used extensively in garment manufacturing, especially in processing segments such as dyeing, washing, compacting and finishing units that form the backbone of the

## Gleanings from the Press

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apparel export ecosystem. Many of these units fall under the MSME category and are already operating under significant cost pressures. He further emphasized that any disruption at this stage may result in cancellation of orders and diversion of business to competing countries, which would be difficult to recover. If the situation persists, many factories may be forced to temporarily shut down, which would severely affect the livelihood of workers and their families.

Dr Sakthivel appealed to the Tamil Nadu Govt to consider including the apparel export industry within the 20% commercial LPG cylinder allotment so that the sector can continue its operations without disruption during this challenging period.

*The Times of India 16.03.2026*

### **Surcharges, longer routes push up cost for apparel exporters**

The ongoing conflict in West Asia is pushing up costs for India's apparel exporters, adding between Rs 12 and Rs 55 for every single garment exported due to longer shipping routes and war-related surcharges, according to estimates by the Apparel Export Promotion Council (AEPC).

The increase comes as shipping companies impose an Emergency War Surcharge (EWS) on cargo moving to Gulf countries. AEPC said the surcharge raised container costs by about \$1,200 per 20 foot container, increasing the cost of individual garments depending on the product category.

For instance, in a 20-foot container, the surcharge can add to about Rs.12 per shirt, Rs.18 per trouser, Rs.37 per ladies' dress, Rs.43 per 2-piece suit, and Rs.55 for a winter coat, the industry body's estimates show. Shipping disruptions also added to the pressure as shipping companies suspended vessel crossings through the Strait of Hormuz and the Red Sea, forcing cargo to be rerouted or rescheduled.

Exporters said many shipments are now being diverted around the Cape of Good Hope, which adds nearly 6,500 km to the journey and delays deliveries by 10 to 15 days, raising fuel and insurance costs.

West Asia remains an important market for India's ready-made garments, accounting for nearly 11.8% of the country's apparel exports. Data from the Directorate General of Commercial Intelligence and Statistics (DGCI&S) shows India exported garments worth about \$1.9 billion to West Asian countries in the previous financial year.

*The Times of India 16.03.2026*

### **India notes strong potential for growth in textile exports to Japan**

At the seventh joint committee meeting under the India-Japan Comprehensive Economic Partnership Agreement (CEPA) held in Tokyo, Indian commerce secretary Mr Rajesh Agrawal noted the significant potential of export of Indian textiles, pharmaceuticals, agriculture and services to Japan. Both sides reviewed issues relating to the implementation of the CEPA and deliberated on ways to further

## Gleanings from the Press

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strengthen bilateral economic engagement, the Indian Ministry of Commerce & Industry said in a release.

Discussions covered a wide range of issues, including bilateral trade and investment, improving the business environment. While the Japanese side underscored the need to enhance and diversify bilateral trade and investment, Mr Agrawal underlined the importance of achieving a more balanced bilateral trade relationship to ensure long-term sustainability.

A trade and investment roadshow was organised by the embassy of India in Japan in collaboration with the Confederation of Indian Industry (CII) and the Japan Business Federation (Keidanren), focusing on promoting trade from India and facilitating greater investment flows from Japanese companies.

*Fibre2Fashion 06.03.2026*

### **Rising Sulphur Prices Add Pressure to India's Textile Dye Chain**

Rising sulphur prices are placing fresh cost pressure on India's textile dye industry, potentially squeezing margins across the downstream textile value chain, including dye manufacturers, processors and garment exporters. Industry participants warn that the surge in sulphur costs-an essential raw material used in the production of sulphur dyes-could translate into higher dyeing costs, particularly for cotton and denim processing units.

India relies heavily on imported sulphur, with much of the supply sourced from the Middle

East, mainly from the UAE, Oman, Saudi Arabia, Kuwait and other regional suppliers where sulphur is recovered as a by-product of oil and gas refining.

Recent supply disruptions, rising freight rates and logistical uncertainties-especially around the Strait of Hormuz have tightened availability and pushed prices upward. As a result, dye manufacturers are facing increased input costs, which are gradually being passed along the textile production chain.

Sulphur-based dyes are widely used in textile processing because they are cost-effective and provide durable colours, making them especially popular in cotton fabrics and denim production. Any sustained increase in sulphur prices therefore has a direct impact on dye manufacturing costs and the broader textile finishing sector.

Industry observers note that smaller dye manufacturers and textile processors could feel the greatest strain, as they often operate on thinner margins and have limited capacity to absorb sudden raw material price increases.

If the upward trend in sulphur prices continues, it may eventually influence fabric processing costs and, in turn, apparel prices in both domestic and export markets. For India's textile sector-already navigating fluctuating raw material prices and global supply chain uncertainties-the surge in sulphur costs represents another challenge for maintaining competitiveness in the global apparel trade.

*Apparel Resources 06.03.2026*

## Gleanings from the Press

### India well-prepared to meet 270 GW peak power demand

India is well-prepared to meet the projected peak power demand of 270 GW during this Summer season, Union Power Minister Shri Manohar Lal said . The statement assumes significance in view of the ongoing West Asia crisis, when the use of electric appliances like induction cookers, as well as electric vehicles, is likely to increase.

Addressing the Bharat Electricity Summit 2026, he said, "We always keep an eye on our peak demand. Our peak demand, that is, the maximum amount of power we need at any given time." Two years ago, in 2024-25, India had a peak demand of 250 GW. In 2025-26, the

Power Ministry had set a higher target of 270 GW, but due to weather conditions, peak demand did not increase to the estimated levels, he added.

"This time too, we've made preparations that if we need to supply up to 270 GW of power this May-June, then we are prepared. There's no problem," the Minister said. About the power demand, Khattar stated that this is only going to increase in the future as the era of AI dawns, data centres are built and EVs are used. "As we progress in all these areas, we'll need at least 30 GW for these tasks over the next five-six years. At that time, our target of 300 GW (peak power demand) will be reached on its own," he pointed out.

*Business Line 20.03.2026*



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# REVIEW

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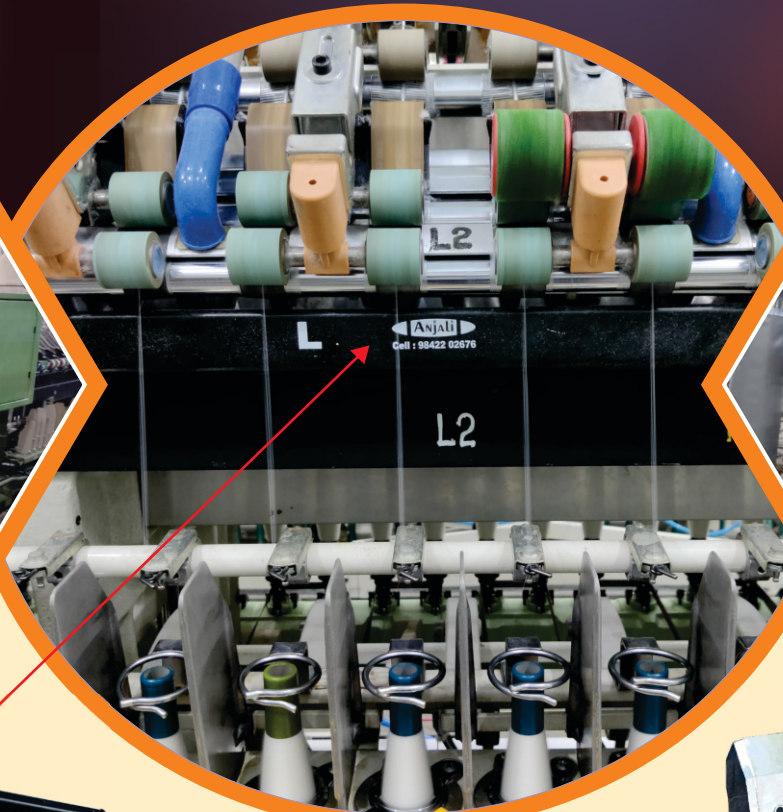
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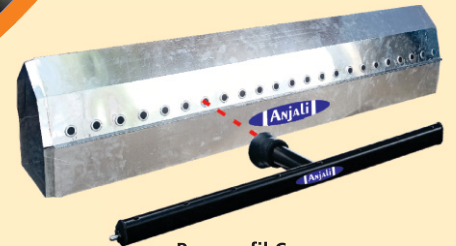
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Pneumafil Individual Type  
Duct Conversion for Common Suction Pipe



Pneumafil Common  
Suction Type Duct & Pipes

## PNEUMAFIL GROUP SUCTION PIPE WITH FAN BOX CONVERSION

POWER SAVING AND SUCTION IMPROVEMENTS LR6s / G5/1 LR60A, LRJ9 AXL, LR9 AXL  
Reiter Ring Frame and KTTM All Compact Spinning Ring Frame (1200 Spindle)

SUCTION and POWER SAVING DETAILS

### CONVERSION

#### BEFORE

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OE	100 mm
MD	70 mm
GE	45 mm

Old Suction Pipe and Fan - 6 Ams  
3.88 Units Per Hour

Per Day 2.26 X 23.5 Hrs. = 53 Unit Power Saving

Per Month 53 x 30 Days = 53 x Unit Cost Rs. 9/-

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