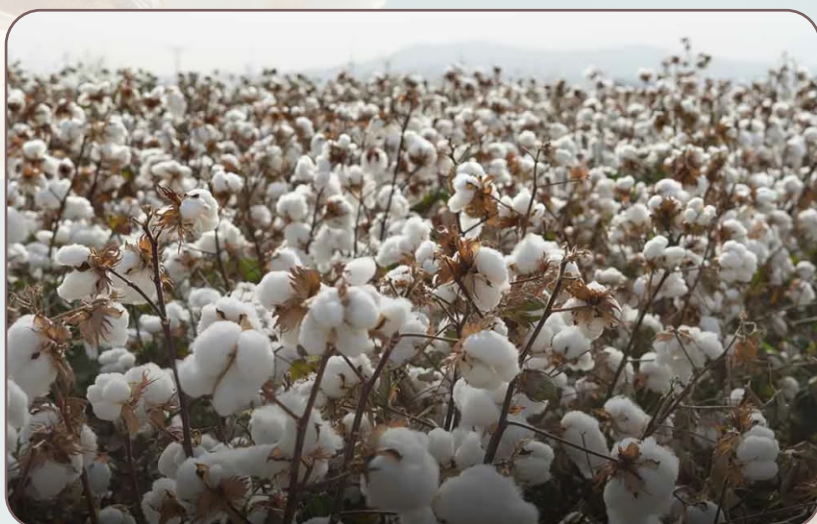




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**Unlocking High-Yield Potential with
the Right Cotton Seed Varieties**



HIGHLIGHTS OF TAMIL NADU REVISED BUDGET 2026-27

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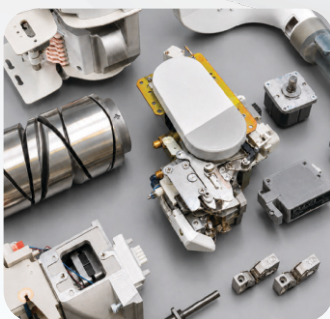
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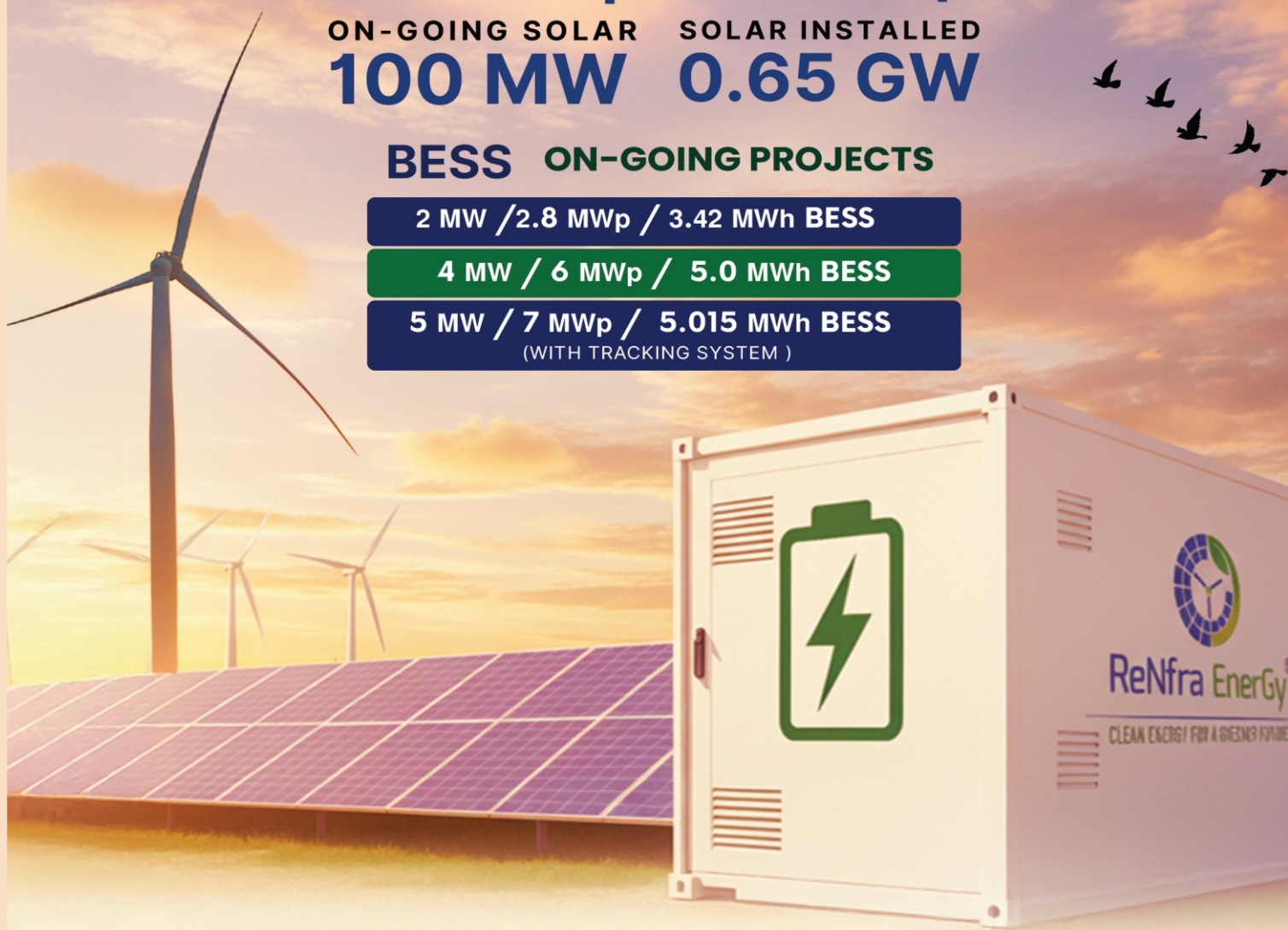
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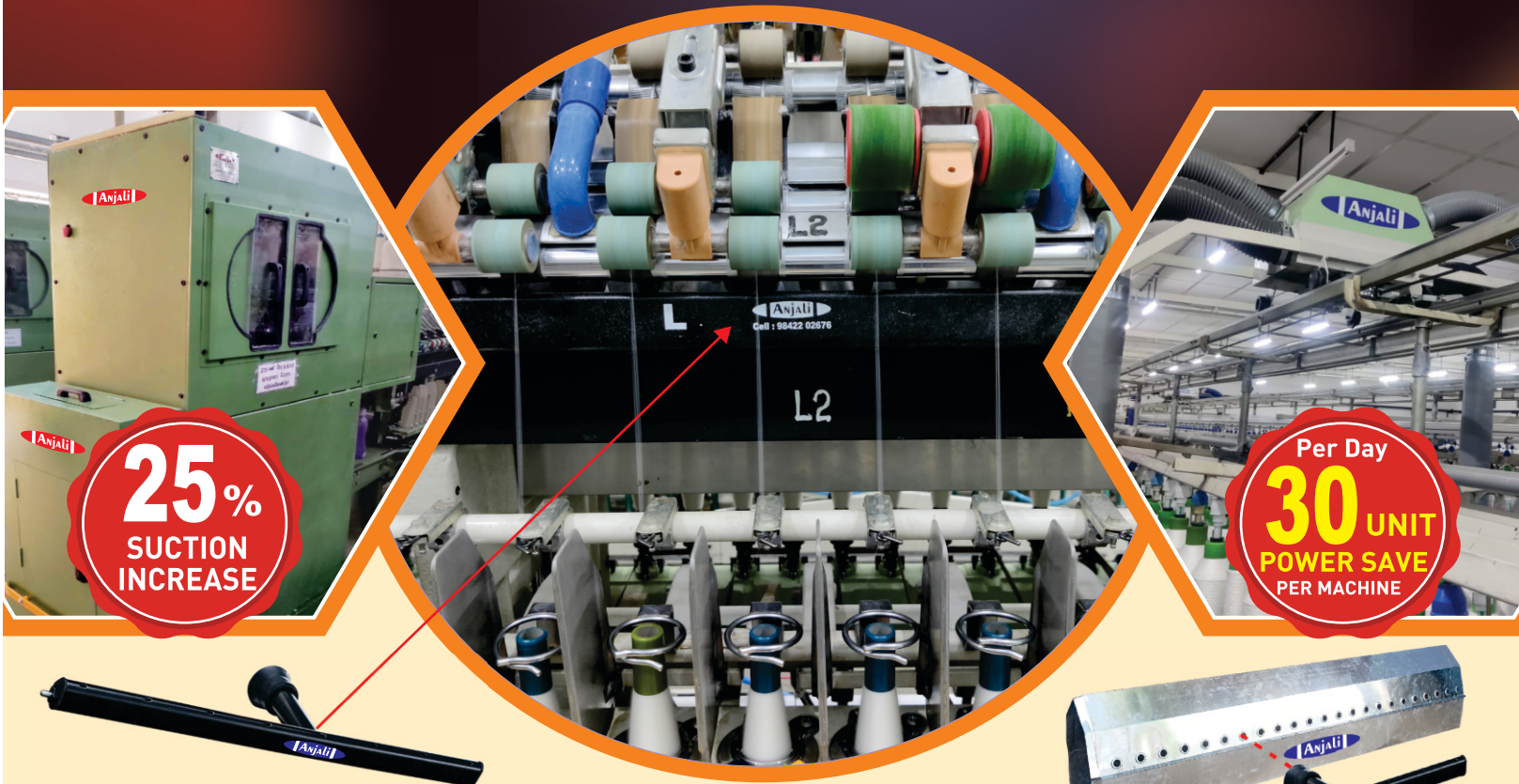
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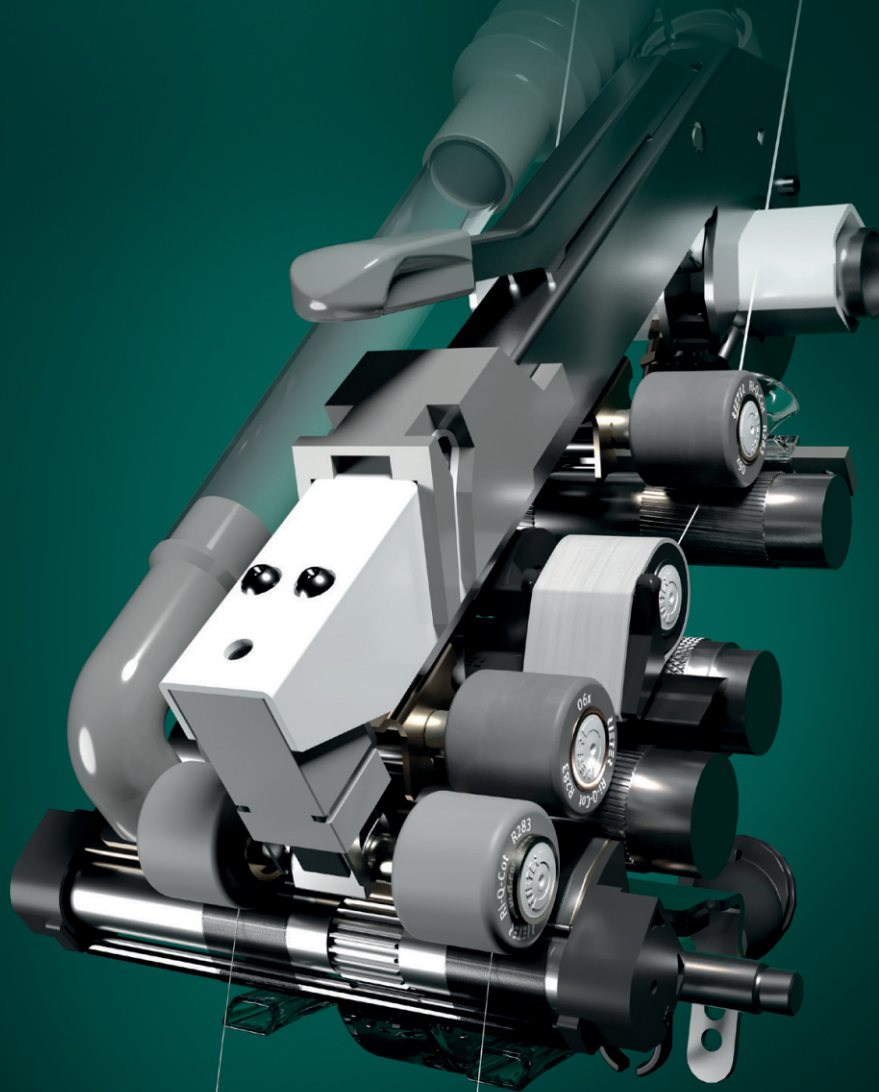
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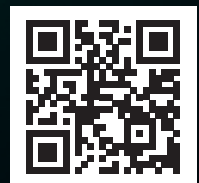
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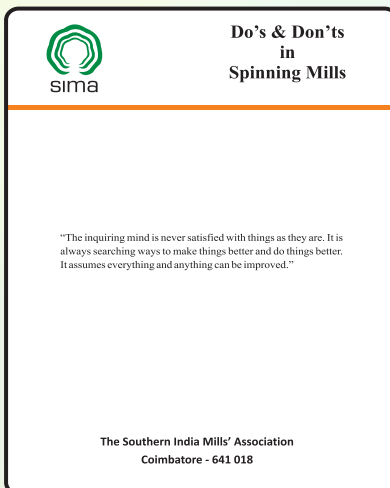
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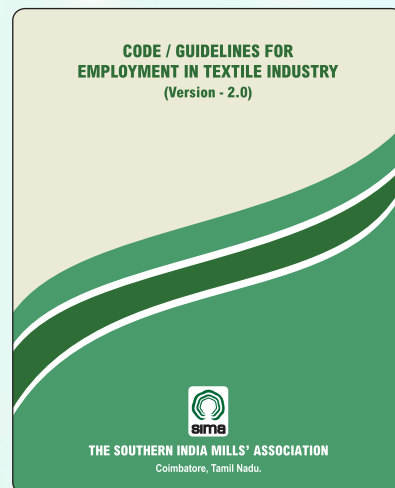
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From the Chairman

Friends,

The second half of 2026 has commenced against the backdrop of shifting global trade dynamics and a challenging domestic cotton situation, presenting both opportunities and uncertainties for the textile industry. While India's cotton yarn exports have shown encouraging growth, particularly to China, driven largely by increasing demand for coarser count yarns, domestic consumption is also gaining momentum. However, the delayed southwest monsoon and the possibility of El Nino are likely to impact cotton production, quality and timely arrivals. In this backdrop, we have urged the Hon'ble Union Finance Minister to extend the duty free import of cotton till December 2026, which is necessary to ensure the availability of quality raw material at an internationally competitive price, sustain the competitiveness of the textile value chain and enable the industry to fully leverage opportunities arising from FTAs. We have also requested the Hon'ble Chief Minister of Tamil Nadu to recommend for the extension of duty free import of cotton. We hope our demand will be considered favourably.

We thank the Hon'ble Chief Minister Thiru C Joseph Vijay and Hon'ble Finance Minister Dr N. Marie Wilson for presenting a growth oriented maiden Tamil Nadu Revised Budget 2026-27 by giving a significant support for the textile industry by allocating Rs. 1,678 Crores and announcement of various schemes including, Establishing a specialized Tiruppur Textiles Technology Centre (TTTC) with a budget outlay of Rs.10 Crores; Promotion of Technical Textiles, Tamil Nadu Institute of Design, Loom modernization; Guidance 3.0 and Single Window Portal 3.0 to facilitate faster approvals through a streamlined single window system; Allocation of Rs. 150 Crores for skilling; Set up a premium institute with a budget outlay of Rs. 60 Crores to foster fashion innovation and global branding; Rs. 6,080 Crores for the Green Energy Corridor III; Transmission projects; expansion of SIPCOT Industrial parks; New Multi-Modal Logistics park etc. which will strengthen Tamil Nadu's leadership in the national and global textile industry.

The Secretary General of the Association and myself met Dr Vijayakumar, IAS., Additional Chief Secretary, Department of Industries and Thiru T.N. Venkatesh, IAS., Principal Secretary to Government of Tamil Nadu to brief them on the policy interventions required to achieve the Hon'ble Chief Minister's Vision of making Tamil Nadu as a 1.5 Trillion Dollar Economy by 2035-36. We also met Smt. Neelam Shami Rao, IAS., Secretary, Ministry of Textiles, Government of India and submitted a join memorandum seeking consideration of the 39th TAMC for simplified protocols and resolve previous versions of TUF Scheme cases.

On 23rd July 2026, Office of the United States Trade Representative (USTR) announced penal duties on imports from 60 countries including India with a 10% Additional Tariff under Section 301, on the ground that the said countries have been adopting Forced Labour practices. However, the USTR had introduced TRQs

From the Chairman

for specified imports of textiles and apparel made from US Cotton by competing countries such as Bangladesh, Indonesia and Malaysia. As India is the largest buyer of US cotton, non-extension of similar benefits for the country could erode the competitiveness in the US market, particularly in product segments where beneficiary countries compete directly with us.

The global cotton market continues to present a mixed outlook. According to the International Cotton Advisory Committee (ICAC), global cotton production during the 2026-27 cotton season is projected to decline by around 2% to 25.8 Million Tonnes, while consumption is expected to remain strong at 25.5 Million Tonnes, resulting in a tighter global supply-demand balance. As inventories held by major exporting countries assume greater importance, international cotton trade is expected to remain firm.

The Committee on Cotton Production and Consumption (CoCPC) in its meeting held on 28th July 2026, estimated cotton production at 290.24 lakh bales, a decline of 2.35%, while domestic demand is projected to increase by 2.17%. Cotton imports are estimated at 55 lakh bales, reflecting growing requirement of quality raw material to support domestic spinning and downstream sectors.

Another encouraging development is the ongoing efforts of the Ministry of Textiles to finalise a National Apparel Sizing Framework, such initiatives together with continued focus on technology upgradation, sustainability, skill development and market diversification through FTAs will play a crucial role in enhancing the long-term competitiveness of the sector.

As the industry moves forward amidst evolving global trade dynamics, policy reforms and sustainability expectations, continued collaboration between Government and industry will be essential to address raw material security, improve ease of doing business and attract investments. With timely policy interventions and sustained industry efforts leaning towards achieving the Vision of USD 350 Billion business size by 2030 is achievable.



Durai Palanisamy
Chairman

Trade Performance

India's Trade Performance of HS Code 5203 (Cotton, Carded or Combed)			
\$79.74M Exports (Apr - Mar 2026)	14.82% (YoY Growth) (Apr - Mar 2026 Vs Apr - Mar 2025)	\$1.45M Imports (Apr - Mar 2026)	37.35% (YoY Growth) (Apr - Mar 2026 Vs Apr - Mar 2025)

Chart - 1 : Export and Import Performance of HS Code 5203

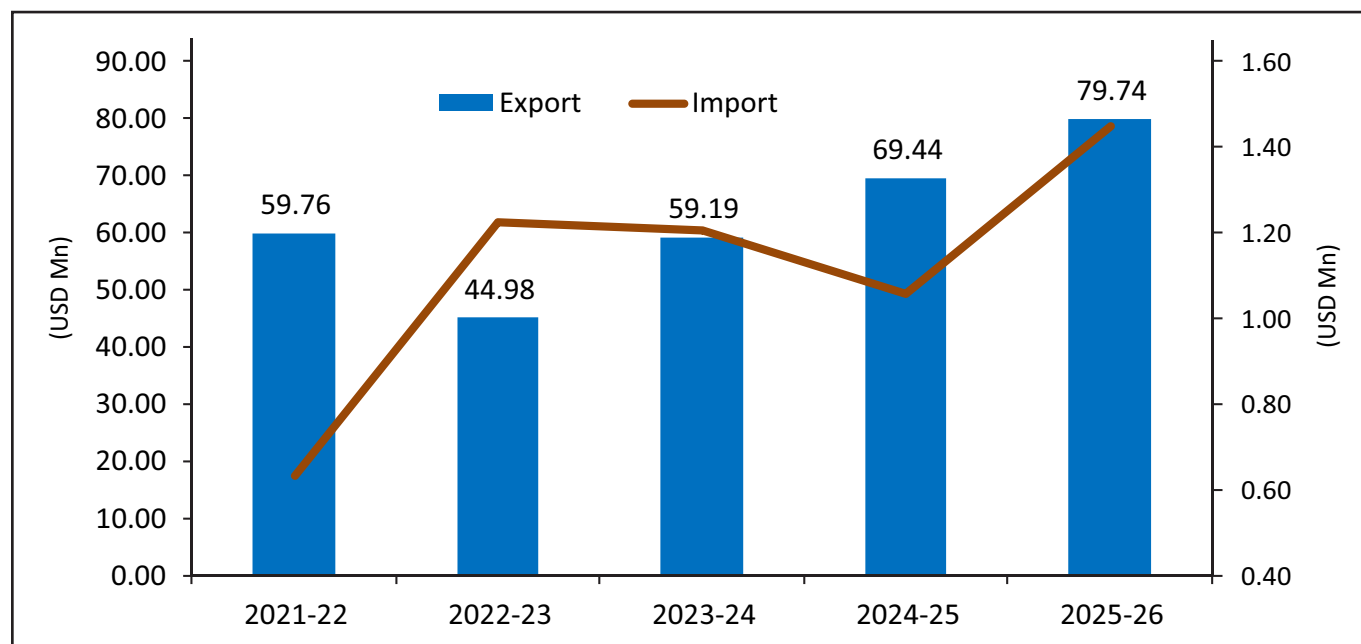
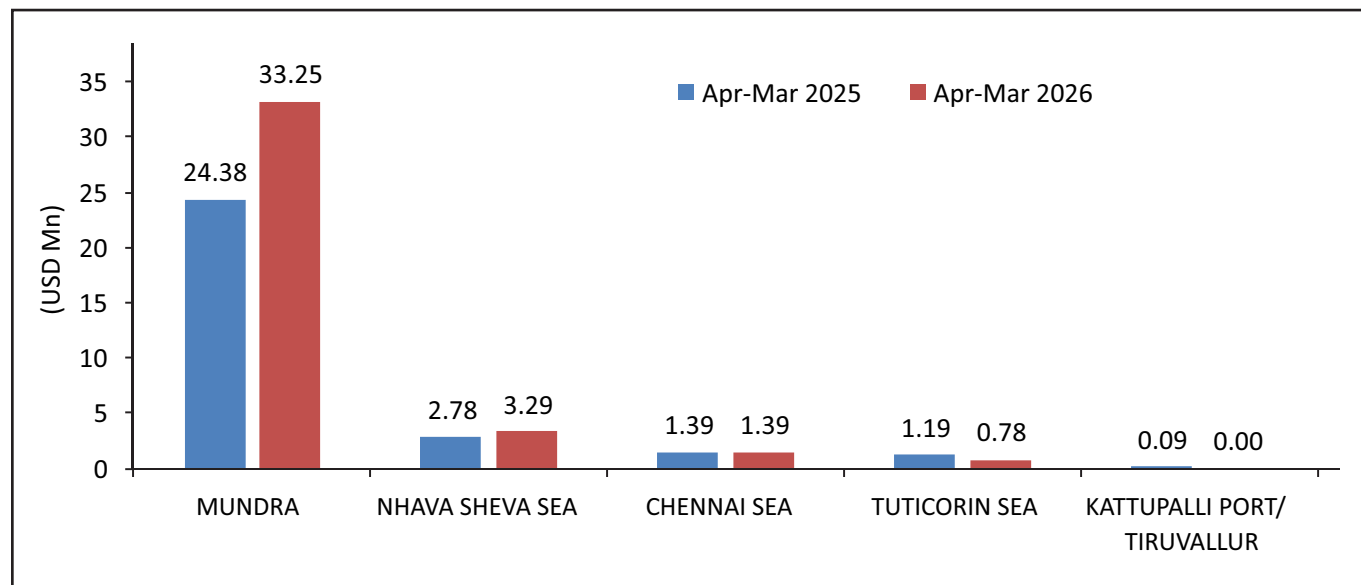


Chart - 2 : Port wise Export of HS Code 5203



Highlights of Tamil Nadu Revised Budget 2026-27

The Government of Tamil Nadu under the leadership of Hon'ble Chief Minister, Thiru C Josphe Vijay had presented a maiden Tamil Nadu Revised Budget 2026-27 on 5th August 2026. Hon'ble Minister for Finance, Dr N. Marie Wilson, outlined the Government's revised fiscal priorities and policy initiatives by giving a significant support for the textile industry by allocating;

- ❖ Rs.1,678 crore allocated for the Handlooms, Handicrafts, Textiles and Khadi Department.
- ❖ "Tiruppur Textiles Technology Centre" (TTTC) with a budget outlay of Rs. 10 Crore, to promote and upgrading the Infrastructure facilities at Tiruppur in multiple phases to promote environmentally sustainable textile production.
- ❖ "Technical Textiles Transformation Scheme" for Entrepreneurs to be implemented in collaboration with international educational and research institutions, with the financial assistance from Tamil Nadu Technical Textiles Mission.
- ❖ Allocating Rs.60 Crore for establishing "Tamil Nadu Institute of Design"

MSME

- ❖ Allocated Rs. 2,142 crore for the MSME.
- ❖ Capital subsidies and interest subsidies to be provided to new entrepreneurs under various schemes.

Energy

- ❖ New Battery Energy Storage Systems (BESS) Promotion Policy to be implemented to facilitate private investment in this sector and transform Tamil Nadu into India's 'BESS Hub'.

Renewable Energy

- ❖ A new "Rooftop Solar Subsidy Scheme" to be introduced in convergence with the 'Pradhan Mantri Surya Ghar Muft Bijli Yojana'. Under this

scheme, a subsidy of up to Rs.1 lakh will be provided to domestic consumers for installing solar panels, significantly reducing their electricity bills and supporting the transition to renewable energy. An amount of Rs.50 crore is allocated to implement this scheme.

- ❖ To strengthen the State's transmission network, the Coimbatore-Ariyalur 765 KV Transmission Line Project to be implemented through the PPP mode at an estimated cost of Rs.4,000 crore.
- ❖ The Phase-II Green Energy Corridor Project, valued at Rs.1,187 crore and crucial to evacuating renewable energy from southern Tamil Nadu, to be expedited alongside the Virudhunagar-Coimbatore 765 KV Transmission Project, valued at Rs.1,640 crore.
- ❖ A system for installing smart meters to be introduced for all consumers in Chennai city, as well as for 50 lakh industrial and commercial consumers across other parts of the State.
- ❖ The Government to construct 178 new sub-stations at an investment of Rs.1,543 crore to strengthen the power distribution infrastructure.
- ❖ 40,000 old transformers to be replaced in a phased manner at a cost of Rs.2,000 crore.
- ❖ To set up more Multi Modal Logistics Parks (MMLPs) and Dry Ports at strategic locations and to establish petrochemical and ancillary industries.

Foreign Trade Performance

India's textile & apparel exports fell 3% to \$9 Bn in April-June 2026

- ❖ India's textile and apparel exports fell 3 per cent to \$8.81 Billion in during Q1 2026, with apparel down 12.44 per cent and textiles up 5.19 per cent.
- ❖ June saw textile up and apparel down.
- ❖ Imports of raw cotton surged 57.13 per cent, highlighting rising dependency.
- ❖ T&A share in India's exports declined to 6.82 per cent during Apr-Jun 2026.

During April-June 2026, textile exports increased by 5.19 per cent to \$5.14 Billion, while apparel exports declined by 12.44 per cent to \$3.67 Billion.

Within the textile segment, exports of cotton yarn,

fabrics, made-ups and handloom products rose by 3.71 per cent to \$2.96 Billion during the period of April-June 2026. Exports of man-made yarn, fabrics and made-ups stood at \$1.17 Billion.

In June 2026, Apparel exports declined by 11.25 per cent to \$1.16 Billion, from \$1.30 Billion in June 2025, whereas textile exports rose by 9.64 per cent to \$1.74 Billion from \$1.59 Billion. Exports of cotton yarn, fabrics, made-ups and handloom products increased by 8.82 per cent to \$1.01 Billion, while exports of man-made yarn, fabrics and made-ups stood at \$383.96 Million. Imports of raw cotton and waste stood at \$185.08 Million, compared to \$73.73 Million in the same period of the previous fiscal.

Table - 1 : Quick Estimates for Selected Major Commodities

Exports (Million USD)	Apr - Jun 2025	Apr - Jun 2026	% Change
Cotton Yarn / Fabrics / Made-ups, Handloom Products etc	2859.93	2965.94	3.71
Man-made Yarn / Fabrics / Made-ups etc.	1166.80	1179.39	1.08
RMG of all Textiles	4192.52	3670.95	-12.44
Jute Manufacturing Floor Covering	93.75	81.19	-13.40
Carpet	370.84	374.24	0.92
Handicrafts excluding handmade carpet	398.47	542.84	36.23

Imports (Million USD)	Apr - Jun 2025	Apr - Jun 2026	% Change
Cotton Raw & Waste	262.92	413.13	57.13
Textile yarn Fabric, Made-up articles	619.89	607.64	-1.98

Source : DGCIS / MOC

Foreign Trade Performance

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

- ❖ India's export of cotton products covered under HS Code 52 during May 2026 stood at USD 522.48 Million, as against the previous year same time export level of USD 476.48 Million.
- ❖ Export of Man-made filaments during the period stood at USD 135.39 Million, fell by 6 per cent compared to previous year export level of USD 144.70 Million.
- ❖ Manmade staple fibres covered under HS Code 55 increased by 5 per cent to USD 133.50 Million as against its previous year export level of USD 127.32 Million.
- ❖ Exports of garments covered under HS Code 62 during the period stood at USD 666.39 Million which is declined by 13% when compared to previous year same time export level of USD 761.73 Million.
- ❖ Made-ups exports covered under HS Code 63 stood at USD 496.09 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 May 2026 stood at USD 167.83 Million, rose by 40 per cent when compared to previous year same time import level of USD 120.06 Million.
- ❖ Import of Man-Made Filaments stood at USD 132.02 Million.

- ❖ Import of Man-Made Staple Fibres stood at USD 104.21 Million which is higher by 31 per cent when compared with previous year same time import level of USD 79.65 Million.
- ❖ Import of garments covered under HS Code 62 stood at USD 65.34 Million, which is increased by 16 per cent when compared to previous year same time import level of USD 56.57 Million.
- ❖ Import of made ups covered under HS Code 63 stood at USD 55.01 Million, registered a decline of 8%.

HS Code wise Performance

Export & Import Quantum - April-May 2026

- ❖ Export of cotton covered under HS Codes 5201 to 5203 during Apr-May 2026 stood at 55.54 Million kgs, declined by 3 per cent as against previous year same time export level of 57.31 Million kgs.
- ❖ At the same time, its imports during the period stood at 129.87 Million kgs, 27 per cent higher than previous year same time import level of 101.87 Million kgs.
- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 213.50 Million kgs, which is 17 per cent higher than the previous year same time export level of 182.92 Million kgs.

Foreign Trade Performance

- ❖ Import of cotton yarn of all types covered under HS Codes 5204 to 5207 stood at 1.31 Million kgs.
- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 stood at 347.62 Million square metres, registered a decline of 7 per cent compared to previous year export level of 374.92 Million square metres.

Export and Import Value - April-May 2026

- ❖ Export of cotton in all forms covered under HS Codes 5201 to 5203 during Apr-May 2026 stood at USD 95.34 Million, as against the previous year same time export level of USD 95.88 Million.
- ❖ Its import during the period stood at USD 228.05 Million, which is higher by 21 per cent

as against the previous year import level of USD 189.19 Million.

- ❖ Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period was valued at USD 631.71 Million, 15 per cent higher than previous year same time export level of USD 548.25 Million. Its import stood at USD 4.08 Million.
- ❖ Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 was valued at USD 302.46 Million as against previous year export level of USD 324.07 Million. At the same time its import stood at USD 34.45 Million.

Table - 2 shows export and import of HS Codes 5201 to 5212 during April-May 2026 compared with the corresponding period export and import in Dollar terms.

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 - 2 : Export / Import – USD Million

HS Code	Description	Export			Import		
		Apr - May 2025	Apr - May 2026	% Growth	Apr - May 2025	Apr - May 2026	% Growth
5201	Cotton, Not Carded or Combed	77.69	75.24	-3.16	186.09	222.71	19.68
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	7.83	8.75	11.63	2.86	5.09	77.91
5203	Cotton, Carded or Combed	10.36	11.35	9.55	0.24	0.25	4.14
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	2.24	1.63	-27.09	0.05	0.06	14.83
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	514.19	594.24	15.57	3.42	3.89	13.87
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	30.24	33.46	10.65	0.26	0.11	-58.51
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	1.58	2.38	50.21	Neg	Neg	Neg
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	185.88	172.44	-7.23	16.88	16.45	-2.53
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	87.72	88.69	1.11	5.79	5.45	-5.86
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	11.13	9.85	-11.56	3.53	5.87	66.32
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	35.57	28.45	-20.02	4.61	6.15	33.38
5212	Other Woven Fabrics of Cotton	3.77	3.03	-19.48	0.68	0.53	-22.87
	Cotton (HS 5201-5203)	95.88	95.34	-0.56	189.19	228.05	20.54
	Cotton Yarn (HS 5204-5207)	548.25	631.71	15.22	3.74	4.08	9.09
	Woven Fabrics of Cotton (HS 5208-5212)	324.07	302.46	-6.67	31.49	34.45	9.40

Source : MoC

Foreign Trade Performance

India's Export of Cotton - Major Countries

- ❖ India's cotton exports observed a 16% decline in May 2026 compared to the same period in 2025.
- ❖ Bangladesh, the top export destination, saw a significant decline of 16%.
- ❖ Major declines were observed in:
 - ❖ China
 - ❖ Nepal
 - ❖ Vietnam

Chart - 1 shows the details of India's Cotton export during current cotton season compared with previous season and 5-years average (2019-2023).

India's Export of Cotton Yarn - Major Countries

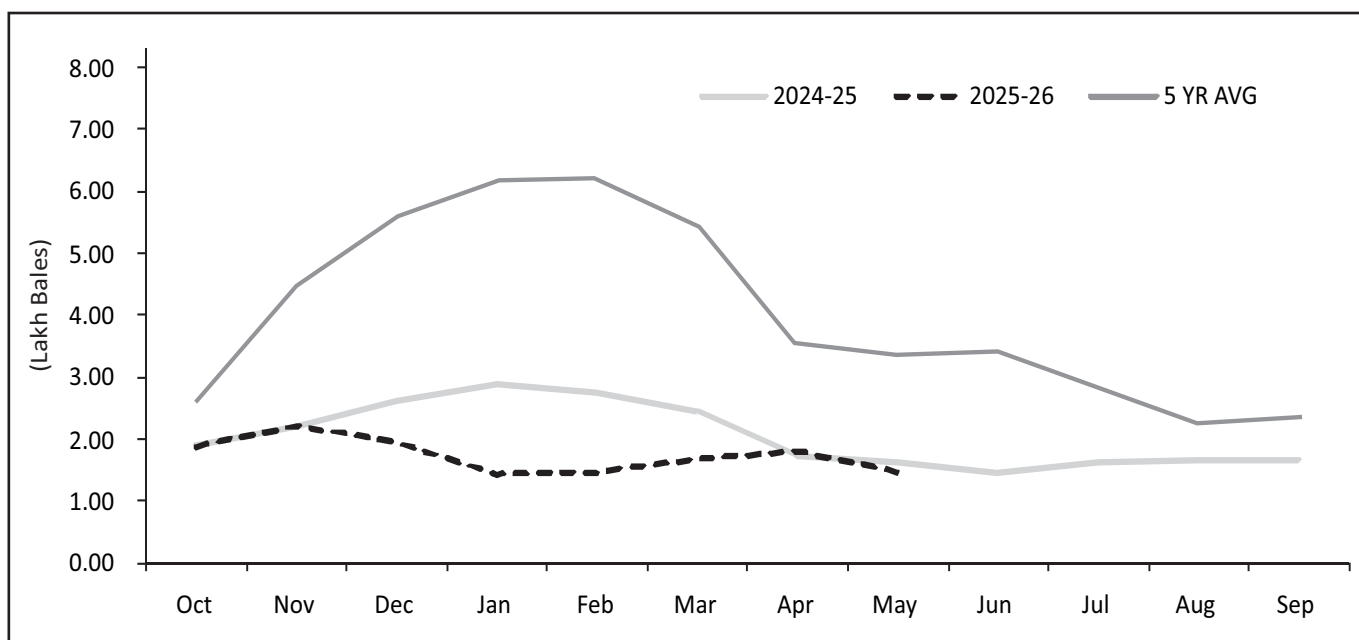
- ❖ India's cotton yarn exports recorded a growth

of 23% in May 2026 compared to the same period in 2025, rising from 84 Million kgs to 103 Million kgs.

- ❖ Bangladesh remained the largest importer, registered a marginal decline of 1%.
- ❖ Strong growth was observed in:
 - ❖ China
 - ❖ Vietnam
- ❖ Several Major markets witnessed sharp declines:
 - ❖ Egypt
 - ❖ Portugal

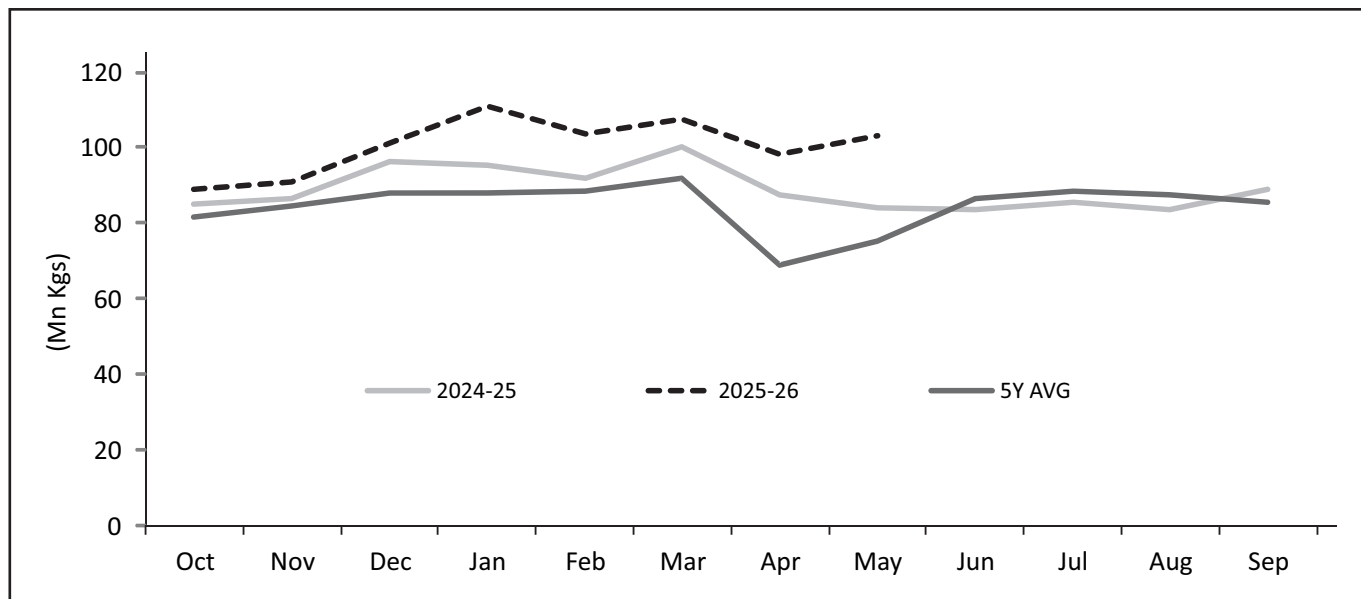
Chart - 2 shows the details of India's Cotton yarn export during current cotton season compared with previous season and 5-years average (2019-2023).

Chart-1 : India's Cotton Export (5201)



Foreign Trade Performance

Chart - 2 : India's Cotton Yarn Export (5205)



Cotton Import - Major Countries

- ❖ India's cotton imports surged expressively rising from 2.95 lakh bales in May 2025 to 4.66 lakh bales in May 2026.

- ❖ Brazil became the leading supplier of cotton.

Table - 3 shows the details of India's cotton import from major countries in quantitative terms.

Table - 3 : Import of Cotton (5201)

(Actual Quantity)

S.No.	Country	May 2025	May 2026
1	BRAZIL	5,818,657	32,678,076
2	U S A	18,759,247	22,103,004
3	MALI	4,974,294	4,190,302
4	EGYPT A RP	3,763,169	3,519,809
5	SUDAN	40,000	3,433,972
6	SWITZERLAND	4,213,652	2,938,045
7	COTE D' IVOIRE	-	1,741,165
8	FRANCE	295,618	1,675,957
9	TURKEY	2,026,193	1,447,051
10	SINGAPORE	2163244	1,403,386
	TOTAL	50,087,593	79,211,845

Source : MoC

Foreign Trade Performance

Country Watch

US textile & apparel import volume drop 7% in January-May 2026

- ❖ US textile and apparel import volume across all fibre types dropped 7 per cent to 37,966.65 Million Square Metre Equivalents (SME) during January-May 2026, down from 40,945.62 Million SME a year earlier.
- ❖ Apparel imports fell 9.35 per cent to 9,155.09 Million SME from 10,098.91 Million SME. Textile imports fell 6.60 per cent to 28,811.55 Million SME from 30,846.71 Million SME in the same period of 2025.
- ❖ The import volume of cotton products fell by 9.90 per cent to 6,443.99 Million SME during the period, compared with 7,152.19 Million SME, a year earlier.
- ❖ Imports of man-made fibre (MMF) products decreased to 30,500.28 Million SME in January- May 2026, down from 32,767.34 Million SME in January-May 2025.
- ❖ The US textile and apparel trade in 2025 reflected a broad-based slowdown after a strong rebound in 2024. Total imports declined by 5 per cent to 101,256.313 Million SME from 106,589.398 Million SME in 2024.

Vietnam's textile & garment exports rise 0.9% to \$18.8 Bn in H1

- ❖ Vietnam's textile and garment exports (excluding yarn and fibre) inched up 0.9 per cent year-on-year (YoY) to \$18.86 Billion

during January-June 2026, according to the Customs IT and Statistics Department under the Ministry of Finance.

- ❖ In June 2026, textile and garment exports increased 16 per cent to \$3.699 Billion. Yarn exports decreased 0.8 per cent in value to \$407.81 Million, but volumes soared 40.9 per cent to 169,230 tons.
- ❖ On the import side, Vietnam's cotton imports dropped 3.1 per cent in January- June 2026 YoY to \$1,571.96 Million, while volumes increased 4.2 per cent to 986,750 tonnes. Yarn imports totalled 660,922 tonnes, valued at \$1,553.35 Million, up by 11.8 per cent in value and 5.7 per cent in volume.
- ❖ During June 2026, the country imported 184,505 tonnes of cotton, valued at \$303.48 Million. Volume decreased 5.2 per cent and value eased 0.6 per cent on a MoM basis. Vietnam imported 113,049 tonnes of yarn valued at \$298.72 Million . Volume decreased 0.7 per cent but value rose 0.8 per cent.

South Korean apparel imports up 1% to \$4.8 Bn in January-May 2026

- ❖ South Korea's apparel imports were slightly up by 1 per cent to \$4.806 Billion during January-May 2026, compared with \$4.758 Billion in the same period of 2025, according to the latest data. The shipment witnessed mild growth in the second month consecutively.

Foreign Trade Performance

- ❖ Imports of knitted apparel and clothing accessories (Chapter 61) were valued at \$2.11 Billion and imports of non-knitted apparel and clothing accessories (Chapter 62) totalled \$2.70 Billion.
- ❖ South Korea's apparel imports increased by 5.76 per cent to \$755.09 Million in May 2026, compared with \$713.96 Million in the corresponding month of 2025.
- ❖ In May 2026, imports of knitted apparel and clothing accessories (Chapter 61) were valued at \$344.23 Million and imports of non-knitted apparel and clothing accessories (Chapter 62) totalled \$410.86 Million.

Türkiye's apparel exports fall 4.6% in Jan-May amid weak global demand

- ❖ Türkiye's apparel exports declined 4.59 per cent year on year to \$6.46 Billion during January-May 2026, down from \$6.77 Billion in the corresponding period of 2025, reflecting continued weak demand in key export markets.
- ❖ Exports of knitted and crocheted garments (HS 61) slipped 3.5 per cent to \$3.71 Billion in the first five months, while woven apparel and clothing accessories (HS 62) declined 6 per cent to \$2.75 Billion. The sharper contraction in May weighed on the cumulative performance.
- ❖ In May 2026, exports of knitted garments fell 14.1 per cent year on year to \$736.47 Million, while woven apparel exports dropped 13.5

per cent to \$536.65 Million. Combined shipments under HS 61 and HS 62 totalled \$1.27 Billion, down 13.85 per cent, from a year earlier.

- ❖ Türkiye's apparel exporters continue to operate in a challenging global environment marked by subdued consumer spending, cautious inventory management by international brands and retailers and persistent geopolitical and trade uncertainties.

Cambodia's H1 2026 apparel exports up 5.7%; cotton imports surge

- ❖ Cambodia's apparel exports increased by 5.7 per cent year on year (YoY) to \$5.54 Billion in the first six months of 2026. Apparel exports accounted for 32.45 per cent of Cambodia's total merchandise exports, which reached \$17.07 Billion during January-June 2026.
- ❖ Exports of knitted apparel and clothing accessories under HS Chapter 61 rose by 3.5 per cent YoY to \$3.56 Billion and exports of non-knitted apparel and clothing accessories under HS Chapter 62 recorded stronger growth of 7.9 per cent, reaching \$1.99 Billion.
- ❖ In June 2026, total apparel exports inched up by 2.80 per cent YoY to \$1.10 Billion from \$1.07 Billion in the same month of 2025.
- ❖ Knitted garment exports remained almost steady at \$746.360 Million, while exports of non-knitted apparel increased by 9.3 per cent to \$353.826 Million.

Foreign Trade Performance

UK's clothing imports drop 9.3% YoY in May 2026

- ❖ The UK's clothing imports declined 9 per cent to £1.30 Billion in May 2026, compared with £1.43 Billion in the corresponding period of 2025. The inbound shipment was also 4.3 per cent lower month on month compared with £1.36 Billion in April 2026.
- ❖ The imports of textile fabrics edged down 2.8 per cent to £481 Million in May 2026, against £495 Million in May 2025 but increased 5.9 per cent from £454 Million in April 2026.
- ❖ Its imports of fibre were noted at £32 Million against £29 Million in May 2025 and £28 Million in April 2026. (£ - Pound).

Greece's apparel imports up 9.4% in Q1, led by cotton garments

- ❖ Greece's apparel imports increased by 9.39

per cent year on year in the first quarter of 2026, reaching \$654.31 Million from \$598.16 Million in the corresponding period of 2025.

- ❖ Spain retained its position as Greece's largest apparel supplier during the quarter, exporting garments worth \$133.94 Million, followed by Italy (\$123.35 Million), Germany (\$60.54 Million), China (\$55.04 Million) and Netherlands (\$51.10 Million). Four of the five largest suppliers were European countries, highlighting the importance of regional sourcing.
- ❖ Cotton apparel (\$304.75 Million) remained the leading fibre category in Greece's imports, followed by man-made fibre garments (\$206.30 Million), while wool, animal hair, and silk products accounted for comparatively smaller shares.

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 7.3% growth in June 2026

India's industrial production growth in June 2026 registered a 7.3% 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 10.6% year-over-year increase. The manufacturing sector and water supply, sewage & waste management sector experienced a growth of 7.8% & 6.1% respectively. Mining & Quarrying saw a marginal growth of 1%.

The General Index of Industrial Production (IIP) for June 2026 stood at 123.1 points, compared to 114.7 in June 2025. The indices of Industrial Production for Mining & Quarrying, Manufacturing, Electricity & Gas Supply and Water Supply, Sewerage & Waste Management for the month of June 2026 stand at 110, 123.3, 131 and 145.7 respectively.

Within the manufacturing sector, 19 out of the 23 industry groups posted positive year-on-year growth. The top three positive contributors for the month of June 2026 are - "Manufacture of electrical equipment" (34%), "Manufacture of motor vehicles, trailers and semi-trailers" (17.5%) and "Manufacture of textiles" (13.7%)

The index of manufacturing of wearing apparel stood at 95.6 points during the month, recorded a growth of 1% comparing to previous month index of 94.7 points. The manufacture of textiles marginally fell by 0.3% to 136.4 points from 136.8 points in May 2026.

The manufacture of textiles showed a year-on-year increase, with the index rose to 136.4 from 120 in June 2025, reflecting a growth of 13.7%. The manufacture of wearing apparel registered a decline of 6.9%, with the index fell to 95.6 from 102.7 in the same period last year.

As per the Use-Based Classification, the indices stand at 119.5 for Primary Goods, 140.5 for Capital Goods, 124.2 for Intermediate Goods and 132.9 for Infrastructure/ Construction Goods for the month of June 2026. Further, the indices for Consumer durables and Consumer non-durables stand at 119.8 and 115.4 respectively.

The IIP reflects a positive trend in India's industrial performance, with manufacturing remaining the principal driver of overall growth.

Most manufacturing industries recorded improved production, indicating stronger industrial activity and favourable market conditions. Within the manufacturing sector, the textile industry performed strongly, indicating improved production, while, the wearing apparel industry registered a decline. The contrasting performance of textiles and wearing apparel highlights differing market conditions and production dynamics within the broader textile value chain.

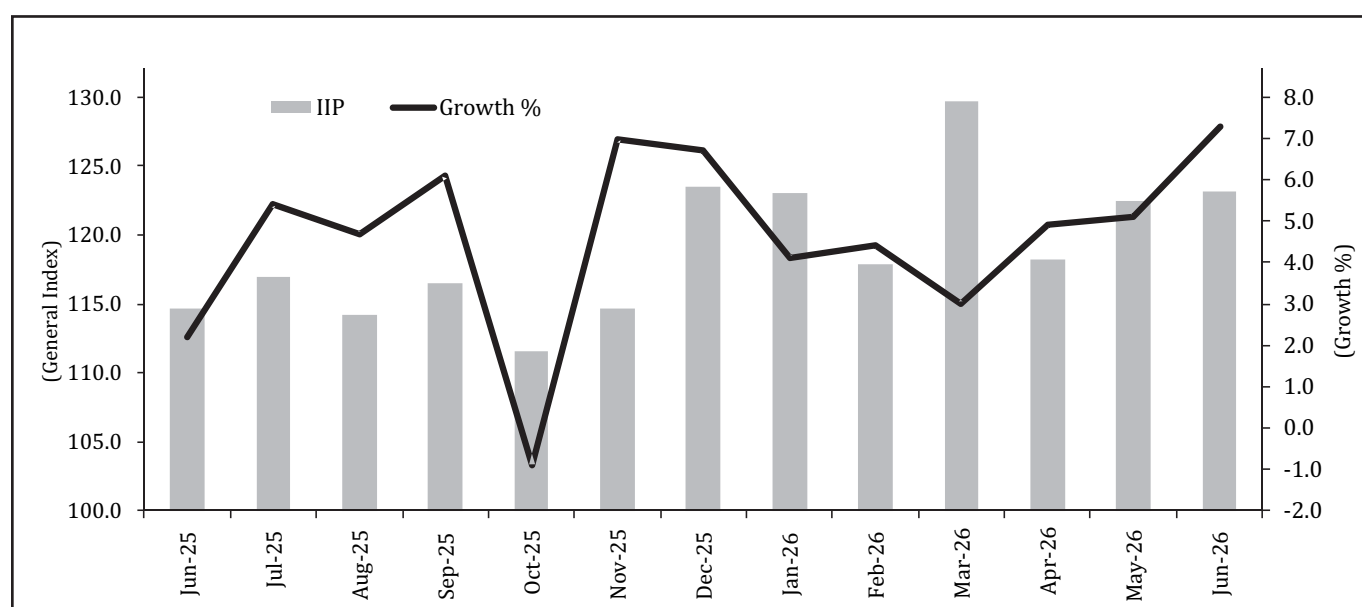
Overall, the IIP reflects a positive industrial outlook, although variations across industries underscore the need for targeted measures to strengthen sectors experiencing slower growth.

Index of Industrial Production

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

Sectoral	Feb '26	Mar '26	Apr '26	May '26	Jun '26
Mining & quarrying	-2.4	-2.6	-3.8	-1.4	1.0
Manufacturing	5.7	4.0	6.1	5.2	7.8
Electricity & Gas Supply	1.9	1.2	4.6	10.3	10.6
Water Supply, Sewerage & Waste Management	5.6	6.4	6.6	5.5	6.1
Primary goods	0.0	0.2	0.8	2.7	4.9
Capital goods	16.5	8.5	12.0	15.5	14.2
Intermediate goods	4.7	6.0	10.3	5.8	9.3
Infrastructure/construction goods	10.1	5.2	6.0	6.6	7.5
Consumer durables	4.2	2.4	5.6	8.0	7.7
Consumer non-durables	1.6	-0.6	0.2	-0.4	4.9
Overall IIP	4.4	3.0	4.9	5.0	7.3

Chart - 1 : Index of Industrial Production



Index of Industrial Production

Table - 2 : Index of Industrial Production (Base 2022-23 =100)

NIC 2008	Description	Weights	June 2025	June 2026	% Change
10	Manufacture of food products	5.679	93.9	104.0	10.8
11	Manufacture of beverages	1.113	136.5	153.6	12.5
12	Manufacture of tobacco products	0.774	112.9	116.8	3.5
13	Manufacture of textiles	3.275	120.0	136.4	13.7
14	Manufacture of wearing apparel	1.970	102.7	95.6	-6.9
15	Manufacture of leather and related products	0.607	100.1	107.5	7.4
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.239	108.6	100.6	-7.4
17	Manufacture of paper and paper products	1.375	105.1	115.7	10.1
18	Printing and reproduction of recorded media	0.506	95.8	99.5	3.9
19	Manufacture of coke and refined petroleum products	7.721	108.8	108.3	-0.5
20	Manufacture of chemicals and chemical products	7.813	109.1	108.8	-0.3
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	5.833	120.1	121.1	0.8
22	Manufacture of rubber and plastics products	3.384	103.0	110.0	6.8
23	Manufacture of other non-metallic mineral products	3.519	115.1	130.0	12.9
24	Manufacture of basic metals	9.198	125.1	129.1	3.2
25	Manufacture of fabricated metal products, except machinery and equipment	2.481	124.1	130.5	5.2
26	Manufacture of computer, electronic and optical products	2.085	137.6	154.9	12.6
27	Manufacture of electrical equipment	3.175	130.4	174.7	34.0
28	Manufacture of machinery and equipment n.e.c.	5.020	120.8	131.3	8.7
29	Manufacture of motor vehicles, trailers and semi-trailers	6.417	108.5	127.5	17.5
30	Manufacture of other transport equipment	2.089	129.8	145.3	11.9
31	Manufacture of furniture	0.283	112.6	125.1	11.1
32	Other manufacturing	1.509	96.1	107.3	11.7
	Manufacturing	76.062	114.4	123.3	7.8
	Mining & Quarrying	11.053	108.9	110.0	1.0
	Electricity & Gas Supply	10.865	118.4	131.0	10.6
	Water Supply, Sewage & Waste Management	2.020	137.3	145.7	6.1
	General	100.000	114.7	123.1	7.3

Need for Rationalising Seeds

Mission for Cotton Productivity – Need for Rationalising Seeds

India's cotton sector occupies a unique position in the global agricultural and textile economy. The country is the world's largest cotton cultivator by area and number of farmers, accounting for nearly 38% of the global cotton acreage and engaging around seven million farmers. India is the second largest producer accounting around 20% of world cotton production, second largest consumer by using around 5.4 Million Metric Tonnes. Cotton is the growth engine of the Indian textile industry, the second largest employment provider employing over 35 Million people directly.

Despite its dominant position, India's cotton productivity is only around 440 kgs per hectare as against the world average of around 815 kgs per hectare mainly due to the obsolescence in the cotton seed technology and rampant use of

spurious seeds. While countries such as Australia, Brazil, China and the United States have consistently improved yields through advanced seed technologies, precision farming and improved crop management, India is plagued with numerous challenges on cotton seed front. Though Government is paying huge price subsidy by exercising Minimum Support Price which is already 5 to 10 percent higher than international price, the same is not fully compensating the farmers, thus cotton as the most preferred cash crop is losing its importance. Around 10 to 20 percent of the farmers switch over to alternate crops due to productivity and quality issue. This causes uncertainties in sustaining the adequate availability of home grown quality cotton at internationally competitive price.

Productivity of Major Cotton Growing Countries

Year	Particulars	India	Australia	Brazil	China	Turkey	Mexico	Israel	World	
									Excluding India	Including India
1999-00	Area (lakh ha)	87.32	4.50	7.50	37.26	7.19	1.52	0.15	238.00	325.59
	Production (1000 MT)	2652	707	700	3832	791	145	24	16391	19043
	Yield (Kg / ha)	304	1571	859	1028	1113	954	1640	689	585
2024-25	Area (lakh ha)	126.80	5.70	16.60	29.00	4.40	2.00	0.05	191.40	318.20
	Production (1000 MT)	5529	1089	3173	5987	697	196	15	20315	25844
	Yield (Kg / ha)	436	1910	1911	2065	1583	1720	2293	1072	812
Change in Area (%)		45	27	121	-22	-39	32	-67	-20	-2
Change in Yield (%)		43	22	122	101	42	80	40	56	39

Need for Rationalising Seeds

The agriculture departments of State and Central Governments do not give equal attention for cotton development and sustaining the area under cotton cultivation by bringing new seed technology. The area under rain fed acreage continues remain above 2/3rd for decades. The private seed producers have numerous challenges in bringing the new Bt variety technology having herbicide tolerance, pink boll worm and other pest tolerance technology, weather tolerant technology, synchronised boll maturing technology with suitable defoliant to facilitate mechanised harvesting, high density planting of plant population on par with countries like Brazil, licensing procedures with high lead time, etc. They also ignore sustaining the productivity and fibre quality parameters and there is no system to monitor the performance of any seed owing to truthfully labelled seed trading.

Recognising the need to improve cotton production and quality, the Government of India has launched the Mission for Cotton Productivity (2026-2031) with a budget outlay of Rs.5,659.22 Crores. The mission aims to increase cotton productivity, improve fibre quality, promote sustainable cultivation and strengthen India's competitiveness in global textile markets. However, achieving these ambitious objectives will depend largely on addressing the cotton seed issue.

Bt Cotton

India is the only country blessed with varied agro-climatic conditions favouring the production of cotton with different staple length

(22 mm to 39 mm) and other fibre quality parameters and enabled the country to produce yarn counts from 2s to 120s. This advantage got vanished when the Government decided to officially recognise the Bt technology and allowed the private seed producers to acquire Bt technology from Monsanto and develop the seeds for Indian agro-climatic conditions. Since the market share of cotton staple length ranging from 27 mm to 31 mm was more than 70 percent, the industry started using waste cotton for the production yarn counts upto 20s using open end spinning technology (an invention emerged after 1980s), the private seed producers developed the seeds only for the production of medium and long staple cotton varieties due to economical reasons.

The Government permitted selling Bt seeds as truthfully labelled seeds and stopped monitoring the performance of the cotton seeds during the last two decades. More than 98 percent of the cotton farmers in the country use Bt hybrid cotton seeds. Though CICR developed numerous varieties of non-GMO cotton seeds as usual, none of them could be developed as commercially viable seeds and compete with the Bt seeds. Hence, the annual production of around 25 lakh bales of extra long staple cotton during 1980s has reduced to less than 5 lakh while the demand for such cotton remains same and the industry is heavily depending on imports.

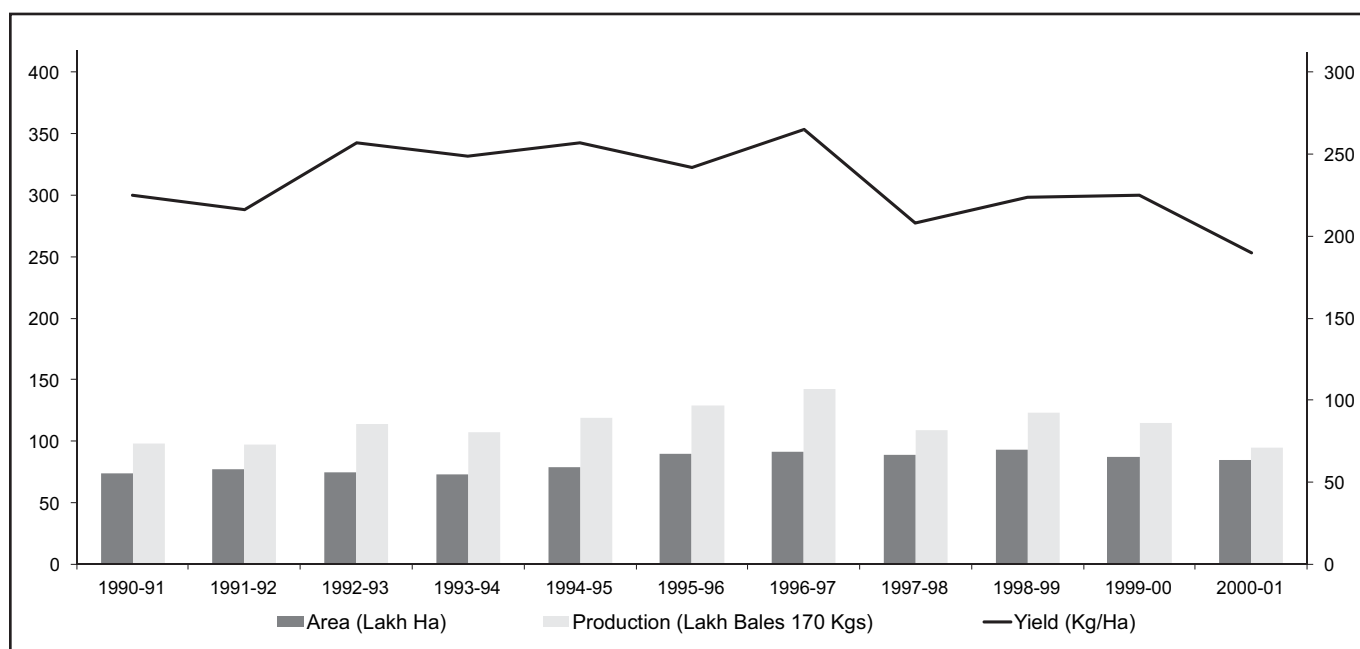
However, the introduction of Bt cotton in 2002 marked a major technological breakthrough. The technology helped farmers effectively

Need for Rationalising Seeds

control American bollworm infestations, reduced pesticide usage and significantly increased yields during the initial years. Cotton production rose sharply, enabling India to emerge as the world's largest producer of cotton during 2014-15. The productivity increased from 300 kgs per hectare to 565 kgs

per hectare, an increase of 88% and the annual cotton production increased from 2 Million Metric Tonnes to 7 Million Metric Tonnes. But, the momentum created by Bt cotton gradually slowed and made India to slip to the second position leaving the first position to China, despite having almost three times of Chinese area under cotton.

Chart - 1 : Evolution of Indian Cotton prior to the adoption of Bt cotton



Source: Office of the Textile Commissioner

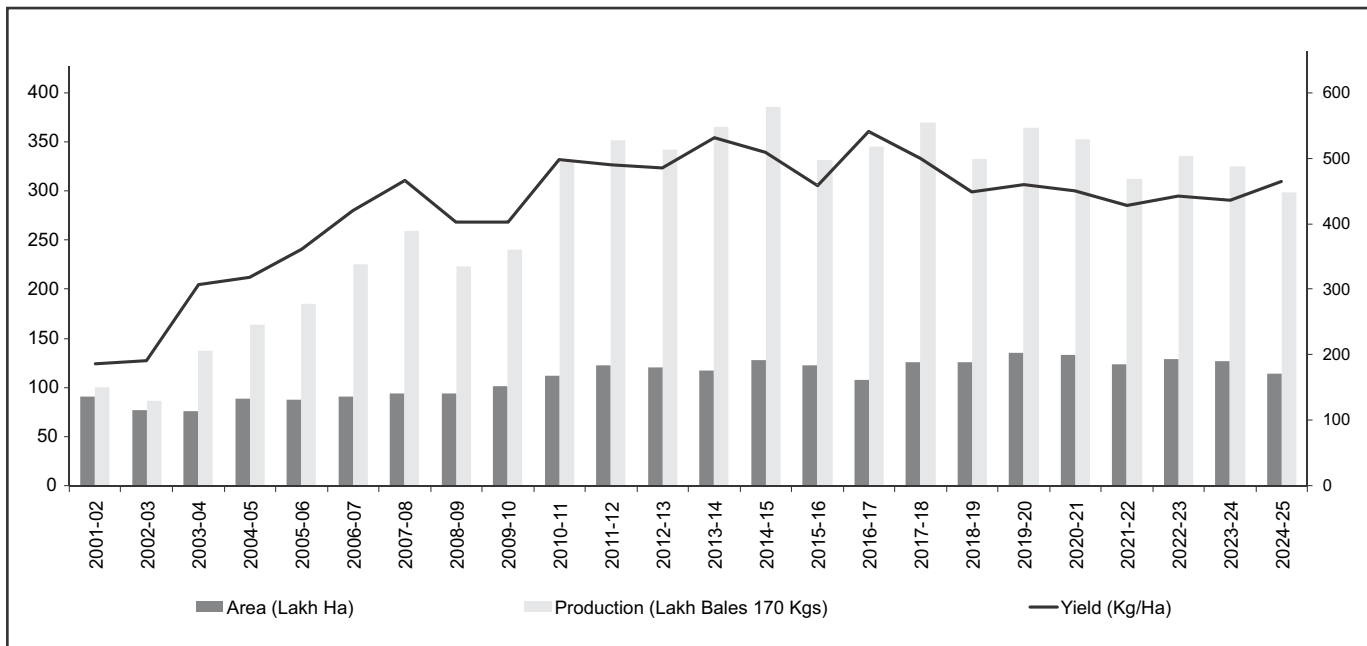
Indian private cotton seed producers preferred developing Bt hybrid seed owing to IPR issue while the rest of the world produces Bt variety cotton seeds. The Government continues to encourage only Non-GMO seeds. The huge royalty price and huge expenditure incurred in the manual pollination process involved in the production Bt hybrid seeds increased the seed cost steeply. When Government intervened in the seed cost and private seed producers continue to produce only Bt hybrid and GEAC

did not give license for new technology seeds, seed quality could not be sustained beyond 2012 when the Boll Guard II Bt technology license expired in 2012.

The dedicated Technology Mission on Cotton (TMC) was also not extended beyond March 2012. All these combinations of factors affected the seed quality and prevented the invention of appropriate seed technology for Indian agro-climatic conditions.

Need for Rationalising Seeds

Chart - 2 : The Era of Bt Cotton in Indian Cotton Cultivation



Source: Office of the Textile Commissioner

The focus on developing precision cotton farming and adopting global best practices in cotton cultivation also did not take place after closing the TMC.

Cotton production and productivity continue to decline over the past decade, while pest pressures (pink boll worm, curl leaf, etc.,) and climate-related challenges have intensified. The need for a new generation of cotton seed technologies has become immensely important.

Seed quality and varieties

Farmers across the country were able to get quality seeds without any admixture till the Government permitted truthfully labelled seed certification concept for allowing Bt hybrid. The Government had full control on the distribution of appropriate variety of seeds mapping the

agro-climatic and soil conditions till the introduction of such truthfully labelled seeds. Thereafter, there is no control on the certified seeds and spurious seeds. It is understood that there are more than 2,000 varieties of cotton seeds available in the market and the farmers are helpless. In this regard, due to price difference in the quality seeds and admixture / spurious seeds, the private seed producers also do not monitor the performance of the seeds of older technology and therefore the productivity and the fibre quality parameters of several hundreds of seeds are very poor.

No attempt has been made so far to assess the performance of the cotton seeds, curb the sale of illegal/spurious seeds, map the seeds to different zones/blocks and restrict the number of cotton seed varieties.

Need for Rationalising Seeds

Survey of cotton seed performance

There is an urgent need to conduct a study the performance of all the cotton seed varieties in the country. It is also essential to review of the performance of the seeds distributed by the

private seed producers. Based on the study and making a thorough analysis, the number of seed varieties can be reduced to 20 to 30 seeds and permit only the certified seeds. Sample questionnaire is given in the Annexure.

Annexure

Cotton Seed Questionnaire

Part - A : General Particulars

1.	Name of the producer	
2.	Address	
3.	Contact number	
4.	E-mail ID	
5.	Name of the contact person	
6.	Mobile number	
7.	E-mail ID	
8.	Year of establishment	
9.	Unit type (<i>select applicable</i>)	MSME / Non-MSME
10.	Annual production capacity	
	a) Non-GMO (tonnes)	
	b) GMO (no. of 450 g packets)	

News Snippets

India-EU FTA: 63% cotton basket could cap apparel export gains

- ❖ India's FTA with the EU can improve price competitiveness, but tariffs alone will not double apparel exports.
- ❖ TexPro data show India's Europe-bound basket remains heavily cotton-focused, while demand is stronger for jerseys and outerwear.
- ❖ The biggest opportunity lies in expanding MMF capacity and higher-value product categories before the agreement takes effect.

Need for Rationalising Seeds

Part B: Variety-wise Particulars

(To be submitted separately for each cotton seed variety)

1. Seed category (select applicable)	Variety / Bt Variety / Hybrid / Bt Hybrid	
2. Commercial name of the seed	Truthful / Certified	
3. Seed type (select applicable)	Rainfed / Irrigated	
4. Cultivating District & State		
5. Water source (select applicable)		
6. Year of approval for commercial multiplication		
7. Approved zone / location		
8. Crop cultivation particulars	Original Status (at the time of release)	Current Status
a) Seed price (Rs. per kg)		
b) Seed price (Rs. per packet of 450 gm)		
c) Crop duration (No. of days)		
d) Plant population (No. per ha)		
e) Average no. of pickings per season		
9. Seed performance indicators	Original Status (at the time of release)	Current Status
a) Average seed cotton yield (kg per ha)		
b) Gin-out ratio (%)		
c) Staple length: 2.5% span length (mm)		
d) Strength (gtex)		
e) Micronnaire		
f) Uniformity index		
10. Major reasons for fall in productivity, if any.		
11. Major reasons for fibre quality deterioration, if any.		
12. Support measures required from the Government to improve seed quality.		

Raw Material Scenario

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

World Cotton Production Projected Lower in 2026-27

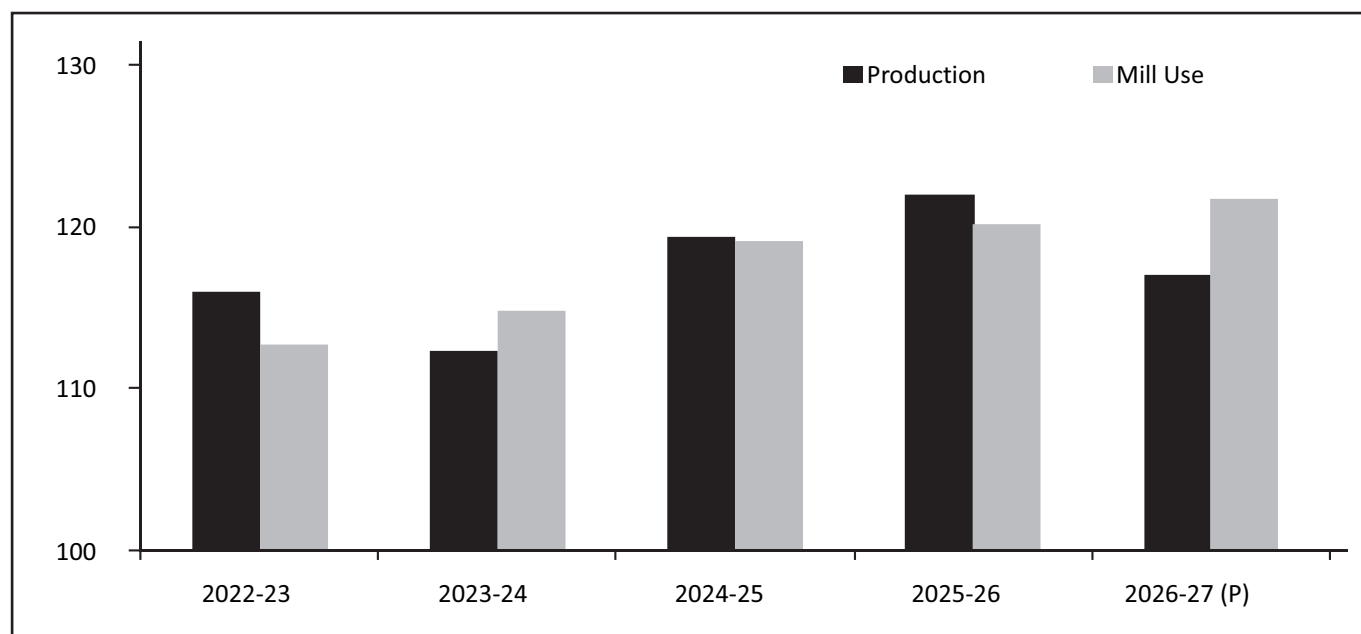
Global cotton production in 2026-27 is projected at 25.53 Million tonnes nearly 4 per cent below the previous year. For 2026-27, cotton production prospects for the major producing countries such as China, Brazil, the United States, Pakistan and Australia are forecast to decline, while India is projected to maintain the growth. World 2026-27 cotton harvested area is forecast at 29.31 Million

hectares, down slightly from 2025-26. The 2026-27 Global cotton yield is forecast at 871 kilograms (kg) per hectare, 4 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 20 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 yield is expected to decrease to 555 kg per hectare in 2026-27.

Brazil is forecast to reach its cotton production 3.91 Million tonnes in 2026-27. The drop is a result of reduced area harvested from last year while yield is expected to marginally increase 0.4 per cent to 1,960 kg per hectare. Australia is forecast to decrease production by 33 per cent in 2026-27.

Raw Material Scenario

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 2 per cent in 2026-27 to 26.55 Million tonnes, the highest in 5 years. Each major country's cotton mill use is projected to increase in 2026-27 from its year-ago level. China and India remain 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 9.03 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 1.69 Million tonnes in 2026-27. Bangladesh is forecast to contribute 6 per cent of the global total. Vietnam's cotton use is forecast to account for nearly 7 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 3 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 and 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 1.74 Million tonnes. Bangladesh is forecast to account for 18 per cent of global imports in 2026-27.

For China, cotton imports are projected to 1.52 Million tonnes in 2026-27 and account for 16 per cent of the world total. Pakistan's cotton imports are also projected to increase 19 per cent to 1.08 Million tonnes.

SIMA Placement Services

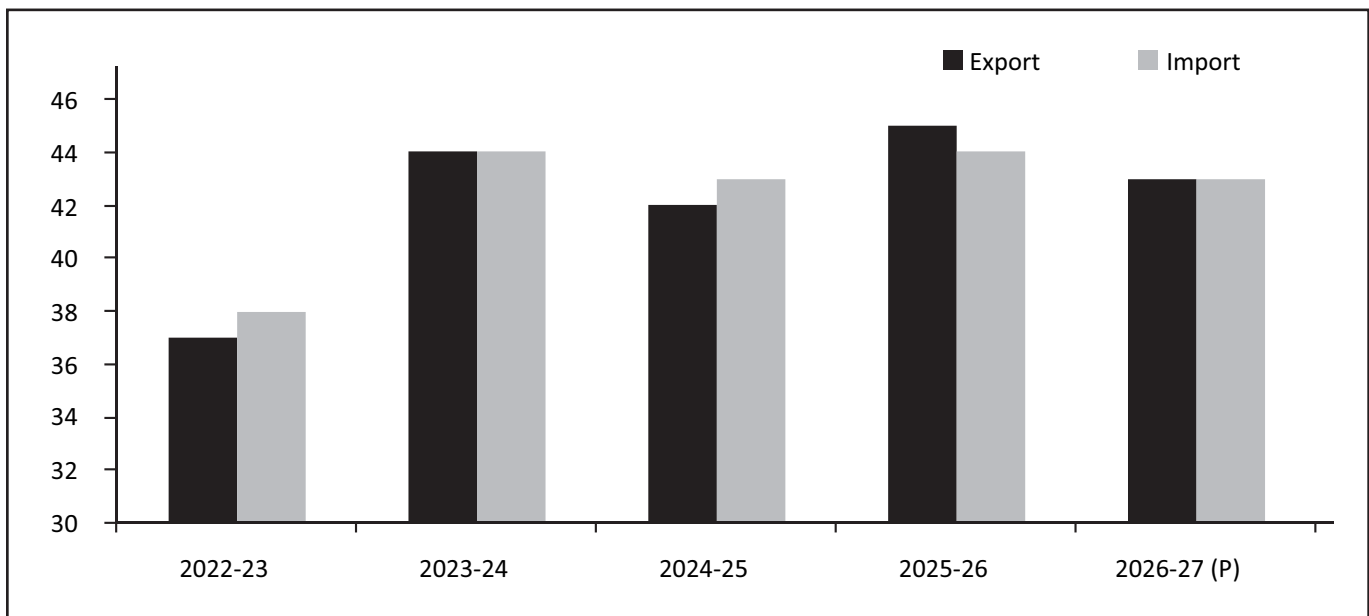
SIMA Placement Cell helps member mills in sourcing and selecting suitable candidates for different positions. SIMA would use its wide contacts, data bank and also release advertisements, if mill desires. Please send your requirements to

legal@simamills.org

Raw Material Scenario

Figure - 2 : Export and Import

(Million bales)



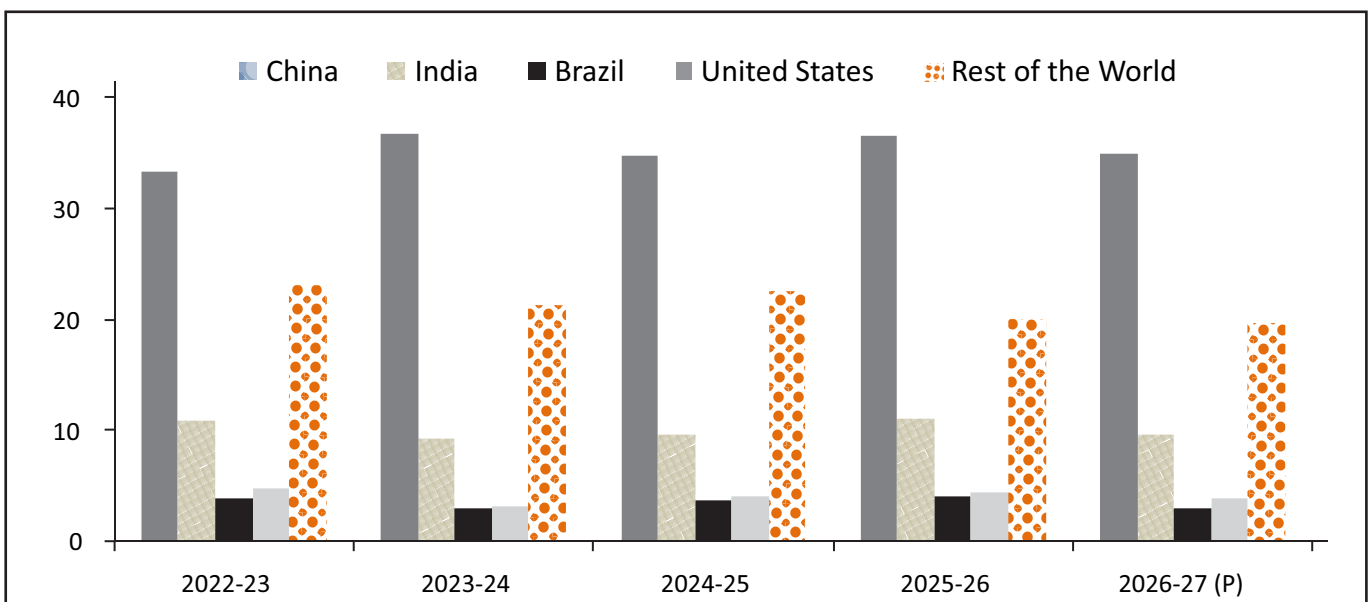
1 bale = 480 pounds | Source : USDA

Global ending stocks are projected to decline in 2026-27. Stocks in China are projected to 7.72 Million tonnes in 2026-27, compared with 7.96 Million tonnes in 2025-26. 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 2.26 Million tonnes, or approximately 15 per cent of the global total.

Chart - 3 : Global cotton ending stocks

(Million bales)



1 bale = 480 pounds | Source : USDA

Raw Material Scenario

For India, the Committee on Cotton Production and Consumption (COCPC) which met on 28th July 2026 has projected,

- ❖ Cotton production as 290.24 lakh bales for marketing year 2025-26 on an area of 115.25 lakh hectares.
- ❖ Import at 55 lakh bales and consumption at 336 (Non -MSME: - 222; MSME:- 98;

Non Textile:- 16) lakh bales. Presuming export as 12 lakh bales.

- ❖ The Closing stock has been estimated at 42.74 lakh bales of cotton during the cotton year 2025-26.

Table - 1 & 2 shows the Balance sheet and State-wise area, cotton production and yield decided by the COCPC for the seasons 2024-25 & 2025-26.

Table - 1 : Cotton Balance Sheet

Particulars	2024-25		2025-26 (P)*	
	(In lakh bales of 170 kg. Each)	(in Thousand Tons)	(In lakh bales of 170 kg. Each)	(in Thousand Tons)
SUPPLY				
Opening Stock	47.47	806.99	45.50	773.50
Crop	297.24	5053.08	290.24	4934.08
Import	41.40	703.80	55.00	935.00
TOTAL SUPPLY	386.11	6563.87	390.74	6642.58
DEMAND				
Non-MSME Consumption	213.04	3621.68	222.00	3774.00
MSME Consumption	93.50	1589.50	98.00	1666.00
Non-Textile Consumption	16.00	272.00	16.00	272.00
Export	18.07	307.19	12.00	204.00
TOTAL DEMAND	340.61	5790.37	348.00	5916.00
Closing Stock.	45.50	773.50	42.74	726.58

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Raw Material Scenario

Table - 2 : State-wise area of Cotton, Production & Yield

Area : in Lakh Hectares

Production : in Lakh bales of 170 Kg

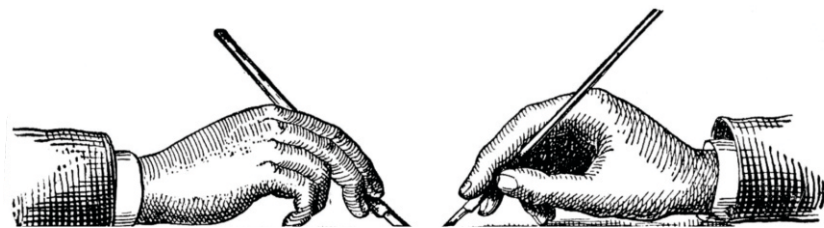
Yield : kg per hectare

Name of the State	2024-25			2025-26 (P)		
	Area	Production	Yield	Area	Production	Yield
Punjab	1.60	4.14	439.88	1.42	3.35	401.06
Haryana	3.98	11.77	502.74	4.01	8.80	373.07
Rajasthan	6.27	17.86	484.24	6.44	17.04	449.81
NORTHERN ZONE	11.85	33.77	484.46	11.87	29.19	418.05
Gujarat	23.72	71.57	512.94	20.96	67.93	550.96
Maharashtra	41.23	73.73	304.00	38.55	77.55	341.98
Madhya Pradesh	5.37	15.35	485.94	5.59	11.64	353.99
CENTRAL ZONE	70.32	160.65	388.37	65.10	157.12	410.30
Telangana	18.12	57.89	543.12	20.53	55.54	459.90
Andhra Pradesh	4.04	11.31	475.92	5.54	16.13	494.96
Karnataka	6.78	22.73	569.93	8.77	21.20	410.95
Tamilnadu	1.02	2.11	351.67	0.80	1.82	386.75
SOUTHERN ZONE	29.96	94.04	533.60	35.64	94.69	451.66
Orissa	2.39	8.23	585.40	2.39	8.73	620.96
Others	0.32	0.55	292.19	0.25	0.51	346.80
TOTAL	114.84	297.24	440.01	115.25	290.24	428.12

P - Provisional | Loose Cotton delivery is based on the survey of "loose cotton delivery and consumption in India" undertaken by Sardar Vallabhbhai Patel International School of Textiles and Management

* - As estimated by Committee on Cotton Production and Consumption (COCPC) in its meeting held on 28th July 2026.

Editorials



Minister proposes policy advocacy committee to boost ease of doing business

Hon'ble Minister for Industries, Smt. S Keerthana indicated that the state would take favourable steps to improve ease of doing business by constituting a policy advocacy committee with the participation of major industry stakeholders. The idea was mooted at a textile industry meeting convened by the Southern India Mills' Association (SIMA).

SIMA hosted the interaction at its office with the Office - Bearers of Textile Associations representing the entire value chain in Tamil Nadu. MLAs Ms. Kanimozhi Santhosh (Kavundampalayam), Mr N M Sukumar (Sulur) and Mr K S Sri Giri Prasath (Singanallur) were among those who attended.

Industry representatives flagged mounting cost pressures, led by power tariffs and other input expenses, India's textile business has been facing sustained stress in recent years. The sector highlighted raw material constraints, noting Tamil Nadu produces only about 3%-4% of its cotton requirement and has no man-made fibre manufacturing facility within the state.

SIMA said the industry's ability to sustain

operations has been depending on manufacturing efficiency and entrepreneurship. It cited two steps taken after Hon'ble Chief Minister Shri C Joseph Vijay assumed office: recommending to the Centre exemption of cotton from the 11% import duty during the off-season and refraining from implementing a proposed 3.48% electricity tariff hike. SIMA said the measures helped the units meet export commitments and recover from the downturn.

At the meeting, Minister assured Associations that their demands would be taken up with the Chief Minister and acted upon in a time-bound manner. She acknowledged the need to address power-related issues and problems faced by the textile processing units, described as a weak link in the value chain.

SIMA Chairman Shri Durai Palanisamy sought policy reliefs, including annual banking for post-2018 windmills for captive users, night-time adjustment of surplus solar power, waiver of penal interest on pending deemed demand charges, freezing demand charges at 608 per kVA per month for three years, withdrawal of network charges for rooftop solar and a 10-year exemption from cross-subsidy and additional surcharges for open access power for

Gleanings from the Press

new investments. He also sought a long-term, cost-competitive solution for treatment & disposal of textile effluents.

The Sunday Times 05.07.2026

Coimbatore-based textile research body plans to promote green processing through Rs.80 Cr project

The South India Textile Research Association (SITRA) has mooted a Rs.80 crore project to promote green textile processing.

Mr Prakash Vasudevan, Director of SITRA, told that the plan is to set up a Centre of Excellence in Tiruppur, which is a hub for garment production and strengthen the research and development facilities at SITRA'S Coimbatore facility.

Garment and made-up manufacturers need to look at reducing water and salt usage in textile processing to meet the sustainability norms of western buyers. The plan is to set up a Centre of Excellence on 2-3 acres and connect it to a common effluent treatment plant.

All the textile processing units that are

connected to the CETP will benefit from the technologies implemented through the Centre of Excellence. The SITRA has already worked on saltless dyeing and is working on waterless dyeing, too. The research activities will be a continual effort, he said.

Dr. A.Sakthivel, Chairman of the Apparel Export Promotion Council, urged the Hon'ble Union Textile Minister Shri Giriraj Singh to support the project when the Minister visited Tiruppur. Tiruppur and the nearby town of Perundurai are major textile processing centres. Though the dyeing units in Tiruppur have opted for zero liquid discharge, disposing the sludge remains a major issue for the effluent treatment plants, said industry sources.

The Hindu 05.07.2026

UK buyers look at higher sourcing from Tiruppur

Garment buyers in the UK are looking at increasing purchases from Tiruppur as the India - UK free trade agreement is coming into force.

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

According to Dr. A. Sakthivel, Chairman of the Apparel Export Promotion Council (AEPC), buyers who are sourcing from Tiruppur or India are increasing the orders. And some of the new buyers who are sourcing from Bangladesh are also turning to India.

While Tiruppur is a leader in knitwear, Bengaluru is a hub for woven shirts, Delhi is a hub for garments. "India has an advantage over countries such as Bangladesh or Vietnam because of availability of raw material. So, there may be manufacturers in India who will be able to quote lower prices," he said.

Earlier, Tiruppur was a major supplier of core garments to the UK. With Bangladesh getting duty free access, Tiruppur lost a lot of orders. These will return to Tiruppur as India will also have duty free access now, said exporters in the knitwear town.

Currently, 10% of Tiruppur's exports are to the UK. The purchasing trend of customers in the European countries has changed. Even large brands are introducing economy lines and smaller retailers are seeing higher sales and opening new stores. So, the demand has reduced for premium garments. All these are offering more opportunities for clusters such as Tiruppur.

The Hindu 01.07.2026.

Openend spinning mills hit by high raw material price

The Openend Spinning Mills in Tamil Nadu are in crossroads as there is a pressing need to modernise leading to higher demand for raw

materials, which is waste cotton. But, the cost of waste cotton is affecting operational margins.

The Openend Spinning Mills Association and the Recycle Textile Federation have urged the Union Government to control export of waste cotton. Price of waste cotton has reduced by Rs.20 a kg in the recent days and should come down by another Rs.10 a kg so that the users of yarn made from waste cotton benefit, they said.

Most of Openend Spinning Mills in the north have modernised their mills and nearly 40% of the Tamil Nadu Openend Spinning Mills should also modernise. With modernisation, yarn production has doubled and demand for waste cotton has increased.

However, the price of waste cotton (comber noil) peaked to Rs.140 a kg in May 2026. If the openend spinning mills increase the price of yarn, the home textile factories in Karur and powerloom weavers are affected as they are unable to absorb the price, said Mr G. Arulmozhi, President of the Openend Spinning Mills Association.

Waste cotton is a byproduct from the textile mills and it is usually priced at 65% of the cotton price. However, with higher exports of comber noil and increase in domestic demand, its prices have shot up, they said.

The Hindu 07.07.2026

Meet throws spotlight on decarbonising textile processing

The textile clusters in Coimbatore and nearby areas should be open to adopting technologies

Gleanings from the Press

piloted for real time data so that the entire cluster can progress in decarbonisation, said Mrs Nirmala Raja, Managing Director, Rajapalayam Mills and Chairperson, Ramco Community Services, in Coimbatore city.

Speaking at a meeting titled 'Future-Proofing Textile Manufacturing', she said the textile processing industry needs heat for many activities. This can be generated from electricity rather than use of fossil fuel sources. However, the industry should be open to technology that is piloted in textile units, look for proof of concept, and work as a cluster for better results. The initiatives should also be at affordable costs, she said.

Mr Ravi Sam, vice-chairman of the Cotton Textiles Export Promotion Council, said the textile industry developed in the western districts of Tamil Nadu mainly because of availability of raw materials, manpower and power at competitive costs. While raw material and manpower are not available here anymore, the industry has urged the Tamil Nadu government to ensure availability of power supply at competitive costs.

The Perundurai SIPCOT Textile Processors Association Secretary Mr Suresh Manoharan said the association is working with Vasudha Foundation for quite some time to move away from use of fossil fuels in textile processing and adopt electrification. The foundation is supporting the Perundurai textile processing cluster by connecting the industrial units with technology providers and identifying viability gap funding options.

According to Dr K. Selvaraju, Secretary General of the Southern India Mills' Association, while free trade agreements have enabled removal of tariff barriers for the Indian exporters, non-tariff barriers are a matter of concern. Marine discharge of treated textile processing effluent is a viable solution compared with zero liquid discharge. Mr Srinivas Krishnaswamy, Chief Executive officer of Vasudha Foundation, said it had released climate plans for four districts and four cities in the State, including Coimbatore and The Nilgiris.

The Hindu 10.07.2026

Minister submits 20-point charter to Centre for textile sector

Minister for Handlooms, Textiles and Khadi Mr M. Vijay Balaji met Hon'ble Union Textiles Minister Shri Giriraj Singh and submitted a 20-point memorandum seeking the Centre's support for Tamil Nadu's handloom, powerloom and textile sectors.

The memorandum sought the establishment of an Integrated Powerloom Park in Erode, Silk Export Facilitation and Product Diversification Centres, and financial assistance for the second phase of the Handloom Silk Park at Arni. It also called for international marketing support for handloom products and measures for the overall development of the sector.

Key demands included exemption of handloom products from the Goods and Services Tax (GST), inclusion of pure zari and half- fine zari yarn under the Raw Material Supply Scheme, establishment of a silver thread production unit

Gleanings from the Press

at Tamil Nadu Zari Limited in Kancheepuram, release of pending Central assistance, and financial support for Common Effluent Treatment Plants with Zero Liquid Discharge facilities in textile clusters in Erode, Namakkal and Karur.

The State also urged the Centre to permanently remove the 11% import duty on cotton beyond October 31, 2026, promote technical textiles and exports, expedite implementation of the Site Adjacent Factory Employee Accommodation (SAFE) Scheme, extend support for the Theni Vaigai Hitech Weaving Park and revive the Scheme for Integrated Textile Parks (SITP).

The Hindu 15.07.2026

Textile associations demand measures to reduce power costs

With the Tamil Nadu government planning to come out with a new industrial policy, textile industry associations have urged the government to announce measures to reduce the power cost and encourage investments.

The Southern India Mills Association (SIMA) said the textile industry, which is labour-intensive, will benefit from a hybrid incentive structure that combines upfront capital subsidy, power tariff support, and technology upgradation assistance.

Upfront capital support helps improve project viability, particularly in spinning, weaving, processing, garmenting, technical textiles and textile machinery manufacturing.

In addition, power constitutes a significant portion of manufacturing costs and therefore competitive power tariff support and incentives for renewable energy adoption are essential to enhance cost competitiveness, it said.

The SIMA added that employment-linked incentives should form an integral part of the policy to encourage large-scale job creation, particularly for women and skilled workers.

The Hindu 30.07.2026

Garment exporters hope for tariff-rate quota from the U.S.

Indian garment exporters are hoping for tariff-rate quota, which countries such as Bangladesh have got, from Washington as India is also a major buyer of U.S. cotton.

Officials in textile and apparel export promotion councils told the Centre was trying to negotiate with the U.S. for tariff concession for such garments exported to that country.

"Bangladesh, Indonesia and Malaysia will not be charged the additional 10% tariff by America for garments with U.S. cotton. However, this is a quota-based concession and does not apply to all garments exported by Bangladesh to the U.S. Australia offers India similar concessions," said an official. Further, India is talking to the U.S. for a bilateral trade pact too.

The Hindu 30.07.2026

India's technical textile exports triple in a decade

Technical textile exports from India have more than tripled over the past decade, reflecting the

Gleanings from the Press

sector's growing global competitiveness, Hon'ble Minister of State for Textiles,

Shri Pabitra Margherita has said. Speaking at the National Conference on Technical Textiles - Sportech Bharat Vision 2047 in New Delhi, the Minister attributed the momentum to Government support and rising demand for high-performance products, particularly in the Sportech segment.

India's technical textile exports rose from Rs.8,827 crore in fiscal 2013-14 to Rs.28,392 crore in 2024-25, more than tripling over the past decade, he said.

He said government initiatives such as Khelo India and Fit India are creating strong domestic demand for high-performance Sportech

products while supporting the sector's long-term growth.

The conference, organised by PHDCCI in collaboration with the Ministry of Textiles, brought together policymakers, industry representatives and researchers to discuss strategies for positioning India as a global leader in technical textiles under the Vision 2047 roadmap.

Mr RK Vij, Co-chair of the PHDCCI Textile Committee, called for the rationalisation of duties on key raw materials such as purified terephthalic acid (PTA) and monoethylene glycol (MEG), along with addressing the GST inverted duty structure to improve industry competitiveness.

Fibre2Fashion 02.07.2026



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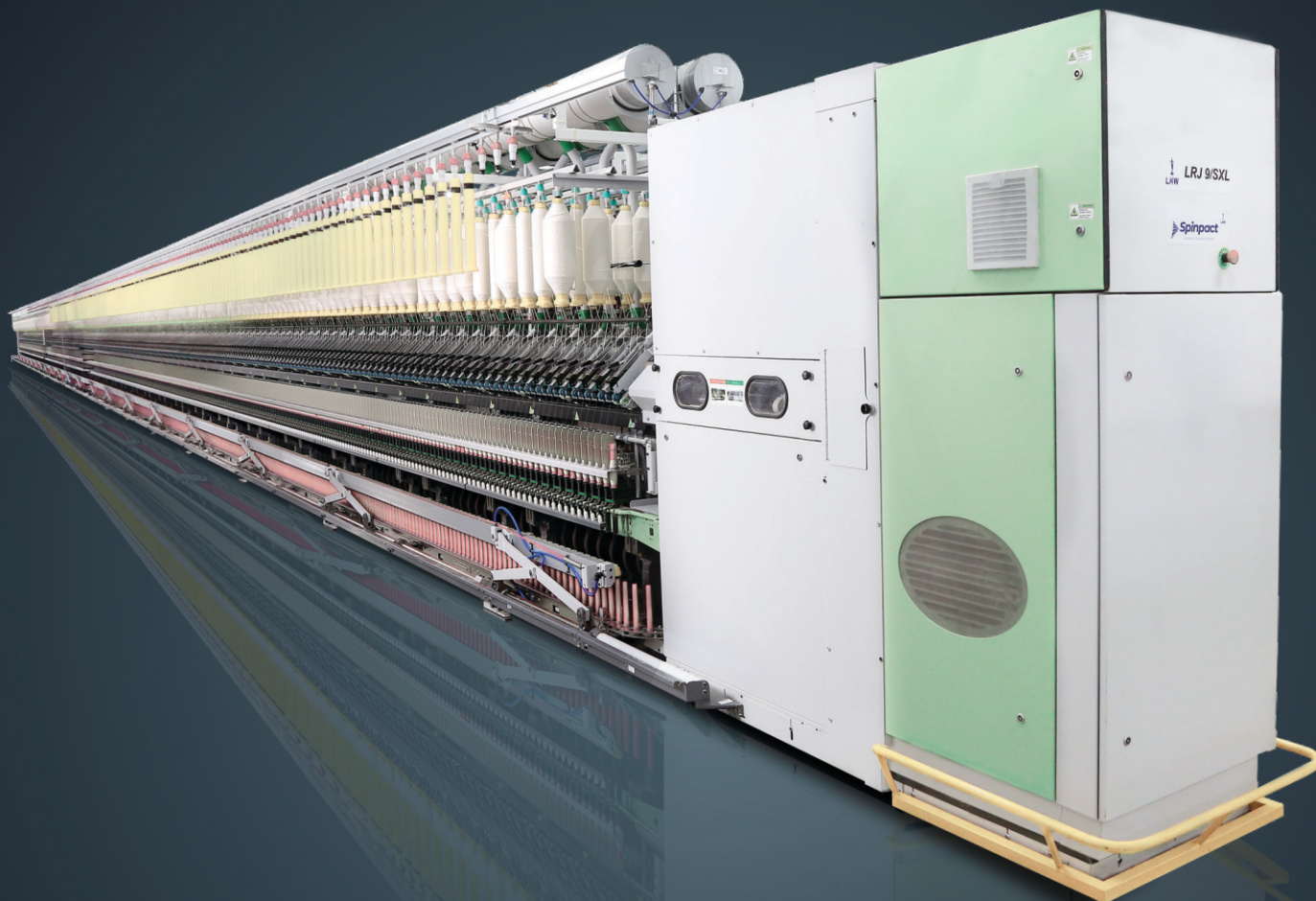
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