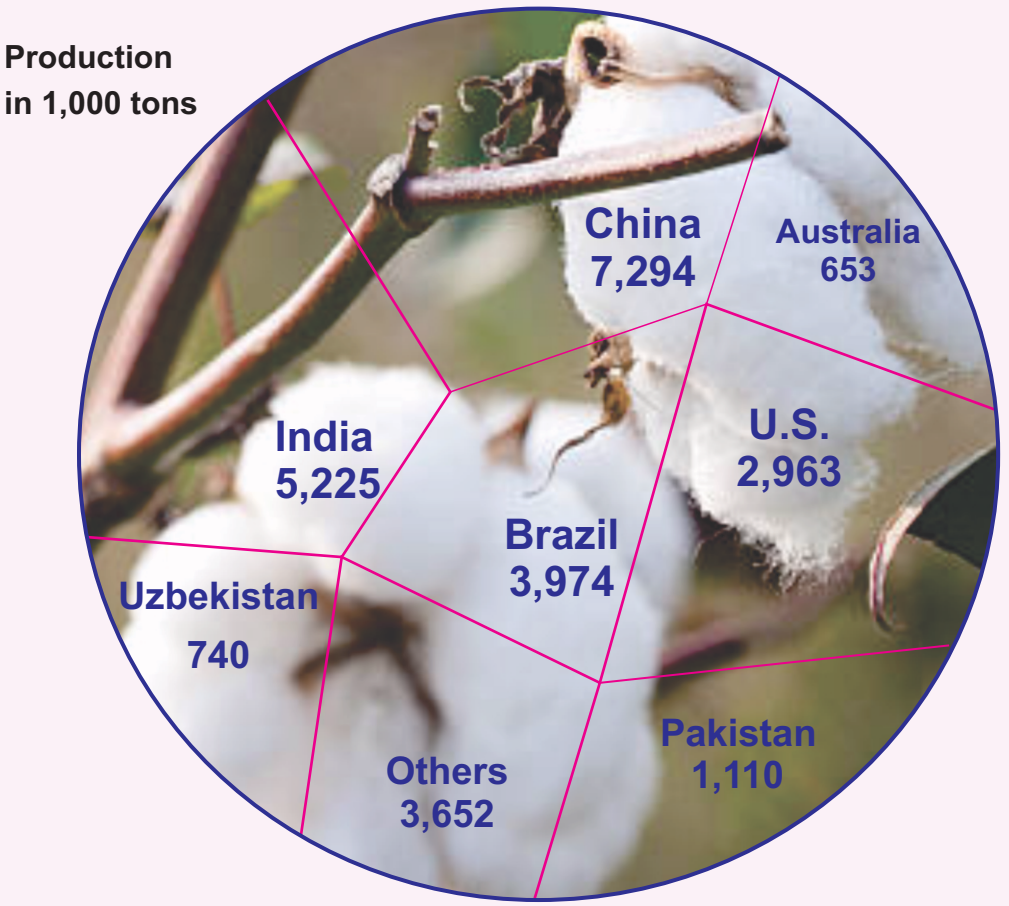
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REVIEW

Vol. - XXXI No. 8
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August
2026

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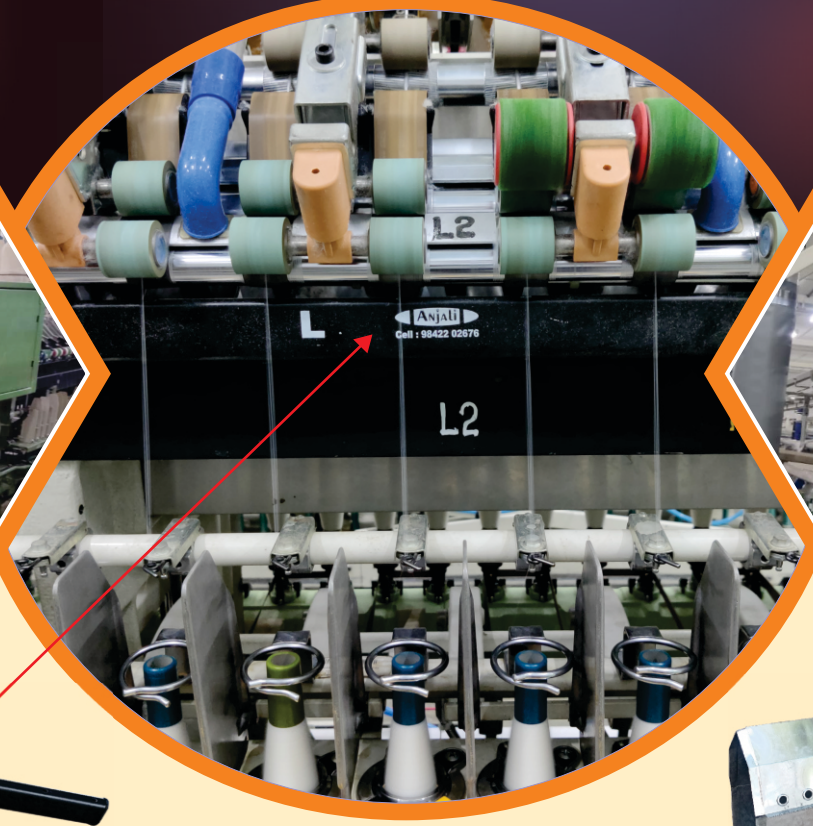
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Friends,

The Government of India is steadily expanding its global trade engagement through Free Trade Agreements. The Government is currently negotiating FTAs with another 8-9 Countries with the long-term objective of covering nearly 75% of global trade through preferential agreements. The recently concluded agreements with the UK, Australia and the EU are expected to create significant market-access opportunities for Indian textiles in leading developed markets. However, converting these opportunities into sustained export growth will ultimately depend on our global competitiveness.

At the same time, we must recognise that tariff concessions alone will not guarantee market access. Non-tariff barriers such as Rules of Origin, technical standards, certification requirements and other regulatory compliances need to be closely monitored and addressed. This is particularly important for MSMEs, which often face greater difficulty in meeting such requirements and therefore may not be able to fully realise the benefits of FTAs.

Against this backdrop, India's Textile and Apparel exports have shown encouraging signs of recovery. Textiles and Apparel exports increased by 9% to USD 3.14 Billion during July 2026, with Textiles exports registered a strong growth of 12% to USD 1.86 Billion and the exports of Apparel also registered a growth of 5% to USD 1.27 Billion during the period when compared to April 2026.

While market-access opportunities are expanding, geopolitical uncertainties continue to pose serious challenges. The renewed escalation of the West Asia conflict is disrupting overseas shipments, leading to container shortages, congestion at major ports and a sharp increase in freight rates. These developments are adding significantly to exporters' cost pressures at a time when global competition is already intense. Strengthening logistics resilience and diversifying export markets must therefore remain key priorities.

Sustainability is another area that will increasingly determine our competitiveness in global markets. India's achievement of 50% non-fossil fuel power capacity ahead of schedule demonstrates the country's strong commitment to clean energy. At the same time, the rising environmental footprint of the global apparel industry highlights the urgency of decarbonising textile supply chains.

On the domestic policy front, the Association has been continued to engage with the Government on issues affecting the sector. Ahead of the GST Council Meeting expected in October 2026, we have urged the Government to reinstate the 12% GST for dyeing and printing activities, restore the 12% GST on PTA, MEG and Man-made fibres and allow Input Tax Credit on GST paid for Wind Turbines/Solar Panels used for Captive Renewable Energy Generation. We have also highlighted the difficulties arising from the accumulation of GST Credit on Capital Goods, which continues to strain the Industry's working capital.

The Association has also submitted the Pre-Budget Memorandum for 2027-28, outlining several priority measures for the industry. These include the continuation of duty free Import of cotton both the season and off-season without timeline; Introduction of specific HSN Code for Recycled sustainable textile products; a National Mission for Man-Made Fibre Textiles; a dedicated Scheme for Water Management, ZLD and Effluent disposal and measures to encourage the use of import cargo for carrying export cargo on their return journey, etc. We remain hopeful that these recommendations will receive favourable consideration in the forthcoming Union Budget.

Looking ahead, With the implementation of India-UK trade agreement, fast approaching EU and progress in bilateral trade negotiations with the United States and several other Countries and the upcoming festive season will provide some much-needed momentum to the industry. However, the opportunities before us will have to be matched by greater competitiveness, innovation, sustainability and resilience. The Indian textile industry must remain agile, globally connected and future-ready so that we can convert the changing global trade landscape into sustained growth and stronger exports.



Durai Palanisamy
Chairman

India's Textile & Apparel exports fell 2% to $12 Bn in April-July 2026

- India's Textile and Apparel exports fell 1.84 per cent to $11.95 Billion in April-July 26, with textile up 5.38 per cent and apparel down 10.52 per cent.
- July saw textile up and apparel drops.
- Imports of raw cotton surged 53.63 per cent during April - July 2026.
- T&A share in India's exports declined to 6.88 per cent.

During April-July 2026, textile exports increased by 5.38 per cent to $7.01 Billion, while apparel exports declined by 10.52 per cent to $4.94 Billion.

Within the textile segment, exports of cotton yarn, fabrics, made-ups and handloom products rose by 4.94 per cent to $4.07 Billion during the period April-July 2026. Exports of man-made yarn, fabrics and made-ups stood at $1.60 Billion.

During July 2026, apparel exports declined by 4.48 per cent to $1.27 Billion, from $1.33 Billion in July 2025, whereas textile exports increased by 5.94 per cent to $1.86 Billion from $1.76 Billion. Export of cotton yarn, fabrics, made-ups and handloom products rose by 8.40 per cent to 1.10 Billion, while exports of man-made yarn, fabrics and made-ups stood at $424.13 Million. Imports of raw cotton and waste rose by 46.01 per cent to $175.67 Million compared to $120.31 Million in same period of previous year.

Table - 1 : Quick Estimates for Selected Major Commodities

Exports (Million USD)	Apr - Jul 2025	Apr - Jul 2026	% Change
Cotton Yarn / Fabrics / Made-ups, Handloom Products etc	3880.67	4072.23	4.94
Man-made Yarn / Fabrics / Made-ups etc.	1589.05	1603.44	0.91
RMG of all Textiles	5531.09	4949.28	-10.52
Jute Manufacturing Floor Covering	126.12	108.71	-13.80
Carpet	503.83	505.17	0.27
Handicrafts excluding handmade carpet	551.71	719.88	30.48

Imports (Million USD)	Apr - Jun 2025	Apr - Jun 2026	% Change
Cotton Raw & Waste	383.22	588.75	53.63
Textile yarn Fabric, Made-up articles	853.14	844.66	-0.99

Source : DGCIS / MOC

Foreign Trade Performance

Commodity Group wise Performance (FTPA)

According to the Foreign Trade Performance Analysis of principal commodities data released by the Department of Commerce, the country's total exports stood at USD 130 Billion during April-June 2026, 16 per cent higher than corresponding period of the previous fiscal of USD 112 Billion.

At the same time, the country's import had increased at a faster rate during the period. Country's total import during the period has been estimated at USD 216 Billion, 20 per cent higher than corresponding period import of USD 180 Billion in the previous fiscal. As far as the export of textile & allied products are concerned, a 4 per cent drop in exports during April-June 2026. At the same time import increased by 12 per cent over previous year corresponding period.

Table - 2 & 3 shows comparison of provisional on item wise export & import of commodities under textiles & allied products category during April-June 2026 with corresponding period export in the previous year.

Chart 1 and 2 shows per cent share of major textile allied products in the country's export and import during April-June 2026 compared with the corresponding period share in the previous fiscal. It may be observed that except share of Manmade Staple Fibre and Cotton Yarn, other groups export share was lower than previous year's share. In the case of import the share of Manmade Staple Fibre and 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 June 2026 stood at USD 527.09 Million, as against the previous year same time export level of USD 456.45 Million.
- Export of Man-made filaments during the period stood at USD 127.79 Million.
- Manmade staple fibres covered under HS Code 55 stood at USD 137.93 Million, rose by 21 per cent compared to previous year export level of USD 113.76 Million.
- Exports of garments covered under HS Code 62 during the period stood at USD 580.43 Million which is decreased by 6 per cent when compared to previous year same time export level of USD 619.38 Million.
- Made-ups exports covered under HS Code 63 stood at USD 516.65 Million, which is rose by 3 per cent when compared to previous year same time export level of USD 501.56 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 June 2026 stood at USD 207.21 Million, compared to previous year same time import level of USD 88.76 Million.
- Import of man-made filaments during the period stood at USD 145.74 Million which is

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

Commodity	Apr - Jun 2025	Apr - Jun 2026	% Growth
Textiles & Allied Products	**9,083.80**	**8,720.09**	**-4.00**
Manmade Staple Fibre	93.66	133.87	42.93
Cotton Yarn	811.46	956.02	17.81
Cotton Fabrics, Made-ups Etc.	1,677.84	1,612.82	-3.88
Other Textile Yarn, Fabric Made-up Articles	235.86	228.65	-3.06
Silk, Raw	Neg	Neg	Neg
Natural Silk Yarn, Fabrics, Made-ups	51.01	51.23	0.41
Manmade Yarn, Fabrics, Made-ups	1,166.80	1,179.31	1.07
Wool, Raw	Neg	Neg	Neg
Wollen Yarn, Fabrics, Made-ups, etc.	40.78	51.51	26.32
RMG Cotton Including Accessories	2,527.21	2,251.31	-10.92
RMG Silk	17.94	22.97	28.04
RMG Manmade Fibres	682.27	599.75	-12.10
RMG Wool	50.12	43.14	-13.93
RMG of Other Textile Material	914.98	753.52	-17.65
Coir And Coir Manufactures	156.46	189.45	21.09
Handloom Products	41.10	34.35	-16.43
Silk Waste	9.16	10.04	9.54
Jute, Raw	3.44	0.06	-98.19
Jute Yarn	7.51	4.03	-46.40
Jute Hessian	27.86	23.87	-14.30
Floor Covering of Jute	20.66	17.83	-13.69
Other Jute Manufactures	37.73	35.46	-6.02
Carpet (Excluding Silk) Handmade	357.62	362.10	1.25
Silk Carpet	13.21	12.02	-9.03
Cotton Raw Including Waste	139.01	146.32	5.26

Source : MoC

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

Commodity	Apr - Jun 2025	Apr - Jun 2026	% Growth
Textiles & Allied Products	**2,152.13**	**2,420.86**	**12.49**
Manmade Staple Fibre	128.07	176.29	37.65
Cotton Yarn	4.61	6.34	37.40
Cotton Fabrics, Made-ups Etc.	153.08	159.64	4.28
Other Textile Yarn, Fabric Made-up Articles	334.12	265.32	-20.59
Silk, Raw	32.92	40.53	23.09
Natural Silk Yarn, Fabrics, Made-ups	13.77	13.43	-2.45
Manmade Yarn, Fabrics, Made-ups	745.15	804.14	7.92
Wool, Raw	62.18	82.53	32.73
Wollen Yarn, Fabrics, Made-ups, etc.	28.83	35.09	21.74
RMG Cotton Including Accessories	140.59	160.53	14.18
RMG Silk	1.52	2.31	51.35
RMG Manmade Fibres	104.50	133.91	28.15
RMG Wool	3.24	3.16	-2.68
RMG of Other Textile Material	48.53	57.22	17.90
Coir And Coir Manufactures	0.70	1.01	43.02
Handloom Products	Neg	Neg	Neg
Silk Waste	0.65	0.57	-12.60
Jute, Raw	28.37	6.26	-77.93
Jute Yarn	18.88	25.60	35.63
Jute Hessian	13.49	12.20	-9.52
Floor Covering of Jute	0.09	0.02	-79.11
Other Jute Manufactures	19.84	12.70	-35.97
Carpet (Excluding Silk) Handmade	5.61	6.86	22.17
Silk Carpet	0.06	0.02	-66.82
Cotton Raw Including Waste	262.92	413.09	57.12

Source : MoC

Chart - 1 : % Share of Country's Export

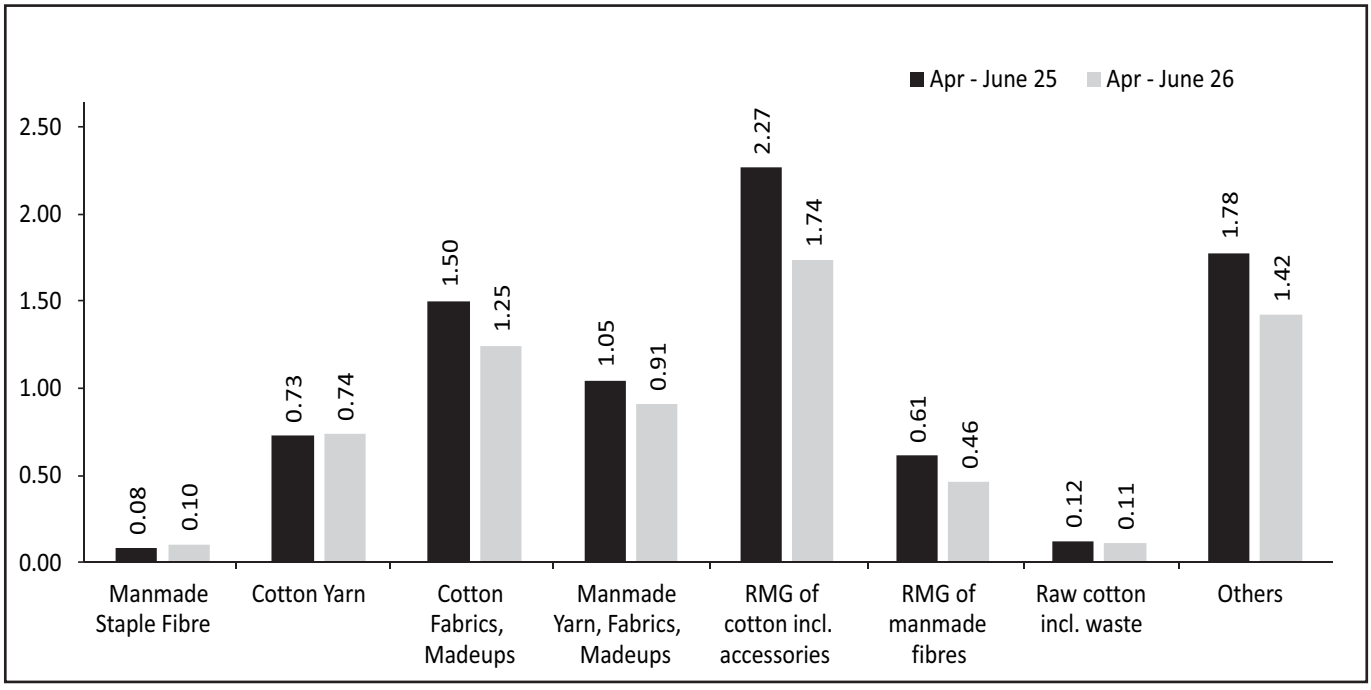
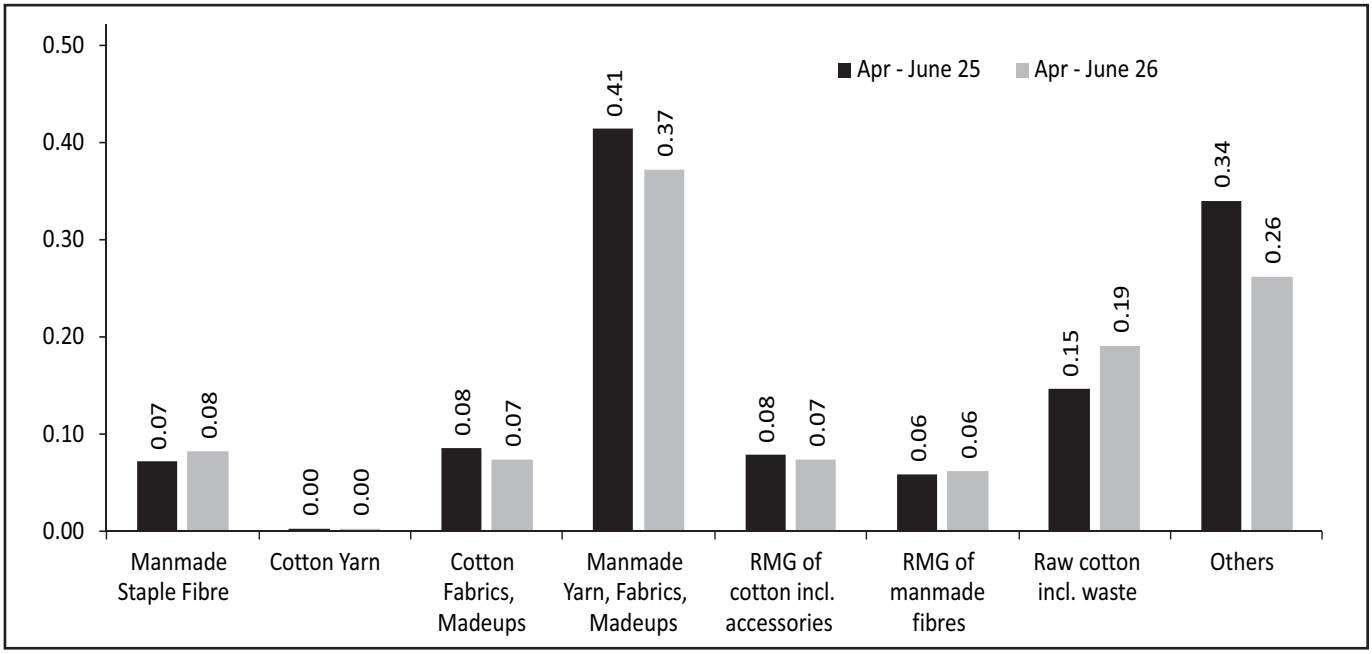


Chart - 2 : % Share of Country's Import



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higher by 4 per cent when compared with previous year same time import level of USD 139.75 Million.

- Import of garments covered under HS Code 62 during the period stood at USD 60.32 Million which is increased by 20 per cent when compared to previous year same time import level of USD 50.32 Million.

- Import of made ups covered under HS Code 63 stood at USD 52.44 Million.

Table - 4 & 5 shows India's export & import of textile items covered under HS Codes 50 to 63 in USD Million during June 2026 compared with same period of the previous year.

HS Code wise Performance

Export & Import Quantum - June 2026

- Export of cotton covered under HS Codes 5201 to 5203 during the period June 2026 stood at 28.61 Million kgs, increased by 15 per cent as against previous year same time export level of 24.96 Million kgs. At the same time, its imports during the period stood at 101.96 Million kgs, considerably higher than previous year same time import level of 36.71 Million kgs.

- Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period stood at 103.38 Million kgs, which is 17 per cent higher than the previous year same time export level of 88.08 Million kgs.

- Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period stood at 161.23 Million square metres.

Export and Import Value - June 2026

- Export of cotton in all forms covered under HS Codes 5201 to 5203 during June 2026 stood at USD 50.99 Million, rose by 18 per cent as against the previous year same time export level of USD 43.12 Million. At the same time its import during the period stood at USD 185.25 Million which is higher by 151 per cent as against the previous year import level of USD 73.73 Million.

- Export of cotton yarn of all types covered under HS Codes 5204 to 5207 during the period was valued at USD 326.83 Million, 23 per cent higher than previous year same time export level of USD 266.58 Million. Its import stood at USD 2.37 Million.

- Export of woven fabrics containing cotton covered under HS Codes 5208 to 5212 during the period was valued at USD 149.27 Million as against previous year export level of USD 146.74 Million. At the same time its import stood at USD 19.57 Million.

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

Cotton Export - Major Countries

- India's cotton exports observed a 6% decline

during Apr-Jun 2026 compared to the same period in 2025.

- ❖ Bangladesh, the top export destination, saw a significant decline of 8%.
- ❖ Major declines were observed in:
  - Nepal
  - China
  - Indonesia

Cotton Yarn Export - Major Countries

- ❖ India's cotton yarn exports recorded a growth of 17% during Apr-Jun 2026 compared to the same period in 2025, rising from 255 Million kgs to 298 Million kgs.
- ❖ Bangladesh remained the largest importer, registering a decline of 4%.
- ❖ Strong growth was observed in:
  - China
  - Vietnam
  - Korea
- ❖ Several Major markets witnessed sharp declines:
  - Egypt
  - Portugal
  - Colombia
  - Turkey

Table - 7 shows the details of India's cotton yarn export to major countries in quantitative 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.

News Snippets

Ind-Ra lifts India's FY27 economic growth forecast by 10 bps to 6.8%

- ❖ India Ratings and Research (Ind-Ra) raised its 2026-27 (FY27) real gross domestic product (GDP) growth forecast to 6.8 per cent from 6.7 per cent estimated in May 2026, citing lower crude oil prices. However, the rating agency warned that an El Niño weather pattern and geopolitical headwinds could weigh on economic momentum, keeping growth below the National Statistical Office's (NSO's) provisional estimate of 7.6 per cent for FY26.

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

HS Code	Commodity	June 2025	June 2026	% Growth
50	Silk	14.72	19.97	35.65
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	10.29	15.13	47.13
52	Cotton.	456.45	527.09	15.48
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	58.57	62.78	7.19
54	Man-Made Filaments.	124.94	127.79	2.28
55	Man-Made Staple Fibres.	113.76	137.93	21.25
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	53.26	50.27	-5.61
57	Carpets and other textile floor coverings.	171.51	160.49	-6.43
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	29.09	32.34	11.18
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	39.89	46.05	15.43
60	Knitted or crocheted fabrics.	38.54	47.43	23.06
61	Articles of apparel and clothing accessories, knitted or crocheted.	691.29	584.52	-15.44
62	Articles of apparel and clothing accessories, not knitted or crocheted.	619.38	580.43	-6.29
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	501.56	516.65	3.01

Source : MoC

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

HS Code	Commodity	June 2025	June 2026	% Growth
50	Silk	17.58	21.13	20.16
51	Wool, fine or coarse animal hair, horsehair yarn and woven fabric.	31.60	37.50	18.66
52	Cotton.	88.76	207.21	133.44
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn.	40.90	89.29	118.30
54	Man-Made Filaments.	139.75	145.74	4.28
55	Man-Made Staple Fibres.	92.28	102.82	11.42
56	Wadding, felt and nonwovens; spacial yarns; twine, cordage, ropes and cables and articles thereof.	38.09	43.19	13.40
57	Carpets and other textile floor coverings.	12.12	13.90	14.72
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery.	18.81	21.21	12.74
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use.	80.98	88.42	9.19
60	Knitted or crocheted fabrics.	97.28	57.54	-40.86
61	Articles of apparel and clothing accessories, knitted or crocheted.	45.90	60.34	31.46
62	Articles of apparel and clothing accessories, not knitted or crocheted.	50.32	60.32	19.87
63	Other made up textile articles; sets; worn clothing and worn textile articles; rags	48.69	52.44	7.71

Source : MoC

Table - 6 : Export / Import – USD Million

HS Code	Description	Export			Import		
		June 2025	June 2026	% Growth	June 2025	June 2026	% Growth
5201	Cotton, Not Carded or Combed	35.58	35.45	-0.36	72.61	182.17	150.89
5202	Cotton Waste (Including Yarn Waste and Granted Stock)	3.71	4.94	33.00	1.12	2.97	165.22
5203	Cotton, Carded or Combed	3.83	10.60	176.86	Neg	Neg	Neg
5204	Cotton Sewing Thread W/N Put Up for Retail Sale	1.13	0.89	-21.42	Neg	Neg	Neg
5205	Cotton Yarn (Other Than Sewing Thread) Containing 85% Or More By Weight ff Cotton Not Put up for Retail Sale	252.58	305.87	21.10	0.83	2.28	176.31
5206	Cotton Yarn (Other Than Sewing Thread) Containing Cotton <85% By Weight not put for Retail Sale	12.08	18.56	53.72	0.10	0.03	-71.16
5207	Cotton Yarn (Other Than Sewing Thread) Put Up for Retail Sale	0.79	1.51	89.80	Neg	Neg	Neg
5208	Woven Fabrics of Cotton Containing >=85% By Weight of Cotton Weighing not more than 200 G/M2	84.40	84.53	0.15	7.57	9.75	28.78
5209	Woven fabrics of Cotton, Containing >=85% Cotton by Weight Weighing>200 G/M2	39.12	41.74	6.69	2.91	3.12	7.03
5210	Woven fabrics Containing <85% Cotton, mixed mainly or solely with manmade fibres Weighing <=200g/M2	5.13	4.80	-6.59	Neg	Neg	Neg
5211	Woven Fabrics of Cotton, containing <85% Cotton, mixed Mainly with Manmade Fibres Weighing>200 G/M2	16.93	16.67	-1.53	2.41	4.53	88.51
5212	Other Woven Fabrics of Cotton	1.16	1.53	31.91	0.34	0.31	-7.04
	Cotton (HS 5201-5203)	**43.12**	**50.99**	**18.25**	**73.73**	**185.25**	**151.25**
	Cotton Yarn (HS 5204-5207)	**266.58**	**326.83**	**22.60**	**0.94**	**2.37**	**152.13**
	Woven Fabrics of Cotton (HS 5208-5212)	**146.74**	**149.27**	**1.72**	**14.10**	**19.57**	**38.79**

Source : MoC

Table - 7 : Cotton Yarn Export (5205) *(Million Kgs)*

S.No.	Country	Apr - Jun 2025	Apr - Jun 2026	% Growth
1	BANGLADESH PR	128.38	123.62	-4
2	CHINA P RP	15.80	67.49	327
3	VIETNAM SOC REP	9.43	16.54	75
4	PERU	13.61	16.10	18
5	EGYPT A RP	20.39	11.18	-45
6	KOREA RP	5.74	6.90	20
7	PORTUGAL	8.47	6.55	-23
8	COLOMBIA	7.17	6.10	-15
9	SRI LANKA DSR	5.08	4.77	-6
10	TURKEY	2.97	2.70	-9
	TOTAL	**255.00**	**297.66**	**17**

Source : MoC

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.

Country Watch

South Korea's apparel imports inches up to $5.6 Billion in H1, 2026

- South Korea's apparel imports rose by 2.30 per cent to $5.658 Billion during January-June 2026, compared with $5.531 Billion in the same period of 2025.
- Imports of knitted apparel and clothing accessories (Chapter 61) were valued at $2.48 Billion in the first six months of 2026, 4.42 per cent higher than $2.37 Billion a year earlier.
- The imports of non-knitted apparel and clothing accessories (Chapter 62) valued $3.17 Billion, 0.67 per cent increased from $3.15 Billion in January- June 2025.
- South Korea's apparel imports increased by 4.55 per cent to $851.74 Million in June 2026, compared with $814.69 Million in the corresponding month of 2025.

Vietnam's textile & garment exports reach to $22.8 Bn in Jan-July 2026

- Vietnam's textile and garment exports (excluding yarn and fibre) inched up 1.1 per cent year-on-year (YoY) to $22.86 Billion during January-July 2026. The country's yarn exports grew 11.1 per cent YoY to $2.72 Billion.
- Textile and Garment exports increased 7.7 per cent in July 2026 to $3.982 Billion from the previous month. Yarn exports in the month increased 5.5 per cent to $430.229 Million.
- Vietnam's cotton imports increased 0.7 per cent in January-July 2026 YoY to $1.87 Billion. Yarn imports valued at $1.83 Billion, up by 12.4 per cent.
- During July 2026, Vietnam imported cotton valued at $306.04 Million, while yarn imports were valued at $280.68 Million.

US' textile & apparel imports slip 7% in H1 2026

- US textile and apparel imports dropped by 7.12 per cent to $47.67 Billion during January-June 2026, down from $51.33 Billion a year earlier.
- During January-June 2026, apparel imports, the dominant product category, softened by 7.71 per cent to $35.08 Billion, compared with $38.02 Billion in the corresponding period of 2025.
- Non-apparel imports also fell by 5.43 per cent to $12.583 Billion.
- Across product categories, Man-made fibre products dominated at $24.14 Billion, supported by cost advantages, year-round availability, and strong demand for performance wear and synthetic-rich categories. Cotton-based products followed at $20.11 Billion. Wool textiles reached $1.63 Billion, while silk and vegetable fibre products totalled $1.78 Billion.

RMG exports from Bangladesh declines 1.92% in July 2026

- Ready-made garment (RMG) exports (Chapters 61 and 62) from Bangladesh declined by 1.92 per cent to $3.88 Billion in July 2026.
- Knitwear exports (Chapter 61) declined by 0.90 per cent to $2.16 Billion, compared with $2.17 Billion in the same period of fiscal 2025-26. Woven apparel exports (Chapter 62) dipped 3.16 per cent to $1.72 Billion, down from $1.78 Billion.
- Home textile exports (Chapter 63, excluding 630510) showed an increase, gaining by 14.37 per cent to $77.86 Million from $68.08 Million, in July 2025.
- Exports of cotton and cotton products, including yarn, waste, and fabrics (Chapter 52), fell by 14.42 per cent to $39.71 Million during the period, compared with $46.40 Million in the same period of the previous fiscal.

Sri Lankan Garment exports reach $2.26 Bn in H1 2026

- Garment exports from Sri Lanka reached $2.26 Billion during January-June 2026, reflecting a 5.8 per cent decline compared to $2.40 Billion recorded in the same period of 2025.
- During the first six months of 2026, textile exports decreased by 5.8 per cent to $134.0 Million. Exports of other manufactured textile articles eased by 12.4 per cent to $52.9 Million.
- Combined exports of textiles, garments and other manufactured textile articles amounted to $2.45 Billion between January-June 2026, accounted for 45 per cent of all industrial exports from Sri Lanka during the period.
- This underscores the continued dominance of the apparel sector in Sri Lanka's industrial export base, despite on-going global demand volatility.
- In June 2026, textile and garment exports decreased by 11.6 per cent year-on-year (YoY) to $410.3 Million. By category, garment exports dipped 11.6 per cent to $378.9 Million, while textile exports inched up by 0.5 per cent to $24.2 Million. During the same month, exports of other manufactured textile articles were down 37.0 per cent to $7.1 Million.
- On the import side, textiles and textile articles decreased by 2.5 per cent to $1,303.3 Million in January-June 2026. The imports of clothing and accessories eased by 3.0 per cent to $127.9 Million.
- In June 2026, imports of textiles and textile articles fell 6.9 per cent YoY to $208.1 Million, while imports of clothing and accessories dipped by 10.2 per cent to $19.1 Million.

Index of Industrial Production

India's IIP Growth records 6.7% growth in July 2026

India's industrial production growth in July 2026 registered a 6.7% 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 8.7% year-over-year increase. The manufacturing sector and water supply, sewage & waste management sector experienced a solid growth of 7.3% and 7.4% respectively. Mining & quarrying saw a marginal decline of 0.9%.

The General Index of Industrial Production (IIP) for July 2026 stood at 124.8 points, compared to 117 in July 2025. Sector-wise, the indices were recorded at 94.4 for Mining & Quarrying, 127.4 for Manufacturing, 133.5 for Electricity & Gas Supply and 148.4 for Water supply, Sewage & Waste management.

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 July 2026 are - "Manufacture of electrical equipment" (28.3%), Manufacture of motor vehicles, trailers and semi-trailers" (22.2%) and "Manufacture of other transport equipment" (22%) .

The index of manufacturing of wearing apparel stood at 95.9 points during the month, declined by 2.2% comparing to previous month index of 98.1 points. The manufacture of textiles marginally declined by 0.2%, with the index fell to 135.5 points from 135.8 points in June 2026.

The manufacture of textiles recorded a year-on-year growth of 3.9%, with the index rising to 135.5 from 130.4 in July 2025. In contrast, the manufacture of wearing apparel declined by 0.6%, as the index decreased to 95.9 from 96.5 during the corresponding period of the previous year.

As per the Use-Based Classification, the indices stand at 115.9 for Primary Goods, 141.8 for Capital Goods, 130.9 for Intermediate Goods and 136.2 for Infrastructure/ Construction Goods for the month of July 2026. Further, the indices for Consumer durables and Consumer non-durables stand at 129.9 and 113.7 respectively.

Overall, India's industrial sector maintained a positive growth trajectory, supported by broad-based improvement across major segments and a favourable outlook for industrial activity. The textile sector recorded positive year-on-year growth, indicating sustained production activity in the manufacturing segment. In contrast, the wearing apparel sector registered a marginal decline, reflecting weaker performance. This divergence indicates an uneven trend across the textile value chain. Strengthening demand, productivity and value addition in the apparel segment would help improve its performance and support balanced growth across the industry.

Chart 1 shows the India's Index of Industrial Production and YOY Growth % during July 2025 to July 2026.

Index of Industrial Production

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

Sectoral	Mar '26	Apr '26	May '26	Jun '26	Jul '26
Mining & quarrying	-2.6	-3.7	-1.4	1.6	-0.9
Manufacturing	3.5	5.7	5.2	9.5	7.3
Electricity & Gas Supply	-0.3	1.8	10.3	11.3	8.7
Water Supply, Sewerage & Waste Management	6.4	6.6	5.5	6.1	7.4
Primary goods	0.2	0.8	2.7	5.4	4.1
Capital goods	8.5	12.0	15.5	17.9	16.1
Intermediate goods	6.0	10.3	5.8	11.5	10.0
Infrastructure/construction goods	5.2	6.0	6.6	8.8	6.9
Consumer durables	2.4	5.6	8.0	10.3	10.5
Consumer non-durables	-0.6	0.2	-0.4	5.6	-1.0
Overall IIP	2.4	4.2	5.0	8.8	6.7

Chart - 1 : Index of Industrial Production

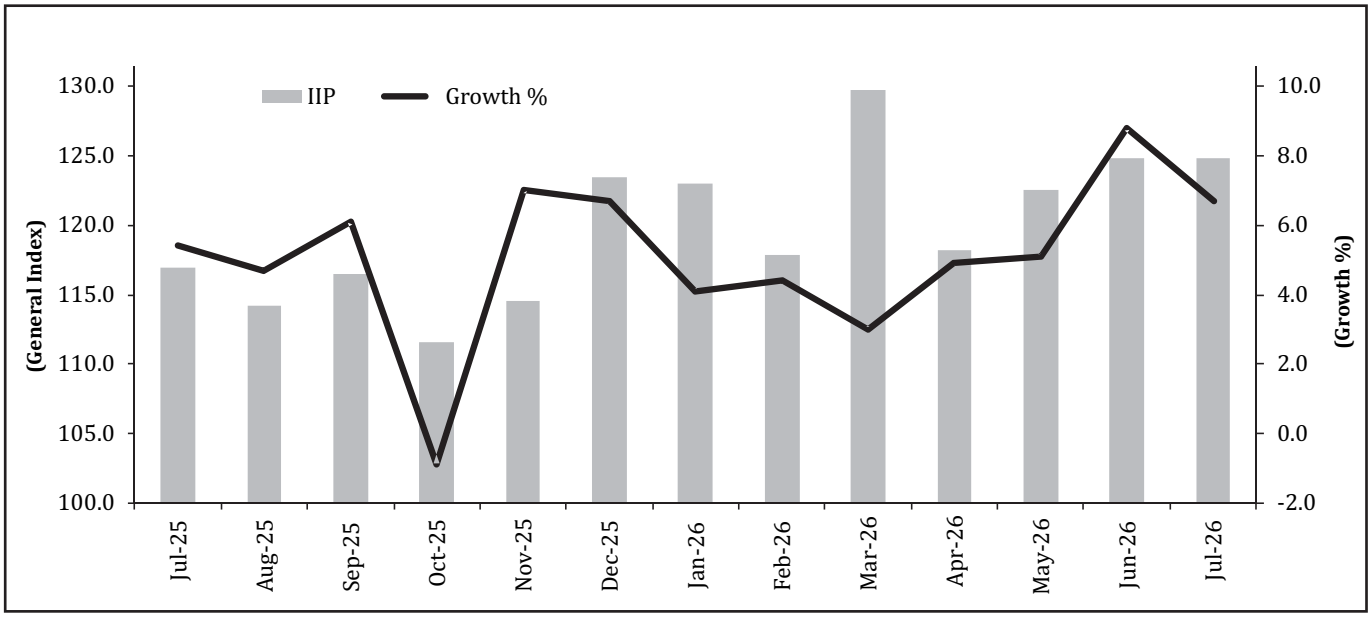


Chart 2 and 3 shows the Index of Manufacture of Textiles and Manufacture of Wearing Apparel during July 2024 to July 2026.

Chart - 2 : Manufacture of Textiles

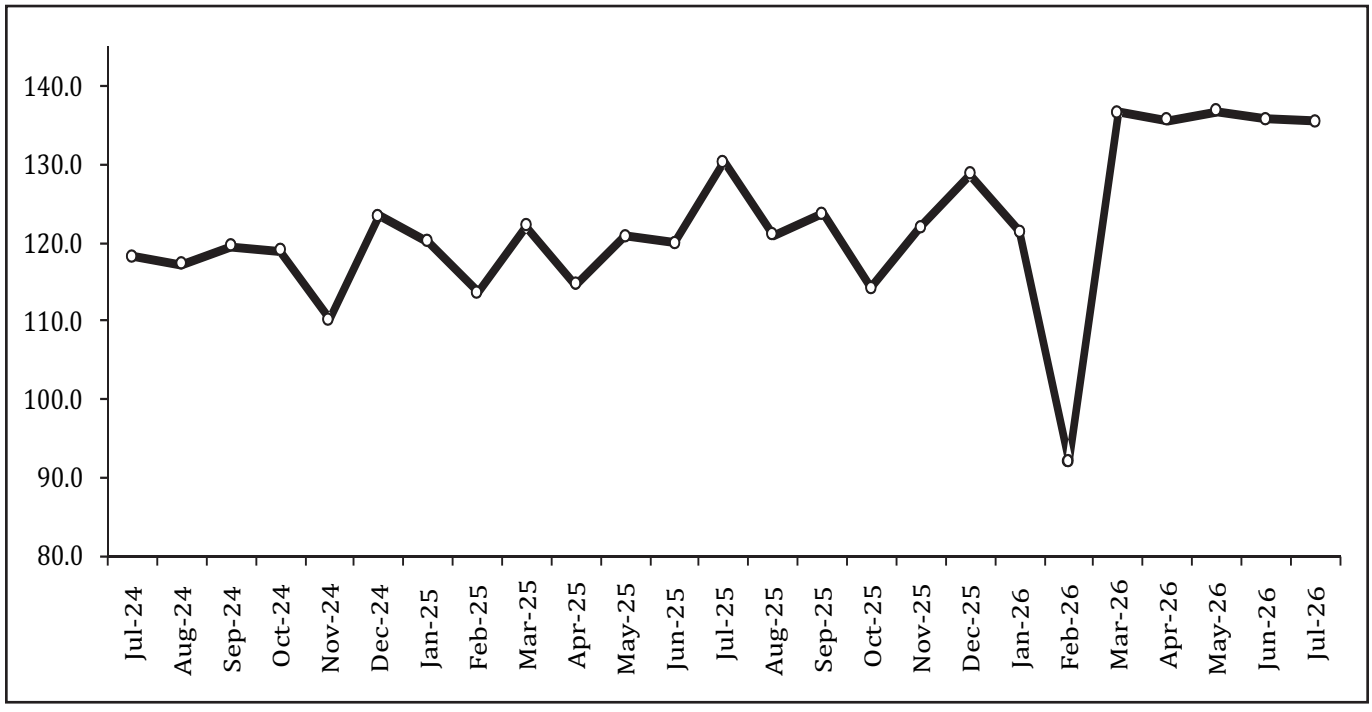
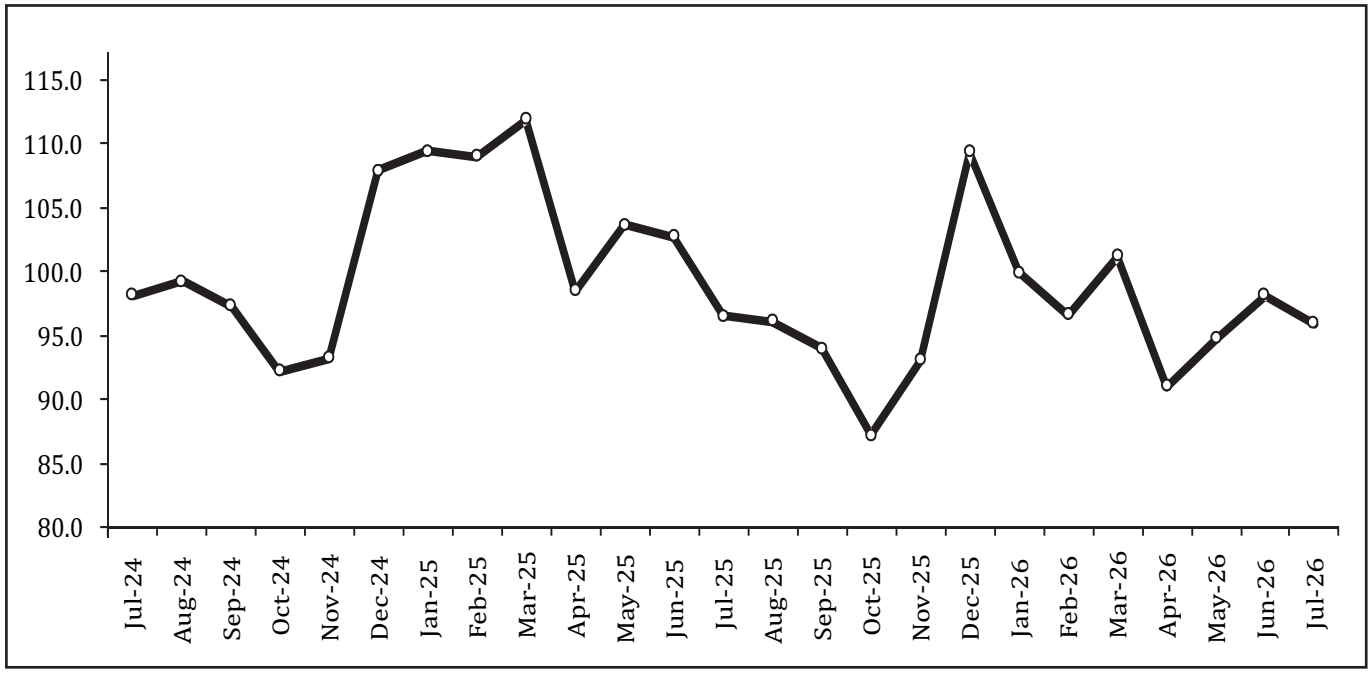


Chart - 3 : Manufacture of Wearing Apparel



Index of Industrial Production

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

NIC 2008	Description	Weights	July 2025	July 2026	% Change
10	Manufacture of food products	5.679	103.3	106.0	2.6
11	Manufacture of beverages	1.113	104.6	127.5	21.9
12	Manufacture of tobacco products	0.774	122.6	107.7	-12.2
13	Manufacture of textiles	3.275	130.4	135.5	3.9
14	Manufacture of wearing apparel	1.970	96.5	95.9	-0.6
15	Manufacture of leather and related products	0.607	112.3	113.2	0.8
16	Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.239	105.0	113.1	7.7
17	Manufacture of paper and paper products	1.375	109.4	118.5	8.3
18	Printing and reproduction of recorded media	0.506	96.6	101.8	5.4
19	Manufacture of coke and refined petroleum products	7.721	111.6	113.1	1.3
20	Manufacture of chemicals and chemical products	7.813	112.8	109.8	-2.7
21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	5.833	126.0	119.0	-5.6
22	Manufacture of rubber and plastics products	3.384	107.6	127.6	18.6
23	Manufacture of other non-metallic mineral products	3.519	113.0	131.7	16.5
24	Manufacture of basic metals	9.198	131.9	134.1	1.7
25	Manufacture of fabricated metal products, except machinery and equipment	2.481	126.5	137.7	8.9
26	Manufacture of computer, electronic and optical products	2.085	140.6	156.2	11.1
27	Manufacture of electrical equipment	3.175	131.0	168.1	28.3
28	Manufacture of machinery and equipment n.e.c.	5.020	114.7	128.6	12.1
29	Manufacture of motor vehicles, trailers and semi-trailers	6.417	119.8	146.4	22.2
30	Manufacture of other transport equipment	2.089	143.4	174.9	22.0
31	Manufacture of furniture	0.283	115.3	125.4	8.8
32	Other manufacturing	1.509	112.6	117.0	3.9
	Manufacturing	***76.062***	***118.7***	***127.4***	***7.3***
	Mining & Quarrying	***11.053***	***95.3***	***94.4***	***-0.9***
	Electricity & Gas Supply	***10.865***	***122.8***	***133.5***	***8.7***
	Water Supply, Sewage & Waste Management	***2.020***	***138.2***	***148.4***	***7.4***
	General	***100.000***	***117.0***	***124.8***	***6.7***

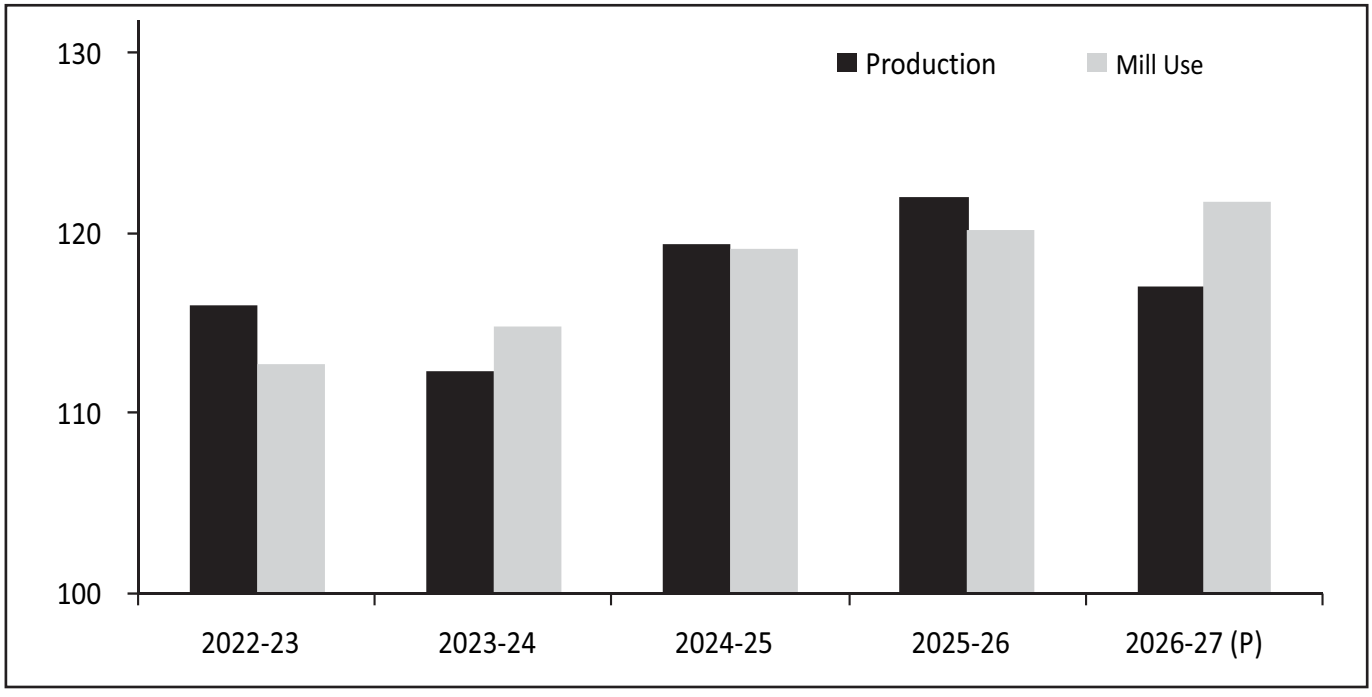
Global Cotton Production Expected to decline in 2026 - 27

Global cotton production in 2026 - 27 is projected at 25.61 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 29.60 Million hectares, 1 per cent higher than 2025 - 26. The 2026 - 27 Global cotton yield is forecast at 865 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 28 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 4 per cent to 555 kg per hectare in 2026-27. Brazil is forecast to reach its cotton production 3.97 Million tonnes in 2026-27. The drop is a result of reduced area harvested from last year while yield is expected to increase 2 per cent to 1,987 kg per hectare. Australia is forecast to decrease production by 33 per cent in 2026-27.

World Cotton Mill Use Growth Forecast in 2026 - 27

Global cotton mill use is projected to increase 2 per cent in 2026 - 27 to 26.76 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 56 per cent of the global total.

China's cotton mill use is forecast at 9.14 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 5.77 Million tonnes (+2.0 per cent) in 2026 - 27. Mill use in Bangladesh is forecast to improve slightly to 1.65 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 4 per cent. World cotton trade is forecast at 9.54 Million tonnes in 2026 - 27. Higher exports are largely projected for the leading cotton exporters Brazil, India and the United States as cotton supplies grow in each country. Brazil's cotton exports in 2026 - 27 are projected at 3.33 Million tonnes, 1 per cent below from 2025 - 26. Brazil is expected to account for 35 per cent of global trade in 2026 - 27. The United States is expected to contribute 28 per cent of world cotton trade in 2026 - 27. Australia's cotton exports are forecast to decline 21 per cent and account for 10 per cent of global trade in 2026 - 27.

Vietnam is expected to be the leading cotton importer in 2026 - 27 as imports are projected to 1.78 Million tonnes. Bangladesh is forecast to account for 19 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.

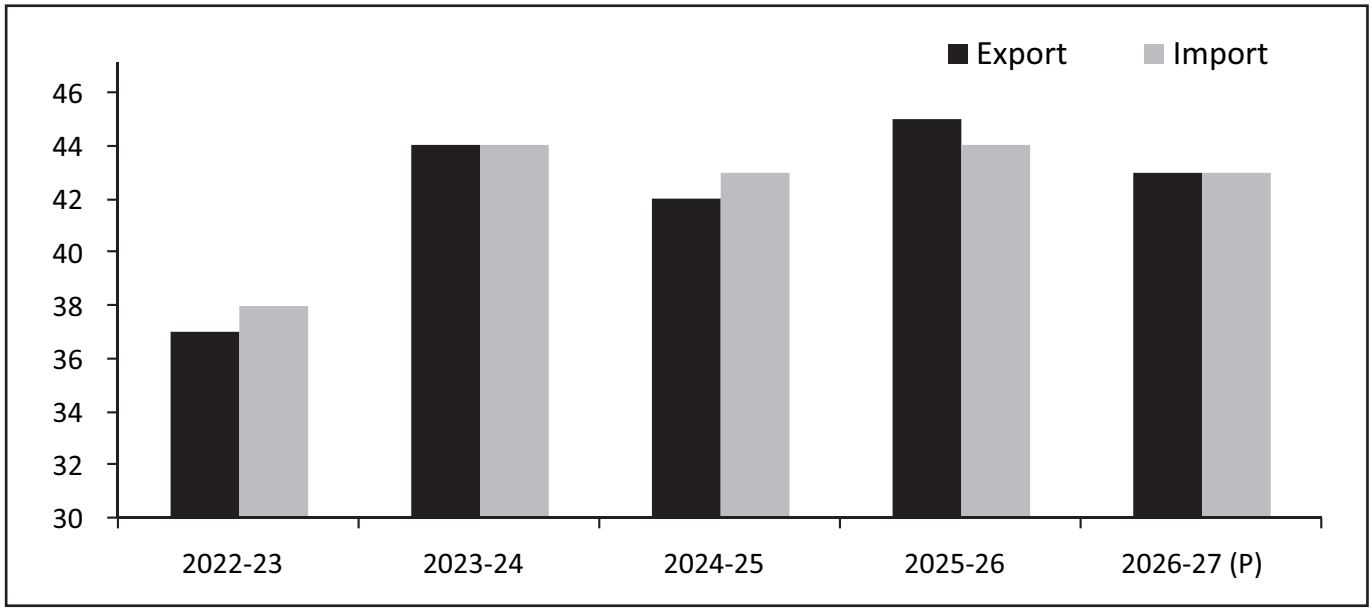
News Snippets

Textiles, chemicals can fuel India's aim to be manufacturing hub: Govt

- India's textile industry has the potential to strengthen its global competitiveness by improving raw material availability, scaling up manufacturing through infrastructure support and expanding market access through deeper trade integration, according to a latest NITI Aayog report
- Enhancing skilling, technology adoption and productivity, while promoting technical textiles, MMF-based products, sustainable textiles and premium Indian weaves, can further drive value addition and global growth, the report, titled Key Sectors to Position India as a Global Manufacturing Hub.

Figure - 2 : Export and Import

(Million bales)

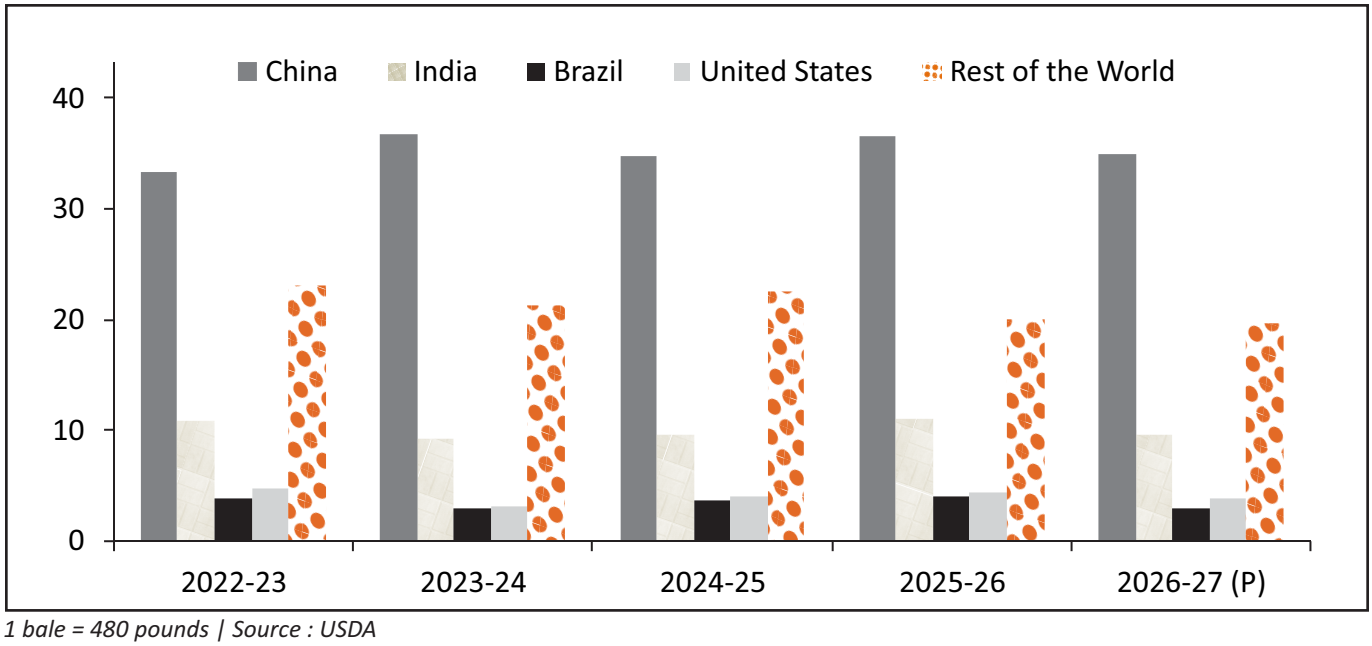


1 bale = 480 pounds | Source : USDA

Global ending stocks are projected to decline in 2026-27. Stocks in China are projected to 7.55 Million tonnes in 2026-27, compared with 7.89 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 2.18 Million tonnes, or approximately 14 per cent of the global total. United States ending stocks are forecast to decline by 5 per cent and account for nearly 6 per cent of the world total in 2026-27.

Figure - 2 : Export and Import

(Million bales)



1 bale = 480 pounds | Source : USDA

Mapping of Textile Waste Value Chain

The Hon'ble Union Minister of Textiles Shri Giriraj Singh released the report titled "Mapping of Textile Waste Value Chain in India" on March 10, 2026. The report provides a comprehensive assessment of textile waste generation, recovery pathways, recycling technologies and opportunities to strengthen circularity across India's textile value chain. Highlights of the report are as follows.

The study maps both pre-consumer and post-consumer textile waste streams, identifies recycling practices across clusters, documents emerging technologies and outlines policy recommendations to strengthen India's circular textile ecosystem.

The report projects that India's textile recycling market could reach USD 3.5 Billion by 2030, with the potential to generate around one lakh new green jobs. Mechanical recycling currently represents the most established pathway for textile recycling, while chemical recycling technologies are gaining traction for their ability to recover fibres at the molecular level and support textile-to-textile recycling.

Overview of Existing Systems for Textile Waste Management in India

The Textile Industry in India, often described as the "Spinning Wheel" of the nation's industrial and economic growth, stands as a testament to the country's rich cultural heritage and entrepreneurial spirit. Historically, the country's textile traditions have contributed significantly to India's global trade, making it a prominent player in the international textile market. The Indian textile industry is the second largest vertically integrated in the world after China. The textile industry's current reliance on linear value chains, where textiles flow from production to consumption and then end up in landfills or are incinerated, results in releasing harmful emissions into the ecosystem. Shifting towards a circular textile economy offers India a vital opportunity to mitigate these impacts while unlocking economic, social, and environmental gains.

India's textile industry manifests in diverse forms, encompassing the large mill sector and a vast decentralised sector comprising a vast network of Micro, Small and Medium Enterprises (MSME).

Textile production has a complex value chain, consisting of both natural and synthetic materials which go through several stages of processing and manufacturing before the end-product, its use, reuse, and final disposal. These include composite textile mills, spinning mills, power looms, knitting and hosiery units, independent textile processors and garment manufacturing units.

The industry is highly fragmented and spread over several industrial clusters which have evolved across the length and breadth of the country. With rising incomes, fast fashion trends, and increasing consumption, the volume of textile waste generated has grown substantially. The sector currently operates largely within a linear value chain model, where

waste generated at various stages is inadequately recovered while mostly ends up in landfills or incinerated.

Textile waste is generated throughout the production-to-consumption cycle, encompassing discarded materials and used garments. It is broadly categorized into pre-consumer waste from manufacturing processes and post-consumer waste arising after products reach and are used by consumers.

Pre-Consumer Textile Waste

Pre-Consumer Textile Waste produced during the manufacturing process and before the finished article reaches the consumer. The process begins with fibre raw materials, which are converted into yarn or filament and then into woven or knitted textile surfaces.

This includes waste produced during the combing, blowing, and carding processes, waste produced during spinning, yarn waste, draw frame waste, sliver waste, scrap waste or cutting waste, and packaging and trimmings. This waste is collected, sorted and graded for further recovery. High-grade waste can be reused, repaired, resold or upcycled, while low-grade or damaged waste can undergo mechanical downcycling, chemical or thermal recycling.

Post-Consumer Textile Waste

Post-consumer textile waste primarily consists of discarded garments and household textiles after end use. It forms the largest portion of textile waste in India. Collection systems for this waste are typically managed by local bodies through door-to-door collection, often supplemented by informal networks who play a significant role in aggregation, reuse and resale.

Despite these efforts, most post-consumer waste either gets reused in low-value applications, downcycled, incinerated, or landfilled. Its recovery is often economically unviable due to challenges in segregation, contamination, and lack of traceability. Nonetheless, addressing post-consumer textile waste is essential, as it offers significant potential to divert vast volumes of textile material away from landfills.

Currently, the value chain for post-consumer textile waste follows a predominantly linear trajectory, from generation to collection, aggregation, and final disposal without adequate loops for recycling or reuse.

A relatively smaller portion of textile waste (approx.600 kilotons annually) is imported into India. This includes second-hand clothing and mutilated rags, primarily sent for recycling and reprocessing.

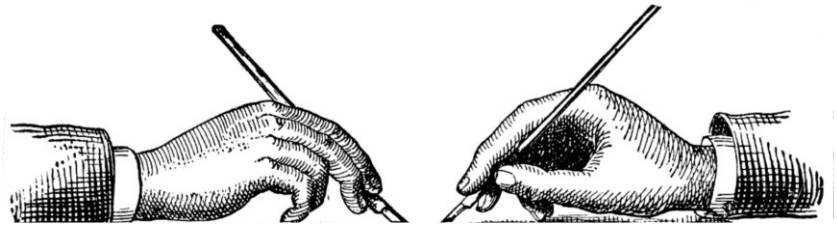
Textile Waste Generation Estimates in India

Based on the primary research and estimation methodology, the total textile waste generated in India is estimated to be 7,073 KTPA* (with ~5 % MOE). This comprises 2,973 KTPA of pre-consumer textile waste and 4,100 KTPA of post-consumer textile waste.

KTPA* - Kilo Tons Per Annum

(To be Continued in the next issue)

Editorials



PM's handloom vision: Weaving heritage into Viksit Bharat

In the vast landscape of Indian heritage, few traditions embody our civilisational identity as intimately as our handlooms, where a single woven thread can trace its origins back to a specific town, family or centuries-old tradition. The heavy drape of Banarasi silk, the natural golden sheen of Assam's Muga, the geometric symmetry of Patan Patola or the temple borders of a Kanchipuram saree, each weave carries centuries of collective memory.

These handlooms serve as living archives to civilisation, safeguarding stories, beliefs, landscapes and communities that have endured across generations. It is this extraordinary continuity that Bharat honours annually on National Handloom Day. The choice of August 7 is not accidental. On this day in 1905, through the Swadeshi movement, handwoven cloth stopped being just a household commodity and became a tool of economic resistance. Choosing local weave over imported textiles was a direct statement of self-reliance and national identity.

Today, as we advance toward the vision of Aatmanirbhar and Viksit Bharat, that foundational spirit finds expression.

Beyond its historical importance, handloom is proving to be a practical driver of rural enterprise and local employment. The farsighted vision of Hon'ble Prime Minister, Shri Narendra Modi for the handloom sector has brought it renewed policy attention, with a strong emphasis on empowering weavers, strengthening value chains and positioning handlooms as a symbol of Aatmanirbhar Bharat and India's global cultural soft power.

This sector supports nearly 35 lakh weavers and allied artisans, with women comprising over 72 per cent of this workforce.

Under the guidance of Hon'ble Union Minister of Textiles, Shri Giriraj Singh, the Ministry has pursued a strategic vision ensuring that artisans not only preserve tradition but also achieve tangible prosperity through it. Targeted initiatives, such as the National Handloom Development Programme, Raw Material Supply Scheme, Weavers' Mudra Scheme, and Hathkargha Samvardhan Sahayata, along with specialised design development programmes and market assistance, have strengthened the value chain. Through financial inclusion, equipment modernisation, robust infrastructure, digital storefronts, product

diversification and structured capacity building via SAMARTH training, weavers are being empowered to adapt to contemporary markets with confidence.

Long before "sustainable fashion" became buzzword, Indian handlooms operated on low-carbon principles through manual looms, minimal power consumption, plant- based or low-impact dyes, and localised material sourcing. In an era dominated by synthetic waste and fast-fashion overproduction, handlooms prove that economic progress and environmental consciousness can seamlessly coexist.

Driven by this global shift towards conscious consumption, Indian handlooms are captivating new audiences through participation in international expositions, Geographical Indication(GI) protection, strategic branding, e-commerce integration and high-level designer collaborations.

The future of this sector will be defined not only by seasoned master artisans but also by emerging designers, entrepreneurs, researchers and tech innovators. Their capacity to synthesise heritage craftsmanship with modern design aesthetics, digital storytelling and global brand positioning will shape the next era of handloom legacy.

The observance of National Handloom Day reminds us that a purchase of a handloom means contributing to the livelihood of India's artisans and preserving hundreds of years of artisanship. Making a decision to use a handloom is more than just putting on a cloth, it is honouring an age-old tradition with pride. The author is the Minister of State for Textiles and External Affairs, Shri Pabitra Margherita.

Business Line 07.08.2026

Ensure smooth cotton buy, Telangana to CCI

The Cotton Corporation of India (CCI) is gearing up for arrivals at designated procurement centres. Despite expectations of lower acreage due to the El Nino impact, the area under cultivation increased by nearly 1.21 lakh hectares in the State. The State Government asked CCI to ensure a smooth procurement process and assured it of support.

Amid fears of a decline in acreage and production due to delayed and erratic rain, farmers in Telangana have planted 19.31 lakh hectares under kharif crops this year, reaching the normal acreage for the season.

Farmers, however, have flagged issues with slot booking on the designated app.

A farmer from Khammam district told that when they had been booking slots on the app run by the State Government, they used to get slots at procurement centres mandal-wise. However, they were now facing issues as the slots were being allotted district-wise. He also said that the reduced rainfall was proving to be a blessing in disguise, as it had helped reduce the weed menace.

Taking note of the complaints, the Minister asked the Centre to make the Kisan Kapas app more accommodating by incorporating the farmers' suggestions.

Business Line 19.08.2026

Indian cotton should be a global price influencer: CCI Head

India should make efforts to be a price influencer in the international cotton market, said Mr Lalit Kumar Gupta, Chairman and Managing Director of Cotton Corporation of India (CCI), in Coimbatore.

Inaugurating the Biannual Cotton Conference organised by the Indian Cotton Federation jointly with the Indian Cotton Association, he said all stakeholders of the Indian cotton sector should focus on productivity, quality, transparency, differentiation, and price discovery. India has the scale as it is one of the top five cotton producers. But, its production does not meet the consumption needs.

He stated that the objective was to become a globally competitive producer and emphasised that productivity was crucial to achieving this goal. Under the Mission on Cotton, around five lakh hectares had been targeted in the first year to enhance productivity. He noted that high-density planting had been implemented across 25,000 hectares, where a yield of 15 quintals of seed cotton per acre had been achieved.

On quality, he highlighted that the global market required consistent and contamination-free fibre. He stressed that the entire industry needed to work collectively to reduce contamination. He further identified price discovery as another critical factor and emphasised the need for transparency and standardisation. He noted that the sector had fragmented data and stressed the importance of obtaining reliable data and integrating the information across the entire system.

The CCI procured 105 lakh bales of cotton from the market this cotton season and has sold 94 lakh bales. It has about 17 lakh bales with it, he said.

Dr K.V. Srinivasan, former International Textile Manufacturers' Federation President, said the Indian textile industry got a boost in the 1990s because of higher cotton yield in the domestic market.

He said that the time has come for a technology boost to improve cotton yield again to compete with Brazil, the US and China (in cotton production)," he said.

Of the total cotton produced globally, 74% comes from four countries, including India that has 38 % of the world's area under cotton in it. If the yield improves, India will be the leader in cotton production, he added.

The Hindu 22.08.2026

Coimbatore Corporation launches 'Maru Nesavu' textile waste drive

The Coimbatore Corporation has launched a pilot initiative to collect textile waste separately from households in Ward 33 of the West Zone, as part of its efforts to prevent the dumping and burning of discarded textiles and promote recycling.

Corporation Commissioner Mr Katta Ravi Teja launched the 'Maru Nesavu' (Reweave) campaign at the Integrated Command and Control Centre (ICCC) in R.S. Puram.

As part of the initiative, a training and orientation programme was held for conservancy staff engaged in the collection drive in Kavundampalayam areas of Ward 33. More than 80 workers participated.

Mr Ravi Teja distributed collection bags to conservancy workers and flagged off vehicles deployed for the campaign. Under the initiative, residents in the West Zone have been asked to handover unwanted textile waste to conservancy workers every Wednesday. The collected material will be segregated and sent for recycling and reuse.

Residents can hand over old clothes, bed sheets, blankets, pillow covers, curtains, towels and other household textiles, including torn and unusable pieces of cloth. The Corporation said the initiative would first be implemented in the West Zone and subsequently extended to other zones in a phased manner.

The Hindu 23.08.2026

Textiles, cotton emerge as focus of India-Uzbekistan partnership

Textiles and cotton emerged as key areas of collaboration as India and Uzbekistan sought to deepen economic ties, with Hon'ble Minister of Commerce and Industry, Government of India, Shri Piyush Goyal, called for efforts to double bilateral trade over the next three years at the India-Uzbekistan Business Forum in New Delhi. He highlighted Uzbekistan's strength in cotton production and India's leadership in the textile sector, stating that both countries could jointly expand into garment manufacturing, design and global markets. He urged businesses from both sides to co-invest, co-manufacture and co-innovate to unlock the full potential of the partnership.

Bilateral trade between India and Uzbekistan has crossed approximately $1.5 billion, but he said it represents only a fraction of what the two economies can achieve together. He said the strategic partnership, built on mutual trust and shared prosperity, offers significant opportunities to expand trade, investment and economic co-operation. The Minister also identified information technology, digital public infrastructure, fintech, agri-tech, engineering goods, advanced manufacturing and auto components as promising sectors for future collaboration, the Ministry of Commerce & Industry said.

Referred to the Bilateral Investment Treaty, Mr Goyal said it would strengthen investor confidence and encourage long-term investments and business partnerships between the two countries. He called for eliminating trade barriers, promoting mutual recognition of standards, testing and certification, increasing customs digitalisation and improving trade routes to facilitate commerce. He added that both governments are working towards a structured, time-bound and outcome oriented economic partnership.

He said the political leadership of Hon'ble Prime Minister Shri Narendra Modi and Uzbekistan President Mr Shavkat Mirziyoyev has given fresh momentum to bilateral relations and urged businesses to deepen engagement to

realise the partnership's full economic potential.

Fibre2Fashion 03.08.2026

India opens new inventory-based e-commerce export, T&A to benefit

India has introduced a new framework that allows eligible e-commerce companies to hold inventory exclusively for exports, a significant shift from the existing marketplace-led model. The Directorate General of Foreign Trade (DGFT) has notified the Inventory-based Cross-border E-Commerce Facilitation Framework under the Foreign Trade Policy (FTP) 2023 and operational guidelines under the Handbook of Procedures (HBP), with immediate effect.

The move is expected to benefit India's textile and apparel sector, where cross-border online sales have been growing rapidly. Under the current system, most garment manufacturers or brands either export directly or sell through online marketplaces that primarily act as intermediaries. Inventory ownership by e-commerce entities has been constrained under the existing framework.

The new policy creates a separate role called the Exporter-on-Record (EOR). A registered EOR can procure goods from one or more Indian manufacturers, called Seller-on-Record (SOR), hold them as dedicated export inventory and fulfil overseas e-commerce orders. The inventory must be used only for exports and cannot be diverted to the domestic market.

For textile and garment manufacturers, especially micro, small and medium enterprises (MSMEs), the framework simplifies participation in global e-commerce. Instead of managing export documentation, overseas fulfilment and logistics, manufacturers can focus on production while the EOR undertakes export operations, compliance and inventory management.

Another important change concerns export incentives. Under the new framework, the EOR will claim export rebates and refunds such as Remission of Duties and Taxes on Exported Products (RoDTEP), Rebate of State and Central Taxes and Levies (RoSCTL) and Duty Drawback, but must pass the seller-attributable portion to the manufacturer based on the free on board (FOB) value of goods exported. The EOR may retain an administrative charge, which has been capped at 10 per cent of the export rebates and refunds.

The framework also introduces a mandatory payment timeline. The EOR must pay the Seller-on-Record within seven days of accepting the goods, irrespective of when payment is received from the overseas buyer. This provision could improve working capital for textile and apparel suppliers. To strengthen transparency, exporters will have to maintain a digital repository linking procurement records, Goods and Services Tax (GST) invoices, inventory records and export documents. The framework also requires annual compliance certification by an independent professional and preservation of records for five years.

The framework further mandates that only Indian-origin goods are eligible. If the exporter

is different from the manufacturer or brand owner, the identity of the manufacturer or brand owner must be disclosed to overseas buyers. Returned consignments cannot be sold in India's domestic market and must instead be re-exported, returned to the supplier or disposed of in accordance with the prescribed procedures.

For India's textile and apparel industry, the framework offers a structured route for scaling direct-to-consumer exports by enabling faster overseas order fulfilment while ensuring manufacturers receive timely payments and a transparent share of export benefits. At the same time, exporters have to comply with stricter inventory management, traceability and reporting requirements under the new DGFT framework.

Fibre2Fashion 06.08.2026

MSMEs with rooftop solar to get exemption from power tax

Micro, Small and Medium Enterprises (MSMEs) installing rooftop solar power systems at their establishments are set to get a 100% exemption from electricity tax for five years under the Vetri Solar Mission. The energy department will soon issue a notification to implement the exemption for eligible MSMEs. The move is aimed at encouraging industries to adopt renewable energy and boosting rooftop solar generation across Tamil Nadu.

"Both the Central and State Governments are already providing subsidies of up to Rs.1 Lakh to domestic consumers in stalling rooftop solar systems. The State Government has now decided to extend support to MSMEs through an exemption from electricity tax," an official said. Tamil Nadu has around 45 lakh MSMEs, many of which have sought incentives to install rooftop solar systems, officials said. Electricity tax is currently levied at 5% of the net energy charges paid by consumers. TNPDCL officials said field-level engineers would inspect establishments and verify whether the systems meet the eligibility criteria before granting the exemption.

Business Line 27.08.2026

Turkiye's apparel exports decline to $7.7 bn in H1, but surge in June

Turkiye's apparel exports declined 1.76 per cent year on year to $7.794 billion during January-June 2026, compared with $7.934 billion in the corresponding period of 2025. However, outbound shipments rebounded strongly in June, reflecting improved overseas demand and helping to narrow the cumulative decline recorded in the first half of the year.

According to the Turkish Statistical Institute and the Ministry of Trade, exports of knitted and crocheted garments (HS 61) slipped 0.8 per cent year on year to $4.504 billion during the first six months of 2026, while woven apparel and clothing accessories (HS 62) fell 3.1 per cent to $3.288 billion.

In June 2026, exports of knitted garments increased 14.0 per cent year on year to $794.50 million, while woven apparel exports rose 15.7 per cent to $535.53 million. Combined exports under HS 61 and HS 62 reached $1.330 billion

during the month, up 14.75 per cent from June 2025. The June performance marked the strongest monthly growth so far in 2026 and helped reduce the first-half decline in apparel exports. Despite the rebound, cumulative exports for January-June remained below the level recorded a year earlier, indicating that the recovery has yet to fully offset weaker shipments during the opening months of the year.

The latest figures suggest improving momentum for Turkiye's apparel sector, supported by stronger export demand in June. Sustaining this growth in the coming months will be crucial for the country to return to positive export growth in the second half of 2026. The latest figures follow a challenging 2025 for Turkiye's apparel industry.

Total apparel exports had declined 6.27 per cent year on year to $16.393 billion in 2025 from $17.489 billion in 2024, as subdued demand across key European markets, cautious inventory management by global brands and intense price competition from lower-cost sourcing hubs weighed on shipments.

Exports of knitted and crocheted garments (HS 61) fell 4.8 per cent to $9.618 billion, while woven apparel and clothing accessories (HS 62) dropped 8.2 per cent to $6.775 billion. Turkiye's apparel exports have been on a downward trajectory over the past three years. Shipments fell 4.47 per cent in 2024 after declining 5.86 per cent in 2023.

China's textile & apparel shipments edge up in Jan-Jul 2026

China's textile and apparel (T&A) exports were little higher during January-July 2026 period, signalling a steadier trend. According to data from the General Administration of Customs of China (GACC), combined exports of textiles, garments and accessories rose 2.36 per cent year-on-year(YoY) to $174.747 billion, compared with $170.712 billion in the same period of 2025.

China's shipments of garments and accessories

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SIMA Industrial Engineering Division

inched up 0.91 per cent YoY to $89.403 billion from $88.599 billion. Meanwhile, exports of textile products, including yarns, fabrics and related articles, rose 3.93 per cent to $85.344 billion from $82.113 billion, supported by improved downstream manufacturing activity across Asia.

In July 2026 alone, garment shipments were valued at $16.449 billion, while exports of textile yarns, fabrics and related articles stood at $12.345 billion, taking the combined monthly total to $28.794 billion.

On the import side, China's imports of textile yarns and fabrics increased 20.75 per cent YoY to $6.740 billion in January-July 2026, compared with $5.582 billion in the same period of 2025. July 2026 imports alone stood at $969.1 million. The increase points to replenishment of raw materials, including cotton and specialised yarns, as domestic mills raised production in response to improving export demand.

The steady export performance in January-July 2026 indicates China has compensated for reduced access to the US market by expanding sales to other regions. Improving external demand, normalising supply chains and competitive manufacturing capabilities have helped sustain export momentum.

China's outbound shipments of textiles and apparel declined 2.42 per cent to $293.77 billion in 2025. Of this, garments and accessories accounted for $151.18 billion, while textile products contributed $142.58 billion. Imports of textile yarns and fabrics also fell 7.9 per cent to $9.97 billion in 2025, compared with $10.83 billion in 2024, reflecting weaker domestic demand and cautious procurement.

China's textile and apparel exports were valued at $301.07 billion in 2024, marking a modest 2.7 per cent recovery after a sharp 8.05 per cent contraction in 2023, when shipments dropped to $293.64 billion from $319.38 billion in 2022.

Philippines' T&A imports down but exports strengthen in H1, 2026

The Philippines' textile and apparel (T and A) imports declined during the first half of 2026, while exports recorded stronger growth as shipments of both apparel and textile products increased, according to the latest data from the Philippine Statistics Authority (PSA).

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Combined textile and apparel imports fell 6.01 per cent year on year (YoY) to $1.091 Billion during January-June 2026, compared with $1.161 Billion in the corresponding period of 2025. Imports of textile yarn, fabrics, made-up articles and related products declined 10.14 per cent to $606.41 Million from $674.84 Million a year earlier. Imports of articles of apparel and clothing accessories, however, increased 1.03 per cent to $421.47 Million from $417.18 Million. Imports of textile fibre and waste declined 8.15 per cent to $63.48 Million from $69.11 Million.

In June 2026, combined textile and apparel imports edged up 0.76 per cent YoY to $194.01 Million from $192.55 Million. Imports of textile yarn, fabrics, made-up articles and related products fell to $101.96 Million from $106.51 Million, while apparel and clothing accessories imports increased to $82.60 Million from $74.52 Million. Textile fibre and waste imports declined to $9.45 Million from $11.52 Million.

On the export front, combined textile and apparel shipments increased 7.22 per cent YoY to $499.93 Million during January-June 2026, compared with $466.25 Million in the corresponding period of 2025. Apparel and clothing accessories exports rose 2.15 per cent to $335.02 Million from $327.96 Million, while exports of textile yarn and fabrics increased 19.25 per cent to $164.91 Million from $138.30 Million.

Exports strengthened further in June 2026. Combined textile and apparel exports rose 17.83 per cent YoY to $99.01 Million from $84.02 Million. Apparel and clothing accessories exports increased to $69.25 Million from $60.84 Million, while textile yarn and fabric exports climbed to $29.75 Million from $23.18 Million.

The latest PSA data indicate an improvement in the Philippines' textile and apparel trade performance during the first half of 2026. While lower textile input imports pulled overall T and A imports down, apparel imports increased marginally. On the export side, strong growth in textile yarn and fabric shipments, accompanied by higher apparel exports, supported the overall increase.

Fibre2Fashion

Coimbatore, Tiruppur exporters seek measures to make Vizhinjam International Seaport viable for MSME exporters

For the exporters in Coimbatore and Tiruppur region, commissioning of the Vizhinjam International Seaport is a promising logistic solution for direct shipments to the western countries. However, much needs to be done to make it economically viable for the exporters to start using this port on a large scale.

Garment exporters in Tiruppur who shipped goods worth Rs.46,000 crore in 2025-2026 have said that the location of the port close to the major international East-West shipping route and its deep-water container handling capabilities provide an opportunity to develop Vizhinjam as an important gateway for EXIM cargo from the manufacturing clusters of Tamil Nadu.

However, for the MSME-dominated industry in

Tiruppur and nearby areas, logistics cost, transit time, container availability, and schedule reliability are critical factors in determining export competitiveness. The Tiruppur Exporters' Association (TEA) has sought development of a Tiruppur-Vizhinjam EXIM cargo corridor, preferably through an ICD/CFS or an appropriate logistics facility either at Vizhinjam or at a strategically suitable location along the Tiruppur-Vizhinjam corridor. There should be focused efforts to provide direct connectivity to the European Union, UK, US and west Asian countries, it said. The TEA said that as global apparel supply chains increasingly operated on shorter lead times, predictable vessel schedules and competitive transit times would be essential for Tiruppur exporters to confidently route cargo through Vizhinjam.

Further, for the MSME-driven clusters in Tamil Nadu to benefit from the port, the total landed logistics cost should be competitive. There should be a commercially attractive and transparent logistics package covering terminal handling, container handling, documentation, storage and other associated charges, it said.

Further, there should be a single window operation covering the terminal operator, Customs, shipping lines and relevant logistics stakeholders, with participation from industry representatives. The industry has suggested to the Kerala government to organise a trade meet in Coimbatore, take the inputs from the exporters here and enable better cargo movement from the MSME exporting units to the western destinations through Vizhinjam.

The Hindu 18.08.2026

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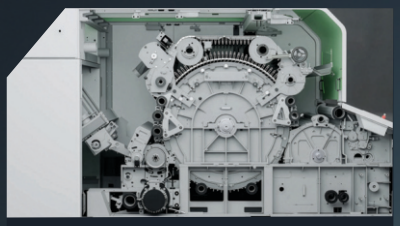
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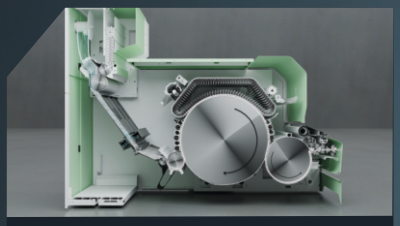
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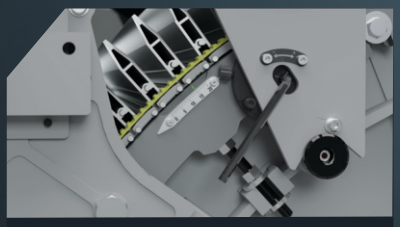
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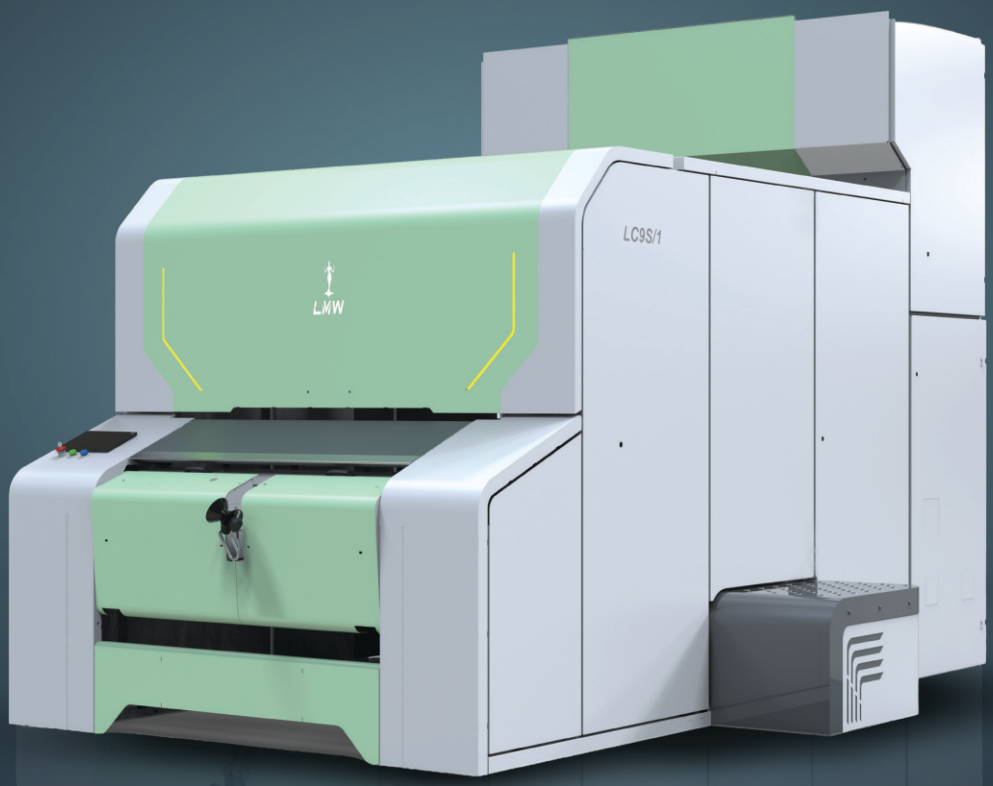
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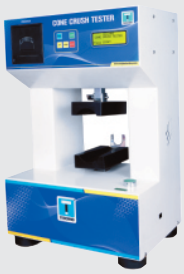


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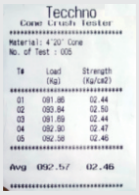
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