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Editor :

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The Southern India Mills' Association
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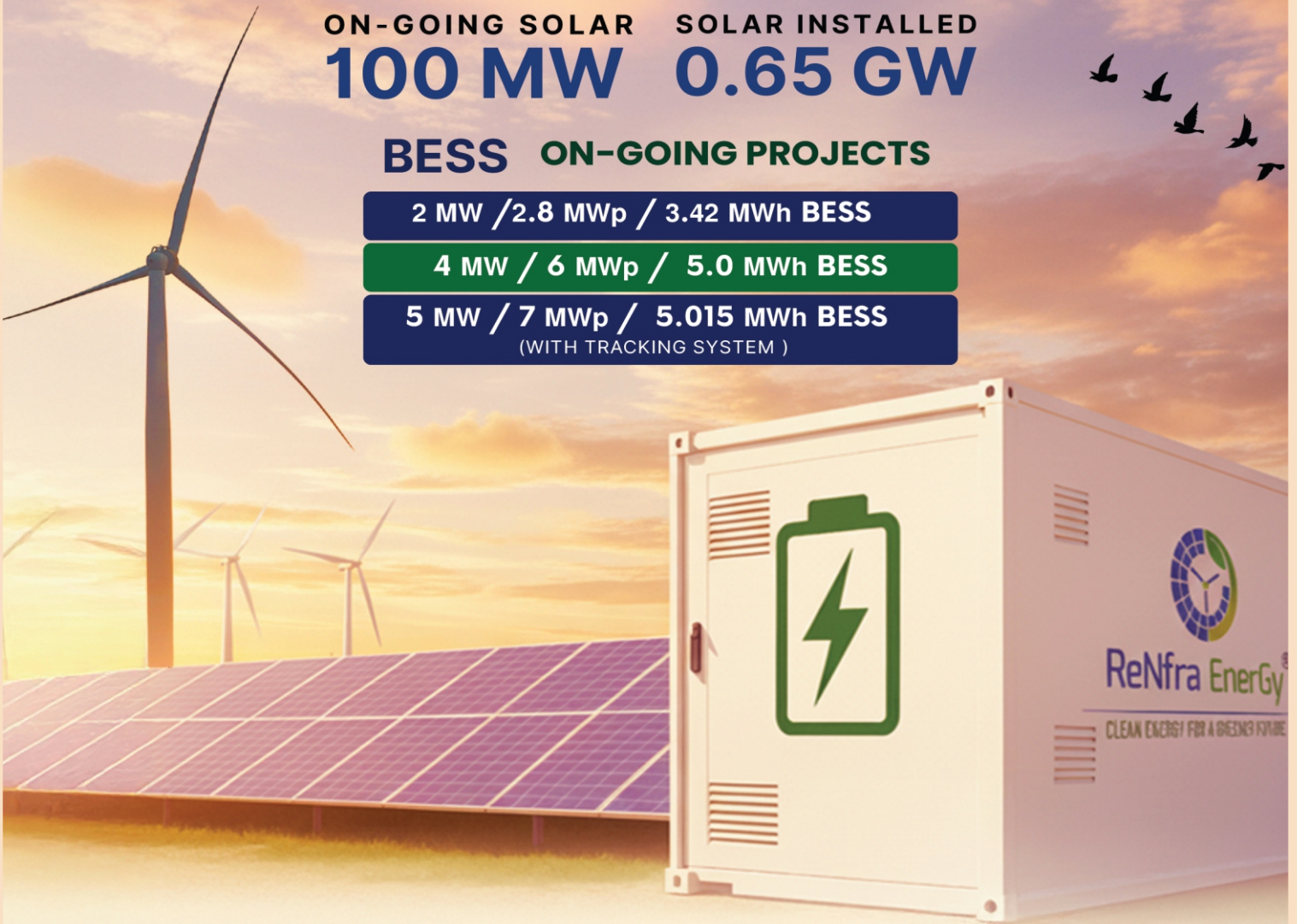
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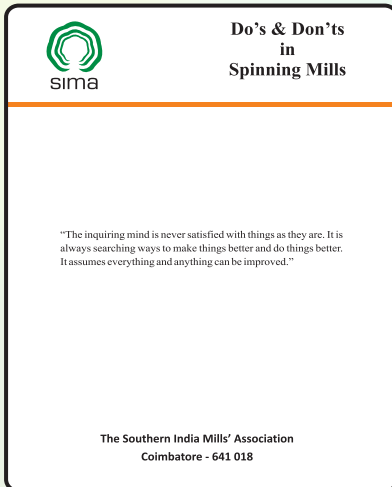
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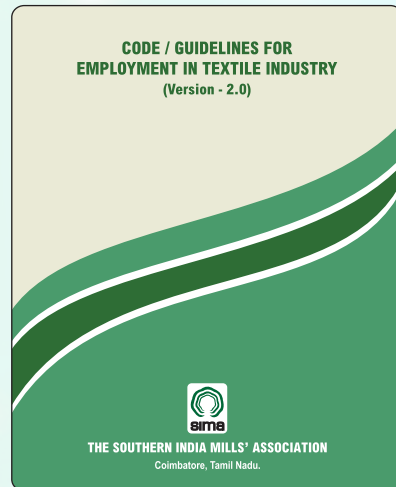
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From the Chairman

Friends,

On behalf of the entire textile industry, we thank the Hon'ble Union Minister for Textiles, Shri Giriraj Singh, for favourably considering our long pending plea of reducing Hank Yarn Obligation from 30% to 20% and issuing a Notification 8/TDRO/8/2026 dated 15th June 2026 in this regard, a step in the right direction to enable ease of doing business. We have also requested the Hon'ble Minister to extend dyed yarn price subsidy scheme in lieu of hank yarn price subsidy through NHDC under Direct Benefit Transfer System.

Another major relief for the entire textile value chain is the announcement that the power tariff will remain unchanged in Tamil Nadu for the current year. The industry has consistently appealed to the Tamil Nadu Government to refrain from increasing electricity tariffs, particularly the demand charges, which have risen steeply from Rs.350/MW to Rs.608/MW over the past four years, an increase of 74%. During the same period, energy charges for HT consumers increased from Rs.6.35 per unit to Rs.7.50 per unit an increase of 18%. This policy has placed a significant burden on all power intensive industries particularly the textile sector.

We sincerely thank the Hon'ble Chief Minister, Thiru C Joseph Vijay and the Hon'ble Minister for Energy Resources and Law, Thiru R Nirmalkumar for favourably considering the industry's request and providing much needed relief by maintaining the existing power tariff for the current year.

We express our sincere gratitude to Selvi S. Keerthana, Hon'ble Minister for Industries, Government of Tamil Nadu, for graciously participating and interacting with representatives of all Textile Industry Associations covering the entire textile value chain in Tamil Nadu at the Interaction Meeting held on 4th July 2026 at the SIMA Conference Hall. We hope all the representations put forth by the Industry Associations would be considered favourably, thereby facilitating ease of doing business and to achieve Tamil Nadu Vision of attaining USD 1.5 Trillion Economy by 2035-36.

The Association has been consistently pursuing policy reforms to strengthen the textile industry. Our continuous representations on the Handloom Reservation Act have received positive attention from the NITI Aayog and the Prime Minister's Office, leading to active engagement with the Ministry of Textiles. The Association has submitted a detailed analytical report in this regard. Simultaneously, the Government is focusing on indigenization of raw materials and textile machinery, to reduce import dependence and enhance the competitiveness of the domestic textile sector. The Association is also working closely with NITI Aayog to simplify regulatory processes, reduce compliance burdens and improve the ease of doing business.

From the Chairman

The global cotton market continues to navigate a period of balanced supply but uncertain demand, as reflected in the USDA's June 2026 report. The U.S. Cotton Outlook remains largely unchanged. For India, the monsoon situation for the 2026-27 cotton season has emerged as a matter of serious concern. According to the reports, cotton sowing has been delayed. This situation is particularly worrying in Maharashtra and Gujarat, where sowing has reached only 55% to 60% respectively. As these two States account 50% of India's cotton production, any prolonged delay or adverse weather could significantly affect both crop size and fibre quality. Even if acreage improves with subsequent rainfall, delayed sowing may impact crop maturity & lint quality, posing challenges for spinning mills and downstream textile manufacturers. We urge the Government to extend the duty-free import of cotton until the end of 2027 to ensure the availability of quality cotton and thereby stabilize raw material prices.

Concerns over the delayed cotton crop, uncertainty in the availability of quality raw material, subdued global demand, rising compliance requirements and persistent cost pressures are collectively impacting the competitiveness. While the industry remains resilient and committed to sustaining production and exports, timely policy interventions will be essential to address these emerging challenges. The coming months are expected to be crucial and the industry's performance largely depend on the availability of quality cotton, stable market conditions and policy support.

Friends, forced labour has become a significant geopolitical risk for global supply chains. International brands and buyers are strengthening their social compliance audits by interacting directly with workers, while the International Labour Organization (ILO) is closely monitoring developments in India. The recent U.S. actions under Section 301 and India's inclusion on the watch list have further heightened the importance of robust labour compliance.

Despite many managements paying wages well above the statutory minimum and in line with market standards, retaining manpower remains a major challenge. As the Labour Codes are intended to protect the workforce and reinforce fair employment practices, it is imperative that every establishment complies with both their letter and spirit. Such proactive adoption will not only mitigate compliance risks but also enhance the credibility and competitiveness of our industry in global markets.



Durai Palanisamy
Chairman

The Association had convened a Textile Industry interaction meeting with Selvi S. Keerthana, Hon'ble Minister for Industries, Government of Tamil Nadu on 4th July 2026 at SIMA Conference Hall, Coimbatore, bringing together Office-Bearers of all major Textile Associations representing the entire textile value chain in the State. The meeting was also attended by Tmt. Kanimozhi Santhosh, MLA (Kavundampalayam Constituency), Thiru N.M. Sukumar, MLA (Sulur Constituency), and Thiru K.S. Sri Giri Prasath, MLA (Singanallur Constituency).

Chairman, SIMA welcomed Hon'ble Minister for Industry, Selvi S Keerthana, and the industry representatives. He thanked the Hon'ble Chief Minister for the timely initiatives taken to support the industry, notably recommending the exemption of the 11% import duty on cotton during the off-season and refraining from implementing the proposed 3.48% electricity tariff increase. These measures have played a significant role in enabling the industry to fulfil export commitments and recover from recent challenges.

Industry representatives highlighted structural challenges viz., non-availability of raw materials, issued plagued in the processing sector, power related issues, etc.

On behalf of the textile industry, Mr. Durai Palanisamy, Chairman, SIMA, submitted a set of key policy recommendations aimed at enhancing the sector's competitiveness. These included permitting annual banking for post-2018 commissioned captive windmills,

allowing adjustment of surplus daytime solar power against night-time consumption, waiving penal interest on pending deemed demand charges, freezing demand charges at the current level for three years, withdrawing network charges on rooftop solar generation, exempting new open access power investments from cross subsidy and additional surcharges for ten years, and developing a long-term, cost-effective solution for the treatment and disposal of textile effluents.

Office-Bearers of various Textile Associations had submitted a memorandum including support to construct affordable housing and dormitories for migrant workers, mounting cost pressures, led by power tariffs and other input expenses, establishment of Textile and Apparel Park under the Centre Governments Bharat Audyogik Vikas Yojana, etc.

During the interaction, the Hon'ble Minister for Industries assured the representatives of the Textile Industry that the concerns and recommendations submitted by the Textile Associations would be taken up with the Hon'ble Chief Minister for favourable consideration. She acknowledged the urgency of addressing power-related issues and the difficulties faced by the textile processing sector, which remains a critical segment of the textile value chain.

The Hon'ble Minister also indicated that the Government would consider constituting a Policy Advocacy Committee comprising major industry stakeholders to strengthen policy dialogue and facilitate ease of doing business.

Textile Industry Meeting

Further, she urged the Industry to prepare a comprehensive roadmap to enhance the Textile Industry contribution towards achieving the Vision of transforming the State into a USD 1.5 Trillion Economy by 2035-36.

The interaction reaffirmed the industry's commitment to working closely with the Government to strengthen Tamil Nadu's leadership in the textile sector through collaborative policy interventions and sustainable industrial growth.

Glimpses



Mr. Durai Palanisamy, Chairman, SIMA,
Welcoming the participants



Mr. T Rajkumar, Former Chairman, SIMA,
Delivering the special address

Representatives from various Textile Industry Associations submitting a memorandum to the Hon'ble Minister for Industries, Government of Tamil Nadu



Textile Industry Meeting



Mr. K Sivaraj, Vice-Chairman, SIMA, Delivering Vote of Thanks

Trade Performance

India's Trade Performance of HS Code 5202 (Cotton Waste; Include Yarn Waste and Garnetted Stock)

\$44.61M

Exports
(Apr - Mar 2026)

-44.14%

(YoY Growth)
(Apr - Mar 2026 Vs
Apr - Mar 2025)

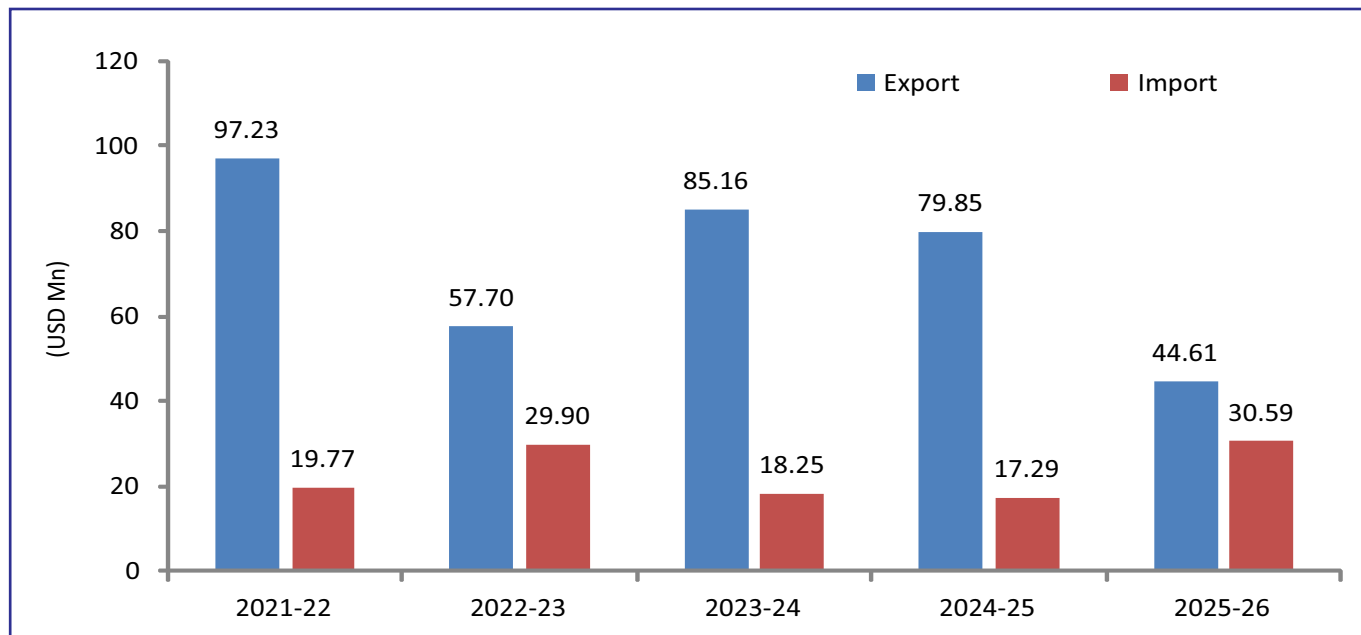
\$30.59M

Imports
(Apr - Mar 2026)

76.92%

(YoY Growth)
(Apr - Mar 2025 Vs
Apr - Mar 2026)

Chart - 1 : Export and Import Performance of HS Code 5202



Tamil Nadu District wise Export Performance of HS Code 5202

(Values in USD Mn)

S.No.	Seaport	FY '24	FY '25	FY '26
1	Coimbatore	5.13	2.86	1.79
2	Erode	-	0.55	0.59
3	Dindigul	4.31	3.53	0.57
4	Tiruppur	2.25	1.37	0.29
5	Chennai	0.04	0.22	0.14
	Top 5	11.73	8.53	3.38
6	Namakkal	-	0.02	0.09
7	Virudhunagar	0.17	-	0.02
8	Karur	0.04	0.01	0.02
9	Vellore	-	0.03	0.01
	Others	0.21	0.15	0.16
	Total	11.94	8.68	3.54

Source : DGCIS

India's textile & apparel exports fell 5% to \$6 Bn in April-May 2026

- ❖ India's textile and apparel exports fell 5.11 per cent to \$5.87 Billion in April-May 2026, with textiles up 3.03 per cent and apparel down 12.98 per cent.
- ❖ Imports of raw cotton surged 20.54 per cent.
- ❖ T & A share in India's exports declined to 6.61 per cent.
- ❖ T & A share in India's imports declined to 1.06 per cent.

Within the textile segment, exports of cotton yarn, fabrics, made-ups rose by 1.38 per cent to \$ 1,696.89 Million during April-May 2026. Exports of man-made yarn, fabrics and made-ups marginally increased by 0.26 per cent to \$795.43 Million.

Exports of RMG of Cotton Including accessories fell by 11.78 per cent to \$1,531.62 Million during Apr - May 2026 compared to \$1,736.13 Million in 2025. Exports of RMG of Manmade Fibres declined by 11.53 per cent to \$411.55 Million. Exports of RMG of other textile material stood at \$520.15 Million.

Imports of cotton yarn, fabrics, made-ups decreased by 1.53 per cent to \$ 109.09 Million during April-May 2026. However, imports of man-made yarn, fabrics and made-ups increased by 11.62 per cent to \$531.29 Million.

Imports of RMG of Cotton Including accessories rose by 13.33 per cent to \$106.82 Million compared to \$94.25 Million. RMG of Manmade

Fibres increased by 21.59 per cent to \$86.60. Imports of RMG of other textile material stood at \$39.64 Million.

Imports of raw cotton and waste increased by 20.54 per cent to \$228.05 Million during April-May 2026, compared to \$189.18 Million in April-May 2025. Imports of other textile yarn, fabrics, and made-ups fell by 24.26 per cent, from \$219.74 Million to \$166.42 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 of all goods stood at USD 89 Billion during April-May 2026, 16 per cent higher than corresponding period of the previous fiscal of USD 77 Billion. At the same time, the country's import had increased at a faster rate. Country's total import during the period should at USD 145 Billion, 15 per cent higher than corresponding period import of USD 126 Billion in the previous fiscal.

As far as the export of textile & allied products are concerned, export declined by 5.11 per cent and their import increased by 7.49 per cent over previous year corresponding period.

Table - 1 & 2 shows comparison of provisional on item wise export and import of commodities under textiles & allied products category during April-May 2026 with corresponding period export in the previous year.

Foreign Trade Performance

The export share of textile and allied products during April-May 2026, had declined to 6.61 per cent from previous year corresponding period share of 8.09 per cent. At the same time import share had also decreased to 1.06 per cent from previous year share of 1.13 per cent.

Chart 1 and 2 show per cent share of major textile & allied products in the country's export and import during April-May 2026 compared with the corresponding period share in the previous fiscal. It may be observed that export share of Manmade Staple fibre and Cotton Yarn was same as the previous year's share. In the case of import, the share of Manmade Staple Fibre, Raw Cotton was higher than previous year's level.

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

- ❖ India's export of cotton products covered under HS Code 52 during April 2026 stood at USD 507.03 Million, as against the previous year same time export level of USD 491.72 Million.
- ❖ At the same time, export of Man-made filaments during the period stood at USD 147.97 Million, rose by 10 per cent compared to previous year export level of USD 134.49 Million.
- ❖ Manmade staple fibres covered under HS Code 55 stood at USD 127.54 Million.
- ❖ Exports of garments covered under HS Code 62 during the period stood at USD 692.52

Million which is decreased by 8 per cent when compared to previous year same time export level of USD 751.76 Million.

- ❖ Made-ups exports covered under HS Code 63 stood at USD 484.54 Million, which is increased by 5 per cent when compared to previous year same time export level of USD 461.96 Million.

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

- ❖ India's import of cotton products covered under HS Code 52 during April 2026 stood at USD 98.75 Million, fell by 5 per cent compared to previous year same time import level of USD 104.35 Million.
- ❖ Man-made filaments during the period stood at USD 172.96 Million which is higher by 35 per cent when compared with previous year same time import level of USD 128.22 Million.
- ❖ Garments covered under HS Code 62 during the period stood at USD 64.37 Million, increased by 19 per cent.
- ❖ Made ups covered under HS Code 63 stood at USD 47.63 Million, which is marginally declined by 0.42 per cent when compared to previous year same time import level of USD 47.84 million.

Table - 3 & 4 shows India's export and import of textile items covered under HS Codes 50 to 63 in USD Million during April 2026 compared with same period of the previous year.

Foreign Trade Performance

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

Commodity	Apr - May 2025	Apr - May 2026	% Growth
Textiles & Allied Products	6,193.86	5,877.65	-5.11
Manmade Staple Fibre	65.40	83.21	27.24
Cotton Yarn	546.01	630.08	15.40
Cotton Fabrics, Made-ups Etc.	1,127.81	1,066.81	-5.41
Other Textile Yarn, Fabric Made-up Articles	159.75	149.90	-6.17
Silk, Raw	Neg	Neg	Neg
Natural Silk Yarn, Fabrics, Made-ups	40.30	34.22	-15.09
Manmade Yarn, Fabrics, Made-ups	793.39	795.43	0.26
Wool, Raw	Neg	Neg	Neg
Wollen Yarn, Fabrics, Made-ups, etc.	28.47	34.49	21.12
RMG Cotton Including Accessories	1,736.13	1,531.62	-11.78
RMG Silk	11.71	16.65	42.22
RMG Manmade Fibres	465.21	411.55	-11.53
RMG Wool	32.58	28.65	-12.06
RMG of Other Textile Material	637.14	520.15	-18.36
Coir And Coir Manufactures	108.71	133.74	23.03
Handloom Products	30.65	23.57	-23.11
Silk Waste	5.10	7.17	40.36
Jute, Raw	2.66	0.06	-97.66
Jute Yarn	4.75	3.13	-34.08
Jute Hessian	18.79	16.52	-12.09
Floor Covering of Jute	14.12	12.10	-14.30
Other Jute Manufactures	22.27	25.45	14.27
Carpet (Excluding Silk) Handmade	237.89	249.53	4.89
Silk Carpet	9.03	8.00	-11.35
Cotton Raw Including Waste	95.89	95.34	-0.58

Source : MoC

Foreign Trade Performance

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

Commodity	Apr - May 2025	Apr - May 2026	% Growth
Textiles & Allied Products	1,432.29	1,539.53	7.49
Manmade Staple Fibre	83.22	115.81	39.17
Cotton Yarn	3.68	4.02	9.06
Cotton Fabrics, Made-ups Etc.	107.10	105.07	-1.90
Other Textile Yarn, Fabric Made-up Articles	219.74	166.42	-24.26
Silk, Raw	19.77	24.98	26.38
Natural Silk Yarn, Fabrics, Made-ups	9.42	8.04	-14.62
Manmade Yarn, Fabrics, Made-ups	475.99	531.29	11.62
Wool, Raw	38.87	55.67	43.21
Wollen Yarn, Fabrics, Made-ups, etc.	18.22	23.31	27.90
RMG Cotton Including Accessories	94.25	106.82	13.33
RMG Silk	1.00	1.57	57.92
RMG Manmade Fibres	71.22	86.60	21.59
RMG Wool	1.72	1.79	3.56
RMG of Other Textile Material	33.95	39.64	16.75
Coir And Coir Manufactures	Neg	Neg	Neg
Handloom Products	Neg	Neg	Neg
Silk Waste	Neg	Neg	Neg
Jute, Raw	21.50	1.49	-93.08
Jute Yarn	14.28	16.49	15.46
Jute Hessian	8.91	6.35	-28.75
Floor Covering of Jute	Neg	Neg	Neg
Other Jute Manufactures	15.41	9.28	-39.76
Carpet (Excluding Silk) Handmade	3.48	4.32	24.25
Silk Carpet	Neg	Neg	Neg
Cotton Raw Including Waste	189.18	228.05	20.54

Source : MoC

Foreign Trade Performance

Chart - 1 : % Share of Country's Export

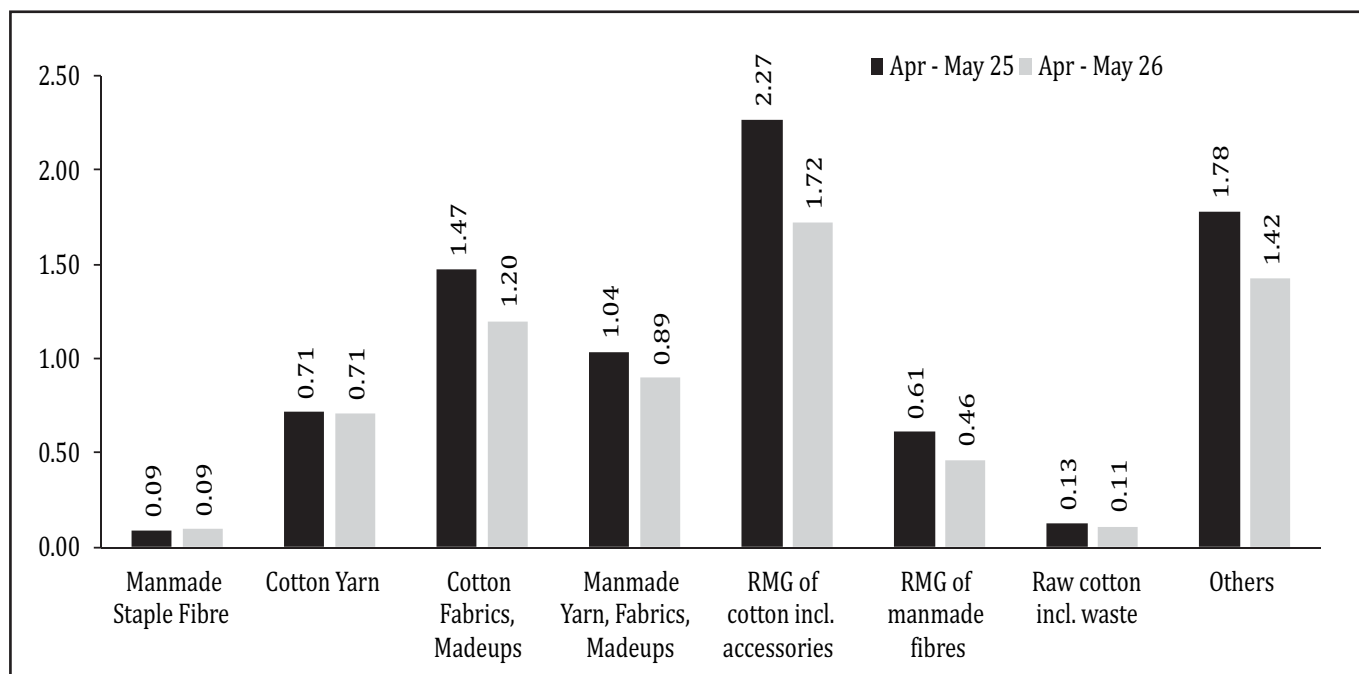
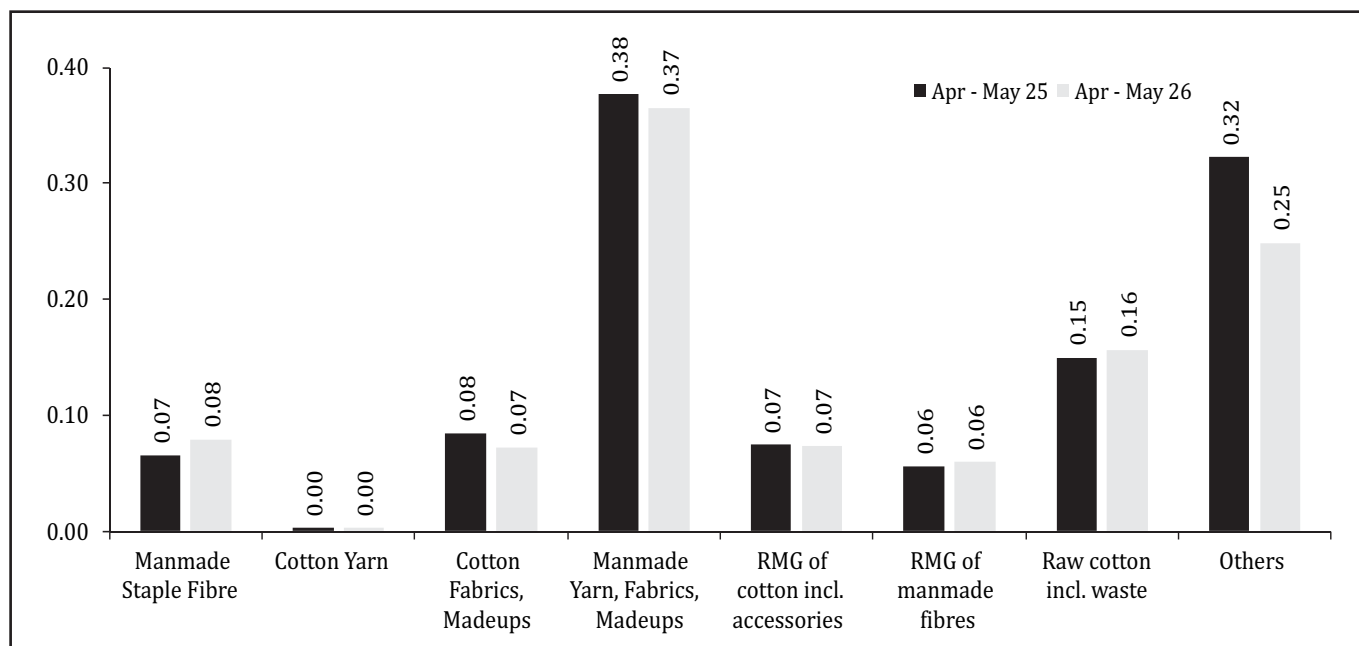


Chart - 2 : % Share of Country's Import



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Foreign Trade Performance

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

HS Code	Commodity	April 2025	April 2026	% Growth
50	Silk	22.69	18.37	-19.05
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	11.58	15.11	30.50
52	Cotton.	491.72	507.03	3.11
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	67.45	77.39	14.74
54	Man-Made Filaments.	134.49	147.97	10.02
55	Man-Made Staple Fibres.	123.06	127.54	3.64
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	50.02	50.93	1.82
57	Carpets and other textile floor coverings.	160.31	171.46	6.96
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	34.21	37.10	8.46
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	41.29	37.12	-10.10
60	Knitted or crocheted fabrics.	46.59	43.40	-6.86
61	Articles of apparel and clothing accessories, knitted or crocheted.	624.59	522.36	-16.37
62	Articles of apparel and clothing accessories, not knitted or crocheted.	751.76	692.52	-7.88
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	461.96	484.54	4.89

Source : MoC

Foreign Trade Performance

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

HS Code	Commodity	April 2025	April 2026	% Growth
50	Silk	13.96	13.87	-0.61
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	26.99	40.22	48.99
52	Cotton.	104.35	98.75	-5.36
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	49.33	42.44	-13.97
54	Man-Made Filaments.	3.50	21.85	-7.06
55	Man-Made Staple Fibres.	69.05	92.50	33.97
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	38.34	39.65	3.41
57	Carpets and other textile floor coverings.	14.57	15.07	3.44
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	18.82	15.62	-17.01
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	71.79	65.62	-8.59
60	Knitted or crocheted fabrics.	70.19	39.38	-43.89
61	Articles of apparel and clothing accessories, knitted or crocheted.	42.60	49.61	16.44
62	Articles of apparel and clothing accessories, not knitted or crocheted.	53.90	64.37	19.42
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	47.84	47.63	-0.42

Source : MoC

Foreign Trade Performance

HS Code wise Performance

Export & Import Quantum - April 2026

- ❖ Export of cotton covered under HS Codes 5201-5203 during April 2026 stood at 30.77 Million kgs, increased by 5 per cent as against previous year same time export level of 29.41 Million kgs. At the same time, its imports during the period stood at 44.08 Million kgs, 9 per cent lower than previous year same time import level of 48.27 Million kgs.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204-5207 during the period stood at 103.61 Million kgs, which is 11 per cent higher than the previous year same time export level of 93.41 Million kgs.
- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208-5212 during the period stood at 175.33 Million square metres.

Export and Import Value - April 2026

- ❖ Export of cotton in all forms covered under

HS Codes 5201-5203 during April 2026 stood at USD 52.31 Million, rose by 6 per cent as against the previous year same time export level of USD 49.31 Million. At the same time its import during the period stood at USD 81.58 Million as against the previous year import level of USD 86.88 Million.

- ❖ Export of cotton yarn of all types covered under HS Codes 5204-5207 during the period was valued at USD 300.54 Million, 8 per cent higher than previous year same time export level of USD 278.91 Million. Its import stood at USD 2.63 Million during April 2026.
- ❖ Export of woven fabrics of containing cotton covered under HS Codes 5208-5212 during the period was valued at USD 154.18 Million as against previous year export level of USD 163.50 Million. At the same time its import stood at USD 14.54 Million.

Table - 5 shows export and import of HS Codes 5201 - 5212 during April 2026 compared with the corresponding period dollar terms.

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Foreign Trade Performance

Table - 5 : Export / Import – USD Million

HS Code	Description	Export			Import		
		April 2025	April 2026	% Growth	April 2025	April 2026	% Growth
5201	Cotton, Not Carded or Combed	39.76	41.77	5.05	85.51	79.33	-7.23
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	4.45	4.56	2.32	1.21	2.15	77.95
5203	Cotton, Carded or Combed	5.10	5.98	17.19	Neg	Neg	Neg
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	1.03	0.79	-23.28	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	261.40	284.16	8.71	2.13	2.52	18.38
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	15.82	14.55	-7.99	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	97.47	89.17	-8.52	7.88	7.22	-8.34
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	43.35	44.75	3.23	3.11	2.04	-34.35
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	4.45	4.78	7.42	1.75	3.04	73.04
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	16.62	14.32	-13.83	1.96	2.09	6.29
5212	Other Woven Fabrics of Cotton	1.61	1.16	-27.77	Neg	Neg	Neg
	Cotton (HS 5201-5203)	49.31	52.31	6.08	86.88	81.58	-6.10
	Cotton Yarn (HS 5204-5207)	278.91	300.54	7.76	2.29	2.63	14.85
	Woven Fabrics of Cotton (HS 5208-5212)	163.50	154.18	-5.70	15.17	14.54	-4.15

Source : MoC

Foreign Trade Performance

Table - 6 : India's Cotton Export (5201) to Major Countries

(Quantity)

S.No.	Country	April 2025	April 2026	% Growth
1	BANGLADESH PR	1,99,89,897	2,02,84,430	1
2	VIETNAM SOC REP	3,63,728	12,97,778	257
3	INDONESIA	11,46,253	7,41,465	-35
4	CHINA P RP	1,07,612	3,13,974	192
5	NEPAL	77,100	52,666	-32
6	THAILAND	1,46,034	25,687	-82
7	JAPAN	12,458	22,243	79
8	POLAND	0	340	-
9	CANADA	0	92	-
10	AUSTRALIA	72	54	-25
	TOTAL	2,19,33,562	2,27,38,837	3.67

Source : MoC

Table - 7 : India's Cotton Yarn Export (5205) to Major Countries

(Quantity)

S.No.	Country	April 2025	April 2026	% Growth
1	BANGLADESH PR	4,25,83,088	3,70,78,114	-13
2	CHINA P RP	76,79,247	2,42,25,466	215
3	VIETNAM SOC REP	30,98,638	60,74,778	96
4	PERU	53,51,794	56,00,006	5
5	EGYPT A RP	60,75,850	36,16,335	-40
6	PORTUGAL	32,09,430	30,15,121	-6
7	KOREA RP	19,16,943	21,52,538	12
8	COLOMBIA	22,09,844	17,65,358	-20
9	SRI LANKA DSR	17,01,694	15,51,018	-9
10	THAILAND	8,03,539	11,59,900	44
	TOTAL	8,75,99,548	9,80,46,130	11.93

Source : MoC

Foreign Trade Performance

Women's wear drives Bahrain apparel imports in Q1 2026

- ❖ Bahrain imported apparel worth \$68.72 Million during January-March 2026, of which women's apparel contributed \$33.21 Million, representing 48.32 per cent of total imports. Men's wear accounted for \$16.96 Million, while unisex apparel stood close behind at \$16.64 Million.
- ❖ Total apparel imports declined from \$87.25 Million in Q1 2025 to \$68.72 Million in Q1 2026, reflecting softer consumer spending and cautious retailer inventory buying.
- ❖ China further strengthened its dominance in Bahrain's apparel supply chain. Chinese exports to Bahrain reached \$29.07 Million in Q1 2026, increasing China's market share to 42.31 per cent from 38.92 per cent, a year earlier.
- ❖ India (\$9.95 Million) and Bangladesh (\$6.45 Million) remained the second and third largest suppliers but experienced lower export values due to intensified sourcing competition.

Türkiye's apparel export decline moderated in January-April 2026

- ❖ Türkiye's apparel exports eased 1.98 per cent year on year to \$5.192 Billion in January-April 2026, down from \$5.297 Billion in the same period last year, reflecting demand pressure in key markets.
- ❖ Exports of knitted and crocheted garments (HS 61) fell 0.4 per cent to \$2.975 Billion, while woven apparel and accessories (HS 62) dropped 4 per cent to \$2.217 Billion.

- ❖ The European Union remained Türkiye's largest apparel market, with Germany (17%) and the Netherlands (11%) leading destinations, although competition from Bangladesh, Vietnam, Pakistan, and Cambodia intensified.
- ❖ Türkiye's annual apparel export declined to three consecutive years, with exports falling to \$16.393 Billion in 2025

US home textile imports fall in Q1 as buyers seek affordability

- ❖ US home textile imports stood at \$4.34 Billion during January-March 2026, declined 17.2% from \$5.24 Billion in the corresponding period of 2025.
- ❖ MMF based home textile imports stood at \$1.50 Billion during the period, accounted for 35 per cent of total imports.
- ❖ Imports of cotton home textiles fell to \$900 Million in January-March 2026 from \$1.133 Billion a year earlier. Cotton products accounted for 21 per cent of total imports.
- ❖ The 'others' category, which includes blended fibres and non-traditional materials, remained the largest segment with imports worth \$1.762 Billion and a 40.56 per cent share in total imports during the first quarter of 2026.

South Africa's textile imports fall 5.6% in January-April 2026

- ❖ South Africa's imports of textile and apparel stood at \$1.25 Billion in January-April 2026, declined 5.6 per cent compared to \$1.33 Billion in January - April 2025.

Foreign Trade Performance

- ❖ South Africa's export of textile and apparel stood at \$493.14 Million during the period compared to \$489.61 Million in the corresponding period of 2025.
- ❖ During April 2026, imports of textile and apparel decreased by 4.86 per cent to \$292.74 Million from \$307.70 Million in March 2026.
- ❖ Exports increased by 9 per cent to \$147.42 Million in April 2026 from \$135.26 Million in March 2026.

South Korea's apparel imports rebound in April, reach \$4.05 Bn

- ❖ South Korea's apparel imports were stood at \$4.05 Billion during January-April 2026, compared with \$4.04 Billion in the same period of 2025.
- ❖ Imports of knitted apparel and clothing accessories (Chapter 61) were valued at \$1.761 Billion and imports of non-knitted apparel and clothing accessories (Chapter 62) totalled \$2.289 Billion.

- ❖ South Korea typically exports fabrics and textile materials and imports readymade garments.
- ❖ In 2025, the country's apparel imports eased by 1.44 per cent to \$12.18 Billion, comprising knitted apparel and clothing accessories at \$5.14 Billion and non-knitted apparel and clothing accessories (Chapter 62) of \$7.04 Billion.
- ❖ The exports of man-made filaments, strips and similar materials (Chapter 54) from South Korea were down 11.42 per cent, valued at \$1.76 Billion and knitted or crocheted fabrics (Chapter 60) dipped 14.24 per cent to \$1.46 Billion.

Sri Lanka's garment exports fall 7.4% to \$1.5 Bn in Jan-April 2026

- ❖ Garment exports from Sri Lanka reached \$1.49 Billion during January-April 2026, reflecting a 7.45 per cent decline compared to

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

\$1.61 Billion recorded in the same period of 2025.

- ❖ Total textile product exports amounted to \$1.62 Billion, accounted for 45.70 per cent of all industrial exports during January- April 2026.
- ❖ During April 2026, textile and garment exports eased by 4.7 per cent year-on-year to \$348 Million.
- ❖ During 2025, the island nation's garment exports totalled \$4,911.4 Million, marking a 5.4 per cent increase. Sri Lanka also exported textiles worth \$287.6 Million and other manufactured textile articles worth \$114.7 Million during the year.

Jordan's apparel exports fall 21.7% in January-April 2026

- ❖ Jordan exported apparel worth \$695.286 Million in the first four months of 2026, compared to \$888.097 Million in the corresponding period of 2025.
- ❖ The US market continued to account for more than 71% (\$498.12 Million) of Jordan's total apparel shipments followed by Mexico (6%), Canada (3%), France (3%) and Germany (2%) during the period.
- ❖ Jordan's apparel exports had increased to \$2.77 Billion in 2025 from \$2.55 Billion in 2024.

Bangladesh garment exports slip to \$35.3 Bn in July-May 2026

- ❖ Ready-made garment (RMG) exports (Chapters 61 and 62) from Bangladesh

declined by 3.41 per cent to \$35.31 Billion during July 2025 - May 2026.

- ❖ Knitwear exports (Chapter 61) declined by 4.28 per cent to \$18.78 Billion, compared with \$19.62 Billion in the same period of fiscal 2024-25.
- ❖ Woven apparel exports (Chapter 62) eased 2.42 per cent to \$16.53 Billion, down from \$16.94 Billion during July 2024- May 2025.
- ❖ In May 2026, RMG exports totalled \$3.59 Billion, registering 22.95 per cent decrease from \$2.92 Billion in the corresponding month, of the previous year.
- ❖ Knitwear exports eased by 8.91 per cent to \$1.97 Billion, while woven garment exports eased by 7.53 per cent to \$1.62 Billion.

Vietnam's textile, garment exports reach \$15 Bn in January-May 2026

- ❖ Vietnam's textile and garment exports (excluding yarn and fibre) stood at \$15.13 Billion during January-May 2026. The country's yarn exports grew 8.7 per cent to \$1.88 Billion.
- ❖ Textile and garment exports increased 3.5 per cent in May 2026 to \$3.18 Billion. Yarn exports in the month increased 3.1 per cent in value to \$410.95 Million.
- ❖ During 2025, Vietnam's textile, garment and yarn exports calculated \$43.95 Billion, missing the target of \$47-\$48 Billion. The Vietnam Textile and Apparel Association had set a higher export target of \$50 Billion for textiles, garments, and yarn in 2026.

Foreign Trade Performance

Philippines's T&A exports edge up in Jan-April, imports fall 11%

- ❖ The Philippines' textile and apparel imports fell 11.49 per cent to \$705.43 Million in January-April 2026, compared with \$796.98 Million in the corresponding period of 2025.
- ❖ In April 2026, the country's imports of textiles and apparel imports fell to \$165.34 Million from \$190.64 Million in April 2025.
- ❖ On the export front, textile and apparel exports increased by 3.91 per cent to \$309.29 Million in January-April 2026, compared with \$297.66 Million in the corresponding period of 2025.
- ❖ The textile and apparel exports declined to \$64.02 Million in April 2026, compared with \$72.73 Million a year earlier.

UK's clothing imports up 2.4% and exports down 3% in April 2026

- ❖ The United Kingdom's clothing imports

increased 2.4 per cent to £1.36 Billion (~\$1.83 Billion) in April 2026, compared with £1.33 Billion in the corresponding period of 2025.

- ❖ During the first quarter of 2026, clothing imports eased 2.95 per cent to £3.95 Billion (~\$5.34 Billion) in January-March 2026, compared with £4.07 Billion in the corresponding period of 2025.
- ❖ The country's imports of clothing rose 6.04 per cent to £17.73 Billion (~ \$24.11 Billion) in 2025, compared to £16.72 Billion in 2024.
- ❖ Clothing exports from the United Kingdom eased by 3.04 per cent to £223 Million (~\$298.97 Million) in April 2026.
- ❖ The country's clothing exports eased by 7.87 per cent to £655 Million (~ \$884.96 Million) in the first quarter of 2026.
- ❖ The country's clothing exports declined 9.17 per cent to reach £3,013 Million (~ \$4,096.79 Million) in 2025 compared to \$3,317 Million in 2024.

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.

India's IIP Growth records 5.1% growth in May 2026

India's industrial production growth during May 2026 registered a 5.1% year-on-year increase according to data released by the Ministry of Statistics and Programme Implementation (MoSPI).

The electricity and gas supply sector was a major contributor to this growth, recorded a 9.9% year-over-year increase. The manufacturing sector and water supply, sewage & waste management sector experienced a growth of 5.5% respectively and mining & quarrying saw a degrowth of 1.6%.

The General Index of Industrial Production (IIP) for May 2026 stood at 122.7 points, compared to 116.7 in May 2025. Sector-wise, the indices were recorded at 112.9 for Mining & Quarrying, 122.6 for Manufacturing, 129.6 for Electricity and Gas Supply and 145.1 for Water supply, Sewage & Waste management.

Within the manufacturing sector, 16 out of the 23 industry groups posted positive year-on-year growth. The top three positive contributors for the month of March 2026 are - "Manufacture of electrical equipment" (20.8%), "Manufacture of fabricated metal products, except machinery and equipment" (15.5%), "Manufacture of motor vehicles, trailers and semi-trailers." (14.5%).

The index of manufacturing of wearing apparel stood at 94.5 points during the month, recorded a growth of 3.8% comparing to previous month index of 91 points.

The manufacture of textiles marginally rose by 0.4%, with the index rising to 136.2 points from 135.7 points in April 2026.

The manufacture of textiles showed a year-on-year increase, with the index rose to 136.2 from 120.9 in May 2025, reflecting a growth of 12.7%. The manufacture of wearing apparel registered a decline of 8.8%, with the index fell to 94.5 from 108.2 in the same period last year.

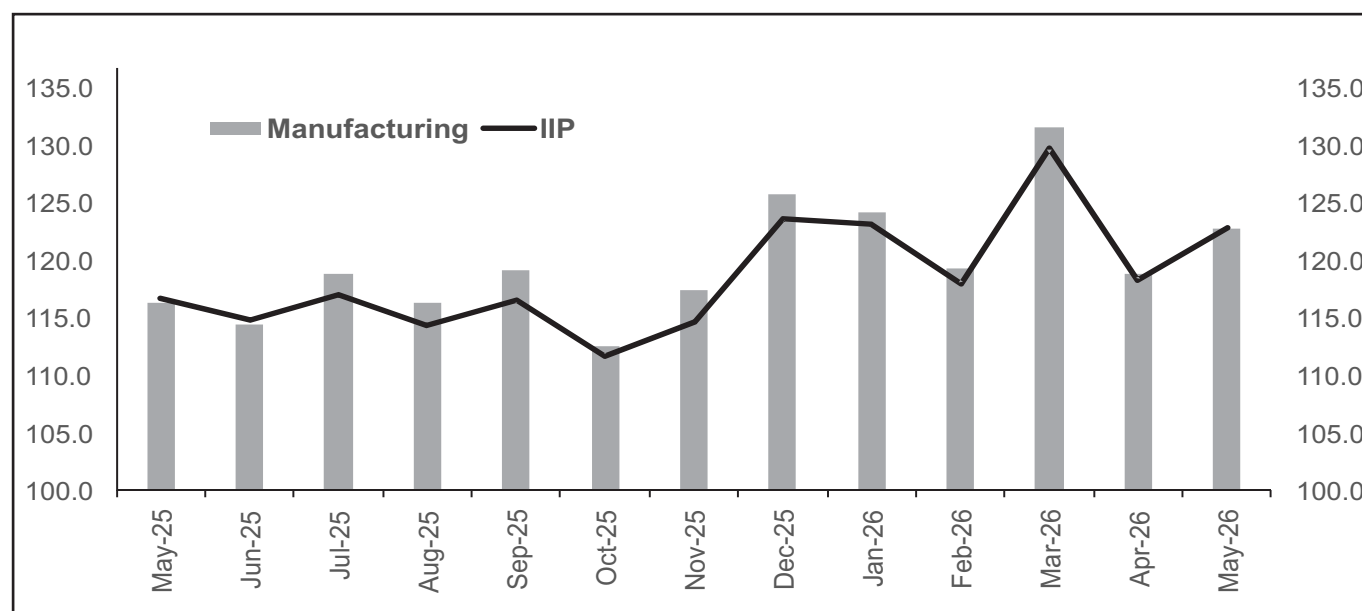
India's industrial production showed healthy growth during May 2026, supported mainly by strong performance in the Electricity and Manufacturing. Manufacturing continued to be the key contributor to overall industrial expansion, although growth varied across industry groups. Within the textile value chain, the textile industry maintained strong production momentum, whereas the wearing apparel sector continued to face challenges despite registering a sequential improvement over the previous month. The fact that textiles performed better than clothing indicates that the rebound has been more noticeable in upstream manufacturing than in downstream clothing manufacture. To support a more balanced recovery, it will be crucial to increase export markets, boost demand, and improve supply chain efficiency. Employment and industrial output can be further increased by maintaining concentration on labour-intensive industries like clothing. Overall, the May 2026 IIP reflects a resilient industrial outlook with scope for broader-based growth.

Index of Industrial Production

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

Sectoral	Jan'26	Feb'26	Mar'26	Apr'26	May'26
Mining & quarrying	-6.9	-9.6	-17.1	-10.3	-6.1
Manufacturing	4.6	5.7	4.0	6.1	5.5
Electricity & Gas Supply	5.6	1.9	1.2	4.6	9.9
Water Supply, Sewerage & Waste Management	5.1	5.6	6.4	6.6	5.5
Primary goods	1.9	0.0	0.2	0.8	2.6
Capital goods	12.4	16.5	8.5	12.0	12.9
Intermediate goods	5.6	4.7	6.0	10.3	5.8
Infrastructure/construction goods	12.9	10.1	5.2	6.0	5.9
Consumer durables	-0.2	4.2	2.4	5.6	7.2
Consumer non-durables	-1.2	1.6	-0.6	0.2	3.6
Overall IIP	4.1	4.4	3.0	4.9	5.1

Chart - 1 : Index of Industrial Production



Index of Industrial Production

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

NIC 2008	Description	Weights	May 2025	May 2026	% Change
10	Manufacture of food products	5.679	98.2	102.1	4.0
11	Manufacture of beverages	1.113	158.1	166.0	5.0
12	Manufacture of tobacco products	0.774	121.7	119.7	-1.6
13	Manufacture of textiles	3.275	120.9	136.2	12.7
14	Manufacture of wearing apparel	1.970	103.6	94.5	-8.8
15	Manufacture of leather and related products	0.607	108.2	103.8	-4.1
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.239	99.6	95.5	-4.1
17	Manufacture of paper and paper products	1.375	107.3	118.1	10.1
18	Printing and reproduction of recorded media	0.506	106.3	95.3	-10.3
19	Manufacture of coke and refined petroleum products	7.721	112.2	106.9	-4.7
20	Manufacture of chemicals and chemical products	7.813	109.6	108.2	-1.3
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	5.833	122.8	129.4	5.4
22	Manufacture of rubber and plastics products	3.384	106.8	111.9	4.8
23	Manufacture of other non-metallic mineral products	3.519	115.6	117.4	1.6
24	Manufacture of basic metals	9.198	126.7	132.5	4.6
25	Manufacture of fabricated metal products, except machinery and equipment	2.481	112.6	130.0	15.5
26	Manufacture of computer, electronic and optical products	2.085	133.4	148.6	11.4
27	Manufacture of electrical equipment	3.175	133.5	161.3	20.8
28	Manufacture of machinery and equipment n.e.c.	5.020	115.0	120.8	5.0
29	Manufacture of motor vehicles, trailers and semi-trailers	6.417	115.3	132.0	14.5
30	Manufacture of other transport equipment	2.089	134.0	153.2	14.3
31	Manufacture of furniture	0.283	109.9	113.8	3.5
32	Other manufacturing	1.509	93.8	103.6	10.4
	Manufacturing	76.062	116.2	122.6	5.5
	Mining & Quarrying	11.053	114.7	112.9	-1.6
	Electricity & Gas Supply	10.865	117.9	129.6	9.9
	Water Supply, Sewage & Waste Management	2.020	137.6	145.1	5.5
	General	100.000	116.7	122.7	5.1

Raw Material Scenario

World cotton supply-demand outlook may tighten next year: USDA

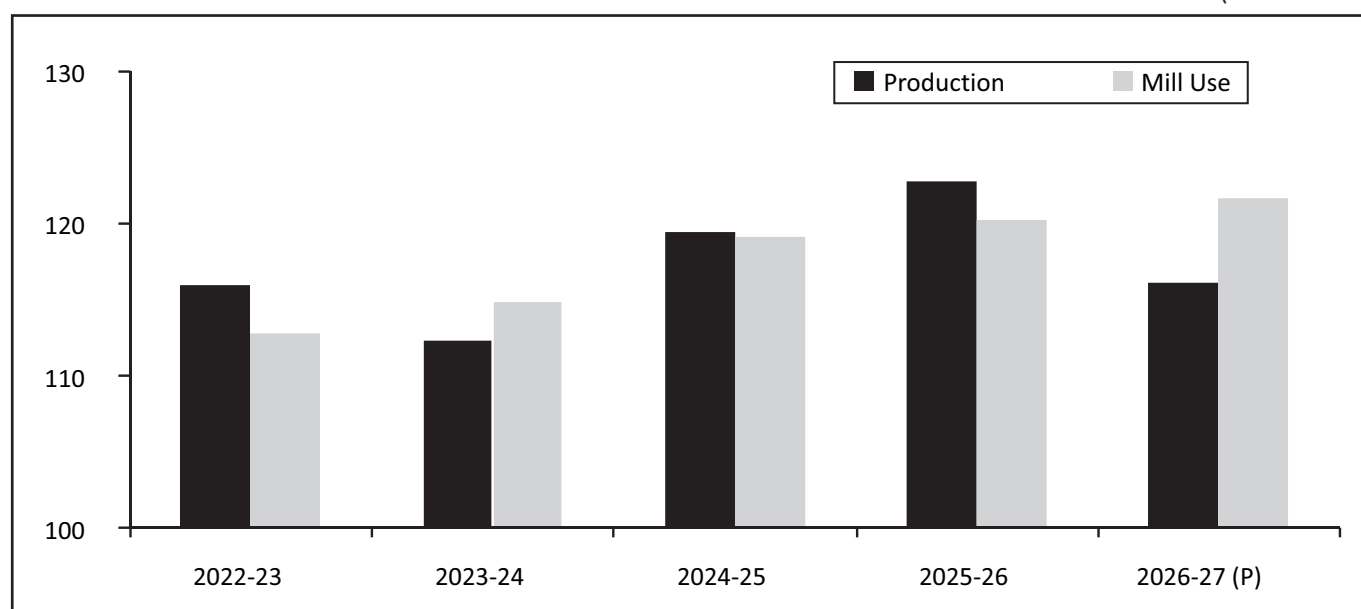
The global cotton supply-demand is expected to tighten in 2026-27, according to the World Agricultural Supply and Demand Estimates (WASDE) report released by the US Department of Agriculture (USDA). Global cotton supply is projected to decline slightly due to lower beginning stocks, while stable production and higher consumption are expected to increase demand. Lower opening stocks are also expected to tighten the global cotton balance sheet.

Global consumption was revised higher due to increased demand from China, despite lower consumption forecasts for Bangladesh, Pakistan

and South Korea. According to the report, Global cotton consumption is projected at 26.51 Million tons, up from 26.49 Million tons in May 2026. China's cotton mill use is forecast at 9.04 million tons (+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 tons (+2.0 per cent) in 2026-27. Mill use in Bangladesh is forecast at 1.69 million tons in 2026-27. Bangladesh and Vietnam are forecast to contribute 6 per cent of the global total respectively. Cotton mill use in Turkey and Uzbekistan are projected to remain unchanged in 2026-27 compared with 2025-26.

Chart - 1 : Global cotton production and mill use

(Million bales)



1 bale = 480 pounds / Source : USDA

Global cotton exports are forecast to decline slightly to 9.432 Million tons from 9.437 Million tons. However, world cotton production is expected to remain unchanged at 25.26 Million tons. Ending stocks for 2026-27 are also forecast to

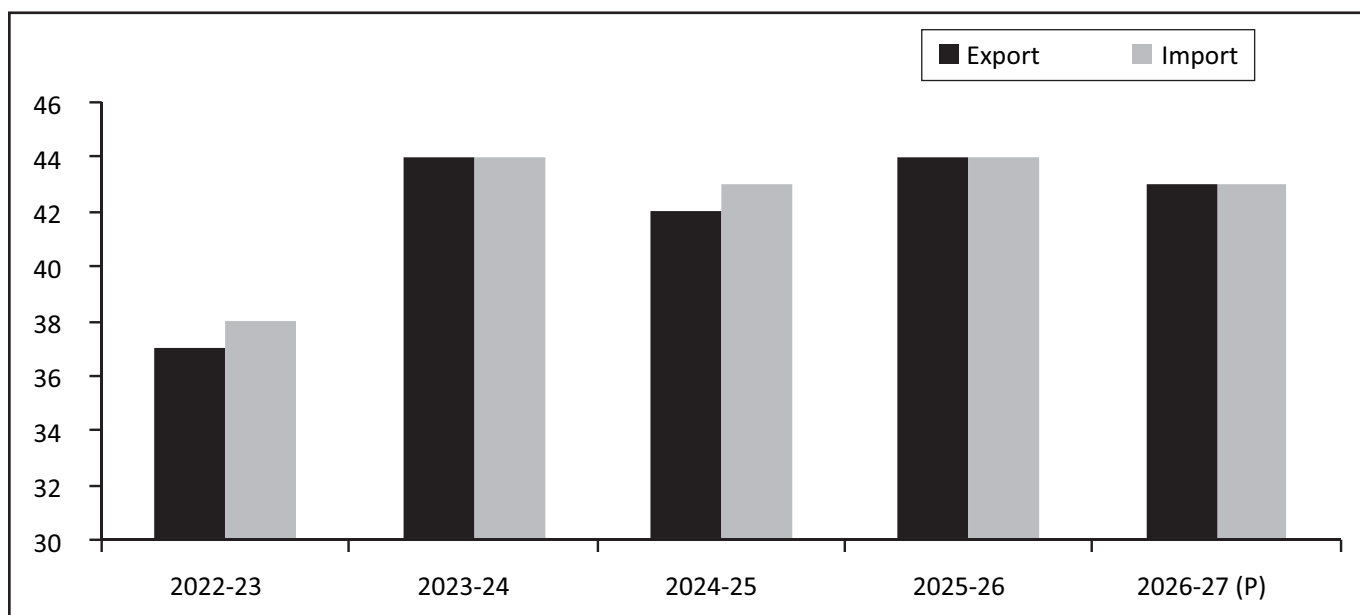
decline to 15.48 Million tons from 15.64 Million tons in the previous report.

Ending stocks for 2026-27 were reduced slightly, mainly because of lower beginning stocks. For

Raw Material Scenario

Chart - 2 : Global Trade

(Million bales)



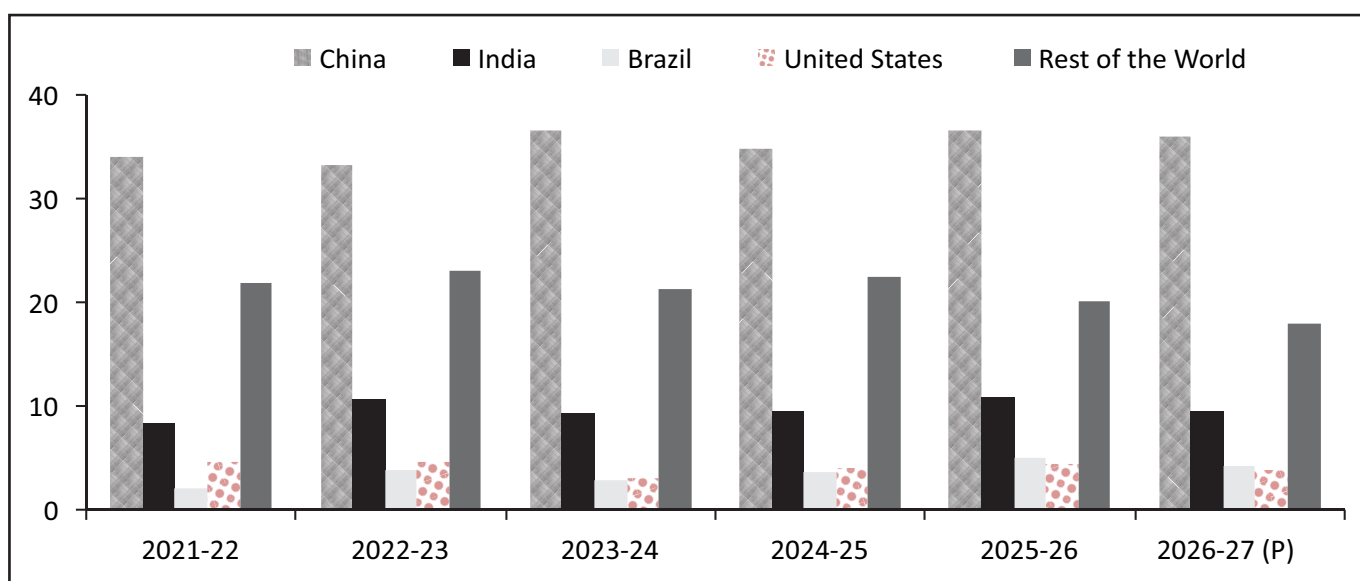
1 bale = 480 pounds | Source : USDA

2025-26, higher global exports are expected to reduce ending stocks, while world production and consumption remain largely unchanged. For 2026-27, the US cotton balance sheet shows

lower beginning and ending stocks. Production, consumption and trade forecasts remain unchanged, while the projected season-average price is maintained at 73 cents per pound.

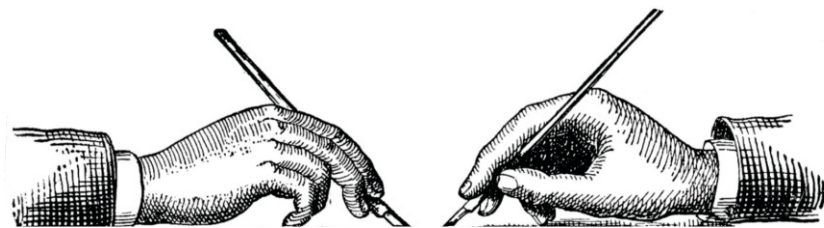
Chart - 3 : Global cotton ending stocks

(Million bales)



1 bale = 480 pounds | Source : USDA

Editorials



Textile industry welcomes cotton import duty waiver, sees boost for exports

The textile and apparel industry has welcomed the Centre's decision to temporarily exempt duties on cotton imports from June 1 to October 31, describing it as a timely measure that will improve raw material availability, ease cost pressures and enhance the competitiveness of Indian textile exports.

The government's move comes as the industry faces a significant cotton supply deficit. Industry bodies estimate that domestic cotton production during the current season will be around 291 lakh bales, while textile sector demand is expected to be between 330 lakh and 340 lakh bales, creating a shortfall of 50-70 lakh bales.

The Coimbatore-based Southern India Mills' Association (SIMA) said it had been urging the Government to remove the 11 per cent import duty on cotton. Cotton prices had surged from about Rs.54,500 per candy (355 kg) to nearly Rs.71,000 per candy over the past two months before showing signs of softening.

SIMA noted that similar duty exemptions were provided during April-October 2022 and August-December 2025 and said the decision

would provide much-needed relief to the entire cotton textile value chain.

The Apparel Export Promotion Council (AEPC) Chairman, Dr.A Sakthivel, said the decision would particularly benefit small and medium enterprises that have been grappling with rising cotton and yarn prices. He urged spinning mills to pass on the benefits of lower cotton costs by rationalising yarn prices, thereby stabilising the value chain and enabling garment exporters to secure export orders more competitively.

The Confederation of Indian Textile Industry (CITI) also welcomed the temporary removal of the duty, saying it would provide momentum to the MSME-dominated sector amid global uncertainty. CITI Chairman Mr Ashwin Chandran said the import duty had placed Indian manufacturers at a disadvantage compared with competing Asian nations that enjoy duty-free access to cotton.

Business Line 01.06.2026

Textile industry can save ₹3,000 Cr by switching to green energy

Tamil Nadu's textile sector can save between Rs.1,560 crore - Rs.13,250 crore annually by transitioning to clean energy, according to a

Gleanings from the Press

report by Bengaluru-based think tank Climate Risk Horizons. The report, which largely used data from the Annual Survey of Industries (ASI) from the past decade to understand the status and potential for decarbonisation in Tamil Nadu's textile industry, said transitioning to 100% renewable electricity can save Rs.2,320 crore - Rs. 3,250 crore.

Production cost for textiles in Tamil Nadu is rising mainly because of fuel and energy expenses.

"Rising fuel costs are one of the reasons for the declining competitiveness of the State's textiles, the exports of which have plateaued since 2017 at approximately \$7.4 Billion. Our analysis finds that transitioning towards RE can save the industry a lot of money, improving cost competitiveness and revitalising the sector," said Mr Rakesh Ranjan, co-author of the report.

The Tamil Nadu textile sector's total energy expenditure has nearly doubled in the past four years and the fuel cost intensity (ratio of fuel costs to out-put) has risen. The report claimed

that India's textile industry has the highest carbon footprint among major exporting countries, reaching over 12.5 kg CO₂e per kg of textile, which is higher than Vietnam, Bangladesh and China. Switching to renewable-powered electric heating can strengthen the sector's cost competitiveness while also lowering emissions, the report said.

Global brands must enable large-scale electrification of heat-based processes, reject biomass as a climate solution and drive policy and grid-level reforms needed to accelerate decarbonisation, said Ashish Fernandes, director of Climate Risk Horizons.

The Hindu 05.06.2026

New India-Oman pact to boost textile trade

The Southern India Mills' Association (SIMA) has welcomed the India-Oman Comprehensive Economic Partnership Agreement (CEPA), which came into effect on June 1, 2026, calling it a significant boost for the country's 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

Gleanings from the Press

Signed on December 18, 2025, the landmark pact provides zero-duty access to 99.38% of Indian exports, including a wide range of textile and apparel products. Oman is India's second-largest trading partner in the Gulf region.

In a statement, SIMA Chairman Mr Durai Palanisamy noted that the agreement, along with five new textile schemes announced in the recent Union Budget, will accelerate growth for the sector. "The CEPA will provide a 5% tariff advantage, enabling Indian ready made garments and home textiles to compete on a level playing field with countries like Bangladesh and Turkey," he said.

He added that the pact would particularly benefit Tamil Nadu's export clusters in Tiruppur, Coimbatore, and Karur offering wider market access. "India's textile exports to Oman stood at \$94 Million in FY 2025-26, accounting for 16% of Oman's total textile imports of \$598 Million, making India its third-largest supplier.

The industry aims to increase textile exports from \$36 Billion to \$100 Billion and overall business size to \$350 Billion by 2030, while creating 20 Million new jobs and attracting \$100 Billion in fresh investments," he said.

The Indian Express 05.06.2026

Tariff shock pulls down knitwear exports from Tiruppur by 5% in FY26

After registering a robust 20 per cent growth in 2024-25, Tiruppur's knitwear export industry witnessed a reversal in 2025-26, with exports declining nearly 5 per cent as uncertainty

surrounding US tariffs weighed on orders in the second half of the fiscal.

Exports from the country's largest knitwear hub fell 4.92 per cent to Rs.42,544 crore in FY26, from Rs.44,747 crore in the previous year, according to data from the Tiruppur Exporters' Association.

Industry leaders, however, describe the performance as resilient given the multiple global disruptions faced by exporters, including the Russia-Ukraine war, West Asia crisis and tariff-related concerns in the US.

"Achieving an export turnover of Rs.42,544 crore in FY26 remains highly commendable and stands as a true reflection of the determination, perseverance and unwavering commitment of every stakeholder involved in Tiruppur's export manufacturing ecosystem," said Mr Kumar Duraisamy, Managing Director of the Tiruppur-based Eastern Global Clothing.

According to exporters, the first half of FY26 was relatively strong, but the second half saw a sharp slowdown as buyers adopted a cautious approach following tariff announcements in the US market. Mr N Thirukkumaran, Chairman of Esstee Exports India Ltd, said the tariff issue significantly affected business sentiment and order flows.

The industry also felt the impact of the West Asia conflict, which pushed up the prices of critical raw materials and added to cost pressures. Mr Thirukkumaran warned that a prolonged conflict could further strain the sector through higher input and logistics costs.

Gleanings from the Press

Despite the setback, exporters are optimistic about the outlook for the current fiscal. Order inflows from both the US and European markets have improved in recent months, signalling a recovery in demand.

Industry stakeholders are also pinning hopes on India's ongoing trade negotiations. Mr Duraisamy said the proposed bilateral trade agreement with the US, along with free trade agreements with the UK, Australia, New Zealand and the European Union, could help restore competitiveness and support the next phase of export growth.

Dr. A Sakthivel, Chairman of Apparel Export Promotion Council, said the sector could grow 12-14 per cent in the current fiscal, aided by trade agreements and a stronger order pipeline. "Things are better now with a good order book for the industry," he said.

Business Line 09.06.2026

Textile PLI third round draws 22 more applicants, attracts Rs.12,822 Cr investment

The Government has approved 22 new applicants under Round-3 of the production linked incentive (PLI) scheme for textiles, taking the total number of companies to 96. The newly-approved companies are expected to bring in a total investment of Rs.2,339.14 crore, generate a projected turnover of

Rs.15,561.34 crore in notified products and create 36,217 employment opportunities across the textile value chain, the Textile Ministry said.

"A total of 96 companies has been selected under Round-3 of the scheme with a total committed investment of Rs. 12,822.67 crore and a projected turnover of Rs. 58,294.18 crore," the Ministry said in a statement.

The approved companies under the PLI scheme are from man-made fibre (MMF) apparel, MMF fabrics and technical textile segments, which will further strengthen India's position as a global hub for value-added textile manufacturing.

The addition of these companies reflects the continued industry response to the Government's efforts to promote investments in sunrise segments of the textile sector, it said, adding that the investments are expected to support the development of globally competitive textile ecosystem aligned with the vision of Aatmanirbhar Bharat.

During November 2025, the Ministry had approved 17 new applicants in the third round of selection with a total investment commitment of Rs.2,374 crore. In the first two rounds of selections, a total of 74 applicants had been approved under the scheme. During October 2025, the government had notified

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Gleanings from the Press

major amendments to the scheme to further enhance industry participation.

These included expanding the list of eligible products that can benefit from the scheme in the given categories, doing away with the requirement of setting up new companies, reducing by half the minimum investment threshold and also lowering the incremental turnover criteria.

The PLI scheme for textiles was notified on September 24, 2021, with an approved outlay of Rs.10,683 crore to promote the production of MMF apparel and fabrics, and products of technical textiles.

The scheme aims to enable the textile industry to achieve the necessary size and scale, become globally competitive, and create substantial employment opportunities.

Business Line 11.06.2026

First phase allotment completed at PM MITRA Textile Park

The first phase of allotment at the PM MITRA Textile Park in Virudhunagar has been completed, with 177 acres allotted to 17 industrial projects and orders issued, Mr AR Chandramohan, Chief General Manager, SIPCOT, said.

Speaking at the stakeholder's consultation on PM Mitra Textile Park, Virudhunagar, he said the second phase is underway. Higher officials from SIPCOT, TEA members, and textile and apparel manufacturers participated in the meeting.

"Infrastructure works valued at Rs.460 crore, including roads, rainwater harvesting systems, and street lighting, are under implementation," he said, adding that drinking water projects executed by TWAD are nearing completion.

The park, spread across 1,052 acres, is being developed as an integrated eco-system with industrial, commercial, and logistics facilities, with around 18% earmarked for open space and green development. Planned facilities include common effluent treatment plant (CETP), sewage treatment plant (STP), testing laboratory, research centre and skill development centre.

The Project Management Consultants (PMC) team said accommodation for "10,000 workers" is planned, along with schools, hospitals and training centres. Designed on the "Farm to Foreign model," it will host the full textile value chain with plug-and-play factories and is planned as a "Net-Zero" park supported by a proposed "20 MW solar power plant."

Mr K M Subramanian, President, TEA, said the park could generate "around one lakh jobs," but meeting Tirupur's 2030 export target would need additional workers. He sought service centres for stitching, knitting, and processing machinery and support for global compliance.

The Times of India 15.06.2026

Indian textile industry sees respite from expected US-Iran peace deal

India's textile and apparel industry is expected to benefit from the proposed US-Iran deal aimed

Gleanings from the Press

at ending the conflict in West Asia, with stakeholders anticipating improved trade conditions, lower energy costs and smoother supply chain operations. The country's textile and apparel industry has welcomed the announcement of a deal, expressing hope for a swift return to normalcy in the region and global trade flows. Industry sources said the agreement could pave the way for the easing of US restrictions on Iran, potentially increasing global crude oil supplies. Higher availability of crude is expected to moderate prices, offering relief across the polyester value chain by reducing costs for key raw materials and synthetic fibres. The deal is also expected to restore normal shipping operations in the region. Trade through key maritime routes, including the Strait of Hormuz, could become more predictable, helping reduce logistics disruptions, improve transit times and lower freight-related uncertainties.

The Confederation of Indian Textile Industry (CITI) said the agreement, once formally signed, could ease the geopolitical and economic uncertainties that have disrupted trade and energy markets over the past three months. The conflict had affected the smooth movement of goods through the Strait of Hormuz, creating challenges for global shipping, trade flows and energy security. CITI Chairman Mr Ashwin Chandran said the development would be a major boost for India's textile and apparel sector, which has faced pressure from disruptions in raw material supplies, supply chains and industrial energy costs. He noted that the predominantly MSME-driven industry

operates on thin margins and is particularly vulnerable to prolonged external shocks.

Market participants believe that the return of stability in West Asia would support global trade flows and economic activity, creating a more favourable environment for textile manufacturers and exporters. Improved access to raw materials and more stable transportation networks are likely to strengthen the competitiveness of India's textile and apparel sector in international markets.

Industry observers said the development could provide a positive stimulus to the sector at a time when exporters are navigating volatile input costs and global demand challenges.

Fibre2Fashion 15.06.2026

UP Government to develop textile parks across 1,500 acres to boost economy

The Uttar Pradesh Government is developing textile parks spanning almost 1,500 acres to make the state a leading textile and garment hub in South Asia. As part of this, six textile projects are expected to entail investments of more than Rs.10,000 crore, generate large-scale jobs, and bolster the state's \$1 Trillion economy goal. A mega textile park is proposed over 1,162 acres on the borders of Lucknow and Hardoi districts under the PM Mega Integrated Textile and Apparel (PM MITRA) scheme. Five other smaller textile parks will be set up over 326 acres under the state's Sant Kabir Textile and Apparel Park Scheme in Varanasi, Amroha, Bareilly, Sant Kabir Nagar, and Bijnor districts. "All these five projects will be established under the public-

Gleanings from the Press

private partnership (PPP) model. The Government aims to attract big-ticket investments and create employment opportunities," an official said.

About 400 big and small textile manufacturing and processing plants are likely to come up in the Lucknow-Hardoi textile project,

The Government is giving due emphasis on developing these projects in compliance with environmental standards.

"The Sant Kabir Textile and Apparel Park Scheme" will provide Uttar Pradesh with a new identity in textile manufacturing, ready-made garments, technical textiles, and exports, the official noted.

Business Standard 18.06.2026

Textile Minister underlines importance of product diversification and value addition

The Hon'ble Union Minister of Textiles Shri Giriraj Singh emphasised the importance of district-led export growth, product diversification, value addition, target setting of Champion and Aspirational Districts and value addition. While addressing the two-day Departmental Summit on "Textiles for Global Markets: Strategy for Achieving USD 100 Billion Exports by 2030" in New Delhi, he also emphasised the importance of technical textiles, creation of branded products, sustainability, skilling and improved market access for achieving the national export target. The Hon'ble Minister of State for Textiles, Shri Pabitra Margherita and Secretary, Ministry of Textiles, Smt Neelam Shami Rao also

addressed the gathering laying emphasis on state governments being catalysts for exports, decentralised thought process, value addition, product diversification and brand creation. The Summit has been organised under the Cabinet Secretariat's initiative on Departmental Summits to strengthen Centre-State collaboration and foster cooperative federalism in achieving national development goals.

Tecoya Trend 24.06.2026

India Plans to Expand Textile Manufacturing Beyond Tirupur and Surat

India's Ministry of Textiles is planning to expand textile manufacturing into States such as Chhattisgarh, Kerala, and Jharkhand as part of a strategic effort to reduce reliance on established textile hubs like Tirupur, Surat, Panipat, and Ludhiana. Traditional clusters often face recurring challenges, including seasonal labor migration and saturated infrastructure, which can disrupt output. By opening up new regions, the Government hopes to create a more resilient supply chain that can better support the target of increasing India's global textile export share. Apart from the newly identified States, Telangana, Odisha, and Madhya Pradesh have also emerged as important garment manufacturing hubs. These States have attracted significant investments from both national and international apparel and textile companies.

Industry leaders noted that expanding textile manufacturing into new States will require significant investment in infrastructure, skilled workers, and supply chains. Unlike established

Gleanings from the Press

hubs such as Tirupur and Surat, these regions will need time to develop the support systems needed for efficient production, which could lead to higher costs and project delays in the initial stages.

Apparel Resources 26.06.2026

SIMA thanks CM for not hiking power tariff this fiscal

The South India Mills Association (SIMA) has welcomed the State Government's announcement of no increase in power tariff for the current financial year and extended its gratitude to Hon'ble Chief Minister Shri C Joseph Vijay and Hon'ble Electricity Minister Shri R Nirmalkumar. In a statement, the association said the state's MSME-based textile sector has been severely impacted by the repeated power tariff hikes in recent years. The sector contributes to 45% of India's spinning capacity, 22% of weaving, 70% of knitted garment manufacturing, and 40% of home textiles, it said.

SIMA Chairman Mr Durai Palanisamy said the move is a step towards achieving Tamil Nadu's ambitious \$1.5 Trillion Economy target by 2035. He also lauded the electricity department's initiatives, including the release of the white paper and long-term plans to strengthen Tangedco.

The Indian Express 26.06.2026

T.N. aims at Rs 1,000-cr. investment in technical textiles by 2030

The Tamil Nadu Government is aiming at an investment of Rs 1,000 crore in technical textiles

by 2030, said Mr T.N. Venkatesh, Principal Secretary, Department of Handlooms, Textiles, Khadi, and Handicrafts. Speaking at the inauguration of a conference on technical textiles organised by the Department, he said the aim was to encourage investments by the Micro, Small and Medium-scale (MSME) sector in the segment of functional textiles.

The State would focus on textiles used in automobile, healthcare, sports, agriculture and construction sectors. Industrial establishments exchanged Memoranda of Understanding with the Government to bring in Rs 123 crore in investment. These plants were expected to be commissioned by the year end.

At least five new technical textile industrial units would come up in the four major regions of the State in three years. The State would soon have a centre of excellence for athleisure (sports related) products, he added.

Annual textile exports from Tamil Nadu currently stood at \$8 Billion and the Centre had fixed a target of strength, manmade fibre \$21 Billion, he added.

Minister for Handlooms, Textiles, and Khadi Mr M. Vijay Balaji said the Department would take measures to bring investments and generate jobs in the textile sector. The State was a leader in textiles and had lost ground to countries such as Bangladesh. The sector would be strengthened and revived. "We will strive to make the technical textile sector in Tamil Nadu a model for the entire world," he added.

Gleanings from the Press

Coimbatore District Collector Mr Pavankumar G. Giriappanavar said the contribution of the textile industry to the district's economy was significant.

Chairman of the Southern India Mills Association (SIMA) Mr Durai Palanisamy said the State should convert the interest subvention that it was offering for technical textile investments into 15% capital subsidy. "While cotton is our Strength, manmade fibre will give growth," he said and urged the government to also come up with measures to strengthen the textile processing sector.

According to K.S. Sundararaman, Chairman of the SIMA Cotton Development and Research Association, the asset/turnover ratio is the highest for technical textiles in the textile and apparel sector.

The Hindu 26.06.2026

Cambodia garment exports maintain growth despite May slowdown

Cambodia's apparel exports increased by 5.6 per cent year on year (YoY) to \$4.45 Billion in the first five months of 2026, underlining the sector's continued role as the country's largest export earner despite a slowdown in May shipments.

According to data released by the General Department of Customs and Excise (GDCE) under the Ministry of Economy and Finance, apparel exports accounted for 31.7 per cent of Cambodia's total merchandise exports, which reached \$14.043 Billion during January-May 2026.

Exports of knitted apparel and clothing accessories under HS Chapter 61 rose by 4.5 per cent YoY to \$2.817 Billion during the period, compared with \$2.696 Billion in the corresponding period of 2025.

Exports of non-knitted apparel and clothing accessories under HS Chapter 62 recorded stronger growth of 7.6 per cent, reaching \$1.632 Billion against \$1.517 Billion a year earlier.

The cumulative performance indicates broad-based expansion across Cambodia's garment industry, although the pace of growth moderated significantly due to weaker exports in May.

In May 2026, total apparel exports declined by 7.3 per cent YoY to \$993.941 Million from \$1.072 Billion in the same month of 2025. Knitted garment exports registered a sharper contraction of 11.9 per cent, falling to \$657.757 Million, while exports of non-knitted apparel increased by 3.4 per cent to \$336.184 Million. The divergent performance suggests that demand for woven garments remained relatively resilient, while knitted apparel shipments faced greater pressure in key export markets.

On the raw material side, import trends reflected changing sourcing patterns within Cambodia's textile and garment supply chain. Imports of knitted or crocheted fabrics under HS Chapter 60 declined by 2.5 per cent YoY to \$1.381 Billion during January-May 2026, compared with \$1.417 Billion in the year-ago period. Imports of man-made fibres also edged down by 0.8 per cent to \$600.466 Million.

Gleanings from the Press

In contrast, imports of cotton and cotton yarn surged by 27.1 per cent YoY to \$415.842 Million, indicating stronger demand for cotton-based garment manufacturing and a possible shift in product mix towards natural fibre apparel.

Monthly import data showed a similar trend. In May 2026, imports of knitted or crocheted fabrics eased by 1.9 per cent YoY to \$335.779 Million. Imports of man-made fibres rose marginally by 0.6 per cent to \$119.746 Million, while cotton and cotton yarn imports jumped by 5Q6.8 per cent to \$106.385 Million.

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.

Guatemala's apparel exports reach \$385 Mn in Q1; knitwear dominates

Guatemala's apparel exports increased by 8.75 per cent year on year to \$385.078 Million in the first quarter of 2026, driven largely by knitted

garments and strong demand from the United States market. Knitted apparel accounted for over 91 per cent of total garment exports, underlining the country's strong positioning in knitwear manufacturing.

The country exported knitted garments worth \$351.691 Million during January-March 2026, while woven garment exports stood at \$33.389 Million. Cotton apparel contributed \$237.103 Million, representing 61.57 per cent of total shipments, while man-made fibre garments accounted for \$102.106 Million or 26.52 per cent.

Among product categories, shirts remained the leading export item with shipments valued at \$140.901 Million, accounting for 36.59 per cent of total apparel exports. T-shirts followed at \$112.350 Million or 29.18 per cent, while jerseys contributed \$60.626 Million or 15.74 per cent. Trousers and shorts exports reached \$41.179 Million, while jackets and blazers accounted for \$4.083 Million.

The United States remained Guatemala's dominant export destination, absorbing apparel shipments worth \$344.316 Million during the first quarter and accounting for 89.41 per cent of total exports. Honduras was the second-largest market with imports worth \$11.289 Million, followed by Canada at \$7.149 Million.

In the corresponding quarter of 2025, Guatemala's apparel exports stood at \$354.150 Million. The United States accounted for \$319.807 Million or 90.30 per cent, while Honduras and Canada imported garments worth \$9.900 Million and \$5.327 Million respectively.

Gleanings from the Press

China's T&A exports stable at \$116.7 Bn in January-May 2026

China's textile and apparel exports were almost stable during January-April 2026, signalling a steadier trend after a subdued 2025. According to data from the General Administration of Customs of China (GACC), combined exports of textiles, garments and accessories rose marginally year-on-year to \$116.726 Billion, compared with \$116.649 Billion in the same period of 2025.

China's shipments of garments and accessories eased 1.6 per cent year-on-year to \$57.244 Billion from \$58.184 Billion. Meanwhile, exports of textile products, including yarns, fabrics and related articles, rose 1.7 per cent to

\$59.482 Billion from \$58.465 Billion, supported by improved downstream manufacturing activity across Asia.

In May 2026 alone, garment shipments were valued at \$13.016 Billion, while exports of textile yarns, fabrics and related articles stood at \$12.587 Billion, taking the combined monthly total to \$25.603 Billion.

On the import side, China's imports of textile yarns and fabrics increased 20.25 per cent year-on-year to \$4.754 Billion in January-May 2026, compared with \$3.958 Billion in the same period of 2025. May imports alone stood at \$980.3 Million.

Fibre2Fashion



REVIEW

In-house Journal - Rate Card

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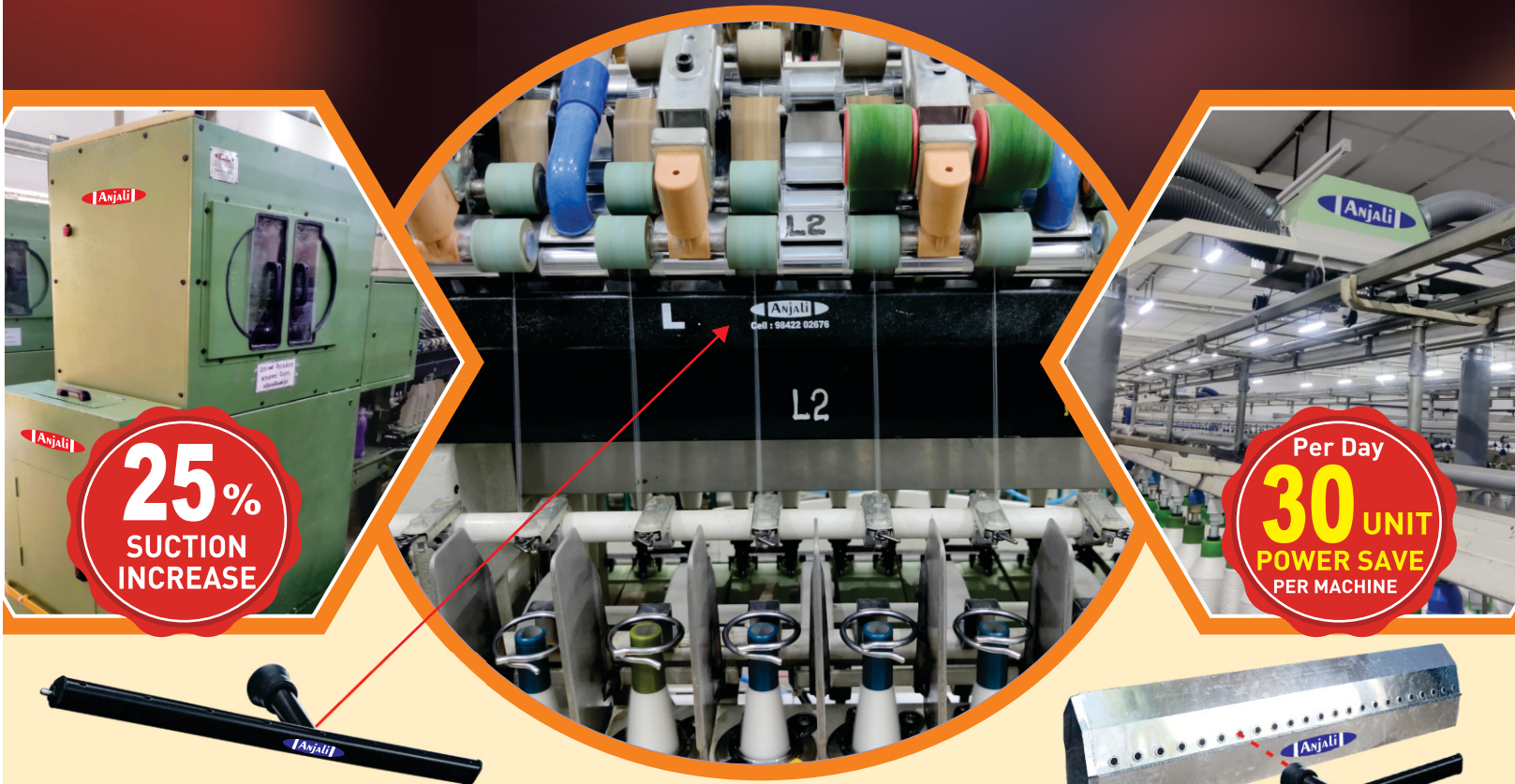
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