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REVIEW

Vol. - XXXI No. 5
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May
2026

In this Issue...

SIMA Delegation met the Hon'ble Chief Minister on 20th May 2026, appealed to resolve power related issues

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Editor :

Dr K Selvaraju, Secretary General

The Southern India Mills' Association

"Shanmugha Manram,

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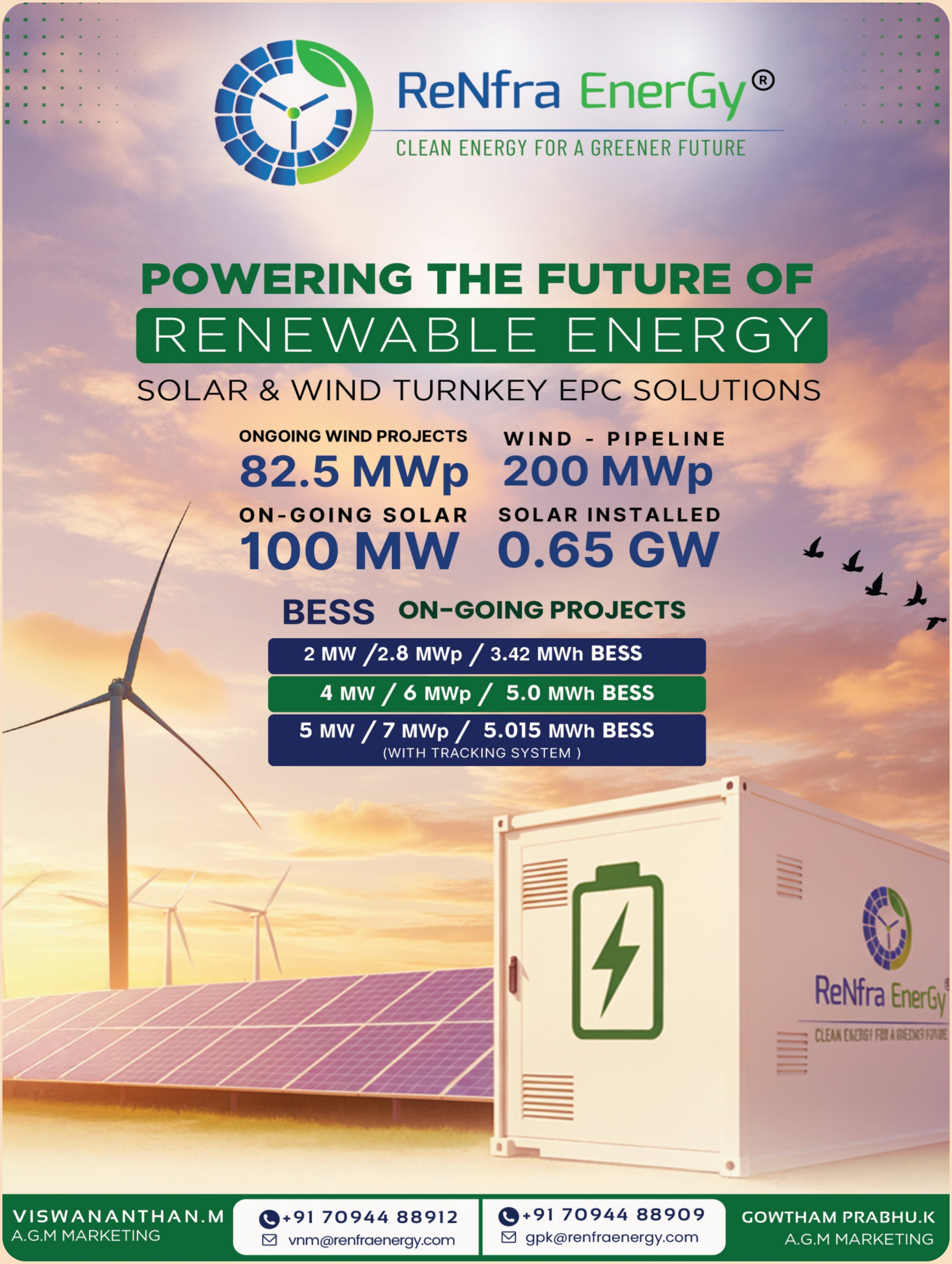
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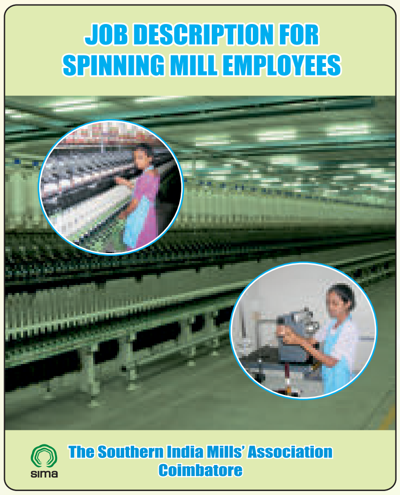

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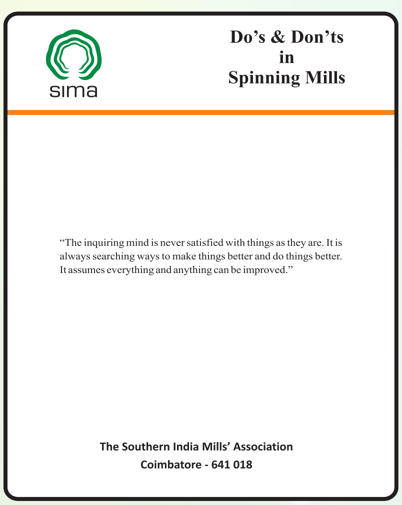

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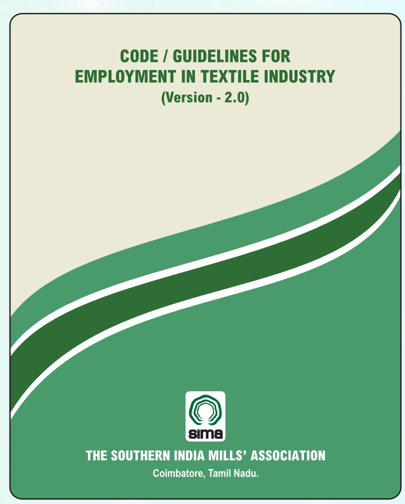

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From the Chairman

Friends,

Raw materials form the cornerstone for economic development on the national and international platform, from the earliest trade routes to today's digital marketplaces. Amidst this competitive environment, the rising costs and unpredictability of quality raw cotton have emerged as a key challenge for the textile industry. The sky rocketing price of raw cotton is eating into the prevailing wafer-thin margins, consequently shrinking our profits.

In this scenario, the exemption granted from the 5% Basic Customs Duty, 5% Agriculture Infrastructure and Development Cess (AIDC) and 10% Social Welfare cess on both, totaling 11% on import of cotton, for a specific period (i.e) from 1st June 2026 to 31st October 2026 is highly appreciable. On behalf of the entire textile fraternity,

I thank Hon'ble Prime Minister, Shri Narendra Modiji, Smt Nirmala Sitharaman, Hon'ble Minister for Finance, Shri Shivraj Singh Chouhan, Hon'ble Minister for Agriculture and Farmers' Welfare, Shri Piyush Goyal, Hon'ble Minister for Commerce & Industry and Shri Giriraj Singh, Hon'ble Minister for Textiles, Government of India and Hon'ble Chief Minister of Tamil Nadu Thiru C Joseph Vijay and various State Chief Ministers and Central & State Government Officials for timely help in achieving the pressing need of the industry.

We also thank Thiru C Joseph Vijay, Hon'ble Chief Minister of Tamil Nadu, Thiru R. Nirmalkumar, Hon'ble Minister for Energy Resources and Law, Government of Tamil Nadu for sparing valuable time to discuss the issues impacting the textile and clothing industry with the SIMA delegation on 20th May 2026. We hope all our submissions would be considered favourably for the benefit and sustained growth of the Textile and Clothing industry in Tamil Nadu.

The pressing issue concerning the non-disclosure of blend ratios in the packaging of 100% cotton yarn, raised by the downstream sector, has gained significant attention. This practice has been causing serious challenges for fabric manufacturers/downstream sectors during the dyeing, printing and finishing processes.

In this context, a meeting was convened by the Textile Commissioner on 26th May 2026 to deliberate the concerns raised by downstream sectors. To avoid the Ministry of Textiles from prescribing stringent labelling provisions on the basis of the issue being taken up by the downstream sectors, I urge all the Member Mills to indicate the percentage of fibre included in the manufacturing process of 100% cotton yarn. This recommendation is in line with the applicable legal provision under the Textiles (Consumer Protection) Regulation, 1988 issued under the Essential Commodities framework.

From the Chairman

During April 2026, India's textile and apparel exports declined 4.02 per cent year-on-year to $2.88 Billion, reflecting pressure from weak global demand and geopolitical disruptions. Textile exports rose 2.40 per cent to $1.67 Billion, while apparel exports declined 11.66 per cent to $1.21Billion. The sector's share in India's total merchandise exports slipped to 6.59 per cent from 7.84 per cent, a year earlier. On the import side, raw cotton and cotton waste imports fell 6.10 per cent to $81.58 Million. Imports of textile yarn, fabric and made-ups declined 28.17 per cent to $74.53 Million during April 2026.

On the other hand, Issues are plaguing for the Man-Made Fibre (MMF) sector. The withdrawal of Quality Control Orders (QCOs) on MMF fibres and filament yarns provided much-needed flexibility to manufacturers and helped sustain the sector's growth momentum. However, the domestic fibre manufacturers have approached the Gujarat High Court against the withdrawal and the court has stayed the same. Consequently, the Customs Authorities have also issued an instruction seeking submission of BIS certificates for import of the said products. The Association is taking up the matter with the government, requesting to address the issue.

India's textile industry is currently witnessing significant export opportunities arising from the global shift in sourcing patterns and the successful conclusion of major Free Trade Agreements. The timely removal of the 11% import duty on cotton, along with other relief measures extended by the Government of India to mitigate the impact of the Middle East crisis, and its continued emphasis on scale, innovation, and global integration, have positioned the textile sector to drive economic growth, generate employment and further strengthen India's position as a leading global textile and apparel hub.

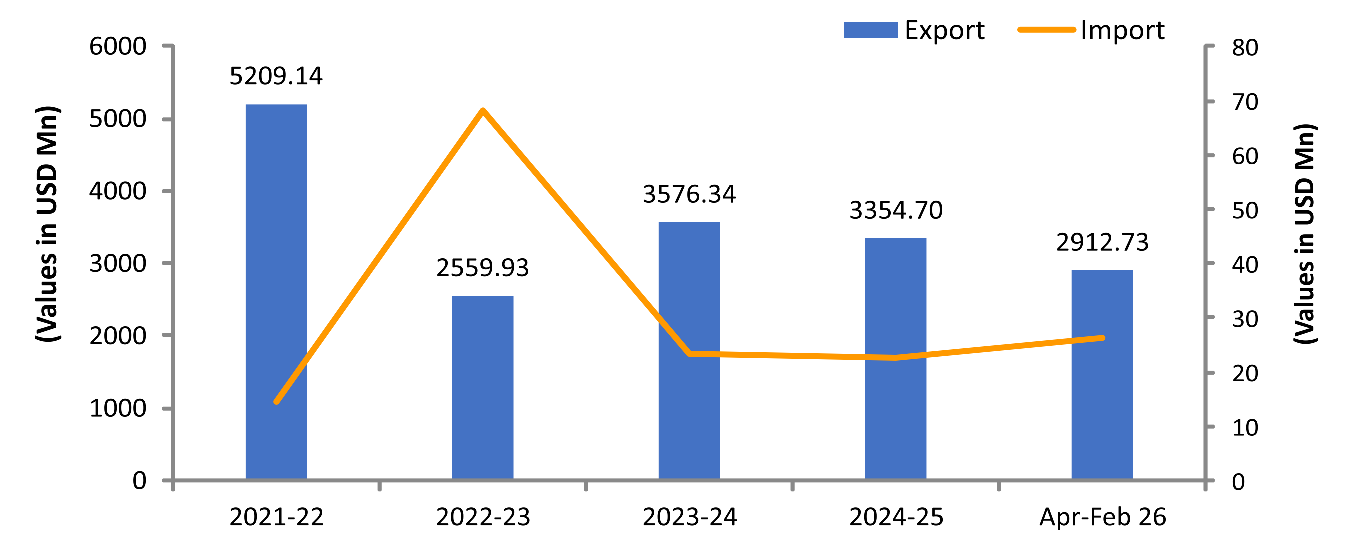
With the collective efforts of industry and government, we are confident that the Indian textile sector will not only overcome current challenges but also seize emerging opportunities to strengthen its leadership in the global textile and apparel marketplace.

Durai Palanisamy
Chairman

India's Trade Performance of HS Code 5205 (Cotton Yarn)

$2912.73M Exports (Apr - Feb 2026)	**-4.57%** (YoY Growth) (Apr - Feb 2025 Vs Apr - Feb 2026)	**$26.14M** Imports (Apr-Feb 2026)	**29.72%** (YoY Growth) (Apr-Feb 2025 Vs Apr-Feb 2026)

Chart - 1 : Export and Import Performance of HS Code 5205



Source : DGCIS

Table - 1 : Tamil Nadu District wise Export Performance of HS Code 5205

(Values in USD Mn)

S.No.	Districts	FY 24	FY 25	Apr - Feb 2026
1	Coimbatore	166.25	140.49	105.65
2	Virudhunagar	69.95	78.05	58.71
3	Madurai	63.78	66.17	56.69
4	Dindigul	76.45	49.85	52.59
5	Tiruppur	46.64	39.26	43.39
6	Erode	26.77	25.54	19.04
7	Chennai	14.20	7.68	8.54
8	Tirunelveli	28.16	9.95	4.11
9	Namakkal	10.09	3.28	3.63
10	Salem	1.57	0.84	1.76
	Others	8.80	4.52	2.23
	Total	**512.66**	**425.63**	**356.35**

Source : DGCIS

Central Government temporarily exempts all customs duties on import of cotton from 1st June, 2026 till 31st October, 2026

To augment availability of cotton for the Indian textile sector, the Central Government has temporarily exempted all customs duties on import of cotton from 1st June, 2026 till 31st October, 2026.

The temporary duty exemption is expected to reduce input costs across the textile and apparel sector, thereby providing a targeted relief to manufacturers and consumers, while also keeping the interests of domestic farmers in mind.

Overall, the measure is anticipated to have a positive impact on the performance of the domestic textile industry, especially the small and medium enterprises, by ensuring better availability of cotton in the market.

The relevant CBIC Notification are as follows:

MINISTRY OF FINANCE

(Department of Revenue)

NOTIFICATION

New Delhi, the 30th May, 2026

No. 19/2026-Customs

G.S.R. 420(E).— In exercise of the powers conferred by sub-section (1) of section 25 of the Customs Act, 1962 (52 of 1962) read with section 124 of the Finance Act, 2021 (13 of 2021), the Central Government, on being satisfied that it is necessary in the public interest so to do, hereby exempts the goods of the description specified in column (3) of the Table below, falling under the heading of the First Schedule to the Customs Tariff Act, 1975 (51 of 1975) (hereinafter referred to as the 'Customs Tariff Act'), specified in the corresponding entry in column (2) of the said Table, when imported into India, from the whole of the duty of customs leviable thereon under the First Schedule to the Customs Tariff Act and from the whole of the Agriculture Infrastructure and Development Cess leviable thereon under the said section of the Finance Act, 2021 (13 of 2021), namely: -

TABLE

Sl. No.	Heading	Description of Goods
(1)	(2)	(3)
1.	5201	Cotton

2. This notification shall come into force with effect from the 01st day of June, 2026, and shall remain in force up to and inclusive of the 31st day of October, 2026.

[F. No. CBIC-190354/288/2021-TO(TRU-I)]
DHEERAJ SHARMA, Under Secy.

SIMA Delegation Meeting with Hon’ble CM

Highlights

SIMA Delegation met Tamil Nadu Hon'ble Chief Minister and appealed for resolving Power related issues.

SIMA Delegation comprising of Mr. T. Rajkumar, Former Chairman, SIMA; Mr. Ravi Sam, Vice-Chairman, The Cotton Textiles Export Promotion Council (TEXPROCIL) Mumbai and Former Chairman, SIMA; Mr. Ashwin Chandran, Chairman, Confederation of Indian Textile Industry (CITI), New Delhi and Former Chairman, SIMA; Mr. S. Krishnakumar, Deputy Chairman SIMA; Mr. K. Sivaraj, Vice-Chairman, SIMA and Dr K Selvaraju, Secretary General, SIMA, met the Hon'ble Chief Minister of Tamil Nadu on 20th May, 2026 at his office and thanked him for sending a D.O letter to the Hon'ble Prime Minister recommending to remove 11% import duty on cotton that has been adversely affecting the entire textile value chain.

The Delegation briefed about the general textile industry scenario particularly with regard to Tamil Nadu and the emphasised the need for proactive initiatives and policy support to sustain competitiveness and realise its full growth potential, thereby retaining its status as the of numero uno State in textile manufacturing in the country.

Highlighting the steep increase in power cost and certain adverse decisions relating to non-conventional energy, the Delegation appealed the Hon'ble Chief Minister to address the following issues immediately:

- ❖ To withdraw the collection of network charges for the rooftop solar power generation (as per the High Court Order).
- ❖ To keep in abeyance the collection of arrears of deemed demand charges until issuance of final Order by the APTEL.
- ❖ To freeze the demand charges at the existing rate of Rs.608 per kVA per month for a period of three years.

The Delegation also appealed to allocate adequate fund and facilitate speedy implementation of PM Mitra Park Scheme, Tamil Nadu Integrated Textile Policy and other schemes.

India's textile & apparel exports fell 4% to $2.88 Bn in April 2026

- India's textile and apparel exports fell 4.02 per cent to $2.88 Billion in April 26, with textile up 2.40 per cent and apparel down 11.66 per cent.
- Imports of raw cotton declined 6.10 per cent.
- T & A share in India's exports declined to 6.59 per cent.

India's textile and apparel (T&A) exports fell by 4.02 per cent to $2.88 Billion during the period of April 2026. Of the total, textile exports increased by 2.40 per cent to $1.67 Billion, while apparel exports declined by 11.66 per cent to $1.21 Billion in April 2026.

The share of T&A in India's total merchandise exports fell to 6.59 per cent during April 2026 according to the trade data released by the Ministry of Commerce and Industry.

Within the textile segment, exports of cotton yarn, fabrics, made-ups marginally rose by 0.45 per cent to $ 838.62 Million during April 2026. Exports of man-made yarn, fabrics and made-ups increased by 2.34 per cent to $392.77 Million. Carpet exports rose by 9.93 per cent to $126.16 Million.

Exports of RMG Cotton Including accessories fell by 10.44 per cent to $740.19 Million in April 2026 compared to $826.49 Million in April 2025. Exports of RMG Manmade Fibres declined by 12.93 per cent to $194.37 Million. In April 2026, exports of RMG of other textile material stood at $255.20 Million.

Exports of Wollen Yarn, Fabrics, madeups etc.., rose by 23.70 per cent to $17.05 Million in April 2026 from $ 13.78 Million in April 2025. Export of raw cotton increased by 6.06 per cent to $ 52.31 Million when compared to $ 49.32 Million in April 2025.

Imports of cotton yarn, fabrics, made-ups increased by 1.15 per cent to $ 49.12 Million during April 2026. Imports of man-made yarn, fabrics and made-ups increased by 22.22 per cent to $276.06 Million. Imports of RMG Cotton Including accessories rose by 16.79 per cent to $51.87 Million compared to $44.41 Million. Exports of RMG Manmade Fibres increased by 13.03 per cent to $40.35 Million. In April 2026, imports of RMG of other textile material stood at $19.99 Million.

Imports of raw cotton and waste declined by 6.10 per cent to $81.58 Million during April 2026, compared to $86.88 Million in April 2025. Imports of other textile yarn, fabrics and made-ups fell by 28.17 per cent, from $103.76 Million to $74.53 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 44 Billion during April 2026, 14 per cent higher than corresponding period of the previous fiscal of USD 38 Billion. Country's total import during the period has been estimated at USD 72 Billion, 10 per cent higher than corresponding period import of USD 65 Billion in the previous fiscal.

As far as the export of textile & allied products are concerned, while their export during April 2026 had declined by 4 per cent, their import increased by 8 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 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 2026 with corresponding period Import in the previous year.

The export share of textile and allied products during April 2026, had declined to 6.59 per cent from previous year corresponding period share of 7.84 per cent. At the same time import share had decreased to 1.01 per cent from previous year share of 1.03 per cent.

Chart 1 and 2 show per cent share of major textile & allied products in the country's export and import during April 2026 compared with the corresponding period share in the previous fiscal. It may be observed that except share of Manmade Staple Fibre, other groups export share was lower than previous year's share.

In the case of import the share of Manmade Yarn, Fabrics, Madeups, Manmade Staple Fibre and RMG of manmade fibres was higher than previous year's level.

Foreign Trade Performance

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

Commodity	April 2025	April 2026	% Growth
Textiles & Allied Products	**3,002.57**	**2,881.84**	**-4.02**
Manmade Staple Fibre	32.54	43.01	32.19
Cotton Yarn	277.88	299.76	7.87
Cotton Fabrics, Made-ups Etc.	557.00	538.86	-3.26
Other Textile Yarn, Fabric Made-up Articles	79.93	74.95	-6.23
Silk, Raw	0.00	0.09	-
Natural Silk Yarn, Fabrics, Made-ups	20.34	14.38	-29.31
Manmade Yarn, Fabrics, Made-ups	383.80	392.78	2.34
Wool, Raw	Neg	Neg	Neg
Wollen Yarn, Fabrics, Made-ups, etc.	13.78	17.05	23.70
RMG Cotton Including Accessories	826.49	740.19	-10.44
RMG Silk	5.64	7.85	39.17
RMG Manmade Fibres	223.23	194.37	-12.93
RMG Wool	10.55	13.87	31.39
RMG of Other Textile Material	305.42	255.20	-16.44
Coir And Coir Manufactures	53.78	67.10	24.77
Handloom Products	15.58	11.92	-23.52
Silk Waste	2.34	3.71	58.66
Jute, Raw	1.71	0.03	-98.11
Jute Yarn	2.04	1.67	-17.81
Jute Hessian	9.49	8.02	-15.46
Floor Covering of Jute	6.89	6.27	-9.04
Other Jute Manufactures	9.94	12.25	23.30
Carpet (Excluding Silk) Handmade	110.16	122.10	10.84
Silk Carpet	4.71	4.06	-13.84
Cotton Raw Including Waste	49.32	52.31	6.06

Source : MoC

Foreign Trade Performance

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

Commodity	April 2025	April 2026	% Growth
Textiles & Allied Products	**672.91**	**727.16**	**8.06**
Manmade Staple Fibre	40.81	55.62	36.31
Cotton Yarn	2.25	2.60	15.67
Cotton Fabrics, Made-ups Etc.	46.31	46.52	0.46
Other Textile Yarn, Fabric Made-up Articles	103.76	74.53	-28.17
Silk, Raw	9.33	11.42	22.40
Natural Silk Yarn, Fabrics, Made-ups	4.35	2.28	-47.49
Manmade Yarn, Fabrics, Made-ups	225.88	276.06	22.22
Wool, Raw	19.43	30.44	56.64
Wollen Yarn, Fabrics, Made-ups, etc.	9.39	11.09	18.11
RMG Cotton Including Accessories	44.41	51.87	16.79
RMG Silk	Neg	Neg	Neg
RMG Manmade Fibres	35.70	40.35	13.03
RMG Wool	1.00	0.85	-15.67
RMG of Other Textile Material	14.99	19.99	33.42
Coir And Coir Manufactures	Neg	Neg	Neg
Handloom Products	Neg	Neg	Neg
Silk Waste	Neg	Neg	Neg
Jute, Raw	7.51	0.05	-99.30
Jute Yarn	6.75	8.30	23.10
Jute Hessian	4.70	3.20	-32.05
Floor Covering of Jute	Neg	Neg	Neg
Other Jute Manufactures	6.70	6.22	-7.16
Carpet (Excluding Silk) Handmade	1.72	2.10	22.18
Silk Carpet	0.02	0.00	-
Cotton Raw Including Waste	86.88	81.58	-6.10

Source : MoC

Chart - 1 : % Share of Country's Export

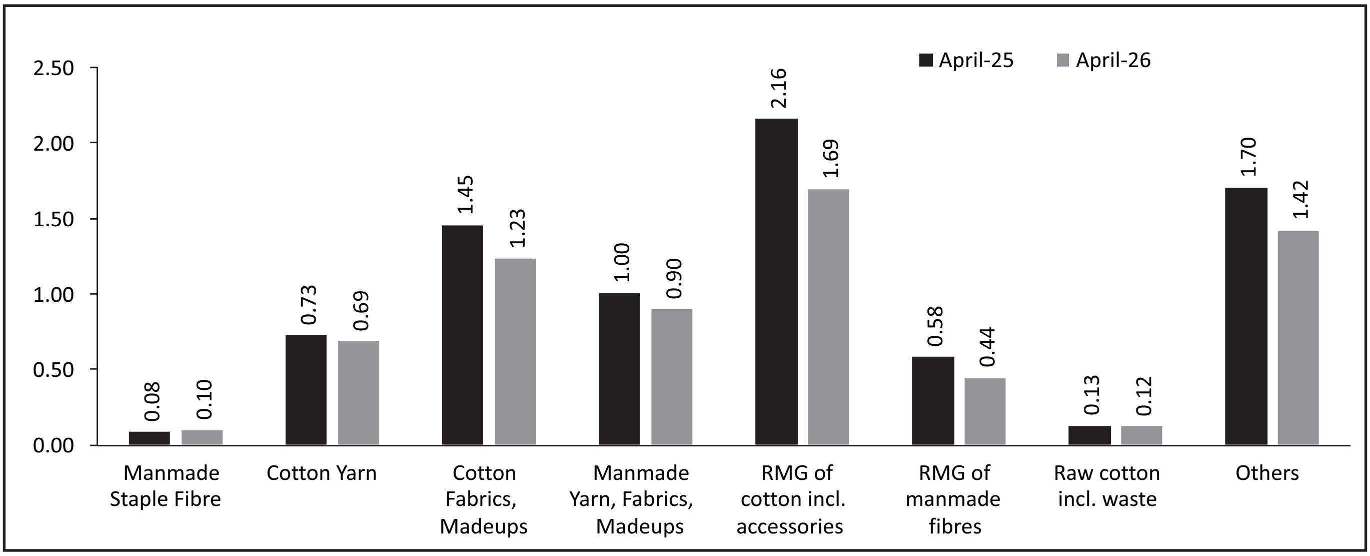
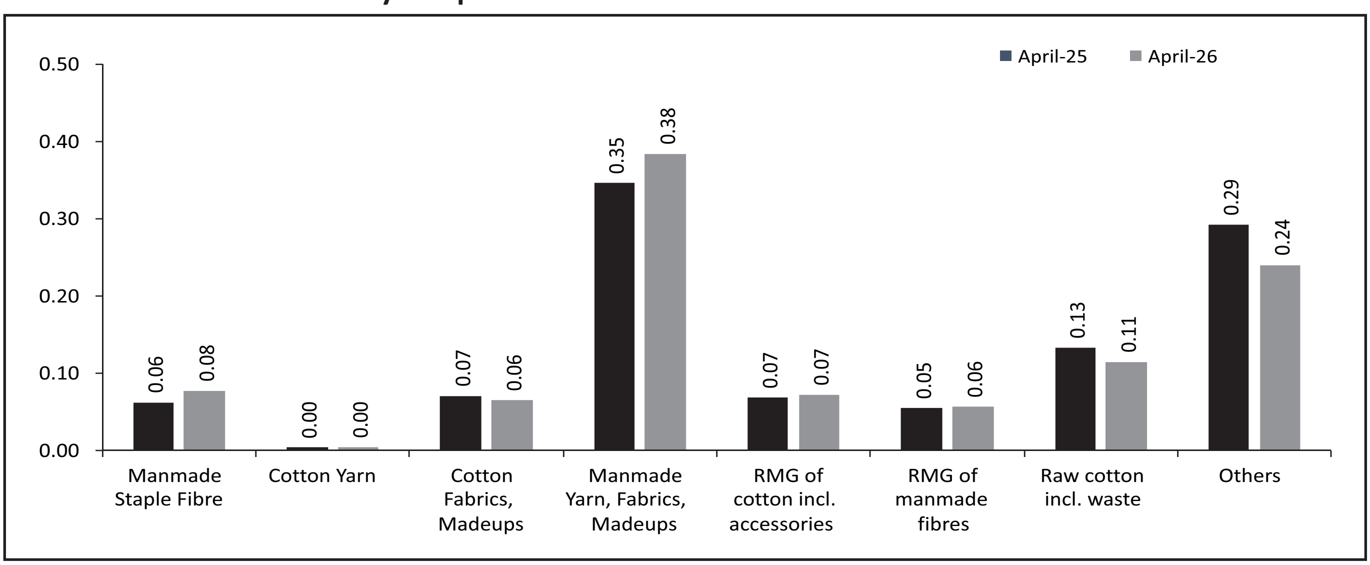


Chart - 2 : % Share of Country's Import



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

- ❖ India's export of cotton products covered under HS Code 52 during March 2026 stood at USD 535.06 Million, as against the previous year same time export level of USD 579.75 Million.
- ❖ At the same time, export of Man-made filaments during the period stood at USD 118.36 Million, fell by 23 per cent compared to previous year export level of USD 154.20 Million.
- ❖ Manmade staple fibres covered under HS Code 55 stood at USD 137.13 Million.

- Exports of garments covered under HS Code 62 during the period stood at USD 725.91 Million which is decreased by 17 per cent when compared to previous year same time export level of USD 874.83 Million.

- Made-ups exports covered under HS Code 63 stood at USD 479.81 Million, which is declined by 13 per cent when compared to previous year same time export level of USD 548.75 Million.

Table - 3 shows India's export of textile items covered under HS Codes 50 to 63 in USD Million during April - March 2026 compared with April - March 2025.

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

- India's import of cotton products covered under HS Code 52 during March 2026 stood at USD 72.23 Million, decreased by 22 per cent compared to previous year same time import level of USD 92.96 Million.

- Import of man-made filaments during the period stood at USD 201.88 Million which is higher by 56 per cent when compared with previous year same time import level of USD 129.37 Million.

- Import of garments covered under HS Code 62 during the period stood at USD 70.99 Million, registered a decline of 9 per cent.

- Import of made ups covered under HS Code 63 stood at USD 46.60 Million, which is declined by 4 per cent when compared to previous year same time import level of USD 48.68 Million.

Table - 4 shows India's import of textile items covered under HS Codes 50 to 63 in USD Million during April - March 2026 compared with April - March 2025.

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.

Foreign Trade Performance

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

HS Code	Commodity	Apr - Mar 2025	Apr - Mar 2026	% Growth
50	Silk	162.72	257.12	58.01
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	135.12	151.78	12.33
52	Cotton.	6,333.99	5,983.51	-5.53
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	610.12	881.61	44.50
54	Man-Made Filaments.	1,769.75	1,620.77	-8.42
55	Man-Made Staple Fibres.	1,613.32	1,575.32	-2.36
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	666.25	608.36	-8.69
57	Carpets and other textile floor coverings.	2,097.72	1,974.26	-5.89
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	367.47	389.99	6.13
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	503.46	436.89	-13.22
60	Knitted or crocheted fabrics.	590.93	494.57	-16.31
61	Articles of apparel and clothing accessories, knitted or crocheted.	7,703.90	7,642.06	-0.80
62	Articles of apparel and clothing accessories, not knitted or crocheted.	8,303.15	8,172.54	-1.57
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	6,103.14	5,995.30	-1.77

Source : MoC

Foreign Trade Performance

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

HS Code	Commodity	Apr - Mar 2025	Apr - Mar 2026	% Growth
50	Silk	176.96	208.13	17.62
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	292.25	335.31	14.73
52	Cotton.	1,418.55	2,128.84	50.07
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	672.73	540.59	-19.64
54	Man-Made Filaments.	1,514.46	1,958.21	29.30
55	Man-Made Staple Fibres.	840.14	1,071.84	27.58
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	474.56	481.40	1.44
57	Carpets and other textile floor coverings.	174.33	177.83	2.01
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	227.67	241.06	5.88
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	808.56	938.03	16.01
60	Knitted or crocheted fabrics.	894.11	950.09	6.26
61	Articles of apparel and clothing accessories, knitted or crocheted.	730.60	818.49	12.03
62	Articles of apparel and clothing accessories, not knitted or crocheted.	911.96	893.80	-1.99
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	635.56	677.08	6.53

Source : MoC

HS Code wise Performance

Export & Import Quantum - March 2026

- Export of cotton covered under HS Codes 5201-5203 during March 2026 stood at 28.12 Million kgs, declined by 32 per cent as against previous year same time export level of 41.34 Million kgs.
- At the same time, its imports during the period stood at 30.94 Million kgs, decreased by 17 per cent when compared to the previous year same time import level of 37.40 Million kgs.
- Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 112.57 Million kgs, which is 5 per cent higher than the previous year same time export level of 106.79 Million kgs.
- Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period stood at 199.44 Million square metres.

Export and Import Value - March 2026

- Export of cotton in all forms covered under HS Codes 5201 to 5203 during March 2026 stood at USD 45.45 Million, fell by 35 per cent as against the previous year same time export level of USD 69.50 Million.
- At the same time its import during the period stood at USD 55.03 Million, fell by 30 per cent when compared to the previous year import level of USD 79.04 Million.
- Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period was valued at USD 319.72 Million, as against the previous year export level of USD 321.43 Million. Its import stood at USD 2.68 Million during March 2026.
- Export of woven fabrics of containing cotton covered under HS Codes 5208 to 5212 during the period was valued at USD 169.89 Million as against previous year export level of USD 188.83 Million. At the same time its import stood at USD 14.52 Million.

Table-5 shows export and import of HS Codes 5201 to 5212 during April - March 2026 compared with April - March 2025 export and import in quantitative terms.

Table - 6 shows export and import of HS Codes 5201 to 5212 during April - March 2026 compared with April - March 2025 export and import in Dollar terms.

News Snippets

China's T&A exports slightly up at $91 bn in January-April 2026

- China's textile and apparel exports inched up 0.75 per cent during January-April 2026, signalling a steadier trend after a subdued 2025.
- Combined exports of textiles, garments and accessories rose year-on-year to $91.127 billion, compared with $90.445 billion in the same period of 2025.

Foreign Trade Performance

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

HS Code	Description	Export			Import		
		Apr - Mar 2025	Apr - Mar 2026	% Growth	Apr - Mar 2025	Apr - Mar 2026	% Growth
5201	Cotton, Not Carded or Combed	340.98	245.65	-27.96	562.06	1013.22	80.27
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	63.81	35.38	-44.55	38.43	59.38	54.50
5203	Cotton, Carded or Combed	53.39	65.12	21.98	Neg	Neg	Neg
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	1.13	1.18	4.33	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	1080.32	1116.17	3.32	6.41	7.50	16.95
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	68.88	64.20	-6.80	1.09	1.48	35.70
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	1672.10	1760.90	5.31	1416.28	227.97	-83.90
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	386.53	402.32	4.09	29.13	37.37	28.27
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	69.18	59.47	-14.04	15.60	18.06	15.79
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	155.95	142.13	-8.87	13.29	17.34	30.49
5212	Other Woven Fabrics of Cotton	25.69	16.36	-36.33	2.92	4.03	37.84
	Cotton (HS 5201-5203)	**458.18**	**346.15**	**-24.45**	**600.66**	**1072.84**	**78.61**
	Cotton Yarn (HS 5204-5207)	**1151.24**	**1182.81**	**2.74**	**7.75**	**9.31**	**20.13**
	Woven Fabrics of Cotton (HS 5208-5212)	**2309.45**	**2381.18**	**3.11**	**1477.22**	**304.77**	**-79.37**

Source : MoC

Foreign Trade Performance

Table - 6 : Export / Import– USD Million

HS Code	Description	Export			Import		
		Apr - Mar 2025	Apr - Mar 2026	% Growth	Apr - Mar 2025	Apr - Mar 2026	% Growth
5201	Cotton, Not Carded or Combed	660.40	436.37	-33.92	1,200.97	1,856.75	54.60
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	79.85	44.61	-44.14	17.29	30.59	76.92
5203	Cotton, Carded or Combed	69.44	79.74	14.82	1.06	1.45	37.35
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	11.91	12.04	1.07	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	3,354.70	3,217.75	-4.08	22.44	28.54	27.16
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	190.80	168.90	-11.48	2.55	3.13	22.66
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	7.69	11.25	46.27	Neg	Neg	Neg
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	1,170.38	1,246.89	6.54	96.79	122.27	26.33
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	483.62	500.47	3.48	28.48	37.48	31.62
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	76.22	63.74	-16.38	16.48	15.21	-7.73
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	202.63	179.51	-11.41	25.27	27.17	7.53
5212	Other Woven Fabrics of Cotton	26.35	22.26	-15.53	6.58	5.61	-14.78
	Cotton (HS 5201-5203)	**809.69**	**560.72**	**-30.75**	**1219.32**	**1888.79**	**54.91**
	Cotton Yarn (HS 5204-5207)	**3565.10**	**3409.94**	**-4.35**	**25.63**	**32.31**	**26.06**
	Woven Fabrics of Cotton (HS 5208-5212)	**1959.20**	**2012.87**	**2.74**	**173.60**	**207.74**	**19.67**

Source : MoC

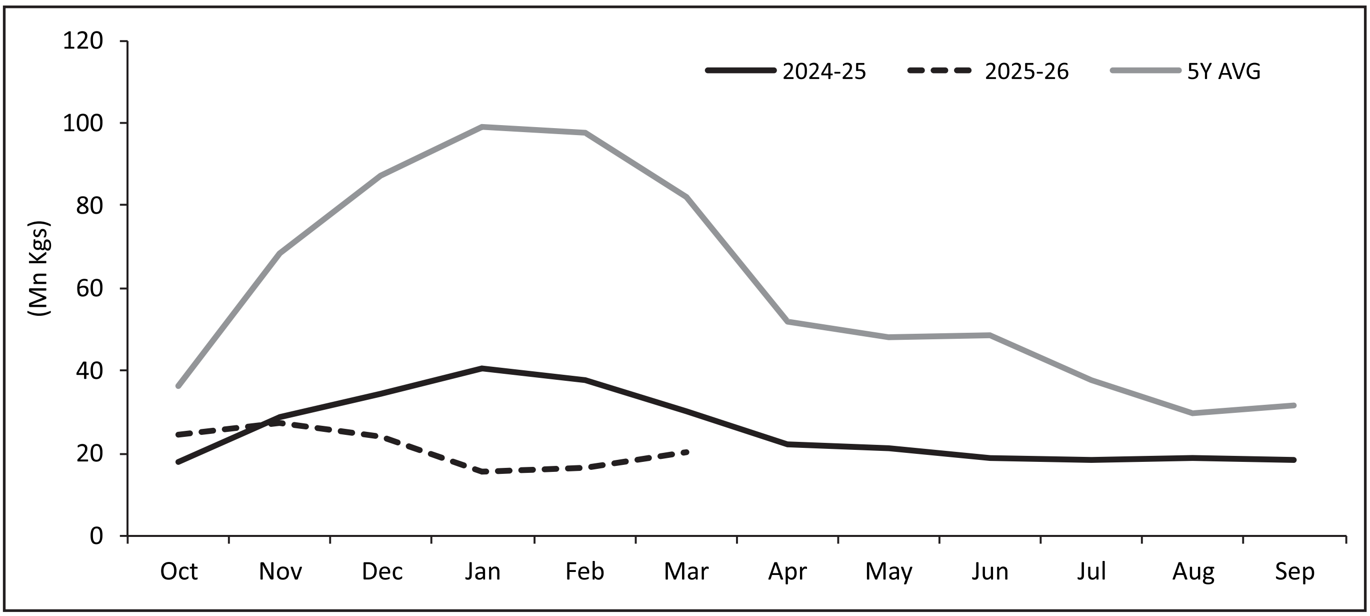
Foreign Trade Performance

Cotton Export-Major Countries

- India's cotton exports observed a 28% decline during Apr-Mar 2026 compared to the same period in 2025.
- Bangladesh, the top export destination, saw a significant decline of 27%.
- Major declines were observed in:
- Vietnam (58%)
- Greece (50%)
- Japan (45%)
- Nepal (34%)
- Among the top 10, only China recorded immense growth.

Chart - 3 shows the details of India's cotton export during current cotton season compared with previous season and 5 years average (2019 -2023).

Chart - 3 : India's Export of Cotton (5201)

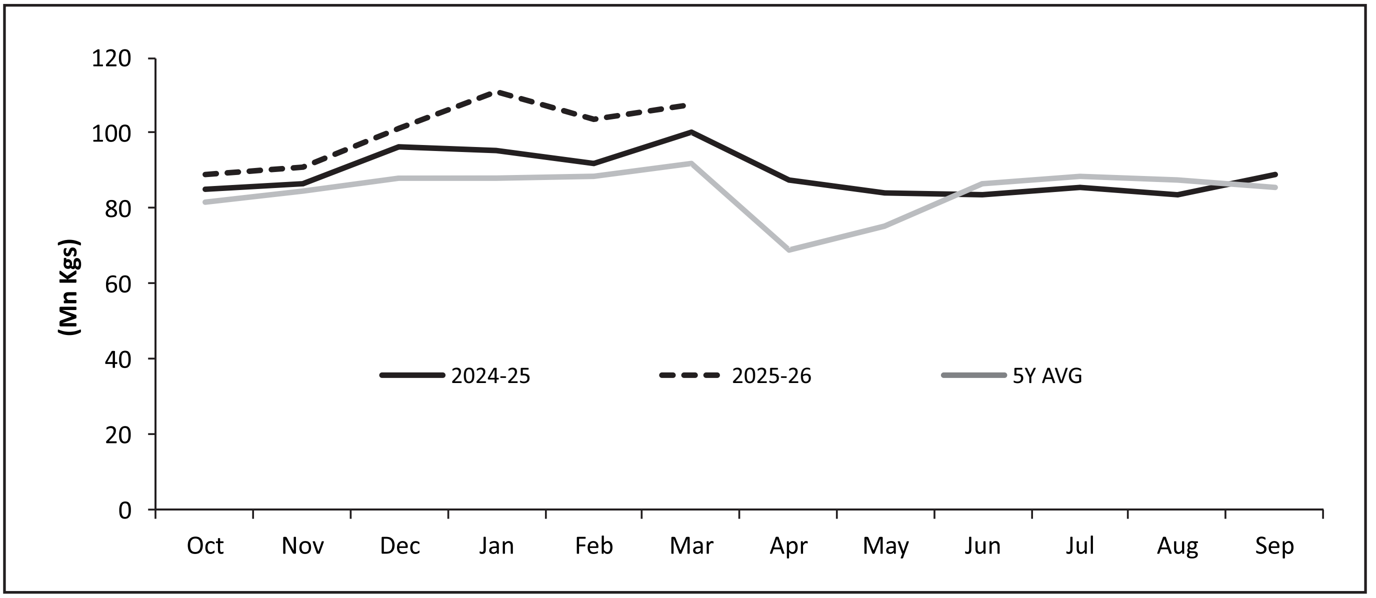


Cotton Yarn Export-Major Countries

- India's cotton yarn exports recorded a growth of 3%, during Apr-Mar 2026 compared to the same period in 2025, rising from 1,080 Million kgs to 1116 Million kgs.
- Bangladesh remained the largest importer, registered a decline of 13%.
- Strong growth was observed in:
- China: up by 120%
- Egypt A Rp: up by 68%
- Several Major markets witnessed sharp declines:
- Turkey (20%)
- Vietnam (15%)
- Colombia (13%)

Chart - 4 shows the details of India's cotton yarn export during current cotton season compared with previous season and 5 years average (2019 -2023).

Chart - 4 : India's Export of Cotton Yarn (5205)



Cotton Import - Major Countries

- ❖ India's cotton imports surged expressively rising from 33 lakh bales in Apr - Mar 2025 to 60 lakh bales in Apr-Mar 2026.
- ❖ Brazil became the leading supplier of cotton.
- ❖ Table - 7 shows the details of cotton import's of India from major countries in quantitative terms.

Table - 7 : Import of Cotton (5201)

(Actual Quantity)

S.No.	Country	Apr - Mar 2025	Apr - Mar 2026
1	BRAZIL	10,45,92,864	24,23,97,596
2	AUSTRALIA	12,62,18,925	21,42,35,019
3	U S A	8,58,40,747	18,20,30,596
4	MALI	3,16,79,516	9,25,51,673
5	SINGAPORE	1,69,36,800	6,02,44,555
6	SWITZERLAND	2,69,31,227	4,45,04,064
7	TANZANIA REP	1,57,92,726	3,05,02,388
8	EGYPT A RP	3,33,01,020	2,69,38,154
9	COTE D' IVOIRE	2,83,72,872	1,91,64,690
10	TOGO	1,67,88,380	1,44,09,767
	TOTAL	**56,20,62,661**	**1,01,32,16,505**

Source : MoC

India's IIP records 4.9% Growth in April 2026 after the Revision of Base Year to 2022 - 23

The Ministry of Statistics and Programme Implementation (MoSPI) has revised the base year of the All India Index of Industrial Production (IIP) from 2011-12 to 2022-23 with the objective of making the index more representative of the current structure and dynamics of the industrial sector. The revised series incorporates an updated item basket, a revised weighting structure, and enhanced sectoral coverage to better capture recent developments in industrial activity across the economy.

The base year revision exercise was undertaken under the aegis of the Technical Advisory Committee for Base Year Revision of the All India Index of Industrial Production (TAC-IIP). The Committee's report was released on 25 May 2026, laying the foundation for a more robust, relevant, and comprehensive measure of industrial production in India.

In the new IIP series (2022-23), the coverage has been expanded by incorporating Gas Supply and Water Supply, Sewerage & Waste Management activities, while retaining the existing three core sectors - Mining, Manufacturing, and Electricity. The weights are updated using latest data on Gross Value Added from National Accounts Statistics (base 2022-23) at sectoral level and Annual Survey of Industries at NIC-2/3/4 digit for the financial year 2022-23.

Under the new series, the item basket and weights have been revised to add relevant commodities and remove outdated ones, ensuring that each item or sector is assigned appropriate significance. The revised basket consists of 1,042 products mapped to 463 item groups as compare to 839 items mapped to 407 item groups in 2011-12 series. This revision better captures changes in the industrial landscape, including the emergence of new products and shifts in production patterns over time.

In the new IIP series (Base 2022-23) manufacturing sectors has the highest weightage of 76.062, followed by mining & Quarrying sector with 11.053, Electricity & Gas Supply sector with 10.865 and Water Supply, Sewerage & Waste Management sector with 2.020.

India's industrial production growth in April 2026 registered a 4.9% 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 6.2% year-over-year increase. The mining sector experienced a dip of 5.1% and electricity generation saw a growth of 4.9%. The indices of Industrial Production for Mining & Quarrying, Manufacturing, Electricity & Gas Supply and Water Supply, Sewerage & Waste Management for the month of April 2026 stand at 104.6, 119.3, 125.5 and 146.1 respectively. The growth rates of the 4 sectors for the month of April 2026 are (-)5.1%, 6.2%, 4.9% and 6.6% respectively.

Within the Manufacturing sector, 17 out of 23 industry groups at NIC 2 digit-level have recorded a positive growth in April 2026 over April 2025. The top three positive contributors for the month of April 2026 are - "Manufacture of electrical equipment" (19.2%), "Manufacture of other transport equipment" (18.8%) and "Manufacture of textiles" (15.6%).

Table - 1 : Textile item groups in the new series of IIP with base 2011-12

NIC 5 Digit	Use-based Classification	Item Groups
13111	Intermediate Goods	Cotton Yarn including hosiery yarn (grey/unbleached, bleached, dyed, or otherwise processed)
13114	Intermediate Goods	Other blended spun yarn
13114	Intermediate Goods	Polyester spun yarn
13114	Intermediate Goods	Rayon / Viscose blended spun yarn
13119	Intermediate Goods	Jute sacking cloth / Hessian fabric
13121	Intermediate Goods	Cotton Woven fabric
13134	Intermediate Goods	Acrylic yarn
13134	Intermediate Goods	Polyester / Viscose blended fabric
13134	Intermediate Goods	Texturised man-made filament yarn
13911	Intermediate Goods	Knitted fabrics of cotton
13921	Consumer durables	Bed linen / bedspread and curtains
13921	Consumer durables	Made-up articles of textile materials other than bed-linen / bedspreads / curtains
13924	Consumer durables	Quilts
13926	Consumer durables	Blankets
13929	Consumer durables	Terry Towels
13931	Consumer durables	Carpets and other floor coverings of textiles
13944	Consumer durables	Nylon Rope
13992	Consumer durables	Narrow fabrics, ornamental trimmings and silk embroidery
14101	Consumer durables	Readymade Garments, not knitted
14104	Consumer durables	Leather Garments
14309	Consumer durables	Readymade Garments, knitted
14309	Consumer durables	Underwears, socks and other hosiery products

Table – 2 : Textile item groups in the new series of IIP with base 2022-23

NIC 2025	Use-based Classification	Item Groups
131101	Intermediate goods	Cotton Waste
131101	Intermediate goods	Cotton Yarn
131106	Intermediate goods	Acrylic Yarn
131106	Intermediate goods	Blended Yarn (Other Than Sewing Thread) of Synthetic Staple Fibres
131106	Intermediate goods	Sewing Thread of Man-Made Filaments or Staple Fibres
131106	Intermediate goods	Yarn (Other Than Sewing Thread) of Synthetic, Viscose and Polyester Staple Fibres
131106	Intermediate goods	Wool Yarn
131201	Intermediate goods	Cotton Woven Fabric
131208	Intermediate goods	Jute Sacking Cloth and Hessian Fabric
131209	Intermediate goods	Woven Fabrics of Synthetic Staple and Man-Made Filament Yarn
131210	Consumer durables	Textile Products and Articles for Technical Uses
131304	Intermediate goods	Dyed, Printed or Embroidered PFY Cloth
139101	Intermediate goods	Knitted Fabrics of Cotton
139201	Consumer durables	Bed Linen, Bedspreads, Curtains, Drapes and Interior Blinds
139203	Consumer durables	Quilts Including Eiderdowns, Cushions, Pouffes, Pillows and Sleeping Bags
139204	Consumer durables	Blankets
139205	Consumer durables	Terry Towels
139299	Consumer non-durables	Made-Up Articles of Textile Materials Other Than Bed Linen/Bedspreads/Curtains
139299	Consumer durables	Jute Sacks and Gunny Bags for Packaging of Goods
139301	Consumer durables	Carpets and Other Textile Floor Coverings
139405	Intermediate goods	Fishing Nets and Knotted Netting of Twine
139902	Intermediate goods	Articles of Non-Woven Textiles
139902	Intermediate goods	Textile Fabrics for Conveyor Belts
139903	Intermediate goods	Textile Labels
139906	Consumer durables	PVC Cloth
141002	Consumer durables	Readymade Garments, Other Than Knitted Garments
141005	Consumer durables	Leather Gloves
142099	Consumer durables	Bags and Handbags of Artificial Fur
143001	Consumer durables	Readymade Garments, Knitted
143002	Consumer non-durables	Underwear, Socks and Other Hosiery Products

Index of Industrial Production

In the new IIP series (Base 2022-23), the weightage of manufacture of textile reduced to 3.275 from 3.291 and the number of item groups has increased to 25 from 18 (Base 2011-12). The weightage of manufacture of wearing apparel increased to 1.970 from 1.322 and the number of item groups has increased to 5 from 4 (Base 2011-12).

The manufacture of textiles showed a year-on-year increase, with the index rose to 132.6 in April 2026 from 114.7 in April 2025, reflecting a growth of 15.6%. The manufacture of wearing apparel registered a decline of 7%, with the index fell to 91.6 from 98.5 in the same period last year.

Under the revised IIP series with base year 2022-23, the textile and wearing apparel sectors have been restructured to provide a more comprehensive representation of the industry's current production profile. The revised series demonstrates that the textile industry had a significant improvement in its index level and became one of the major drivers of manufacturing growth during the reference period, showing robust production activity across a number of textile segments. The wearing apparel sector, on the other hand, had a contraction in output, as seen by a decline in its index level as compared to the same period last year. These patterns draw attention to the various performance dynamics within the larger textile value chain and emphasize how crucial the updated IIP framework is for more accurately capturing sector-specific changes.

India's Index of Industrial Production (IIP) based on the revised base year 2022-23 reflects a steady improvement in industrial activity during April 2026 compared to April 2025.

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

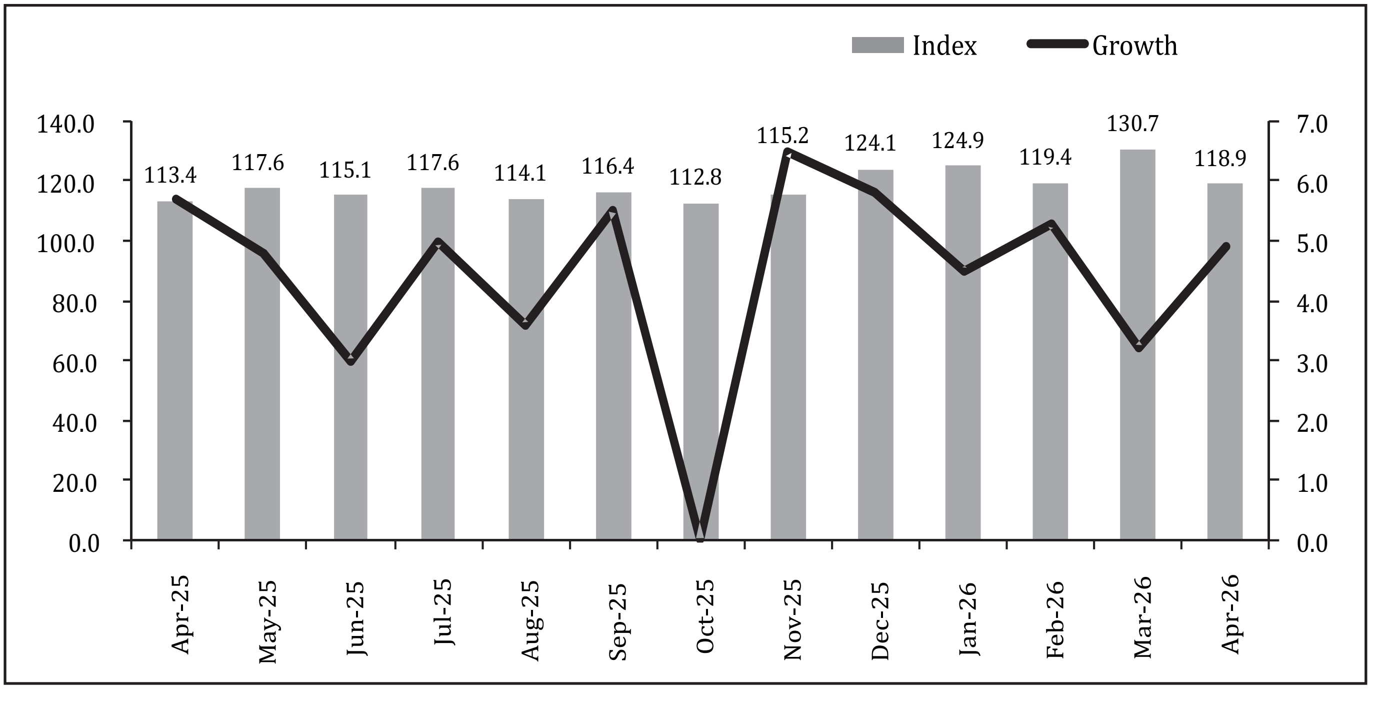


Table - 3 : Index of Industrial Production (Base 2022-23 =100)

NIC 2008	Description	Weights	April 2025	April 2026	% Change
10	Manufacture of food products	5.679	95.9	101.0	5.3
11	Manufacture of beverages	1.113	164.4	152.8	-7.1
12	Manufacture of tobacco products	0.774	111.5	116.6	4.6
13	Manufacture of textiles	3.275	114.7	132.6	15.6
14	Manufacture of wearing apparel	1.970	98.5	91.6	-7.0
15	Manufacture of leather and related products	0.607	96.8	98.3	1.5
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.239	95.5	83.6	-12.5
17	Manufacture of paper and paper products	1.375	102.0	116.0	13.7
18	Printing and reproduction of recorded media	0.506	110.6	106.8	-3.4
19	Manufacture of coke and refined petroleum products	7.721	104.6	104.1	-0.5
20	Manufacture of chemicals and chemical products	7.813	104.0	104.4	0.4
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	5.833	113.7	117.5	3.3
22	Manufacture of rubber and plastics products	3.384	101.1	107.6	6.4
23	Manufacture of other non-metallic mineral products	3.519	111.3	116.0	4.2
24	Manufacture of basic metals	9.198	122.9	130.0	5.8
25	Manufacture of fabricated metal products, except machinery and equipment	2.481	111.4	124.3	11.6
26	Manufacture of computer, electronic and optical products	2.085	137.2	138.7	1.1
27	Manufacture of electrical equipment	3.175	126.3	150.6	19.2
28	Manufacture of machinery and equipment n.e.c.	5.020	108.5	122.5	12.9
29	Manufacture of motor vehicles, trailers and semi-trailers	6.417	116.0	130.8	12.8
30	Manufacture of other transport equipment	2.089	124.9	148.4	18.8
31	Manufacture of furniture	0.283	113.6	111.1	-2.2
32	Other manufacturing	1.509	124.3	124.6	0.2
	Manufacturing	***76.062***	***112.3***	***119.3***	***6.2***
	Mining & Quarrying	***11.053***	***110.2***	***104.6***	***-5.1***
	Electricity & Gas Supply	***10.865***	***119.6***	***125.5***	***4.9***
	Water Supply, Sewage & Waste Management	***2.020***	***137.1***	***146.1***	***6.6***
	General	***100.000***	***113.4***	***118.9***	***4.9***

Global 2026-27 Cotton Ending Stocks Decline as Mill Use Outpaces Production

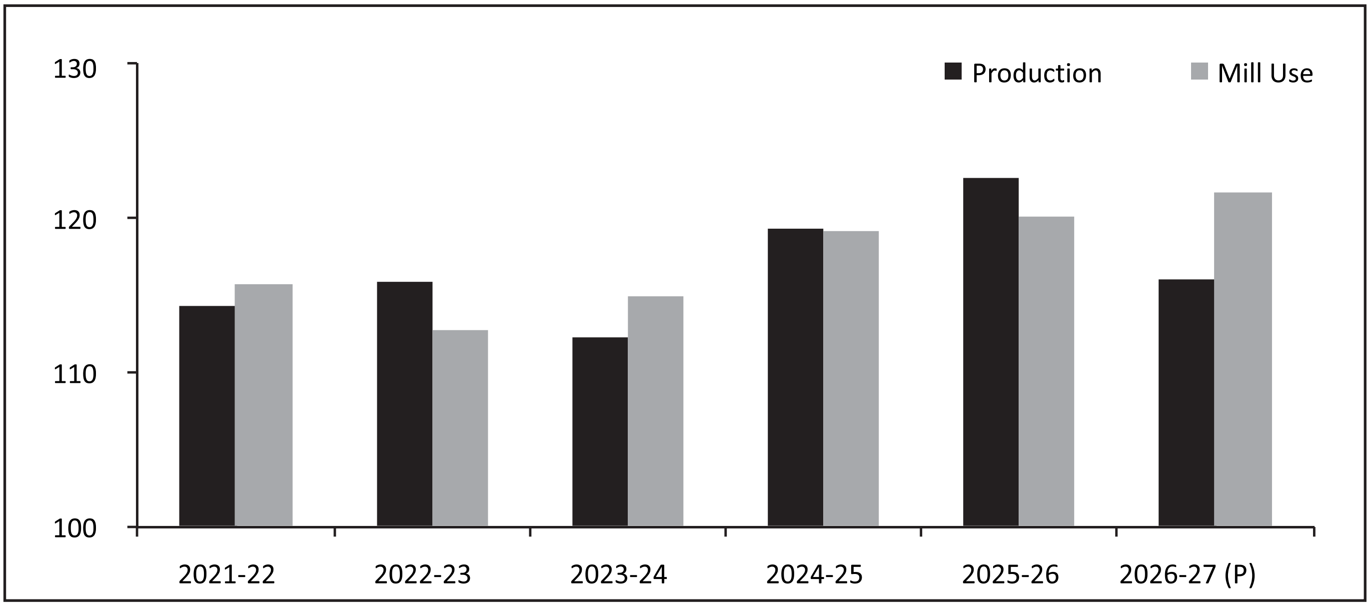
World Cotton Production Projected Lower in 2025-26

Global cotton production in 2026-27 is projected at 25.26 Million tonnes nearly 5 per cent below the previous year. For 2026-27, cotton production prospects for the major producing countries such as China, Brazil, the United States, Pakistan and Australia are forecast to decline, while India is projected to maintain the growth. World 2026-27 cotton harvested area is forecast at 29.24 Million hectares, down slightly from 2025-26. The 2026-27 Global cotton yield is forecast at 864 kilograms (kg) per hectare, 5 per cent below last year's yield.

World cotton production is concentrated among a few countries, with the top 4 countries accounting for 76 per cent of total expected production in 2026-27. China and India are forecast to remain the leading global cotton producers in 2026-27, accounting for 29 per cent and 21 per cent, respectively.

Figure - 1 : Global cotton production and mill use

(Million bales)



1 bale = 480 pounds | Source : USDA

For Pakistan, 2026-27 cotton production is forecast to decrease 4 per cent from the previous year to 1.11 Million tonnes. Harvested area is projected to remain unchanged from 2025-26 at 2.0 Million hectares while the national yield is expected to decrease to 555 kg per hectare in 2026-27. Brazil is forecast to reach its cotton production 3.81 Million tonnes in 2026-27. The drop is a result of reduced area harvested and yield from last year. Area harvested is forecast to decrease about 8 per cent to 2.0 Million hectares while yield is expected to decline 3 per cent to 1,905 kg per hectare. Australia is forecast to decrease production by 33 per cent in 2026-27. Switching to alternative crops, less than ideal growing conditions and water availability account for a lower estimate for harvested area and yield.

World Cotton Mill Use Growth Forecast in 2026-27

Global cotton mill use is projected to increase 1 per cent in 2026-27 to 26.49 Million tonnes, the highest in 5 years. Each major country's cotton mill use is projected to rise in 2026-27 from its year-ago level. China and India remains the leading cotton consuming countries and together are forecast to account for approximately 55 per cent of the global total.

China's cotton mill use is forecast at 8.92 Million tonnes (+1.0 per cent) in 2026-27 and accounts for 34 per cent of the global total. India's cotton mill use is forecast at 5.66 Million tonnes (+2.0 per cent) in 2026-27. Mill use in Bangladesh is forecast to improve slightly to 1.74 Million tonnes in 2026-27. Bangladesh is forecast to contribute 7 per cent of the global total. Vietnam's cotton use is forecast to account for nearly 6 per cent of the world total in 2026-27. Cotton mill use in Turkey and Uzbekistan are projected to remain unchanged in 2026-27 compared with 2025-26.

World cotton trade to down year over year in 2026-27; Ending Stocks to decrease

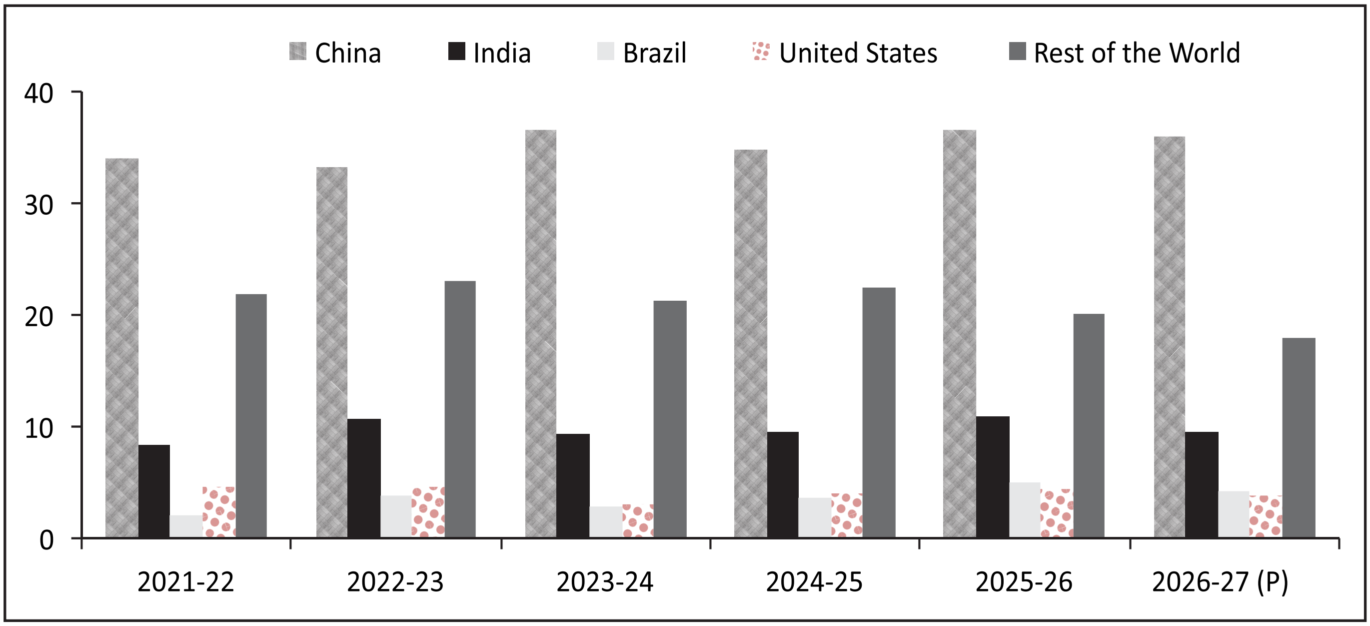
Despite only a slight gain expected in world cotton mill use, global cotton trade in 2026-27 is projected to decrease 1 per cent. World cotton trade is forecast at 9.43 Million tonnes in 2026-27. Higher exports are largely projected for the leading cotton exporters Brazil, India and the United States as cotton supplies expand in each country. Brazil's cotton exports in 2026-27 are projected at 3.26 Million tonnes, 2 per cent above 2025-26. Brazil is expected to account for 35 per cent of global trade in 2026-27. The United States is expected to contribute 28 per cent of world cotton trade in 2026-27.

Vietnam is expected to be the leading cotton importer in 2026-27 as imports are projected to increase 5 per cent. Bangladesh is forecast to account for 18 per cent of global imports in 2026-27. For China, cotton imports are projected to increase 6 per cent in 2026-27 and account for 16 per cent of the world total. Pakistan's cotton imports are also projected to expand.

Stocks in China are projected 7.85 Million tonnes for 2026-27, compared with 7.98 Million tonnes during the previous season. At the end of 2026-27, China is projected to hold 50 per cent of the global supplies. In India, ending stocks are forecast at 2.07 Million tonnes, or approximately 13 per cent of the global total.

Figure - 2 : Global Cotton ending Stocks

(Million bales)



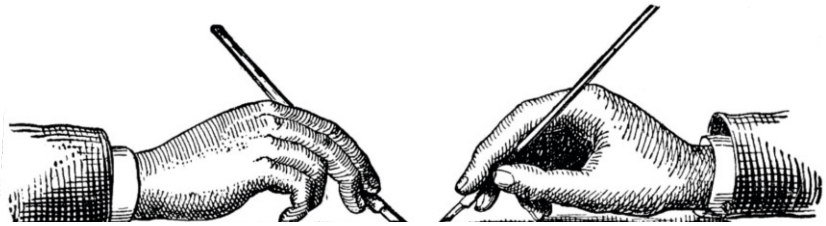
1 bale = 480 pounds | Source : USDA

News Snippets

Australia's Q1 cotton exports rise 16% despite price pressure

- Australia's cotton exports rose 16 per cent year-on-year to $210.3 million in Q1 2026, driven by a sharp increase in shipments to China, which regained its position as the top buyer.
- However, lower average export prices reflected softer global cotton markets.

Editorials



Textile Ministry moves to shield clusters from W. Asia gas supply shocks

The Textile Ministry has launched an assessment of natural gas supplies across all textile and handicraft clusters in India to identify potential shortages.

The move comes as public sector energy corporation GAIL (India) Ltd has assured the Ministry that it can source gas from the spot market to cover disruptions in supplies to the sector, though probably at a higher cost to industrial units, sources said.

"GAIL has confirmed it is currently meeting at least 80 per cent of the natural gas requirements for these clusters, which are classified as a priority sector. However, in the event of further supply shocks and disruptions, the agency is prepared to procure from the spot market to meet demand. But the higher prices would likely be borne by the units," a source said.

There are over 500 textiles and 700 handicrafts clusters in the country. Many units in the clusters depend on natural gas for processes, such as high temperature dyeing and running their furnaces and machinery.

Natural gas supplies in India have been constrained due to the severe disruption in global energy trade routes, primarily caused by the conflict in West Asia and the pro-longed blockade of the Strait of Hormuz.

India's textile and handicraft sectors, in clusters such as Surat and Sanganer, have been experiencing a severe shortage in natural gas and LPG, with many units facing partial or full shutdowns and workers migrating back to their hometowns.

The Textile Ministry's assessment of all textile and handicraft clusters, being carried out by an internal monitoring group, is aimed at avoiding more Ferozepur- like situations, the source added.

Business Line 04.05.2026

Help position 'Made in Tirupur' brand globally, new CM urged

The Apparel Export Promotion Council (AEPC) urged the new Chief Minister, Shri C Joseph Vijay, to support global branding of 'Made in Tirupur' and establish a state-level apparel and textile development board.

Welcoming Shri Vijay as the new CM, AEPC submitted a representation seeking strong policy support to help Tamil Nadu's apparel industry reach Rs.1 lakh crore by 2030.

The industrial body highlighted that the apparel and readymade garment sector was one of the strongest pillars of Tamil Nadu's economy. "Tirupur, in particular, accounts for nearly 68% of India's knitwear exports and generates business worth more than Rs.70,000 crore annually in domestic and global markets. The industry provides direct employment to more than 10 lakh workers, with nearly 65% being women, making it one of the state's largest women-centric industries," the council said.

The sector is largely MSME-driven, with around 90% of the units falling under the micro, small and medium enterprise category. With India signing free trade agreements with 37 countries, AEPC said the coming decade offers major export opportunities and positions Tamil Nadu to emerge as a global hub for sustainable textile and apparel manufacturing.

To achieve this, AEPC has urged State Government to fast-track affordable rental housing for garment workers, reclassify worker hostels under residential electricity tariffs, and promote working women through safe transport and welfare measures. It also sought a 50% capital subsidy for worker hostel construction, along with interest subvention for the remaining project cost, especially as the sector depends heavily on migrant and women workers.

The council has requested dedicated financial support for export-oriented MSMEs, including better access to working capital, interest subvention and capital subsidies for modernization, automation and technology adoption. It has stressed on the need to improve road and rail connectivity to Thoothukudi and Chennai ports, promote multimodal logistics, ensure competitive industrial power tariffs, encourage renewable energy use and extend support for zero liquid discharge systems, common effluent treatment plants and sustainable manufacturing initiatives.

AEPC has also called for simplified regulatory compliance for MSMEs, international buyer-seller meets in Tirupur, stronger global branding for 'Made in Tirupur', and the launch of a Tirupur Knitwear Development Mission through structured Govt-industry engagement.

The Tirupur Exporters Association also congratulated the new Chief Minister and Ministers and sought infrastructure development to strengthen Tirupur's role as a specialized export city and sustain its global competitiveness.

The Times of India 11.05.2026

SIMA lauds Centre's policy boost for Cotton Sector

The Southern India Mills' Association (SIMA) has welcomed the Union cabinet's approval for the Mission for Cotton Productivity (MCP). Announced under the National Mission for Cotton Productivity (Kapas Kranti) with a total outlay of Rs.5,659.22 crore up to 2030-31, MCP would revive cotton output, improve fibre quality and strengthen India's textile competitiveness.

In a press release, Mr Durai Palanisamy, Chairman, SIMA, expressed gratitude to the

Hon'ble Prime Minister and the Union Agriculture and Textiles Ministers for approving the mission, describing it as a timely and visionary step for the cotton and textile sectors. He said the initiative would help enhance cotton productivity, improve farmers' income, ensure the availability of quality cotton to the textile industry and strengthen India's position in global textile markets.

SIMA recalled that the earlier Technology Mission on Cotton (TMC), launched in 1999, had played a transformative role in India's cotton economy. During its implementation, cotton production rose from around 178 lakh bales to nearly 398 lakh bales by 2013-14, while the cultivated area grew from about 92 lakh hectares to 128 lakh hectares. India also accounted for nearly 36% -38% of global cotton acreage during that period.

However, after the closure of TMC, cotton lost policy focus, leading to declining productivity and reduced production, which currently stands at around 292 lakh bales. SIMA noted that Bt cotton technology, which had significantly improved productivity, became obsolete after 2012, resulting in technology stagnation, rising pest incidence and inadequate transfer of advanced farming practices to growers.

According to SIMA, the new mission addresses these challenges through improved seeds, advanced cultivation practices, mechanization, pest management and focused research and development led by institutions like Indian Council of Agricultural Research. The mission is also expected to reduce India's dependence on imports of extra long staple cotton, especially at a time when domestic productivity remains lower than countries such as Brazil and China.

He said the mission would restore the strength of the Indian cotton sector and support the broader textile value chain. He noted that nearly 80% of India's textile exports are cotton-based and said assured availability of quality home-grown cotton, particularly ELS cotton, would provide a major boost to value-added textile exports and help India move towards its $350 billion textile economy target by 2030.

The Times of India 11.05.2026

Gujarat's textile industry hit by West Asia crisis

Gujarat's textile industry is battling a severe financial crisis caused by the West Asia conflict, soaring crude oil prices, rising yarn costs and emerging global trade dynamics. According to industry estimates, the sector has lost between nearly Rs.2,500 crore and Rs.3,000 crore in the last 60 days. The situation has forced many weaving units to operate at only half their capacity.

According to Mr Ashok Jirawala, President of the Federation of Gujarat Weavers Association (FOGWA), textile manufacturers are being forced to sell fabric at rates lower than the actual cost of production simply to keep their operations alive. "When raw material becomes expensive, fabric production naturally becomes costlier, but the market is not ready to pay higher prices for finished cloth," he explained.

"Industrialists are suffering losses worth crores of rupees every day," he added.

Since the artificial fabric industry is heavily dependent on petroleum-based raw materials, the sharp rise in crude oil prices triggered by the ongoing war has sent yarn prices soaring. This has led to an increase in the production cost.

South Gujarat, especially Surat, produces crores of meters of fabric daily, making it one of the largest textile production hubs in the country. Yet, the industry is bleeding financially. He stated that the impact in daily turnover has reached nearly Rs.50 crore to Rs.60 crore.

The crisis is no longer confined to factory floors. Its ripple effects are now reaching banks. Industrialists struggling with shrinking margins are finding it increasingly difficult to manage bank interests and installment repayments. Several weaving units in Surat have already cut operations drastically. Many factories that once ran day and night are now functioning at barely 50% capacity because owners have chosen to reduce operational losses.

But reducing production has created the fear the loss of skilled labour in the industry. Many business owners feel that if factories stop work completely, thousands of skilled migrant workers may return to their hometowns. Once that skilled workforce disperses, rebuilding production capacity could become a challenge.

The situation has become complicated due to changing dynamics of global market conditions, Mr Jitu Vakharia, President of the South Gujarat Textile Processors Association, described the situation as a "double blow". "On one side, the war has increased raw material costs, and on the other side, the 18% tax imposed by the US is hurting exports," he said.

The Indian Express 14.05.2026

Raw Material Costs Up 60%, Exporters in Karur seek Govt Aid

The Karur Textile Manufacturers and Exporters Association (KTMEA) has expressed concern over the severe crisis confronting the textile sector owing to a sharp rise in raw material prices and an acute labour shortage, attributing the situation to the ongoing war and geopolitical tensions.

At a meeting of the association's members held in Karur, industry representatives discussed the mounting challenges faced by the textile sector. Addressing reporters after the meeting, KTMEA President Mr P Gopalakrishnan said the prices of raw materials required for textile manufacturing had risen by 30% to 60% over the past few months.

He said the ongoing war and geopolitical tensions involving the US, Israel and Iran had led to a steep increase in the prices of several essential materials used in textile manufacturing, including petroleum-based products such as polyester, chemicals used in dyeing units, polythene and packing materials.

"Delays in international shipping and shortages in imported goods have also significantly increased the cost of dyeing, printing and other job-work processes," he said.

Industry leaders further stated that the 30% to 40% increase in cotton yarn prices in India had come as a major setback to the textile sector.

Speaking about the labour shortage, KTMEA joint Secretary Mr A Sethupathi said the issue had emerged as one of the biggest challenges for the sector. He said many migrant workers from other states had returned to their native places owing to elections and other reasons, while participation from local workers had also declined considerably.

Stating that the textile industry in Karur serves as a livelihood source for thousands of workers, the association urged both the state and the centre to announce immediate relief measures.

The association also demanded steps to ensure stability in raw material prices, besides interest subsidies and financial assistance for export companies. It further called for special schemes to address the prevailing labour shortage.

The Indian Express 18.05.2026

SIMA delegation meets CM, seeks relief on power charges

A delegation from the Southern India Mills' Association met Tamil Nadu Chief Minister at the Secretariat and appealed for immediate measures to address power-related issues affecting the textile industry.

The delegation comprised Mr T. Rajkumar, Former Chairman of SIMA; Mr Ravi Sam, Vice Chairman of the The Cotton Textiles Export Promotion Council and Former Chairman of SIMA; Mr Ashwin Chandran, Chairman of the Confederation of Indian Textile Industry and Former Chairman of SIMA;

Mr S. Krishnakumar, Deputy Chairman of SIMA; Mr K. Sivaraj, Vice-Chairman of SIMA; and Dr. K. Selvaraju, Secretary General of SIMA.

During the meeting, the delegation thanked the Hon,ble Chief Minister for writing to Hon'ble Prime Minister Shri Narendra Modi recommending the removal of the 11 percent import duty on cotton, which, they said, has adversely impacted the entire textile value chain.

The delegation briefed the Chief Minister on the current condition of the textile industry in Tamil Nadu and stressed the need for proactive policy initiatives and Government support to maintain the State's competitiveness and preserve its position as India's leading textile manufacturing hub.

Highlighting the steep rise in power cost and certain policy decisions related to non-conventional energy, the delegation urged the government to immediately address several key issues.

The textile industry representatives requested withdrawal of network charges imposed on rooftop solar power generation in accordance with the High Court order. They also appealed for suspension of arrears collection related to deemed demand charges until the final order is issued by the Appellate Tribunal for Electricity (APTEL). Further, the delegation requested the

Government to retain the present demand charge rate of Rs.608 per kVA per month for the next three years.

The delegation also sought adequate fund allocation and speedy implementation of the PM MITRA Park Scheme, the Tamil Nadu Integrated Textile Policy, and other industry-related development schemes.

Trinity Mirror 21.05.2025

Ministry of Textiles Launches Smart App for Bharat Tex 2026

Smt. Neelam Shami Rao, Secretary, Ministry of Textiles, has launched the Bharat Tex 2026 Event App, a unified digital platform aimed at enhancing engagement and business networking for buyers, exhibitors, delegates, sourcing consultants, speakers, and visitors attending the textile event.

One of the key features of the platform is an AI-powered Smart Assistant designed to function as a 24×7 conversational support tool for attendees. The feature will allow users to ask event-related questions in simple language and receive information regarding schedules, venue details, directions, and other event-related services.

Exhibitors, buyers, and delegates will be able to identify relevant business partners, schedule meetings, manage availability, receive meeting requests, and monitor confirmed interactions through the platform.

To further support exhibitor engagement, the app includes a Lead Wallet and QR-based lead capture system, enabling participants to scan digital badges and securely store structured contact information for post-event follow-ups.

Attendees will be able to access interactive floor plans, search for exhibitor booths, locate companies, and receive stall-level navigation assistance within the venue.

For international buyers and trade visitors, the exhibitor discovery module will enable structured searches across exhibitor categories. Users will be able to filter companies by name, product category, and exhibitor type, supporting targeted sourcing and more focused business interactions across the textile value chain.

The app will also provide real-time access to the event agenda and knowledge sessions, allowing participants to view conference schedules, create personalised agendas, and receive alerts for upcoming sessions.

Apparel Resources 20.05.2026

Moderation in revenue growth, margin looms for textile MSMES

The readymade garment sector (RMG), dominated by micro, small and medium enterprises (MSMEs), is set to see revenue growth slow a tad to 4-6 per cent this financial year (FY27), to Rs.5.7 Trillion, compared with a 6-8 per cent growth in FY26.

Higher realisations and arebound in RMG exports will support growth. However, the profit margin is likely to decline 100-150 basis points due to increased production costs and weak domestic demand, which make it difficult to pass on the higher costs to customers.

RMG exports are likely to rise 6-8 per cent to Rs.1.49 Trillion this financial year rebounding after a 3 per cent growth in FY26- driven by the free-trade agreements signed with the United Kingdom and the European Union, a depreciating rupee, and the easing of higher tariffs by the United States. Though, the West Asia crisis and its impact on key export markets remain monitorable.

On the domestic front, the segment faces headwinds due to the West Asia crisis, which may raise inflation and pull down demand for apparel. Demand for RMG, which had grown 8-10 per cent in FY'26, is likely to rise 4-6 per cent in FY'27. On the supply side, prices of domestic cotton are likely to increase due to higher international prices, surging fertiliser costs and rising minimum support price for cotton. Furthermore, the conflict has made domestic polyester more expensive.

MSMEs would face the brunt of the impact as they make up nearly 80 per cent of the textile production capacity. These small enterprises usually lack the financial cushion to absorb economic shocks. Export-oriented RMG clusters such as Tirupur and Bengaluru are likely to see better revenue growth than domestic-focused clusters such as Kolkata and Kanchipuram.

Despite these challenges, the RMG sector is poised for growth in the medium term due to free trade agreements, the establishment of large textile parks, Production-Linked Incentive scheme benefits, and remission of state and central taxes and levies, which will boost domestic manufacturing and exports.

Business Standard 27.05.2026

Cambodia's apparel exports rise 9.6% in January-April 2026

Cambodia's apparel exports rose 9.61 per cent year on year to $3.454 Billion in January-April 2026, reaffirming the sector's importance to the country's trade economy. Apparel accounted for 31.1 per cent of Cambodia's total export earnings of $11.120 Billion during the period, according to the General Department of Customs and Excise under the Ministry of Economy and Finance.

Exports of knitted apparel and clothing accessories under Chapter 61 increased 10.8 per cent to $2.159 Billion, compared with $1.949 Billion in the same period of 2025. Shipments of non-knitted apparel and accessories under Chapter 62 rose 8.7 per cent to $1.295 Billion from $1.192 Billion a year earlier, indicating broad-based growth across key garment categories. In April 2026, Cambodia's apparel exports grew sharply by 23.55 per cent year on year to $876.571 Million, pointing to stronger monthly order momentum from major markets such as the US, the EU and Japan. Knitted apparel exports climbed 19.9 per cent to $583.112 Million, while non-knitted apparel exports increased 31.6 per cent to $293.459 Million.

On the input side, imports showed a mixed trend. Imports of knitted or crocheted fabrics under Chapter 60 declined 2.7 per cent to $1.045 Billion in January-April 2026 from

$1.075 Billion a year earlier. Man-made fibre imports edged down 1.1 per cent to $480.720 Million, while cotton and cotton yarn imports rose 19.4 per cent to $309.457 Million, suggesting stronger demand for cotton-based garment production.

These figures show that Cambodia's garment sector continued to expand in early 2026, despite some moderation in fabric and man-made fibre imports. Higher apparel shipments, especially in April, indicate resilient sourcing demand, while the rise in cotton-related imports points to shifting raw material needs among manufacturers.

In 2025, Cambodia's apparel exports rose 16.52 per cent to $11.404 Billion, with knitted apparel exports up 17.0 per cent to $7.766 Billion and non-knitted apparel exports increasing 15.4 per cent to $3.638 Billion.

On the import side, knitted or crocheted fabric imports grew 5.7 per cent to $3.255 Billion, man-made fibre imports edged up 0.2 per cent to $1.352 Billion, and cotton and cotton yarn imports rose 7.8 per cent to $826.122 Million. Apparel exports jumped 24.44 per cent to $9.791 Billion, following a sharp 12.91 per cent contraction in 2023.

The rebound in 2024 and 2025 highlights how Cambodia has benefited from the recovery in global apparel demand, as well as ongoing sourcing diversification away from China towards lower-cost, duty-preferential production bases in Southeast Asia.

Fibre2Fashion 19.05.2026

Brazil's apparel imports double in 5 years, momentum persists

Brazil's apparel imports have expanded sharply over the past five years, rising 111 per cent to reach $2.45 Billion in 2025, underscoring a strong recovery from the pandemic-era dip in 2020. The growth trajectory has remained intact in 2026, with imports increasing 19 per cent year-on-year to $833.75 Million in the first quarter, indicating sustained demand momentum.

The country's apparel imports reached $833.75 Million in Q1 2026, marking a strong 19 per cent year-on-year increase from $700.82 Million in Q1 2025. This builds on a steady upward trajectory in annual imports, which rose to $2.45 Billion in 2025 from $2.22 Billion in 2024 and $1.93 Billion in 2023, following earlier levels of $1.75 Billion in 2022 and $1.24 Billion in 2021 after a pandemic-led dip to $1.16 Billion in 2020.

Category trends reveal a clear hierarchy. Trousers and shorts continue to dominate, contributing $165.7 Million in Q1 2026, with a stable share of around 20 per cent. However, the segment appears to be entering a mature phase, with its share no longer expanding significantly compared to earlier years.

A key structural shift is visible in fast-moving basics. T-shirts recorded one of the strongest gains, rising over 52 per cent year-on-year in Q1 and increasing their share from 7.02 per cent to around 9 per cent. This highlights a growing preference for affordable, high-turnover products aligned with mass consumption trends.

The Q1 performance is particularly notable as it already accounts for roughly one-third of 2025's total, suggesting full-year imports could surpass previous highs if the pace continues. This reflects both resilient domestic consumption and a growing reliance on imports to meet demand, according to the sourcing intelligence tool TexPro.

Shirts have maintained a relatively stable share in the 12-15 per cent range across periods, indicating steady demand for semi-formal apparel. In contrast, coats have shown volatility rising to 18.63 per cent share in Q1 2026 from 16.76 per cent a year earlier but trending lower compared to their stronger positioning in earlier years, suggesting uneven demand in structured categories, as per TexPro.

Overall, Brazil's import basket is increasingly skewed towards mid-to-low value, high-volume apparel, signalling a shift towards affordability, faster inventory cycles, and volume-driven sourcing rather than premium or fashion-led segments.

Bangladesh's cumulative RMG exports down, but rebound in April

Ready-made garment (RMG) exports (Chapters 61 and 62) from Bangladesh declined by 2.82 per cent to $31.719 Billion during July 2025-April 2026, the first ten months of fiscal 2025-26 (July-June), according to provisional data from the country's Export Promotion Bureau (EPB).

The South Asian nation's outbound shipment during April 2026, however, rebounded after steep fall in the preceding month. The shipment reached $3.140 Billion in April. The country's total export earnings also crossed $4 Billion in the month.

Woven garment exports witnessed limited decline compared to knitted garment exports during the ten-month period. Knitwear exports (Chapter 61) declined by 3.68 per cent to $16.814 Billion, compared with $17.457 Billion in the same period of fiscal 2024-25. Woven apparel exports (Chapter 62) eased 1.83 per cent to $14.904 Billion, down from $15.182 Billion during July-April 2025, EPB data showed.

Home textile exports (Chapter 63, excluding 630510) showed a marginal gain, increasing by 3.46 per cent to $766.08 Million from $740.49 Million in the same period of the previous fiscal. Taken together, exports of woven and knitted apparel, clothing accessories, and home textiles accounted for 82.45 per cent of Bangladesh's total exports, which stood at $39.396 Billion during this period.

Exports of cotton and cotton products, including yarn, waste, and fabrics (Chapter 52), fell by 12.76 per cent to $427.83 Million during the period, compared with $490.43 Million in the same period of the previous fiscal. In April 2026, RMG exports totalled $3.140 Billion, registering a 31.21 per cent increase from $2.393 Billion in the corresponding month of the previous year. Cumulative knitwear exports surged by 30.02 per cent to $1.703 Billion, while woven garment exports increased by 32.65 per cent to $1.437 Billion. Shipments of home textiles (Chapter 63, excluding 630510) jumped by 48.61 per cent to $93.46 Million. Exports of cotton and cotton products also fell, increased 33.89 per cent to $49.66 Million from $37.09 Million a year earlier. Bangladesh's RMG exports rose by 8.84 per cent to $39.346 Billion in fiscal 2024-25, compared with $36.151 Billion in 2023-24, $38.142 Billion in 2022-23, $42.613 Billion in 2021-22, and $31.456 Billion in 2020-21, according to EPB data.

Philippines' T&A imports fall 9%, exports rise in Q1 2026

The Philippines' textile and apparel trade showed a divergent trend in the first quarter of 2026, with imports declining while exports improved. According to the International Merchandise Trade Statistics (IMTS) released by the Philippine Statistics Authority (PSA), combined textile and apparel imports fell 9.40 per cent to $530.65 Million in January-March 2026, compared with $585.34 Million in the same period of 2025.

Imports of textile yarns and fabrics declined to $286.04 Million during the quarter, from $340.17 Million a year earlier. Imports of textile fibre and waste also dropped to $29.15 Million, compared with $38.13 Million in January-March 2025. However, imports of articles of apparel and clothing accessories rose to $215.46 Million, against $207.05 Million in the corresponding period of the previous year.

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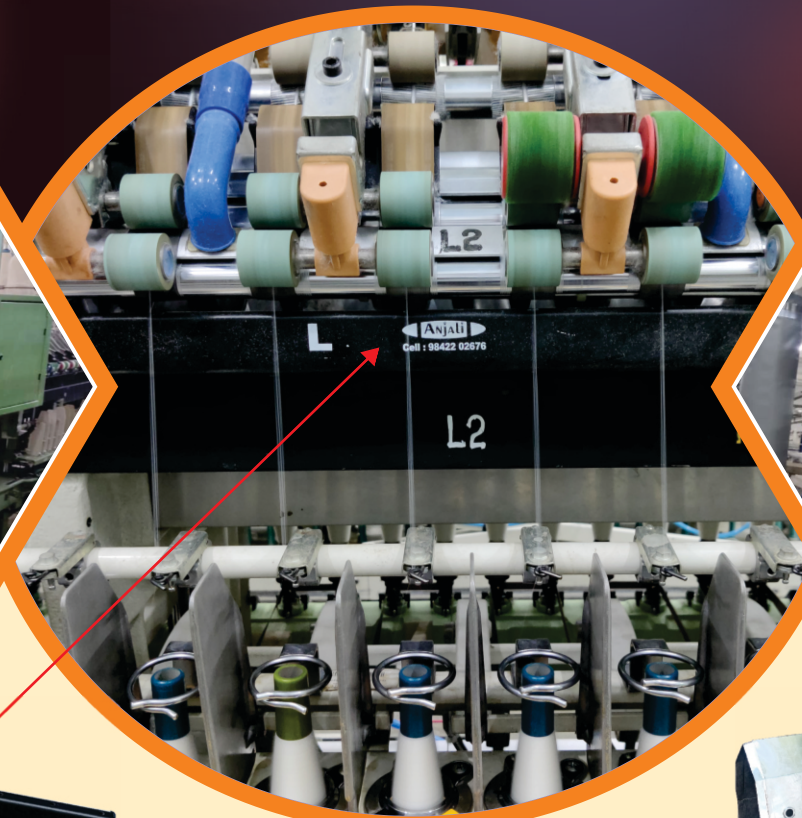

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