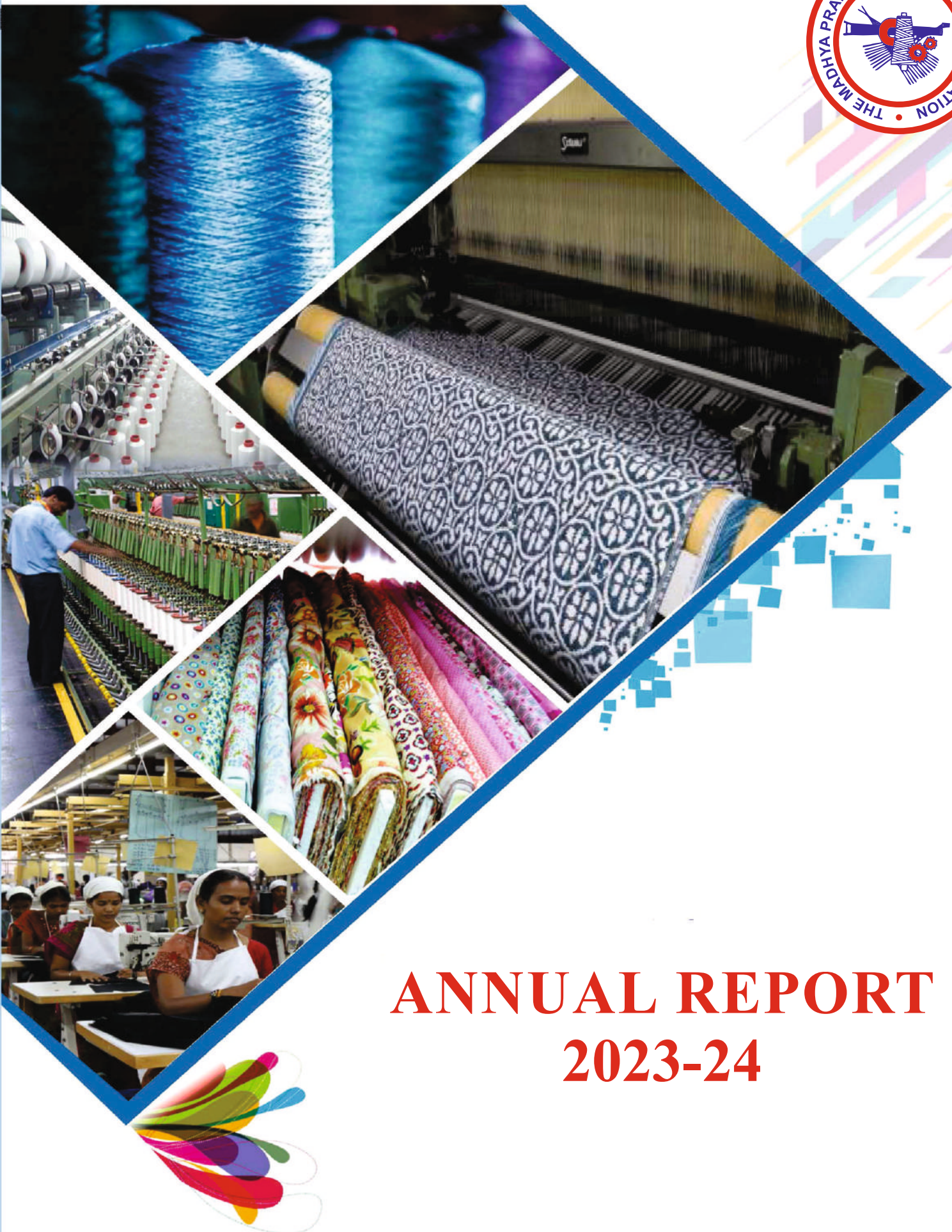


FARM TO FOREIGN



ANNUAL REPORT 2023-24

The Madhya Pradesh Textile Mills Association

[Incorporated under M.P. Non- Trading Corporations Act, 1962]

IN THE SERVICE OF TEXTILE INDUSTRY SINCE 1932



ANNUAL REPORT **2023-24**

OFFICE BEARERS :

Chairman	-	Shri Shreyaskar Chaudhary, Managing Director, Pratibha Syntex Ltd, Pithampur.
Vice Chairman	-	Shri Siddharth Agrawal, Managing Director, Sagar Manufacturers Pvt. Ltd., Tamot.
Deputy Chairman	-	Shri Subhash Chand Jain, Director, Prem Textiles (International) Pvt. Ltd. Indore.
Deputy Chairman	-	Shri Tarun Baldua, President, Maral Overseas Ltd, Maralsarover.

Shri M.C. Rawat,
Secretary,

Registered Office:

Jall Sabhagraha , 56/1, South Tukoganj, Indore – 452 001
Telephone: 0731 –2518148, 4108138
Email: mptma1932@gmail.com
Website : www.mptma.in

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THE MADHYA PRADESH TEXTILE MILLS ASSOCIATION

Its Origin

This Association was established in the year 1932 as Indore Mill Owners' Association by Shri Rao Raja Sir Seth Hukamchand. At the time of its establishment, the Association had seven composite textile mills from Indore as members. After the merger of various States of Gwalior, Indore and Malwa in May, 1948, the name of the Association was changed from 6th August, 1948 as Madhya Bharat Mill Owners' Association and the mills in the region were invited to join. With the formation of State of Madhya Pradesh on 1st November, 1956 integrating, among others, the State of Madhya Bharat, the name of the Association was changed to reflect its regional character and Madhya Pradesh Mill Owners' Association came into being from 1st January, 1957. It was registered under the Madhya Pradesh Non-Trading Corporations Act, 1962 on 1st June, 1966 after being renamed as The Madhya Pradesh Textile Mills' Association.

The Association is committed to the growth of Textile Industry in the State. It also acts as an effective link between the Textile Industry in the State and the Central/ State Governments, Confederation of India Textile Industry and various Chambers, Associations and Organizations.

THE MADHYA PRADESH TEXTILE MILLS ASSOCIATION

Committed to growth of Textile Industry in the State

Objects

- * To protect and promote interest of textile industry engaged in production of fibre (natural/ man-made), yarn, fabric, apparel, readymade garments, technical textiles or similar products and/or activities incidental there to.
- * To take all steps for promoting, protecting, supporting, encouraging opposing, or seeking modifications in legislative and other measures affecting the interest of the textile industry.
- * To create and encourage friendly feeling and unanimity amongst the Member Mills on all subjects connected with their common interest.
- * To afford facilities for ascertaining the views of persons engaged in textile industry and for the communication and interchange of views between the members.
- * To collect, classify, compile and circulate Policy related circulars, press releases and all relevant information of use and interest to textile industry.

The Madhya Pradesh Textile Mills Association

LIVE MEMBER MILLS

- Anant Spinning Mills, Mandideep – 462046
- BEST Lifestyle Apparel Private Limited, Ujjain-456010
- Bhaskar Industries Private Limited, Mandideep – 46 046
- Bio-Spun Private Limited, Pithampur - 454773
- Candor Textiles Private Limited, Indore – 452020
- Deepa Textiles Private Limited, Khanpura, Goharganj - 464993
- Deepak Spinners Limited, Pagara – 473 001
- Gokaldas Exports Acharpura Private Limited, Bhopal - 462038
- Grasim Industries Limited:
 - Staple Fibre Division, Birlagram, Nagda – 456331
 - Vikram Woollens, Malanpur - 477117
- Industrial Filters & Febrics Private Limited, Manglia-453771
- Jaideep India Private Limited, Pithampur - 454774
- Kamal Cotspin Private Limited, Burhanpur - 450331
- Kashida Apparels Private Limited, Dhamnod – 454552
- Kohinoor Elastics Private Limited, Indore – 452015.
- Lion Fabrics Private Limited, Dhobikhedi – 466001
- Madhumilan Industries Limited (Spinning Divn.) , Talawada - 46674
- Mahima Fibres Private Limited Bhilgaon , Kasravad - 451228
- Manjeet Cotton Private Limited, Satrati-451660
- Manjeet Global Private Limited, Satrati- 451660
- Maral Overseas Limited Maral Sarovar – 451660
- Mayur Uniquoters Limited, Morena -476444
- Mohini Health & Hygiene Private Limited, Pithampur - 454774.
- Nahar Spinning Mills Limited, Mandideep - 464993
- Neo Stretch Private Limited, Pithampur – 454774
- PBM Polytex Limited , Boregaon - 480106
- Pratibha Syntex Limited, Pithampur - 454774
- Prem Textiles (International) Private Limited, Indore – 452015
- Ramesh Textiles India Private Limited, Indore – 452015
- Raymond Limited, Saunsar - 480106
- Sagar Manufacturers Private Limited, Tamot – 464993.
- Satyam Spinners Private Limited, Sendhwa - 451666
- Shree Geeta Textile Mills Private Limited, Burhanpur – 450331.
- S R F Limited, Malanpur - 477116
- Swaraj Suiting Private Limited, Jhajarwada, Neemuch- 458441
- Swastik Spintex Limited Rajoda – 453562
- TDB Spinners Private Limited, Indore - 452001.
- Threads of Harman , Satrati – 451660
- Vardhman Fabrics, Pilikarar, Talpura, Budhni – 466441
- Vardhman Yarns, Satlapur, Mandideep – 462046
- Vippy Spinpro Limited, Dewas - 455001

THE YEAR UNDER REPORT

MEMBERSHIP:

The Association has forty one Mills as its live Members. Services to CT Cotton Yarn Limited, Mid India International Limited, Jyoti Overseas Limited, Chhabra Spinners Private Limited, Harshit Textiles Private Limited, Kokila Texpro Private Limited, Chamunda Standard Mills, S. Kumars (Nationwide) Limited, Agrawal Indotex Limited, Parasrampur International, Sheshadri Industries Limited, CLC Industries Limited, Hind Syntex Limited, STI India Limited, Texpert International, National Textile Corporation, S. Kumars Limited, Wearit Global Limited, SEL Manufacturing Limited, and Ritspin Synthetic Limited, have been kept under suspension under Articles 4.11 of the Articles of Association.

OFFICE BEARERS:

The Annual General Meeting of the Association for the year 2022-23 was held on 30th December, 2023, and the following Office Bearers were elected for the term 2023-24:

- | | |
|---|-----------------|
| ● Shri Shreyaskar Chaudhary,
Managing Director,
Pratibha Syntex Ltd.,
Pithampur. | Chairman |
| ● Shri Siddharth Agrawal,
Managing Director,
Sagar Manufacturers Pvt. Ltd.,
Tamot. | Vice Chairman |
| ● Shri Subhash Chand Jain,
Director,
Prem Textiles (International) Pvt. Ltd.,
Indore. | Deputy Chairman |
| ● Shri Tarun Baldua,
President,
Maral Overseas Ltd.,
Maralsarover. | Deputy Chairman |

MANAGING COMMITTEE:

As per Article 6.4 of the Articles of Association, the new Managing Committee was constituted at the Annual General Meeting held on 30th December, 2023. Certain nominations were changed by Member Mills later and some new Members were enrolled. The present nominees on the Managing Committee are as under:

Name of Member Mill	Principal Representative	Alternate Representative
Anant Spinning Mills	Shri S.Pal	Shri Harsh Mani. Tripathi
BEST Lifestyle Apparel Private Limited	Shri S Aadithya Shivam	Shri Menta Ramakrishnaa
Bhaskar Industries Private Limited	Shri Akhilesh Rathi	Shri Sandeep Baheti
Bio-Spun Private Limited	Shri Ashish Doshi	-
Candor Textiles Private Limited	Shri Suryansh Somani	Shri Ashutosh Khandelwal
Deepa Textiles Private Limited	Shri Kanha Rathi	Shri Sunil Choudhary,
Deepak Spinners Limited	Shri V.K. Daga	Shri M.P. Sathpathu
Gokaldas Exports Acharpura Pvt. Limited	Shri Shivramakrishnan Ganapathi	Shri Prabhal Kumar Singh
Grasim Industries Limited (Staple Fibre Div.)	Shri Manish Kumar Jain	
Grasim Industries Unit: Vikram Woollen	Shri Man Mohan Singh	Shri Santosh Kumar Singh
Industrial Filters & Fabrics Pvt. Limited	Shri Prateek Maheshwari	Shri Pradeep Maheshwari
Jaideep India Private Limited	Shri N.K. Agrawal	Shri Vinay Agrawal
Kamal Cotspin Private Limited	Shri Ankit Lath	Shri Kamal Lath
Kashida Apparel Private Limited	Shri P. Kulkarni	Shri Behram Jamshedji Irani
Kohinoor Elastics Private Limited	Shri Rajendra Matlani	Shri Nitin Matlani
Lion Fabrics Private Limited	Shri Himanshu Thukral	Shri Rakesh Sharma
Madhumilan Industries Limited	Shri Ashok K. Choudhary	Shri Kanak Jain
Mahima Fibres Private Limited	Shri Rohit Doshi	Shri Ashok Kumar Doshi
Manjeet Cotton Private Limited	Shri Jai Prakash Jaiswal	Shri Anand Saboo
Manjeet Global Private Limited	Shri Ajay Kumar Singh	Shri Rohit Saboo
Maral Overseas Limited	Shri T K Baldua	Shri Sanjay Bolya
Mayur Uniquoters Limited	Shri Arun Bagaria	Shri Aniruddh Gautam
Mohini Health & Hygiene Private Limited.	Shri Sarvapriya Bansal	Shri Avinash Bansal
Nahar Spinning Mills Limited	Shri D.K. Mundra	Shri Surender Bhatt
Neo Stretch Private Limited	Shri Rajendra Agrawal,	Shri Ashok Agrawal, or
		Shri Vinod Khodol
PBM Polytex Limited	Shri K.K. Patodia	Shri Vikash Patodia
Pratibha Syntex Limited	Shri Shreyaskar Chaudhary	Shri D P Arya, or
		Shri Narendra Kaushik
Prem Textiles (Int.) Private Limited	Shri Subhash Chand Jain	Shri Saurabh Jain
Ramesh Textiles India Private Limited	Shri Ramesh Samria	Shri Sanjay Samria
Raymond Limited	Shri Surendra Tiwari	Shri Deepak Mehunkar
Sagar Manufacturers Private Limited	Shri Siddharth Agrawal	Shri A.K. Saini
Satyam Spinners Private Limited	Shri Chetan Kumar	Shri P.K. Roul
Shri Geeta Textile Mills Private Limited	Shri Anurodh Mittal	Shri Anurag Mittal
SRF Limited	Shri Rajesh Khanna	Shri Vashudev Aggrawal
Swastik Spintex Limited	Shri V.K. Rathi	Shri G.D. Rathi
Swaraj Suiting Private Limited	Shri Niraj Kachhiya	Shri Prakash Jain.
TDB Spinners Private Limited	Shri Akhilesh Gupta.	-
Threads of Harman	Shri Manjeet Singh Chawla	Shri Ramveet Singh Chawla
Vardhman Yarns	Shri S. Pal	Shri Praveen Dhingra.
Vardhman Fabrics	Shri T.C. Gupta	Shri Sanjay Sakhuja
Vippy Spinpro Limited	Shri Piyush Mutha	-

COMMITTEE MEETINGS:

During the year 2023-24, four Managing Committee Meetings were held. The Minutes of the Meetings were circulated and timely action was taken to give effect to the decisions of the Committee. Several virtual meetings were also held to discuss various issues.

ANNUAL MEMBERSHIP SUBSCRIPTION:

The Annual Membership Subscription rates for the year 2024-25 were decided by the Managing Committee in their Meeting held on 20th March, 2024 and are as under:

1 Textile Mills	
Annual Subscription based on capacity:	
Spindles installed	Rs 0.80 each
Rotors installed	3.90 “
Shuttle Looms installed	33.00 “
Shuttleless Looms installed	95.00 “
Knitting Machines installed	200.00 “
Stenter Machines installed	1,950.00 “
Calculation of Subscription as per the rates indicated above	
Total subscription payable per annum subject to:	
Minimum	13,750.00 p.a.
Maximum	50,000.00 “
2 Industrial Group having more than two Mills.	1,00,000.00 “
3 Staple Fibre Unit (Grasim Industries Ltd.)	55,000.00 “
4 National Textile Corporation Ltd.	50,000.00 “
5 Technical Textile Unit.	13,750.00 “
6 Apparel/Garment/ Made-ups Unit	13,750.00 “
7 Textile Unit under construction.	10,000.00 “

One-time admission fee of Rs.1, 000.00 is to be paid by new members.

AFFILIATION WITH OTHER INDUSTRY FORUMS:

The Association is Member the following Bodies/Federations:

- Confederation of Indian Textile Industry (CITI), New Delhi.
- Textile Sector Skill Council (TSSC), New Delhi.
- Confederation of Indian Industry (CII), New Delhi.
- Associated Chambers of Commerce & Industry of India (ASSOCHAM), New Delhi.
- Federation of Madhya Pradesh Chambers of Commerce & Industry (FMPCCI), Bhopal.
- Indore Management Association (IMA), Indore
- Electricity Consumers' Society (ECS), Indore

REPRESENTATION AT ALL INDIA/ STATE LEVEL BODIES :

Our representation (direct/indirect) at various Bodies is as under:

S.No.	Name of the Body	Name of the Representative
•	Confederation of Indian Textile Industry (CITI)	• Shri Shreyaskar Chaudhary, Chairman
	Principal Representative	• Shri Siddharth Agrawal, Vice-Chairman
	Alternative Representative	• Shri, Shreyaskar Chaudhary, Chairman
•	CITI CDRA	• Shri Shreyaskar Chaudhary, Chairman
•	Textile Sector Skill Council	• Shri Shreyaskar Chaduahary, Chairman
•	Confederation of Indian Industry (CII)	• Shri Akhilesh Rathi, Past Chairman
•	Associated Chamber of Commerce & Industry of India – M.P. Development Council	• Shri Akhilesh Rathi, Past Chairman.
•	Federation of Madhya Pradesh Chamber of Commerce & Industry, Bhopal	• Shri Tarun Baldua – Dy. Chairman
•	M.P. Labour Advisory Board	• Shri S. Pal, Vardhman Group.
•	M.P. Labour Welfare Board	• Shri Mukesh Vyas, Pratibha Syntex Ltd.,
•	M.P. Minimum Wages Advisory Board	• Shri S. Pal, Vardhman Group.
•	M.P. State Advisory Board for Contract Labour.	• Shri M.C. Rawat, Secretary
•	Provident Fund Regional Advisory Committee, Indore.	• Shri S. Pal, Vardhman Group.
•	E.S.I. Regional Advisory Committee	• Shri Shreyaskar Chaudhary, Chairman
•	Indore Management Association	• Shri M.C. Rawat, Secretary.
•	Electricity Consumers Society.	• Shri Tarun Baldua, Dy. Chairman
		• Shri M.C. Rawat, Secretary.
•	State Advisory Committee of MPERC	• Shri Mahendra P. Khante, Vardhman Group

ADVISORY COMMITTEE FOR THE TEXTILE SECTOR :

The State Government constituted an Advisory Committee for the Textile Sector on 12th June, 2022 under the Roadmap of Atmanirbhar Madhya Pradesh with an aim to fill up the gap in provision of services, improve quality of products and export promotion under the Chairmanship of Hon'ble Chief Minister. Some of the other Members of the Committee are:

- Ministers for Industrial Policy & Industrial Promotion (IP&IP), and MSME,
- Principal Secretaries, IP&IP, MSME and Mg. Director, MPIDC.
- Non-official Members include Representatives from Textile Industry- some of them are:
 - Shri Neeraj Jain, Vardhman Fabrics,
 - Shri Kamal Oswal, Nahar Spinning Mills
 - Shri Siddharth Agrawal, Sagar Manufacturers Private Limited (Our Vice Chairman),
 - Shri Akhilesh Rathi, Bhaskar Industries Private Limited (Our Past Chairman),
 - Shri Piyush Mutha, Vippro Spinpro Limited (Our Past Chairman)
 - Shri Dilip Guar, Grasim Industries Limited
 - Shri Rohit Doshi, Mahima Fibres Private Limited.

REPRESENTATIONS MADE DURING THE YEAR:

During the year, the Associations submitted a number of Representations to the Central/State Governments and other authorities, some of them are:

1. Smt Darshana Vikram Jardosh, Hon'ble Union Minister of State for Textile and Railways was on visit to Indore on 7th April, 2023. Two Representations were submitted to her:
 - A. First representation included the following subjects:
 - Request to include eight HSN Codes of knitted synthetic products, as the list of HSN Codes provided in the PLI Guidelines are not comprehensive.
 - To include PLI Projects under PM Mitra Park with extension of one year both for PLI investment and performance, etc.
 - B. The second representation related to development of PM Mitra Park. Some of the suggestions given by us included:
 - The park should be powered by a combination of solar, wind, and hydro power and allow 100% use of Renewable Energy
 - Centralized biological zero-waste STP, ETP, and RO plant (including the supply of drinking water) with doorstep delivery and connection should be ensured
 - A dedicated feeder of 132KVA for 24x7 power supply and doorstep electricity availability.
 - A strong road and rail network for ports, such as Mumbai, Mundra, Chennai, and Tuticorin with 24-hour clearance and flight and train connectivity. To support industries in these ports, a help desk can be established to facilitate faster custom clearance.
 - An Inland Container Depot (ICD) as an integral part of the park to facilitate easier movement of goods in and out of the park.
 - Centralized skill development center with World class faculty and equipment.
 - Plug and play facilities for MSMEs with various shed sizes including 10,000/ 20,000/50,000 sq. ft.
 - Centralized kitchen with subsidized food under Government schemes.
 - High-speed communication links such as 5G Wi-Fi, optical fiber lines, and high-resolution CCTV.
 - Centralized gas and steam supply.
 - Dormitory accommodation for both male and female employees, including facilities such as laundry, kitchen and dining, and a multipurpose recreation center.
2. A Representation made to Principal Secretary, Department of Industrial Policy and investment Promotion of the State and also to Managing Director, M.P. Industrial Development Corporation on 15th May, 2023 giving our suggestions for the PM Mitra Textile Park in Dhar District. The major suggestions included:
 - The Park should be powered by a combination of solar, wind, and hydropower, and a central ETP and STP should be set up for the industries in the Park. The Park should be designated as a green zone, and specialists can be engaged to obtain certifications that can serve as a unique selling point for the Park.
 - a. Allow 100% use of Renewable Energy.
 - b. Centralized biological zero-waste STR, ETP, and RO plant (including the supply of drinking water) with doorstep delivery and connection should be ensured.
 - c. A dedicated feeder of 132KVA for 24x7 power supply and doorstep electricity availability.
 - d. Unit rate of Electricity should be Rs.4.00/ kwh for next seven years.
 - Lead time is crucial for customers, who value shorter transit times for sea and air cargo. To attract investors, it is important to have a strong road and rail work for ports such as Mumbai, Mundra, Chennai, and Tuticorin, with 24 hours clearance and flight and train connectivity. To support industries in these ports, a Helpdesk can be established to facilitate faster custom clearance.
 - An Inland Container Depot (ICD) as an integral part of the Park to facilitate easier movement of goods in and out of the Park.
 - A single point of contact for all approval should be appointed so that investors can focus on their core business instead of spending too much time on following with statutory requirements. An effective Single Window Clearance system should be established with Madhya Pradesh Industrial Development Corporation (MPIDC) as the nodal agency.

- One Officer from MPIDC should be assigned to coordinate and follow up with all the concerned Departments for time-bound clearances. It will be a major attraction to make the park successful.
 - All approvals should be provided within 30 days, including Cabinet Committee on investment Promotion (CCIP). If there are any concerns, the MPIDC to inform the same to the interested party.
 - Centralized Skill Development Centre with World class faculty and equipment.
 - Design and Development Centre with partnership with top National Institutes to facilitate research and development in the textile industry.
 - Plug and play facilities for MSMEs/Ancillary Units with various shed sizes including 10,000/20,000/50,000 sq. ft.
 - Centralized kitchen with subsidized food under Government Schemes.
 - High – speed communication links such as 5 G, Wi-Fi optical fiber lines and high –resolution CCTV.
 - Well- developed internal roads with width of 6 meters and Weigh Bridge facility.
 - 24-hour part security facility with a Police Post.
 - Centralized gas and steam supply
 - The Park should be certified with an IGBC Platinum rating.
 - Provide dormitory accommodation for both male and female employees, including facilities such as Canteen, laundry, kitchen and dining, and a multi-purpose recreation centre.
3. A Representation was sent to the Principal Secretary, Paryavaran Vibhag of the State with a copy to Chairman, Pollution Control Board on 2nd June, 2023 for Rationalization of Fees payable by establishments for the consent to operate water/air. The Fees payable under the Order dated 31st March, 2022 of the Department are kept as percentage of total gross investment made in the establishment. The value of investment in Plant & Machinery and other assets diminishes with use every year of these assets by way of depreciation and after particular time, these assets require replacement/modification/up-gradation. The technological innovation is very fast in the present environment and the assets lose value. Under these circumstances, the fees payable for renewal of consent to operate should be based on depreciated value of investment (Net Block) instead of the Gross Block. We, therefore, requested them to consider the matter and revise the fees payable for various consents based on the depreciated value of the investment. The above changes will boost the industry in making investment of the State of Madhya Pradesh, which will lead to generate more employment.
4. We have sent a Representation to the Hon'ble Chief Minister of the State with copies to Principal Secretaries of Labour and Urban Development & Housing Departments on 20th June, 2023 requesting exemption for the Industries registered under the Factories Act, 1948 from the Order dated 16th December, 2022 issued by Urban Development & Housing Department asking all industries having area above 500 square meters and height more than 150 meters to obtain Fire Safety Certificate under provisions of National Building Code, 2016. Detailed provisions with regard to Fire Safety already exist in the Factories Act, 1948 read with Madhya Pradesh Factories Rules, 1962. Obtaining Fire Safety Certificate under National Building Code will increase the work pressure and costs on the industrial units. This is also against the principles of 'Ease of Doing Business' of the Government and will discourage the industry and affect employment avenues. The Government of Gujarat has already exempted industrial units from the provisions of National Building Code in this respect.
5. A Representation was sent to the Principal Secretary, Energy Department of the State on 10th July, 2023, whereby the State Government was requested to clarify that in future surcharges will not be levied on roof top solar power generation to captive use, whether it is installed under CAPEX or OPEX. Hon'ble Prime Minister and Central Government are focusing on ambitious target of net zero greenhouse gases emission by 2070. This would be possible only when Government supports industries to go for renewable sources of energy like solar energy, etc. without imposition of any surcharge or levy. We hope the Government would understand the matter and issue such Guidelines applicable to roof top solar power generation for captive use installed under CAPEX or OPEX for the benefit of the industry, which will boost investment in the sector and generate more employment.
6. A Representation was sent to the Hon'ble Chief Minister of the State with copies to the Minister of Industrial Policy & Investment Promotion and Minister for MSME apprising them that the system of monthly revision of Fuel & Power Purchase Cost Adjustment Surcharge (FPPAS) has put the industry in a position, where it is not in a position to assess its power costs in advance and unable to offer competitive prices for finished products.

The power costs were increased by 3.2% by the Regulatory Commission from April, 2023 and the Power Management Company is every month increasing the rates without any regulatory approval. Earlier the Fuel Cost Adjustment (FCA) charge was revised every quarter and was a nominal amount, which is now revised every month and is percentage of energy charges. Revision in the months of April, May and June, 2023 have been 5%, 8.41% and 6.16% respectively, which is very high. It is against the policy of Ease of Doing Business and has become a roadblock in development of industry and employment. It has therefore, been requested to switch over to the earlier system of quarterly FCA, which will provide relief to the Industry.

7. A request was sent to Principal Secretary, Industrial Policy & Investment Promotion Department of the State on 25th September, 2023 for early release of Investment Promotion Assistance pending for long. It was also requested that if the claims are pending due to non-convening of State Level Empowered Committee, the same may be convened at the earliest.
8. The Association submitted its inputs for Pre-Budget Memorandum 2024-25 to the Confederation of Indian Textile Industry (CITI), FICCI and ASSOCHAM on 28th October, 2022. Some of the important points raised by us are as under:
 - Slot entire MMF textile value chain (fibre to finished goods) @ 5 percent GST rate at par with cotton textile value chain,
 - Enhance RMG value cap under 5 percent GST to Rs. 2,500, which would boost domestic consumption;
 - Allow refund of Input Tax Credit on Capital Goods & Services;
 - Reduce GST rate for services rendered by Common Effluent Treatment Plant from 12 percent to 5 percent;
 - Include Fuel used for generation of electricity under GST, so that industry gets refund of input tax reducing power cost;
 - Remove Custom Duty on import of ELS Cotton;
 - Cotton Price Stabilization Fund be setup with 5 percent interest subvention to actual users. Margin money for cotton finance be reduced from 25 percent to 10 percent and stock limit be increased from three months to nine months to enable mills to purchase during season;
 - Review rates of Duty Drawback to include taxes not being reimbursed through GST;
 - Simplify Electricity Laws regarding levy of Additional Surcharge and other charges on power tariff;
 - Provide funds for clearing pending claims under TUFS and also announce new Scheme in place of TUFS;
 - Reduce Hand Yarn Obligation to 15%.
9. The Labour Department of the State proposed revision of Minimum Wages payable to Workers/Employees as on 1st October, 2019. The two Notifications dated 6th October, 2023 and 13th October, 2023, were published in the State Gazette. If the monthly Minimum Wages are to be revised on the basis of above Notifications, then the Minimum Wages will increase as follows:

	Unskilled	Semi Skilled	Skilled	Highly Skilled
Proposed w.e.f. 1.10.2019	9,575	10,571	12,294	13,919
Proposed D.A. from 1.4.2020 to 1.10.2023	1,875	1,875	1,875	1,875
Total payable from 1.10.2023	11,450	12,446	14,169	15,794
Present Wages	9,825	10,682	12,060	13,360
Proposed Increase	1,625	1,764	2,109	2,434
Other Benefits like PF, ESI, Leave, Bonus, Gratuity.etc.	650	706	844	974
Total Increase	2,275	2,470	2,953	3,408
Increase %	23.15	23.15	24.5	25.5

On 9th December, 2023, we submitted our Representation stating that the proposed increased wages are more than present wages in Rajasthan, Uttar Pradesh Gujarat, Punjab and Jharkhand and the Industry is passing through a very difficult phase. The mills, which were running 24x7 have resorted to about 20 percent cut in their production, exports are down by about 15 percent, as such it is not possible to absorb this increase at present. Moreover, many mills have already closed in the past. The State on one hand is setting up a Textile Park, inviting industries to the State for investment and on the other hand taking such steps, which will deter fresh investment and industry may move to other States providing more incentives and having lower wages.

10. The Association submitted its suggestions / comments on the Proposed Tariff for 2024-25 to Secretary, Madhya Pradesh Electricity Regulatory Commission on 18th January, 2024. Some of our suggestions/comments were as under:
 - The existing system of Billing of KWh and Time of the Day rebate/surcharge should continue.
 - The recovery of Power Factor rebate made by Discoms for the period September, 2021 to March, 2023 be refunded to consumers.
 - Rebate of Rs 2/- per unit on incremental consumption by Captive Power Plant Consumers of HV-3 category needs to be increased to Rs. 3/- per unit.
 - No Additional Surcharge should be levied on Captive Power Plants and Renewable Power Plants.
 - Rebate of Rs.1/- per unit on incremental consumption of Open Access consumers should be allowed considering open access consumption of 2019-20.
 - For exceeding Contract Demand up to 30% penal charges be abolished.
 - Invoke provisions under Section 42(2) sub para 4 of Electricity Act, 2003 and abolish the Cross Subsidy Surcharge and Additional Charge.
 - Limit of 10000 KVA be increased to 15000 KVA for power connection on 33 KV line.
 - Tariffs for all categories should be equal to cost of supply.
 - Tariff increase proposed for 2024-25 not be allowed and the same should be maintained at the current levels. (Tariff for 2023-24)
11. A Representation was submitted to the Additional Chief Secretary, Department of Agriculture of the State on 13th February, 2024 regarding potential repercussions of a Primary Investigative Note (PIN) circulated by Transparenum Limited, a U S based non-profit organization in November, 2023 related to supply chain of some of Indian Companies, based in the State, supplier of high quality cotton based textile products. This agency has made serious allegations related to labour rights violations, etc. We have requested for intervention in the matter as deemed fit.
12. A Representation has been submitted to the Hon'ble Chief Minister on 11th March, 2024 with a request to continue the lower rate of 0.50% of Mandi Tax on cotton beyond 31st March, 2024, as the validity of the Order dated 11th August, 2023 is expiring on 31st March, 2024.
13. A Representation was submitted to the Hon'ble Chief Minister on 11th March, 2024 with a request to advise the concerned Departments to settle/close matters in respect of Commercial Laws subsumed in Goods & Services Tax Act and other repealed laws without any further loss of time, as it is about seven years after GST Act came into force.
14. The State Government has revised Minimum Wages of the various categories of Workmen w.e.f. 1st April, 2024. We have made a representation on 11th March, 2024 to the Principal Secretaries of Labour and Industrial Policy & Investment Promotion Department and Mg. Director, MPIDC informing them that the revised wages are more than the rates prevalent in the neighboring States. The textile industry is already suffering from recession World over. The production is reduced by 15/20 percent, exports are down and many of the Mills have closed in the past. In view of the position, we requested to defer the implementation of the revision for the present.

BHARAT – TEX ROAD SHOW – 2024:

An informative Road show was organized on 13th December, 2023 at the Hotel Marriott, Indore to create greater awareness among the textile community regarding India's most anticipated textile event, Bharat Tex 2024 being organized by a Consortium of 11 Textile Export Councils and supported by the Ministry of Textiles, this Road show set the stage for the grandeur that awaits India's upcoming biggest textile expo 'Bharat Tex' scheduled from 26th -29th February, 2024 at Bharat Mandapam and Yashoboomi, New Delhi, India.

The Road show showcased the richness and diversity of India's textile industry with the presence of the entire textile value chain featuring key textile companies like Bhaskar Denim, Maral Overseas, Prem Textiles, Pratibha Syntex, Vardhman Textiles and Deepa Textiles to name a few. The event was well organized by Cotton Textile Export Promotion Council (TEXPROCIL) with the support of our Association (MPTMA). Shri Akhilesh Rathi, our Chairman assured support from the Association's member companies in and around the State. The dignitaries at the Road show included Shri Siddarth Rajgopal, Executive Director, TEXPROCIL, Shri Rajiv Saxena, Joint Secretary, Ministry of Textiles, Government of India, Shri Navneet Mohan Kothari, (IAS) Managing Director, MPIDC and others.

NEW PROJECTS/EXPANSION PLANS:

Dr. Mohan Yadav, Hon'ble Chief Minister of the State inaugurated Unit No.6 of Sagar Manufacturers, Tamot (Our Member Mill) on 20th January, 2024 in the presence of Shri Sudhir Agrawal, Chairman and Shri Siddharth Agrawal, Managing Director (Our Vice Chairman) of the Company. The unit will produce polyester/ cotton yarn and to provide direct/indirect employment to approx. 3000 persons.

AWARDS/FALICITATION OF MEMBER MILLS:

1. At the 3rd Global Textile Conclave held at Jaipur on 17th March, 2023, Pratibha Syntex Limited (Our Member) was declared winner of CITI Sustainability-Expanding Circularity Award.
2. At a function held on 9th March, 2023 the following of our Members were presented SRTEPC Export Awards for 2021-22:
 - Grasim Industries Ltd for Viscose Staple Fibre - Gold Trophy
 - Vardhman Textiles for Man-made Fibre Yarn Blended with Natural Fibre -Silver Trophy
 - Vardhman Textiles for Blended Fabrics of Synthetic Fibre and Natural Fibres - Bronze Trophy.
3. Sagar Manufacturers Private Limited Integrated Textile Industry has been adjudged as one of the Top Ten Spinning Mills in India in the year 2023 by Industry Outlook, 2023 Award in acknowledgement of its unwavering focus and dedication to achieve excellence in quality and delivery in this field.
4. Pratibha Syntex Limited was awarded CITI Birla Economic & Textile Research Foundation Award – 2024 for
 - (i) Best Practices Adopted by Textile Mills Especially in Social Responsibility & Green Practices and
 - (ii) Best HR Practices
 - at the hands of Union Textile Minister, Shri Piyush Goyal. The Awards were received by Shri Shreyaskar Chaudhary, Mg. Director of the Company (our Chairman) on 26th February, 2024 at New Delhi.
5. At a function held on 7th May, 2024 the following of our Member Mills were awarded by Cotton Textiles Export Promotion Council (TEXPROCIL):

For exports in 2021-22:

 - Highest Global Exports: Vardhman Textiles Limited – Silver Trophy
 - Yarn: Counts 50s and below: Nahar Spinning Mills Limited – Gold Trophy
 - Highest Women Employment Generation: Vardhman Textiles Limited- Gold Trophy

For exports in 2022-23:

 - Highest Global Exports: Vardhman Textiles Limited- Group Companies - Gold Trophy
 - Processed Yarns: Nahar Spinning Mills Limited – Gold Trophy
 - Yarn: Counts 50s and below: Nahar Spinning Mills Limited - Silver Trophy

CSR ACTIVITIES OF MEMBER MILLS:

1. Sagar Multi Speciality Hospital at Bhopal was constructed by Sagar Group (Sagar Manufacturers Pvt. Ltd.,) and inaugurated by the Hon'ble Chief Minister on 7th September, 2023. Shri Siddharth Agrawal, Managing Director (our then Deputy Chairman) stated that with the launch of this Hospital, their vision of giving accessible and exceptional healthcare for all has become a reality.
2. Vardhman Textiles with the initiative of Shri S Pal, Director, M P Locations organized Artificial Limb Camp at Civil Hospital, Mandideep for 15 disabled persons. These persons will get a new lease of life with new limbs.

AUDITORS:

M/S. R.D. Asawa & Co; Chartered Accountants, Indore appointed as Auditors for the financial year, 2023-24.

MONTHLY NEWS LETTER:

M.P. TEXTILE NEWS LETTER, **monthly** newsletter of the Association is being published regularly since September, 1993 and circulated to Ministers, Central and State Government Officials, various Industry Chambers, Associations and Members of the Association, etc.

WEBSITE (www.mptma.in):

The website of the Association is operational from 20th June, 2012.

DIRECTORY OF MEMBERS:

The DIRECTORY – 2024 of Member- Mills was compiled and circulated.

ACKNOWLEDGEMENTS:

The Association wishes to place on record its sincere gratitude to the Hon'ble Union Textile Minister, and Minister of State for Textiles, Chief Minister of the State, other Cabinet Ministers of the State, Textile Commissioner, Officials in the various Ministries/Department of the Centre and State for their co-operation and guidance. The Association is thankful to Confederation of Indian Textile Industry (CITI) and other Chambers, Industry Associations and organizations for their continued support in resolving problems of the Textile Industry from time to time. The Association is also thankful to media and press for raising issues of the textile industry from time to time.

RAW MATERIAL

The textile industry has been an integral part of human civilization, catering to one of our basic need of clothing. It consumes a wide range of fibres, which include Cotton, Man-Made Fibers, Wool, Silk, other miscellaneous fibers and filaments. India currently has an annual production of 5.5 million tons of cotton, 35 million kilos of silk, 37 million kilos of wool and 4.00 million tons of Man-Made Fibre/ filaments, which represent roughly 23% of World production in cotton, 14% in silk, 4% in wool and 5% in Man-Made fibre.

The following steps are needed to improve availability of raw material:

- Self-reliance in raw materials, promote domestic sourcing and reduce dependence on imported raw materials and encourage local production.
- Promote high-yielding cotton varieties, improve farming practices and reduce wastage
- Encourage domestic production of synthetic fibers, like polyester and nylon and promote sustainable sourcing and recycling of raw materials.

FIBRE CONSUMPTION PRODUCTION TREND:

The Cotton dominates the consumption of fibres, which is about 60% of total fibre consumption. However, this trend is likely to reverse in future, when cotton share may be reduced to about 41% and fibre consumption will be dominated by Man-Made fibres.

The following table shown production of various types of fibres in the Country:

Fibres	Production In Mn. Kgs.		Share	CAGR
	2019-20	2022-23	2022-23	
Cotton	6,205	5,723	59%	-3%
Silk	36	37	0%	1%
Wool	45	34	0%	-9%
Others (Jute, Mesta)	1,683	1,739	18%	1%
Natural Fibres	7,969	7,532	78%	-2%
Viscose	578	711	7%	7%
Polyester	1,085	1,352	14%	8%
Viscose	578	711	7%	7%
Polyester	1,085	1,352	14%	8%
Acrylic	70	85	1%	7%
Others	4	4	0%	0%
Man-Made Fibres	1,737	2,152	22%	7%
Total Fibres	9,706	9,684	100	-

Source – Wazir Advisors

COTTON SCENARIO:

Cotton or “White Gold” holds a predominant position and is one of strongest competitive base for Indian Textile & Apparel (T&A) industry. India is one of the of top cotton growing countries in the World. Cotton is being grown in India for over 5000 years. India has the largest number of cotton farmers in the World, around 6 million. This dependence of millions of farmers and people, who are indirectly associated with cotton production especially in rural areas, make cotton the back bone of Indian economy. Cotton is a natural fiber and one of the most important textile fibers. It is classified based on staple, grade and character of each bale-staple refers to the fibre length; grade ranges from coarse to premium and is a function of colour, brightness, and purity; and character refers to the fibre’s strength and uniformity. India is the only country, which grows all four species of cotton: G. Arboreum & G. Hirasutum (Asian cotton), G. Barbadosense (Egyptian cotton) and G. Hirasutum (American Upland cotton). G. Hirasutum represents 90% of the hybrid cotton production in India and all the current Bt cotton hybrids are G. Hirasutum. India has the largest acreage under

cotton, which is about 39% of the World total cotton acreage. Our Country is the largest producer (about 22% global cotton production) second largest exporter next only to U.S.A. and the second largest consumers (22% of global consumption) of cotton next only to China in the World.

KASTURI COTTON BHARAT:

The Kasturi Cotton Bharat is a joint initiative by the Ministry of Textiles, the Cotton Corporation of India (CCI), Trade Bodies and Industry to work on the principle of self-regulation by owning complete responsibility of Branding, Traceability and Certification of Indian Cotton to enhance its' competitiveness in the global market and create a sustainable ecosystem for all stakeholders involved.

On the eve of World Cotton Day on 7th October, Ministry of Textiles announced the “Kasturi Cotton Bharat” brand of cotton by which Indian cotton has been endowed with a brand and a logo that represents Whiteness, Softness, Purity, Luster and Indianness.

All the ginners in the Country have been empowered to produce Kasturi Cotton Bharat brand as per stipulated protocol. Besides this, to provide complete traceability of Kasturi Cotton Bharat across the supply chain, QR based certification technology will be used at each stage of the processing and a block-chain based software platform will provide end to end traceability and transaction certificate.

AREA UNDER COTTON, PRODUCTION AND YIELD:

As per available reports, India cultivates cotton in the area of 125 hectare, which is around 39% of the World cultivated area. The average Kapas production is 1300 kg/hectare and average Gin out turn is around 33 percent. The seeds are also mainly hybrid. In the season 2023-24, cotton production in the Country is estimated at 32.31 million bales (170 kg), while cotton consumption is estimated at 5.4 million tons (22.33 per cent of World). With all these achievements to its credit, the Country is confronted with the challenge of overcoming low yields in large sowing areas.

The year-wise Area under cotton, Production, Consumption, Import, Export and Yield as per Cotton Advisory Board (CAB)/Committee on Cotton Production and Consumption (CoCPC) for the year 2011-12 to 2023-24 are given in the following table:

Cotton year (Oct to Sep)	Area (Lakh Hect.)	Production (Lakh Bales) (As per CAB) / CoCPC)	Yield (Kgs./Hec)	Cotton Consumption by Mills (Lakh Bales)		Import (Lakh Bales)	Export (Lakh Bales)
				Non SSI	SSI		
2011-12	121.78	353.00	496	217.68	22.10	4.54	128.81
2012-13	119.78	365.00	518	250.14	23.02	14.59	101.43
2013-14	119.60	398.00	566	266.00	24.88	11.51	116.96
2014-15	128.46	386.00	511	278.55	26.28	14.39	57.72
2015-16	122.92	332.00	458	270.20	27.08	22.79	69.07
2016-17	108.26	345.00	542	262.70	26.21	30.94	58.21
2017-18	125.86	370.00	500	280.11	26.18	15.80	67.59
2018-19	126.14	333.00	449	270.78	22.43	35.37	43.55
2019-20	125.84	365.00	460	233.70	20.49	15.50	47.04
2020-21	132.85	352.48	451	297.45	22.42	11.03	77.59
2021-22	123.71	311.17	428	284.93	21.48	21.13	42.25
2022-23	129.27	329.33	443	197.80	99.83	14.60	15.89
2023-24	126.80	325.22	436	204.00	103.00	12.00	28.00

STATEWISE AREA UNDER COTTON :

The following table shows State-wise cotton area from 2016-17 to 2023-24 is as under:

Area in lakh Hectares

State	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-2024
Punjab	2.85	2.91	2.68	2.50	2.52	2.51	2.49	2.14
Haryana	5.70	6.65	7.08	7.20	7.40	6.36	5.75	5.78
Rajasthan	4.71	5.84	6.29	7.60	8.07	7.56	8.15	10.04
Gujarat	23.82	26.24	26.60	26.60	22.70	22.84	24.84	26.83
Maharashtra	38.00	43.51	42.18	44.90	45.44	44.10	41.82	42.34
Madhya Pradesh	5.99	6.03	6.14	6.50	5.88	5.60	5.95	6.30
Telangana	14.09	18.97	18.39	21.30	23.58	18.89	19.73	18.18
Andhra Pradesh	4.72	6.46	6.20	6.60	6.06	5.54	7.04	4.22
Karnataka	5.10	5.47	7.18	8.20	8.20	6.74	9.49	7.39
Tamil Nadu	1.42	1.83	1.33	1.70	1.12	1.48	1.73	1.30
Odisha	1.36	1.45	1.57	1.70	1.71	1.93	2.16	2.16
Others	0.50	0.50	0.50	0.10	0.17	0.16	0.12	0.12
Total	108.26	125.86	126.14	134.80	132.85	123.71	129.27	126.80

STATEWISE COTTON PRODUCTION:

The State-wise cotton production from 2016-17 to 2023-24 is as under:

Quantity in lakh bales of 170 kg.

State	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Punjab	9.00	11.50	8.50	9.50	10.23	6.46	4.44	6.29
Haryana	20.50	22.50	23.00	26.50	18.23	13.16	10.01	15.09
Rajasthan	16.50	22.00	27.50	29.00	32.73	24.81	27.74	26.22
Gujarat	95.00	104.00	90.00	89.00	72.18	75.09	87.95	90.60
Maharashtra	88.50	85.00	76.00	87.00	101.05	82.49	83.16	80.45
Madhya Pradesh	20.50	20.50	23.00	20.00	13.38	14.20	14.33	18.01
Telangana	48.00	55.00	42.00	54.00	57.97	48.78	57.45	50.80
Andhra Pradesh	19.00	20.50	15.00	18.00	16.00	17.08	15.41	7.25
Karnataka	18.00	18.00	16.00	20.00	23.20	19.55	25.68	20.47
Tamil Nadu	5.00	5.50	6.00	6.00	2.43	3.02	3.19	2.78
Odisha	3.00	3.50	4.00	4.00	5.51	6.26	7.05	7.05
Others	2.00	2.00	2.00	2.00	0.23	0.27	0.19	0.21
Total	345.00	370.00	333.00	365.00	352.48	311.17	336.60	325.22

The cotton production in our State has started falling from 2020-21.

STATEWISE COTTON YIELD:

Gujarat, Maharashtra, Andhra Pradesh, Telangana and Madhya Pradesh have been in forefront of cotton production in the Country. The productivity in major cotton producing States and at all India level is shown in the following table:

Kgs.per Hectare								
State	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Punjab	537	687	539	651	690	438	303	500
Haryana	611	549	552	623	419	352	296	444
Rajasthan	596	677	743	649	675	558	579	444
Gujarat	678	672	575	569	541	559	602	574
Maharashtra	396	326	306	329	378	317	338	323
Madhya Pradesh	582	624	637	523	386	431	409	486
Telangana	579	488	388	432	418	439	495	475
Andhra Pradesh	684	559	411	466	449	324	372	292
Karnataka	600	538	379	416	481	493	460	471
Tamil Nadu	599	511	767	600	369	347	313	364
Odisha	375	428	433	400	547	551	555	555
India	542	500	449	460	451	478	443	436

COMMITTEE ON COTTON PRODUCTION AND CONSUMPTION:

The Committee on Cotton Production & Consumption (CoCPC) was formed by Ministry of Textiles to estimate production demand, export, etc. in respect of cotton. It is headed by Textile Commissioner and includes members from CAI, CITI, TEXPROCIL, and other stakeholders. The last Meeting of the Committee was held 24th June, 2024, whereat cotton production from 2022-23 and 2023-24, was discussed. Comparative Cotton Balance Sheet of last three years is as under:

Particulars	2021-22		2022-23		2023-24	
	Lakh Bales	'000Tons	Lakh Bales	'000Tons	Lakh Bales	'000Tons
Supply:						
Opening Stock	71.84	1221.28	39.48	671.16	61.16	1039.72
Crop	311.17	5289.89	336.60	5722.20	325.22	5528.74
Import	21.13	359.21	14.60	248.20	12.00	204.00
Total Supply	404.14	6870.38	390.68	6641.56	398.38	6772.46
Demand:						
Mill Consumption	284.93	4843.89	197.80	3362.60	204.00	3468.00
SSI Consumption	21.48	365.16	99.83	1697.11	103.00	175100
Non-Textile Consumption	16.00	272.00	16.00	272.00	16.00	272.00
Export	42.25	718.25	15.89	270.13	28.00	476.00
Total Demand	364.66	6199.22	329.52	5601.84	351.00	5967.00
Closing Stock	39.48	671.08	61.16	1039.72	47.38	805.46

GROWTH OF MAN-MADE FIBRES:

India is the second largest producer of manmade fibres after China. India produces over 1441 million kgs of man-made fibre and over 3000 million kgs of man-made filaments. The manmade fibre value chain is vertically integrated with upstream and downstream linkages from raw materials to finished goods. Globally MMF consumption is dominant,

whereas India has been traditionally focusing on Cotton textiles. Hence, in order to move towards higher Global MMF share, it has become important to focus on man- made textiles along with cotton textiles. Ministry has set up Textile Advisory Group on MMF- an informal body on 17th January, 2023 to deliberate and recommend on the issues pertaining to entire value chain of manmade fibres

The projection of Production, Imports and Exports of Synthetic Fibres, from 2019-20 to 2027-28 are as under:

Figures in 000'MT

Group	Actual Values				Forecast values				
	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28
Synthetic Fibre									
Capacity	4521	4529	4483	4556	4587	4598	4609	4638	4673
Production	3893	3185	4040	3775	3822	3879	3923	4097	4001
Capacity Utilization-%	86.1	70.3	90.1	82.9	83.3	84.4	85.1	88.3	85.6
Imports	347	403	460	478	541	595	638	683	731
Exports	1059	879	1202	1086	1121	1154	1192	1251	1227

Source: Chemical & Petrochemical Statistics at a Glance-2022

AVAILABILITY OF RAW WOOL & IMPORTS :

Most of the Mills have to depend on import of fine quality wool mainly from Australia and New Zealand for their fabric and hosiery production. The production and import of raw wool, etc., from 2010-11 has been as under:

Quantity in Million Kgs.

Year	Production of Indigenous Wool	Imports Raw Wool
2010-11	42.99	94.77
2011-12	44.73	76.29
2012-13	46.05	77.16
2013-14	47.90	89.60
2014-15	48.10	96.53
2015-16	47.20	97.84
2017-18	46.00	79.95
2018-19	46.00	77.00
2019-20	45.00	69.00
2020-21		81.62
2021-22	37.00	107.84
2022-23	34.00	81.00
2023-24		92.00

INTERNATIONAL SCENARIO: COTTON – PRODUCTION AND CONSUMPTION:

Cotton occupies a mere 3% of the World's agricultural area – yet it meets about 25% of the World textile needs. There are around 54 countries in the World that grow cotton, of which the number that produce a significant quantity of 10,000 tons and above is about 46. The countries that can be the leading ones are India, China, U.S.A., Pakistan, Brazil and Uzbekistan. About 50% of all cotton is produced in two countries.

The International Cotton Advisory Committee (ICAC) has projected World Cotton Production and Consumption estimates for 2020-21, 2021-22, 2022-23 and 2023-24, which are given in the following table:

Quantity in Million Tons				
	2020-21	2021-22	2022-23	2023-24
Production	23.96	25.24	24.84	24.58
Consumption	25.71	25.84	23.68	24.66
Exports	10.16	9.10	8.06	9.57
Ending Stocks	20.53	19.93	21.22	21.41

World Cotton Production and Consumption of major producing/consuming countries during 2019-20 to 2023-24 as reported by ICAC are as under:

Quantity in Million Tons										
Country	2019-20		2020-21		2021-22		2022-23		2023-24	
	Prod.	Cons.	Prod.	Cons.	Prod.	Cons.	Prod.	Cons.	Prod.	Cons.
China	5.80	7.23	5.91	8.40	5.73	8.31	5.98	7.50	5.60	7.80
India	6.20	4.45	6.00	5.70	5.28	5.30	5.12	5.52	5.50	5.39
USA	4.34	0.47	3.18	0.52	3.81	0.55	3.15	0.45	2.63	0.38
Pakistan	1.46	2.34	0.96	2.15	1.26	2.45	0.84	1.90	1.35	2.30
Brazil	3.00	0.57	2.36	0.69	2.55	0.70	3.02	0.70	3.56	0.70
Vietnam	0.03	1.44	0.01	1.52	0	1.46	0	1.30	0.00	1.42
Bangladesh	-	1.50	0.55	1.64	0.35	1.73	0.36	1.60	0.33	1.75
RoW	5.40	5.04	4.99	5.09	6.26	5.34	6.37	4.71	5.61	4.92
World	26.23	23.04	23.96	25.71	25.24	25.84	24.84	23.68	24.58	24.66

ICAC has estimated the average yield in major cotton producing countries in the World during 2023-24 as under:

Country	Production '000 Tons	Area Harvested '000 Hectares	Yield Kgs./Hectare
India	5,493	12,469	440.52
China	5,600	2,872	1,949.86
U S A	2,634	2,859	921.46
Brazil	3,560	1,930	1,844.56
Pakistan	1,350	2,370	569.92
Turkey	700	450	1,555.56
Uzbekistan	690	1,000	590.00
Australia	200	220	909.09
Greece	200	220	909.09
Argentina	310	510	607.84
World	24,581	31,979	768.65

WORLD FIBRE CONSUMPTION:

The fibre consumption trend showing increasing dependence on MMFs globally as shown in the following table:

Year	Consumption (Million Tons)				Consumption Share %		
	Total	Cotton	Polyester	Others	Cotton	Polyester	Others
2016	91	21.65	51.62	16	27.5	54.9	17.6
2017	94	23.38	53.03	16	28.7	54.3	17.0
2018	96	27.00	55.05	17	27.1	55.2	17.7
2019	98	25.88	57.69	17	26.5	56.1	17.4
2020	74	26.27	57.07	13	27.0	55.4	17.6
2021	100	24.38	60.54	17	25.0	57.0	17.0
2022	103	29.44	59.00	18	25.2	57.3	17.5
2025	114	28.00	67.00	19	24.6	58.3	16.6
2030	136	32.00	81.00	23	23.5	59.5	17.0

Source: Wazir Advisors

COTTON COLLABORATIVE PROJECT IN MADHYA PRADESH:

CITI-CDRA has been working on a collaborative project to enhance the productivity of cotton in the Madhya Pradesh since 2006. Besides this, during the last one year, CITI CDRA has also been working as an extension partner in the Pilot Project of Cotton, which the Ministry of Agriculture & Farmers' Welfare has announced under NFSM with the Ministry of Textiles also part of the review and steering group of the project. The project is aimed at enhancing the cotton productivity of India by using a cluster-based and value chain approach and Public-Private Partnership (PPP) mode.

To review the progress of both collaborative projects as also the Pilot Project on Cotton, CITI CDRA organized a two day event in Ratlam on 12th – 13th March, 2024.

The inaugural day of the event held on 12th March, 2024 commenced with a Kisan Mela at Shivgarh, Ratlam. The event aimed to conclude the inaugural year of the 'Special Project on Cotton' and provided a platform for discussing various topics including:

- Information of online soil testing facilities.
- Importance of quality maintenance in cotton production, illustrated with cultural examples.
- Sharing of CITI's best practices and techniques employed in high producing areas.

The inauguration of the event was graced by esteemed dignitaries including:

- Mrs. Neelam Chouhan, DDA, and Mr. H.L. Barfa, ADA, from the State Agriculture Department.
- Mrs. Bansari Nag, National Project Coordinator from New Delhi representing the International Labour Organisation (ILO).
- Dr. R.K. Singh, Soil Scientist from the Soil Conservation Department.
- Shri P.N. Sharma, Project Coordinator, and Cotton Production Expert from Rajasthan.
- Shri Arvind Patidar, representing SOLIDARIDAD.
- Associates from CITI – CDRA (Mumbai and New Delhi).

A total of 596 farmers participated in the Kisan Mela, demonstrating significant engagement and interest in the discussions and activities.

Stalls set up by SOLIDARIDAD, SYNGENTA, Doctor Seeds added value to the event, providing attendees with insights and resources relevant to cotton production and technologies.

The Kisan Mela in Ratlam proved to be a significant gathering, facilitating discussions, knowledge sharing and inspiration among farmers, State Agriculture Department, traders, contributors and CITI – CDRA.

The second day of the event, 13th March, 2024 marked a significant reflection on the journey and achievements of the inaugural year of the Special Project on Cotton, outlining a chart for the future course. The event was graced by esteemed Chief Guest including Chairman CITI, Shri Rakesh Mehra; Director CICR, Dr. Y. G. Prasad; Chairman–MPTMA, Shri Shreyaskar Chaudhary; SG-CITI, Ms. Chandrima Chatterjee and Secretary cum Chief Cotton Breeder-SIMA CDRA, Dr. M. Asha Rani.

In Madhya Pradesh During 2023-24, CITI CDRA covered 13,489 hectares, 102 villages, and 9,345 farmers.. Significant increase in agricultural production has been observed including 8 percent improvement in Extra Long Staple (ELS) varieties.

PRODUCTION OF MAN-MADE FIBRE (VSF) IN THE STATE:

The only unit manufacturing Man-made fibre in the State (Grasim Industries Ltd.) has reported the production of Viscose Staple Fibre as under:

Year	Production in '000 Kgs.
2010-11	1,32,204
2011-12	1,42,258
2012-12	1,51,528
2013-14	1,55,011
2014-15	1,53,671
2015-16	1,27,656
2016-17	1,50,121
2017-18	1,54,414,
2018-19	1,51,733
2019-20	1,04,363
2020-21	1,45,318
2021-22	1,47,781
2022-23	1,18,800
2023-24	1,29,000

The production of Viscose Staple Fibre could have been much more, had the production activities of this plant not shutdown every year due to non- availability of water in the summer season for 1 ½ to 2 months

MINIMUM SUPPORT PRICE FOR KAPAS :

The Government of India, Ministry of Agriculture Farmers Welfare announces Minimum Support Price (MSP) for two basic varieties of cotton, medium staple length cotton having staple length of 24.5 to 25.5 mm with micronaire value of 4.3 to 5.1 and long staple length cotton having staple length of 29.5 to 30.5 mm with micronaire value of 3.5 to 4.3 of

Kapas (Seed cotton). Support prices of these two varieties have been fixed as under:

Cotton season	Minimum Support Price- Rs. per quintal	
	Medium Staple (Staple length 24.5 mm with Micronaire value 4.3 to 5.1)	Long Staple (Staple length 29.5 mm with Micronaire value 3.5 to 4.3)
2019-20	5,255	5,550
2020-21	5,515	5,825
2012-22	5,726	6,025
2022-23	6,080	6,380
2023-24	6,620	7,020
2024-25	7,121	7,521

Based on the support price for these two basic varieties vis-à-vis the normal price differential and other relevant factors, the Textile Commissioner announced the support price for other varieties of kapas.

A comparison of Minimum Support Price for 2023-24 and 2024-25 cotton seasons (October –September) notified by the Textile Commissioner is as under:

Class of Cotton	Fibre Quality Parameters		Minimum Support		Names of the Indicative varieties used by the Trade.
	Basic Staple Length (2.5% Span Length) in mm	Micronaire Value	Price Rs. per Qtl.		
			2024-25	2023-24	
(I)	(II)	(III)	(IV)	(V)	(VI)
Short Staple (20 mm & below)					
	-	7.08-8.0	6621	6120	Assam Comilla
	-	6.8-7.2	6621	6120	Bengal Deshi
Medium Staple (20.5 mm- 24.5 mm)					
	21.5-22.5	4.8-5.8	6871	6370	Jaydhar
	21.5-23.5	4.2-6.0	6921	6420	V-797/G.Cot.1.3/Gcot.21
	23.5-24.5	3.4-5.5	6971	6470	AK/Y-1 (Mah &MP)/ MCU7(TN)/ SVPR2(TN)/PCO-2(AP & Kar)-11(TN)
Medium Long Staple (25.0mm)					
	24.5-25.5	4.3-5.1	7121	6620	J-34 (Raj)
	26.0-26.5	3.4-4.9	7221	6720	LRA-5166/KC-2(TN)
	26.5-27.0	3.8-4.8	7271	6720	F-414/H-777/j-34 Hybrid
Long Staple (27.5 mm-32.0mm)					
	27.5-28.5	4.0-4.8	7421	6920	F-414/H-777/J-34Hybrid
	27.5-28.5	3.5-4.7	7421	6920	H4/H- 6/MECH/RCH-2
	27.5-29.0	3.6-4.8	7471	6970	Shankar-6/10
	29.5-30.5	3.5-4.3	7521	7020	Bunny/Brahma
Extra Long Staple (32.5 mm & above)					
	32.5-33.5	3.2-4.3	7721	7220	MCU-5/Surabhi
	34.0-36.0	3.0-3.5	7921	7420	DCH-32
	37.0-39.0	3.2-3.6	8721	8220	Suvin.

The other terms and conditions specified in this Notification were almost similar in both the years.

EXPORT OF RAW COTTON (INCLUDING WASTE):

The position of export of Cotton during last two years has been as under:

Rank	Partner	Quantity Mn. Kgs.		% Growth In Value	Value US\$ Mn.		% Growth In Value
		2022-23	2023-24		2022-23	2023-24	
	World	318.47	573.10	79.95	781.43	1,115.49	42.75
1	Bangladesh	187.32	298.94	59.59	526.67	632.90	20.17
2	China	12.02	113.94	847.74	24.78	222.44	797.68
3	Vietnam	46.98	88.45	88.28	80.93	137.13	69.44
4	Taiwan	12.71	19.86	56.28	20.01	30.07	50.28
5	Indonesia	11.40	11.90	4.41	26.09	21.74	-16.68
6	UAE	8.89	10.30	15.94	22.67	21.27	-6.19
7	Germany	9.04	8.16	-9.75	15.01	13.46	-10.32
8	Belgium	8.86	7.51	-15.28	14.88	12.66	-14.87
9	Thailand	1.33	4.31	224.06	2.78	7.52	170.95
10	Nepal	2.58	2.47	-4.22	3.65	2.83	-22.56
Total	Top 10	301.12	565.83	87.91	87.91	1,102.01	49.43

Source: TEXPROCIL.

DUTY ON IMPORT OF COTTON:

Accordingly to the Notification No.96/2008-Customs dated 13th August, 2008 (as amended), Cotton can be imported from Least Developed Countries (LDC) at 50% of the existing Customs Duty, i.e. 5.5%. The comparative duty structure on Import Duty for Cotton is as follows:

Particulars	From Non LDCs	From LDCs
Basic Customs Duty (BCD)	5%	2.5%
Agriculture Infrastructure and Development Cess (AIDC)	5%	2.5%
Social Welfare Surcharge (SWS)	10% of (BCD+AIDC)	10% of (BCD+AIDC)
Total Import Duty	11%	5.5%
IGST	5%	5%*

* IGST can be claimed as Input Tax Credit

The Director General of Foreign Trade (DGFT) vide Public Notice dated 10th July, 2023 revised the HSN codes for cotton under India-Australia ECTA TRQ in sync with the Ministry of Finance Notification No 38/2023 Customs dated 23rd May, 2023 by substituting HSN52010020 with 52010024 and 52010025.

The Government of India, Ministry of Finance, issued two Notifications on 19th February, 2024 effective from 20th February, 2024 regarding Removal of Import Duty on Cotton covered under "HS Code 52010025 (Other: of staple length exceeding 32.0 mm)" and also Exemption of Agriculture Infrastructure and Development Cess (AIDC).

The Custom Duty on import of Cotton was imposed in November, 2022.

COTTON PRICE TREND:

The average spot rates of cotton during the financial years 2022-23 and 2023-24 have been as under:

Average Spot Rates Rupees per Candy (at Month end)

Month	J-34 SG Punjab		Mech-1/H-4 (28mm) MP		S-6 (28 mm) Gujarat		Dch-32 (34/36 mm) Karnataka	
	2023-24	2022-23	2023-24	2022-23	2023-24	2022-23	2023-24	2022-23
April	65,720	89,120	62,000	96,700	62,500	96,000	76,000	1,17,000
May	61,680	1,02,120	58,500	1,03,000	58,000	1,00,000	72,500	1,16,000
June	59,660	95,045	56,000	94,000	55,000	95,000	71,500	1,09,000
July	62,440	89,890	59,500	88,500	57,500	86,500	73,500	97,000
August	58,285	1,01,625	59,800	1,00,000	60,500	99,500	75,000	1,10,500
September	60,230	66,240	61,500	73,000	61,000	72,000	73,500	87,000
October	54,400	65,235	58,000	67,000	58,000	66,500	75,200	81,500
November	52,460	69,300	56,000	68,500	56,000	68,500	75,500	75,500
December	53,680	62,730	55,000	59,000	55,500	59,500	74,300	64,500
January	54,410	65,770	55,500	62,500	55,600	63,500	78,000	68,000
February	54,410	66,780	56,000	62,300	56,000	62,800	80,500	73,500
March	58,780	65,720	61,500	60,000	61,000	62,500	82,000	76,500

Source: Indian Cotton Federation 16th April, 2024 (one candy- 355.56 kgs.)

QUALITY CONTROL ORDERS:

The following Quality Control Orders have been issued by the Government:

S.No	Items	Standard	Effective Date
1	Cotton Bales	IS 12171:2019	27 th August, 2025
2	Viscose Staple Fibre	IS 17266:2019	29 th March, 2023
3	Polyester Staple Fibres (PSF)	IS 17263:2019	3 rd July, 2023
4	Polyester Continuous Filament Fully Drawn Yarn (FDY) (Except Low Melt Polyester Yarn from 18 th July, 2024)	IS 17261: 2019	5 th October, 2023
5	Polyester Industrial Yarn (PIY)	IS 17264:2019	3 rd July, 2023
6	Polyester Partially Oriented Yarn (POY)	IS 17262:2019	5 th October, 2023
7	Polyester Spun Grey and White Yarn (PSY)	IS 17265:2019	5 th October, 2023

ORGANIC COTTON:

Organic Cotton is grown in system that works with nature, rather than against it. The demand for Organic Cotton is rising with people becoming more conscious for environment and health. According to Organic Cotton Market Report 2022 of Textile Exchange, the World production of Organic Cotton is just 1.4% of all cotton grown and has risen from 610 tons in 2001 to 5,55,991 tons in 2021. Organic Cotton is grown in 21 countries and around 95% of global organic cotton production comes from just seven Countries. Presently it is grown on 6,21681 hectares of land The top eight

organic cotton producing countries are India (38.19%), Turkey (23.62%), China (9.82%), Kyrgyzstan (9.04%), Tanzania (6.12%), Kazistan (4.35%), Tajikistan (3.99%) and USA (1.7%) accounting for 95.00% of the total production. The World Organic Cotton production during last five years have been as under :

Year	Quantity in Tons
2015-16	1,07,790
2016-17	1,18,032
2017-18	1,82,482
2018-19	2,93,787
2019-20	2,49,153
2020-21	3,42,265*
2021-22	
2022-23	

*Excluding In-conversion cotton fibre 1,80,726 tons.

According to this report of Textile Exchange 1,30,849 tons (38.19% of Global production) of Organic Cotton was grown in India on 2,20,125 hectares of land in the year 2020-21. The details of year-wise Organic Cotton production in India are as under:

Year	Quantity in Tons
2015-16	60,184
2016-17	59,470
2017-18	85,530
2018-19	1,22,668
2019-20	1,24,244
2020-21	1,30,849
2021-22	
2022-23	

ORGANIC COTTON PRODUCTION IN INDIA:

As per information given by Minister of State for Heavy Industries Shri Kishan Pal Gurjar in Rajya Sabha on 11th Feb, 2022 the production of organic cotton in India during 2020-21 has been 8,10,934 tons against 3,35,712 tons in 2019-20. State wise details of production during 2016-17 to 2020-21 are as under:

State	Quantity in Tons				
	2016-17	2017-18	2018-19	2019-20	2020-21
Madhya Pradesh	74,027.06	82,737.87	91,925.51	87,701.23	3,83,133.39
Maharashtra	21,455.54	33,447.94	58,423.37	63,720.29	1,68,009.36
Gujarat	22,364.55	55,858.71	51,020.28	55,898.80	85,282.60
Odisha	23,034.40	58,545.71	74,001.57	1,03,312.96	1,06,495.89
Rajasthan	13,625.58	15,412.85	34,033.27	23,211.39	59,173.29
Karnataka	20.08	578.86	363.55	1,152.12	2,998.09
Tamil Nadu	0.00	0.00	1,790.42	2,369.82	3,771.77
Telangana	439.26	856.00	1,316.74	1,343.86	1,561.88
Bihar	0.00	0.00	1.16	1.16	7.47
Total	1,54,966	2,47,438	3,12,876	3,38,712	8,10,434

BETTER COTTON INITIATIVE:

The Annual Report of Better Cotton Initiative (BCI 2023-24), a Switzerland based Not for Profit Organisation states 2.13 million farmers were licensed Worldwide to sell Better Cotton in 2022-23 and they produced 22% of global cotton production. Better Cotton is available in 22 cotton producing countries after only twelve years of operations. During cotton season 2022-23, 54,67,081 tons of Better Cotton lint was produced Worldwide. There was increase of 1% in production compared to season 2021-22.

India was one of the first countries to implement the Better Cotton programme, with the first harvest of Better Cotton produced in 2011. It has the largest number of farmers participating in the programme and growing Better Cotton India also has the largest area under cotton cultivation in the world – approximately 12,927 million hectares. However, farmers can face many growing and productivity challenges, and as all Better Cotton Farmers in India are smallholders (farming on less than 20 hectares of land). Better Cotton and our Implementing Partners work closely with them to help them secure better yields and fibre quality.

As per Report, 2023-24, Better Cotton was produced in India by 8,42,385 BCI Licensed Farmers producing Better Cotton lint of 9,17,2127 tons on 13,27,344 hectares of land in 2022-23.

MANDI TAX ON COTTON:

From 8th January, 2019, Mandi Tax at the rate of Rs.1.50 per Rs. One Hundred was applicable on cotton, which was reduced to Rs.0.50 for every Rs. One Hundred from 11th August, 2023 to 31st March, 2024. From 1st April, 2024 Mandi tax on cotton is applicable at the rate of Rs. 1.00 per Rs. One Hundred.

PRODUCTION OVERVIEW

Indian Textile Industry once a global power house, is facing significant challenges. While its capacity declined during the British rule, it was still a prominent contributor to the Indian economy; it is one of the largest employment generators since the pre-independence era, providing jobs to millions in rural and urban areas. For unskilled labour in remote regions, it is a prominent source of income.

It is highly diversified with a wide range of segments ranging from products of traditional handlooms, handicrafts, wool, silk and similar products to the organized capital intensive technological progressive industry for mass production of textile products and includes Spinning, Weaving, Knitting, Processing, apparel, made- ups and technical textiles manufacturing.

The Indian textile manufacturing industry is a significant market, contributing to India's growth story. Following are some important data on the sector:

- India is the World's second-largest producer of textiles and apparel.
- It is also the sixth-largest exporter of textiles spanning apparel, home and technical products. India has a 4% share of the global trade in textiles and apparel.
- The textiles and apparel industry contributes 3% to the Country's GDP, 7% to industrial production and 9% to exports.
- The textile sector generated a Gross Value Added of Rs. 3.77 lakh crore (US\$ 45.20 billion) in 2022-23, which is about 10.6 percent of manufacturing GVA and is a significant contributor (29.3%) to non-corporate manufacturing GVA and 7.9 percent to corporate manufacturing GVA.
- The textile industry has around 45 million of workers employed in the textile Sector and 100 million in allied activities. Women employees, often the second earners of their families makeup about 20% of the formal workforce.
- Total textile and apparel exports have grown with a CAGR of 2% since 2010-11 to reach US \$ 37 billion in 2023-24. Apparel forms the largest share of exports accounting for 40% in 2023-24. The Ministry of Textiles has set an ambitious target of US \$ 100 billion exports by 2030-31 requiring an accelerate growth of 15%.
- Indian textile and apparel market size is estimated to be US \$ 175 billion in 2023-24 with domestic market contributing 79% and export with rest 21%. Within the domestic market, apparel accounts for 74% share followed by technical textiles with a share of 19%.
- The domestic market of Textiles & Apparel has grown from US \$ 50 billion in 2010-11 to US \$ 138 billion in 2023-24 registering a CAGR of 8%. Market is projected to grow at 9% CAGR from 2023-24 to reach US \$ 250 billion by 2030-31.

The Index of Industrial Production (HP) data (Base 2011-12) covers two textile groups, namely textiles and wearing apparel. The following IIP data for last eight years show the growth pattern of the industry:

Basic Year	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Textiles	119.40	117.40	117.10	118.40	115.70	91.10	117.80	107.50	107.70
Growth (%)		(-)1.68	(-)0.26	1.36	(-)2.50	(-)21.60	29.31	(-)8.70	0.20
Wearing Apparel	131.00	151.70	137.50	154.20	154.60	108.40	138.10	127.90	109.90
Growth (%)		15.10	(-)10.32	12.15	1.00	(-)29.8	27.40	(-)7.40	(-)12.60

NATIONAL TEXTILE POLICY:

- In a recent report, a Parliamentary Committee recognised the need for urgent action and called for a comprehensive National Textile Policy (NTP) to revitalize the sector. As per the Minister of Textiles, Government of India, "The textile industry is a vital contributor to our economy and job creation. A new National Textile Policy is essential to address the challenges and unlock the sector's full potential".
- The National Textile Policy formulated in 2000, is outdated and lacks a holistic approach. Multiple State policies create inconsistencies and hinder national-level planning. Varying support across States creates an uneven playing field. Inadequate power supply, poor transportation networks, and limited access to quality raw material hinder efficiency and raise production costs. Shortage of skilled workers, especially in technical areas, impedes innovation and productivity. Over 100 textile units are currently sick impacting thousands of jobs and hindering industry's growth.
- A comprehensive National Textile Policy, coupled with focused action on modernisation, skill development, and self-reliance, can be the thread that weaves a brighter future for the sector. By addressing the limitations of existing policies and implementing strategic solutions, India can regain its position as a global textile leader.

GROWTH OF TEXTILE INDUSTRY:

The Government has taken a number of initiative /measures to help ameliorate the conditions in textile sector to boost production, marketing and job opportunities in the sector on pan-India, some of which are:

Production Linked Incentive (PLI) Scheme:

The Government launched the Production Linked Incentive (PLI) Scheme with an approved outlay of Rs.10,683 crore over a five year period to promote production of MMF Apparel, MMF Fabrics and Products of Technical Textiles in the Country to enable Textiles Industry to achieve size and scale and to become competitive.

Two of our Member Mills namely Pratibha Syntex Ltd and Mohini Health & Hygiene Ltd. have been selected for Part-I and Part –II of the Scheme respectively.

The phase II of the Scheme has also been announced.

PM Mega Integrated Textiles and Apparel Park (PM- MITRA):

Inspired by 5F vision of Hon'ble Prime Minister Farm to Factory, Factory to Fashion and Fashion to Foreign, the Ministry of Textiles has launched PM Mega Integrated Textile Regions and Apparel Parks (MITRAs) Scheme with an outlay of Rs.4, 445 crore for a period up to 2027-28 to strengthen the Indian textile industry by way of enabling scale of operations, reduce logistics cost by housing entire value chain at one location, attract investment, generate employment and augment export potential.

Under the scheme of PM Mega Integrated Textile Region and Apparel (PM Mitra) Park by the Ministry of Textiles, Government of India, PM Mitra Park has been approved by the Government of India in 1563 acres of land in District Dhar in the State. This Park will provide state of the art infrastructure for the textile sector, attract investment of crore and create lakh of jobs, particularly for women workers. The Park will have plug and play facilities, training centers, logistic, commercial space and health services apart from basic and advanced industry requirements. The Ministry of Textiles will provide financial support in the form of Development Capital Support up to Rs.500 crore for the park. For incentivizing manufacturing units to get set up early in PM MITRA, there is a provision of Rs.300 crore per park, wherein the incentive can be provided to manufacturing units up to 3% of the total sales turnover on first come first serve basis.

Plug and Play Park in Industrial Area Readymade Garments Complex, Indore has been approved for an amount of Rs 186.70 crore.

Textile Cluster Development Scheme (TCDS):

Textiles industry in India has development in form of inter dependent clusters. Some of these clusters have not been able to modernize and are not able to keep pace with changing environment and continuing to work with old and obsolete technology and machines. This results in inefficiencies and lower productivity for the workers. To address the above issue, Ministry is implementing Textile Cluster Development Scheme (TCDS) from 2021-22 to 2025-26 with a view to create an integrated workspace and linkages-based ecosystem for existing as well as potential textile units to make them operationally and financial viable. Such a Cluster is being developed in Nimbola village in Burhanpur. 108 industries have been allotted land in this Cluster with proposed investment of Rs. 200-250 crore.

Integrated Processing Development Scheme (IPDS):

In order to facilitate the textile industry to meet the required environmental standards and to support new Common Effluent Treatment Plants (CETP)/up gradation of CETPs in existing processing clusters as well as new processing parks specially in the Coastal Zones, the Ministry is implementing Integrated Processing Development Scheme (IPDS). The Ministry has decided to continue the said Scheme with some modification till 2025-26.

National Technical Textile Mission (NTTM):

The Government launched a National Technical Textiles Mission (NTTM) with an outlay of Rs.1,480 crore. The key pillars of NTTM include 'Research Innovation & Development; 'Promotion and Market Development; 'Education, Training and Skilling' and 'Export Promotion. The focus of the Mission is for developing usage of technical textiles in various flagship missions, programmes of the Country including strategic sectors. The mission got its extension until 31st March, 2026, with a subsequent sunset clause applicable until 31st March, 2028. Achievement as on date is 126 projects of value Rs.371 crore have been approved in the category of Specialty fibers and Technical Textiles.

STATUS OF INDUSTRY:

No official data is available either from office of Textile Commissioner or the Ministry of Textiles from 2017-18 onwards about the scale of the Industry. India has second largest manufacturing capacity globally. Our Textile Industry accounts for about 25% of the World spindle capacity, 9% of World rotor capacity and has highest loom capacity (including handlooms) with 63% of World's market share. As per International Textile Industry Statistics n°65/2022 Global the position is as under:

		World	India
1	Spindles	227 Million	55 Million
2	Rotors	9.5 Million	8,42,000 Rotors.
3	Shuttle Looms	952 Thousand	45,500 Nos.
4	Shuttle less Looms	1.85 Million	1,60,000 Nos
5	Consumption:		
	Total Raw Material	44.26 Million tons	N.A.
	a. Raw Cotton	22.72 Million tons	5.00 Million tons
	b. Synthetic Staple Fibre	13.21 Million tons	1.30 Million tons
	c. Cellulose Staple Fibre	8.33 Million Tons	N.A.

PRODUCTION OF SPUN YARN:

More than 95% of the yarn is produced in the Organised Sector. The figures of spun yarn production (Cotton, Blended and 100% Non-cotton yarn) since 2010-11 with percentage share (including production in SSI Sector) are given below:-

Year	Cotton Yarn		Blended/Non-Cotton Yarn		Total Mn. Kgs
	Mn. Kgs	%age share	Mn. Kgs.	%age share	
2010-11	3,490	74.05	1,223	25.95	4,713
2011-12	3,126	71.60	1,246	28.40	4,372
2012-13	3,583	73.60	1,285	26.40	4,868
2013-14	3,923	74.09	1,386	25.91	5,309
2014-15	4,055	73.97	1,433	26.03	5,488
2015-16	4,138	73.06	1,527	26.94	5,665
2016-17	4,055	71.66	1,604	28.34	5,659
2017-18	4,064	71.56	1,616	28.44	5,680
2018-19	4,208	71.44	1,682	28.56	5,890
2019-20	3,962	69.95	1,702	30.05	5,664
2020-21	3,625	70.44	1,521	29.56	5,146
2021-22	4,063	69.79	1,759	30.21	5,822
2022-23	3,438	66.36	1,746	33.64	5,184
2023-24	3,756	68.53	1,725	31.47	5,481

PRODUCTION OF MMF & FILAMENT YARN:

The production of filament yarn in the country has been as under:

	Quantity in Million Kgs.					
	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Man-made Fibre	1,442	1,898	1,610	2,160	2,152	1,987
Filament Yarn	1,160	1,688	1,546	2,016	1,904	1,702

PRODUCTION OF FABRIC:

The production of cloth is mainly in decentralized sector. Power-loom sector accounts for 59%, hosiery units 26% and handloom around 12% of total cloth production. Organised sector weaving mills account for only 3% of cloth production. The following table gives the percentage share of fabric production:

	Production Mn. Sq. Mtrs.			Percentage share		
	2018-19	2019-20	2020-21	2018-19	2019-20	2020-21
Cotton	42,204	40,038	36,344	60.23	53.31	51.59
Blended	11,896	11,964	10,513	16.98	15.93	14.93
100% Non Cotton	15,970	23,104	23,588	22.79	30.76	33.48
Total	70,070	75,106	70,445	100.00	100.00	100.00

Data in respect of production of fabric is not available now.

GROWTH OF TEXTILE INDUSTRY IN THE STATE:

From the office of Textile Commissioner Ministry of Textile, no data is available from 2017-18 onwards. As per information given by the State Government during Bharat Tax -2024, the structure of Textile Industry in the State is as under:

S.No.	Textile Mills :	Madhya Pradesh.
1	Units /Mills	60 +
2	Spindles	2.50 Million
3	Rotors	50,000+
4	Shuttle – Looms	4,000 +
5	Shuttle less Looms 200 MS – Nos.	1,063
6	Man-made fibre Units (Viscose)	1
7	Knitted RMG Units	4
8	Woven RMG Units	965

The figures of spun yarn and fabrics production in the State since 2013-14 are as under:

Quantity: Yarn' 000 Kgs, Fabric '000 Sq.Mtrs.

	2013-14		2014-15		2015-16		2016-17	
	Yarn	Fabric	Yarn	Fabric	Yarn	Fabric	Yarn	Fabric
Cotton	2,99,696	1,17,412	3,30,074	1,64,843	3,,48,605	1,82,155	3,26,350	1,,67,818
Blended	75,002	43,909	76,281	62,175	78,842	49,285	86,213	56,304
100%NonCotton	26,369	362	26,000	1,513	31,531	1,611	36,936	1,467
Total	4,01,067	1,61,683	4,32,355	2,28,531	4,58,978	2,33,051	4,49,499	2,25,589

The Figures of spun yarn and fabric production beyond 2016-17 are not available.

HANK YARN OBLIGATION:

Hank Yarn Obligation was introduced in 1974 at 50% of production of cotton and Viscose yarn. However, from 2003 this was reduced to 40% of yarn packed for civil consumption in hank form.

Actual Hank Yarn requirement by the Handloom Sector is less than 8% of weaving yarn delivered to the domestic market. Hence, the Government should further reduce this Obligation to 15%. As per decision taken in the 69th Meeting of Hank Yarn Price Monitoring Committee, all Spinning Mills are to register online and e-file the Hank Yarn Return (Annexure-I and II). It is mandatory for all units to submit the Returns from January-March, 2015.

TECHNICAL TEXTILES:

Technical textiles are textile products that have technical performance and functionality as their primary focus. The end usage of these products caters to a wide array of sectors including construction, agriculture, aerospace, automotive, healthcares, protective gear, home care, among others.

The global technical textiles market is estimated at US \$ 212 billion in 2022 and is expected to reach US \$ 274 billion by 2027, growing at a CAGR of 5.2 % during 2022-27 backed by increasing global demand for technical textiles across industries and expanding base of new applicative products being developed at a rapid rate.

Indian technical textiles market is the fifth largest in the World and stood at US\$ 21.95 billion in 2021-22. India's export of technical textiles in 2022-23 was US\$ 2,504.8 million, which increased to US\$ 2,585.9 million in 2023-24 representing a growth of 3.2 percent. Technical textiles accounts for approximately 13% of India's total textile and apparel market and contributes to India's GDP at 0.7%. There is a huge potential to fulfill a large demand gap as consumption of technical Textiles in India is still only at 5-10% against 30-70% in some of the advanced countries.

The Ministry of Textile has issued the two Quality Control Orders (QCOs) for 31 technical textiles items consisting of 19 Geo Textiles and 12 Protective Textiles including protective clothing for fire-fighters and welders in the first phase.

Our Members Mills – Pratibha Syntex, SRF Limited, Mohini Health & Hygiene, Industrial Filters & Fabrics. and Mayur Uniquoters are working in this segment.

POLICIES FOR PROMOTION OF TEXTILE & APPAREL INDUSTRY IN THE STATE:

Industrial Promotion Policy-2014:

Incentives for Large Manufacturing Industries:

- a. **Basic Investment Promotion Assistance(BIPA):**
Up to 40 % of investment in Plant and machinery disbursed across 7 years.
- b. **Incentive Multiples over IPA:**
 - **Employment generation incentive:** 1.0–1.5 times.
 - **Export incentive:** 1.0–1.2 times.
- c. **Assistance for infrastructure development** in private/undeveloped Government land: 50% of the expenditure incurred upto Rs. 3 crore.
- d. **Assistance for green industrialization:** 50% of expenditure incurred upto Rs. 01 crore.
- e. **100% reimbursement on Patent Charges up to Rs. 5 lakh.**
- f. **Interest Subsidy** of 5-7% for a period of 5 years.
(Customized package available for Investment above Rs. 100 crore and Rs. 25 crore for Garment units).

Special Package for Large Scale Garment Industries:

- a. **Basic Investment Promotion Assistance (BIPA):**
Up to 40 % of investment in Plant and machinery disbursed across 7 years.
- b. **Incentive Multiples over IPA:**
 - Employment generation incentive:** 1.0–1.5 times.
 - Export incentive:** 1.0–1.2 times.
- c. **Interest subsidy** of 5% for 7 years.
- d. **Assistance for green industrialization:** 50% of expenditure incurred up to Rs. 01 crore.
- e. **Employment Generation Assistance** up to Rs. 5,000 month per employee for 5 years from date of Commence of commercial production and applicable for 10 years.
- f. **Skill development and training expenses reimbursement** of Rs. 13000 for 5 years for MP domicile employees.
- g. 50% discount in the **development fee** in case of taking lease land in the industrial area.
- h. 100% reimbursement of **Stamp Duty and Registration Fee.**
- i. **Electricity duty exemption** for a period of 7 years from the date of taking new electricity connection.
- j. **Fixed electricity tariff** of Rs. 5 per unit for 5 years from date of commence of commercial production.
- k. Garment Units can avail maximum incentives to the tune of 200% of their investment in plant and machinery.

M S M E Development Policy -2021:

A. Investment up to Rs. 10 crore in Plant & Machinery:

- a. Investment Promotion assistance of 40%, additional 8% for SC/ST/Women.
- b. Additional 12% on capital subsidy for export oriented units.
- c. Financial assistance up to Rs. 5 lakh for quality certifications.
- d. Financial assistance up to Rs. 5 lakh for energy audit expenses.
- e. Financial assistance up to Rs. 5 lakh for patents/IPR registration.
- f. 50% reimbursement of expenditure towards Infrastructure Development (Road, water electricity, etc.) up to Rs. 25 lakh.
- g. 50% reimbursement for expenditure towards setting up of ETP up to Rs. 25 lakh

Additional Concessions for Specific Sectors:

Power Loom Sector:

- a. Capital subsidy of 25% for up-gradation of power loom.
- b. Electricity Concession of Rs. 1.50 per unit for 20HP and Rs. 1.25 per unit for greater than 20 HP and up to 150 HP.

Apparel Sector:

Salary grant of Rs. 2,500/month per person to units for 5 years (Up to Rs. 5 lakh per annum).

B. Investment more than Rs. 10 crore & up to RS. 50 crore in Plant & Machinery: (Medium Enterprises):

- a. Investment Promotion Assistance up to 40% of Plant & Machinery and Building.
- b. Financial Assistance up to Rs. 5 lakh for patent/IPR registration.
- c. 50% reimbursement of expenditure towards Infrastructure development (Road, water electricity, etc.) up to Rs. 1 crore.
- d. 50% reimbursement for expenditure towards setting up of ETP up to Rs. 1 crore.

Special Package for Specific Sectors:

Textile Sector:

- a. Interest subsidy of 2% for 5 years for investment Up to Rs. 25 crore in new unit.
- b. Interest subsidy of 7% for 5 years for New Composite Unit with investment more than Rs. 25 crore
- c. Interest subsidy of 5% for 5 years for investment more than Rs. 25 crore in standalone unit/expansion diversification, etc.

Apparel Sector:

- a. Interest Subsidy of 5% for 7 years on term loan.
- b. Exemption from Electricity Duty for 7 years.
- c. Fixed Power Tariff fixed at Rs. 5 per unit for 5 years.
- d. Employment Generation Subsidy up to Rs. 5,000 month for 5 years.
- e. Reimbursement of Training expense up to Rs. 13,000 per employee for 5 years.
- f. 100% reimbursement of Stamp Duty & Registration fee.

EXPORTS & IMPORTS

India is the second largest textile and apparel exporter for the entire value chain from natural fibres to man-made fibres. The global textile and apparel trade is estimated to be US \$ 937 billion in 2023. In global trade China had 31 percent share followed by Bangladesh and Germany 5 percent each, Turkey, Italy, Vietnam and India 4 percent each.

India is the second largest textile exporter with 7.4 percent global market share and fifth largest garment exporter, accounting for roughly 3.1 percent of global market share, (Source: WTO, 2023). The country holds a notably stronger global position as a textile exporter than as an apparel exporter.

India's textile and apparel exports have fallen by 11 percent in the last five years as per Textile Ministry data. This decline is attributed to factors like rising production costs, outdated technology, and inadequate infrastructure. Over 100 textile units are currently classified as 'sick' impacting thousands of jobs and hindering industry growth. The industry struggles to compete with countries like Bangladesh and Vietnam due to lower labour costs and policy advantages.

There is an urgent need to limit the export slide. The focus needs to be on value-added products. Shift from basic textiles to technical textiles, functional apparel, and design-driven segments. Also, there is a need for fresh Free Trade Agreements (FTAs). Better trade deals with key markets to reduce tariffs and boost exports. Need for investing in automation, modernisation; R&D to improve efficiency and product quality and building strong brands and promoting Indian textiles globally.

FOREIGN TRADE POLICY 2023:

Foreign Trade Policy, 2023 is based on four pillars, namely:

- Shift from incentives to tax remission.
- Export promotion through collaboration - Exporters, States, Districts. Greater Trade facilitation through technology, automation and continuous process re-engineering.
- Focus on emerging areas such as E-Commerce, Developing Districts as Export Hubs , Streamlining SCOMET policy.

Some of the key highlights of the Policy include:

- Continuation of Advance Authorisations / EPCG/ EOU/ DFIA Schemes.
- Reduction in user charges fees for MSMEs under the Advance Authorisation/ EPCG Scheme.
- Online approval without physical interference for the issue of Advance Authorisation, EPCG issuances, Revalidation of authorisations and Extension of export obligation period, which reduce processing time to one day, from earlier three to seven days.
- Revamp of the 'e-Certificate of Origin' platform to provide for self certification.
- Paperless filing of export obligation discharge applications.
- Extending the benefit of the self- ratification scheme for fixation of norms to two star and above status holders.
- Rationalisation of Status Holder Thresholds to enable more exporter to achieve such status.

The Policy has also taken an effective step towards internationalising the Indian Rupee (INR) by facilitating International Trade settlement in INR and extending policy benefits for payments realised in INR through special Vostro accounts, set-up as per the Reserve Bank of India. Further, the policy seeks to create a suitable policy framework to transform the Country into a merchandise trade hub and accordingly, provides that the merchandise trade of shipment of goods from one foreign country to another without touching Indian Ports, involving Indian intermediary, is allowed for all goods, even if the same are restricted otherwise except for goods/items in the CITES and SCOMET list, but subject to compliance with the Reserve Bank of India guidelines. This will enable certain places in India, like GIFT city, etc. to be significant hubs for merchandise trade, like Dubai, Singapore, and Hong Kong.

The Policy envisions to boost manufacturing in India and also focuses on the prevailing requirements of the Indian market by providing Prime Minister Mega Integrated Textile Region and Apparel Park (PM MITRA) Scheme to claim benefits under the Common Service Provider Scheme of EPCG.

Most importantly, the introduction of “One- Time Amnesty Scheme” was a huge relief to exporters, who were unable to fulfil their export obligations against the EPCG and Advance Authorisations.

REMISSION OF DUTIES & TAXES ON EXPORT PRODUCTS:

The Government approved Scheme for Remission of Duties and Taxes on Export Products (RoDTEP) for all export goods excluding garments and made-ups with effect from 1st January, 2021 to boost exports and for making them globally competitive. Under this Scheme, embedded Central, State and local duties/taxes are refunded to the exporters.

The Ministry of Commerce & Industry issued a notification to amend the Schedule of the Remission of Duties or Taxes on Export Products (RoDTEP) Scheme with effect from 1st May, 2023. It added 149 tariff lines at the 8-digit level and deleted 52 tariff lines from the RoDTEP schedule. The amendment affects cotton and some other textile and apparel (T&A) items. The amendment includes five tariff lines under HSN Code 5201 (cotton fibre). Tariff line 52010021, 54021110 and 54025990 related to the textile and apparel sector have been deleted from the schedule.

The Director General of Foreign Trade (DGFT) vide Notification No. 70/2023 dated 8th March 2024 extended the RoDTEP Scheme beyond 30th June, 2024, which shall now be applicable till 30th September, 2024. The Government has extended RoDTEP to AA holders (except deemed exports), SEZ and EOU units from 11th March, 2024 and till 31st December, 2024. RoDTEP rates pertaining to textiles for SEZ/EOU/AA Exports have also been declared by introducing a new Appendix 4RE. There has been no change in the existing rates of RoDTEP for textile items. For DTA units the scheme has been extended for one year i.e. up to 30th September 2025.

REBATE OF STATE & CENTRAL TAXES AND LEVIES SCHEME:

On 13th August, 2021, the Government issued Notification to continue Rebate of State and Central Taxes and Levies (RoSCTL) Scheme with effect from 1st January, 2021 till 31st March, 2024 for textile exports of Apparel /Garments (Chapters 61 & 62) Made-ups (Chapter-63) in exclusion from RoDTEP Scheme for these chapters.

The scheme has been extended till 31st March, 2026 vide Ministry of Textiles Notification dated 8th February, 2024.

The other products excluding Chapter 61, 62 and 63, which are not covered under RoSCTL shall be eligible to avail the benefits, if any, under RoDTEP along with other products.

INTEREST EQUALISATION SCHEME:

Reserve Bank of India notified on 4th December, 2015, Interest Equalization Scheme on Pre and Post Shipment Rupee Export Credit effective from 1st April, 2015. The Scheme has been extended till 30th June, 2024. The interest equalization @ 3% per annum will be available on exports under 416 Tariff Lines, which include readymade garments and made-ups, fabric of all types, etc. MSME manufacturer exporter will be provided interest equalization @ 3%, Manufacturing Exporters and Merchant Exporters will get @ 2%. The Scheme has been extended till 30th September, 2024 only for MSME exporters.

As per Trade Notice dated 20th April, 2023 issued by DGFT all the exporters seeking benefits under the Interest Equalization Scheme with effect from 01st May, 2023 are required to submit an acknowledgement consisting of UIN, valid for a financial year shall be unique to a specific bank. If a Scheme beneficiary desires to take advantage of the benefits of the Scheme from multiple banks, a new UIN must be provided for each bank. As per Trade Notice dated 25th May, 2023 the net annual subvention has been capped at Rs. 10 crore per IEC in a financial year and the same is applicable from 1st April, 2023. On 30th September, 2024, the Scheme has been extended till 31st December 2024.

DUTY DRAWBACK RATES:

The Central Government notified All Industry Rates of Duty Drawback on 28th January, 2020, which were effective up to 29th October, 2023. Revised rates of All Industry Duty Drawback have been notified on 20th October, 2023 and are effective from 30th October, 2023.

The Department of Revenue Ministry of Finance on 30th April, 2024 revised rates of Duty Drawback with effect from 3rd May, 2024 on following items:

- (i) HSN 630201 – Bed linen, table linen, toilet linen and kitchen linen of cotton from 2.6 to 3% with upper cap increased from Rs.40.50 per kg. to Rs.68.90 per kg.
- (ii) HSN 630202- Bed linen, table linen, toilet linen and kitchen linen of MMF and cotton blend – from 2.40% to 2.60% keeping the upper cap unchanged.

IMPORTANT NOTIFICATIONS:

The Director General Foreign Trade issued many Notifications/ Circulars during the year. Some important ones are:

- On 17th April, 2023 laid out a procedure for applying for Amnesty Scheme for one-time settlement of default in export obligation by certain exporters and directed the Regional Authorities to process any such applications within three working days. Applications for Advance Authorization/EPCG (Export Promotion for Capital Goods) discharge/closure shall be filed online by logging on to the DGFT website and navigating to services
- Introduced online facility of requesting appointment for virtual meeting/personal hearing to the exporters with effect from 1st June, 2023.
- Trade Notice No. 07/2023-24 dated 8th June, 2023 informed that all imports made under Advance Authorization Scheme on or after 13th October, 2017 and up to and including 9th January, 2019, which could not meet the pre-import condition will be regulated by making payment as prescribed in the Customs Circular dated 7th June, 2023
- On 14th June, 2023 removed China from the list of countries, whose textiles entering the Country are exempt from tests for the presence of Azo dyes. The DGFT updated the list in which the UK, Canada, Australia, South Korea and Japan have been added, while China was removed.
- On 17th July, 2023 simplified norms for exporters to avail benefits of Advance Authorization Scheme, under which free imports of input materials for export purposes are allowed. This comes in the backdrop of declining merchandise goods exports that fell for the fifth consecutive month in June amid demand slowdown in the west and China.
- To further improve Ease of Doing Business decided to discontinue the issuance of physical copy of Authorization for Restricted Imports with effect from 19th October, 2023.
- Trade Notice on 10th November, 2023 regarding Pilot Launch of the Upgraded Electronic Bank Realization Certificate (eBRC) system for self- certification by Exporters, which is effective from 15th November, 2023.
- Trade Notice dated 26th December, 2023 extended the Date of Mandatory electronic filing of Non-Preferential Certificate of Origin through Common Digital Platform to 31st December, 2024.
- The Directorate General of Systems and Data Management, CBIC issued Advisory No.06/2021 dated 5th January, 2024 for E-scrip to avail Export Incentive Schemes (RoSCTL, RoDTEP). E-scrip module is developed by ICEGATE, CBIC to provide a digital service to exporters to avail benefits defined under various incentive schemes like RoDTEP (Remission of Duties and Taxes on Exported Produced) and RoSCTL (Rebate of State and Central Taxes and Levies). The Scheme provides for rebate of Central, State and Local duties/taxes/levies, which are not refunded under any other duty remission Schemes.

- Notification No. 77/2023 dated 16th March, 2024 imposed Minimum Import Price of US\$ 3.50 per kilogram on import of Knitted Fabric under Chapter 60 till 16th September, 2024, which was extended till 31st December 2024. Government further included eight new HSN Codes in this list.
- Extended date for mandatory filing of Non- Preferential Certificate of Origin through Common Digital Platform to 31st December, 2024.

VALUE OF RUPEE:

During the year, there were ups and downs in the value of Rupee against US Dollar. As per Reserve Bank of India rates at the end of each month of 2023-24 have been as under:

Month	April 2023	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan 2024	Feb	March
Re/Dollar	81.78	82.63	82.04	82.25	82.68	83.06	83.27	83.35	83.12	83.08	82.92	83.37

EXPORT OF TEXTILES:

India has a share of around 5 percent of global textile and apparel trade. Gradually country has to stop exporting cotton fibre and then yarn and fabrics. It should become a net exporter of finished products only. The details of exports of textiles and clothing (including silk, jute and handicrafts) and their percentage shares in the total export of all commodities since 2014-15 are given below:

Value in US\$ Million			
Year	Export of all Commodities	Export of Textiles & Clothing (includes jute, coir and handicrafts)	Share textile, clothing in total export
2014-15	3,10,338	40,068	12.91
2015-16	2,62,291	38,984	14.86
2016-17	2,75,852	39,110	14.17
2017-18	3,03,526	37,546	12.36
2018-19	3,29,536	38,397	11.65
2019-20	3,13,139	35,177	11.23
2020-21	2,91,808	31,585	10.82
2021-22	4,22,004	44,435	10.52
2022-23	4,51,070	36,686	8.13
2023-24	4,37,113	35,874	8.20

EXPORTS OF TEXTILES & APPAREL:

India's textile and apparel exports have been largely flat around US \$ 35 billion for last seven years, while Vietnam and Bangladesh have gained market share on the back of Free Trade Agreements and Least Developed Countries.. The information about Exports during the year 2017-18 to 2023-24 is tabulated below:

Value in US \$ Million							
Commodity	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Ready Made Garments	16,707	16,138	15,488	12,272	16,015	16,191	14,532
Cotton Textiles (Incl. Other Textiles)	11,212	12,405	10,263	11,128	17,166	11,085	12,258
Man – made Textiles	5,413	5,551	5,324	4,180	6,294	5,412	5,081
Woolen Textiles	187	222	181	109	166	205	192
Silk Product	69	76	72	76	109	95	119
Handloom Products	356	344	319	323	269	183	140
Carpets	1,430	1,482	1,373	1,491	1,790	1,366	1,395
Jute Products	350	340	357	397	537	462	353
Total Textiles & Apparel	35,724	36,558	33,377	29,976	42,346	34,999	34,070
Handicrafts	1,823	1,838	1,798	1708	2,088	1,689	1,802
Total T&A (including Handicrafts)	37,547	38,396'	35,175	31,684	44,434	36,688	35,872

Value in US\$ Billion							
Items	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Fibre	2.8	3.0	1.9	2.7	4.01	1.57	1.88
Filament	1.2	1.3	1.2	0.8	1.48	0.98	0.88
Yarn	4.3	4.8	3.5	3.4	6.48	3.60	4.54
Fabric	4.6	4.8	5.1	4.1	5.90	5.31	4.96
Apparel	16.7	16.2	15.5	12.3	16.02	16.20	14.55
Home Textiles	5.2	5.5	5.3	5.7	7.14	5.84	5.99
Others	1.9	2.0	1.8	1.9	2.41	2.16	2.04
Total T&A	36.7	37.5	34.2	30.9	43.44	35.66	34.84
Total Merchandise Export	303.5	330.1	313.4	291.8	422.04	447.46	437.06
Shares of T&A	12.1%	11.4%	10.9%	10.6%	10.3%	8.00%	7.97%

Source: DGCIS

TARIFF ON TEXTILE & APPAREL PRODUCTS:

Average tariff on textile products faced by India vis-à-vis competing countries in EU and USA is as follows:

Country	EU	USA
India	5.9%	6.2%
Bangladesh	0.0%	3.9%
Vietnam	6.1%	5.5%
Pakistan	0.0%	5.3%

Source: PIB

EXPORT OF COTTON TEXTILES:

In the Financial Year 2023-24 export of cotton textiles increased by 8.25% to a level of US\$ 10.40 billion from US\$ 9.58 billion in the previous year. The item-wise details and their share in exports are given below:-

Commodity	Value US\$ Million					Percentage Share				
	2019-20	2020-21	2021-22	2022-23	2023-24	2019-20	2020-21	2021-22	2022-23	2023-24
Yarn	2.77	2.90	5.52	2.75	3.78	27	33	40	29	36
Fabrics	2.48	2.00	3.11	2.53	2.25	24	22	23	27	22
Made-ups	4.94	4.00	4.99	4.30	4.37	49	45	37	44	42
Total	10.19	8.90	13.62	9.58	10.40	100	100	100	100	100

Source: TEXPROCIL

The export of cotton textiles inclusive of cotton fiber, their value in US\$ and growth percentages during the year 2017-18 to 2023-24 have been as under:

Commodity	Cotton Fibre		Total Cotton Textiles		Total Cotton Textiles (Including Raw Cotton)	
	US\$ Bn.	% Growth	US\$ Bn.	% Growth	US\$ Bn.	%Growth
2016-17	1.63	-	10.70	-	12.33	-
2017-18	1.89	15.85	10.71	0.09	12.60	2.19
2018-19	2.10	11.11	11.56	7.94	13.66	8.41
2019-20	1.05	-50	8.73	-25.48	9.78	28.40
2020-21	1.89	80.00	8.78	-0.57	10.67	9.10
2021-22	2.82	49.20	13.62	56.04	16.52	54.83
2022-23	0.78	-72.35	9.58	-31.62	10.35	-37.35
2023-24	1.12	42.75	10.40	8.66	11.52	11.23

Source: TEXPROCIL

COUNTRYWISE EXPORT OF COTTON TEXTILES:

Top ten importers of cotton textiles from India are as under:

Country	US\$ Million			Percentage Share			% Change
	2021-22	2022-23	2023-24	2021-22	2022-23	2023-24	
World	13,607.18	9573.29	10402.24	100.00	100.00	100.00	8.66
U.S.A.	3,311.98	2437.55	2627.92	24.34	25.46	25.26	7.81
Bangladesh	3,015.92	1,558.36	1783.00	22.16	16.28	17.14	14.42
Sri Lanka	479.66	425.55	415.12	3.53	4.45	3.99	-2.45
Germany	264.45	259.80	224.75	1.94	2.71	2.16	13.49
China	799.84	233.22	713.99	5.88	2.44	6.86	206.06
U.K.	243.84	216.75	219.61	1.79	2.26	2.11	1.32
Egypt	281.90	205.87	218.75	2.07	2.15	2.10	6.26
UAE	215.82	201.22	220.80	1.59	2.10	2.12	9.73
Vietnam	-	113.11	195.78	-	-	1.88	73.09
S. Korea	297.80	169.74	164.05	2.19	1.77	1.58	-3.35
Total of Top 10	8911.21	5821.17	6783.77	65.49	59.62	65.20	16.53

Source: TEXPROCIL

COUNTRYWISE EXPORT OF COTTON YARN:

The Export of Cotton Yarn increased by 83.18 percent in Quantity terms and by 37.25 Percent in value terms during the year 2023-24 as compared to the Exports in 2022-23:

Country	Quantity Million Kgs.		Growth %	Value US \$ Million		Growth%
	2022-23	2023-24		2022-23	2023-24	
Bangladesh	239.04	428.05	79.08	1017.01	1355.05	33.24
China	67.86	256.34	277.75	208.69	696.23	233.62
Egypt	43.27	67.34	55.61	171.87	203.42	18.35
Vietnam	21.28	54.85	157.79	83.96	166.06	97.79
Portugal	30.66	42.53	79.87	119.23	136.99	14.90
Turkey	20.66	37.16	38.73	89.49	126.79	41.68
Sri Lanka	19.85	24.56	23.71	97.10	96.81	-0.29
South .Korea	19.91	26.16	31.37	82.06	84.04	2.41
Columbia	13.15	25.73	95.74	48.06	68.99	43.55
Peru	27.25	45.41	66.65	103.13	133.46	29.41
Total Top 10	502.92	1,008.13	100.46	2,020.60	3,067.84	51.83
World.	663.14	1,214.71	83.18	2,752.41	3,777.57	37.25

Source: TEXPROCIL

EXPORT OF COTTON MADE-UPS AND FABRICS:

The Export of Cotton Made-ups and Fabrics decreased by 2.88 percent during 2023-24 as compared to the previous year:

Country	Value in US \$ Million		% Share		Growth %
	2022-23	2023-24	2022-23	2023-24	
World	6820.88	6624.68	100.00	100.00	-2.88
U.S.A.	2418.17	2612.65	35.45	39.44	8.04
Bangladesh	541.35	427.94	7.94	6.46	-20.95
Sri Lanka	328.45	318.31	4.82	4.80	-3.09
United Kingdom	215.42	218.48	3.16	3.30	1.42
UAE	193.27	212.02	2.83	3.20	9.70
Germany	202.67	174.30	2.97	2.63	-14.00
Senegal	180.61	156.24	2.65	2.36	-13.49
Nigeria	141.23	144.63	2.07	2.18	2.41
Australia	142.53	136.34	2.09	2.06	- 4.35
France	134.17	128.31	1.97	1.94	- 4.36
Total Top 10	4497.87	4529.22	65.95	68.37	0.70

Source: TEXPROCIL

EXPORT OF MAN-MADE FIBRE (MMF) TEXTILES:

In the Financial Year 2023-24, export of MMF Textiles decreased by 0.75 percent to the level of US \$ 5,741.80 million from US\$ 5,785.60 million in the previous year. The item wise details and their share in exports are given below:

Item	Value US \$ Million					Percentage share				
	2019-20	2020-21	2021-22	2022-23	2023-24	2019-20	2020-21	2021-22	2022-23	2023-24
Yarn	1,769.87	1,346.75	2,339.48	1,687.48	1,496.00	30.00	29.00	34.25	29.17	26.06
Fabrics	2,158.25	1,544.46	2,075.41	2,099.59	2,223.90	36.58	33.25	30.39	36.29	38.73
Made-ups	1,469.35	1,380.69	1,735.26	1,537.36	1,620.40	24.90	29.72	25.40	26.57	28.22
Fibre	503.02	373.25	679.59	461.17	401.50	8.52	8.03	9.96	7.97	6.99
Total	5,900.49	4,645.15	6,829.74	5,785.60	5,741.80	100.00	100.00	100.00	100.00	100.00

Source: MATEXIL

The export of Manmade Textiles inclusive of MM fibre, their value in US\$ and growth percentage during the year 2017-18 to 2023-24 has been as under:

Year	M.M.FIBRE		MMF TEXTILES		Total	
	US\$ Mn.	Growth	US\$ Mn.	% Growth	US\$ Mn.	% Growth
2016-17	597.12	-	5,256.37	-	5,853.49	-
2017-18	586.81	-1.73.	5,437.27	3.44	6,024.08	2.91
2018-19	570.80	-2.73	5,568.09	2.40	6,138.89	1.90
2019-20	503.02	-11.87	5,397.47	-3.07	5,900.49	-3.89
2020-21	373.25	-25.80	4,271.19	-20.88	4,645.15	-21.28
2021-22	679.59	+82.07	6,150.15	+43.99	6,829.74	+47.03
2022-23	461.17	-32.12	5,324.43	-13.42	5,785.60	-15.29
2023-24	401.50	-12.94	5,340.30	0.29	5,741.80	-0.75

Source : MATEXIL

COUNTRYWISE EXPORT OF MMF TEXTILES:

Among the top 10 export markets, exports of MMF Textiles to UK and USA have shown growth of 13.26 percent and 2.05 percent respectively during the year 2023-24 as compared to 2022-23.

Country	Value in US\$ Million			
	2022-23	2023-24	Net Change	% Growth
USA	876.4	894.5	+18.1	+2.05
Turkey	553.8	460.2	-93.6	-16.91
UAE	404.0	394.8	-9.2	-2.28
Bangladesh	377.2	341.4	-35.8	-9.50
Sri Lanka	209.0	200.1	-8.9	-4.26
Italy	170.5	133.0	-37.5	-22.00
Brazil	169.8	154.0	-15.8	-9.31
UK	142.5	161.4	+18.9	+13.26
Germany	165.7	140.3	-25.4	-15.33
Spain	126.9	127.3	+0.4	+0.31
RoW	2,589.8	2,734.8	+145.0	+5.60
Total	5,785.6	5,741.8	-43.8	-0.75

Source: MATEXIL

- USA was the leading market for Indian MMF textiles during 2023-24 with 15.6% share in total exports followed by Turkey 9.5 percent UAE 6.9 percent, and Bangladesh 6.4 percent.

EXPORT OF READYMADE GARMENTS:

The current value of apparel manufacturing in India is estimated at \$52 billion, with \$14 to \$17 billion from apparel exports and approximately \$35 to \$38 billion for the domestic market. Indian garment exports have been hovering at around \$14 billion to \$16 billion for last five years. In the financial year 2023-24, India experienced a 10.2 percent decline in garments exports, totalling \$14.53 billion, compared to the previous year's figure of \$16.19 billion 2022-23. The year wise figures of RMG exports are as under:

Year	Value US\$ Mn.	% Growth	Value Rs. crore	% Growth
2018-19	16,158.2	-	1,12,706.9	
2019-20	15,509.4	- 4.0	1,09,702.0	-2.7
2020-21	12,289.7	-20.8	90,639.4	-17.4
2021-22	16,019.2	+30.3	1,19,466.5	+ 31.8
2022-23	16,193.4	+ 1.1	1,29,985.4	+ 0.8
2023-24	14,532.0	-10.2	1,20,316.6	-7.4

Source: AEPC

EXPORT OF READYMADE GARMENTS – MAJOR COUNTRIES:

The major buyers of Readymade garments from India are as under:-

Value in US\$ Million.				
	Country	2022-23	2023-24	% Change
	Total Export	16,176.3	14,517.9	-10.3
1	USA.	5,409.2	4,719.0	-12.8
2	UK.	1,470.0	1,328.9	-9.6
3	UAE (FTA Country)	1,217.9	1,137.9	-6.6
4	Germany	988.6	784.5	-20.6
5	France	694.7	643.6	-7.4
6	Netherlands	627.7	632.1	0.7
7	Spain	643.9	599.3	-6.9
8	Saudi Arabia	412.1	380.2	-7.7
9	Italy	377.4	331.4	-12.2
10	Australia (FTA Country)	302.7	321.1	6.1
11	Japan (FTA Country)	207.3	192.0	-7.4
12	Korea RP (FTA Country)	59.0	56.0	-5.2
13	Mauritius (FTA Country)	35.0	38.06	10.4
14	Switzerland (FTA Country)	37.4	37.00	-1.0
15	Norway (FTA Country)	19.8	18.6	-5.9
16	Iceland (FTA Country)	0.4	0.3	-26.8

Source: AEPC

EXPORT OF TECHNICAL TEXTILES:

During 2023-24, the exports of technical textiles reached US\$ 2,585.90 million from US\$ 2,505.80 million recording a growth of 3.2 percent.

Value in US\$ Million

Category	2017-18	2018-19	2019-20	2020-21	2011-22	2022-23	2023-24	Growth
Packtech	693.37	809.23	740.32	784.45	1,258.40	1,042.70	982.70	-7
Indutech	315.71	370.54	441.74	522.72	911.30	743.60	775.80	+4
Mobiltech	208.68	234.70	212.48	187.22	156.80	182.90	230.60	+25
Clothtech	133.10	158.06	141.40	226.56	59.30	63.70	62.50	-2
Homotech	130.55	115.56	130.90	125.64	92.80	76.60	89.60	+17
Meditech	90.55	94.23	111.53	119.72	190.50	199.30	233.30	+12
Agrotech	71.54	85.04	85.59	89.18	68.50	76.60	88.20	+15
Buildtech	6.04	11.28	14.61	17.90	5.50	5.20	5.20	-1
Protech	28.56	47.36	45.97	39.48	63.30	77.60	73.70	-5
Geotech	24.18	34.90	31.33	27.51	8.30	9.00	16.60	+185
Sportech	91.52	87.88	100.77	73.40	28.50	28.60	27.70	-3
Specialty Fibre	0.44	0.76	1.05	1.58	-	-	-	-
Grand Total	1,794.24	2,049.54	2,057.69	2,215.36	2,843.20	2505.80	2,585.90	+3.2

Source: MATEXIL

During 2023-24:

- Geotech was the largest exported segment registering export growth of 185 percent, Mobitech showed export growth of 25 percent followed by Homotech with 17 percent, Agrotech with 15 percent and Meditech with 12 percent.
- However, segments like Buildtech, Clothtech, Packtech, Protech and Sportech segments experienced decline in exports by 1 percent, 2 percent, 7 percent, 5 percent and 3 percent respectively.
- Packtech was the largest exported segment representing 38 percent of the exports share, followed by Indutech with 30 percent, Meditech 9 percent and Mibiltech with 9 percent in 2023-24.

EXPORTS FROM STATE:

The export of textiles and apparel from the State has been as under:

Value in US\$ Million

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Madhya Pradesh	1,068	1,101	1,175	1,234	1,112	1,199	1,905	1,095	1,129
All India	35,995	35,372	35,722	36,557	33,379	29,904	44,263	36,686	358.74
% share	2.96	3.11	3.28	3.37	3.33	4.00	4.30	2.98	3.14

Source: FIEO

The textiles and apparel exports from the State consisted of:

Value in US\$ Million

	2020-21	2021-22	2022-23	2023-24
Cotton	242.25	375.28	N.A.	N.A.
Cotton Yarn	347.18	674.57	378.85	422.01
Cotton Fabric, Made- ups, etc	342.00	484.97	417.48	459.88
MMF Yarn, Fabrics, Made- , ups, etc	267.51	369.80	299.14	246.90
Total	1,198.94	1,904.62	1,095.47	1,128.79

As per information provided by the State Government at Global Investors Summit- 2023, Textile Exports from the State were Rs.15,600 crore in 2021-22, which consisted of Processed cotton 55 percent, Made-up textile articles 28 percent, Man Made Textiles 7 percent, Apparel & Clothing Accessories 3% percent and others 7 percent.

As per Economic Survey of 2022-23 and 2023-24 of the State, the top ten items of exports from the State consisted of following items of textile and apparel:

Value -Rs. in crore

Commodity	2022-23	2023-24
Cotton	-	4,991
Cotton & Cotton Yarn	8,693	-
Readymade Garment	4,495	4,337

EXPORT PERFORMANCE OF MEMBER-MILLS:

Majority of our Member-Mills are exporting yarn, while some are exporting woven fabrics, knitted fabrics and knitted garments too. The overall export performance of Member-Mills (those, who reported) since 2010-11 has been as under:

Value Rs. in lakh

Year	Yarn	Woven/Knitted Fabrics	Knitted Garments	VSF etc.	Total
2010-11	1,02,019.36	16,454.75	29,865.18	31,435.00	1,79,774.29
2011-12	1,67,583.68	20,094.89	26,938.25	39,689.00	2,54,305.82
2012-13	1,96,772.92	60,327.71	22,497.01	44,223.00	3,23,820.64
2013-14	2,32,911.25	63,160.46	34,170.33	44,461.00	3,74,703.04
2014-15	1,94,939.00	41,545.00	44,059.33	45,555.00	3,26,098.33
2015-16	2,45,134.00	38,309.00	66,594.00	42,083.00	3,92,120.00
2016-17	2,02,248.00	39,665.00	62,825.00	56,536.00	3,61,274.00
2017-18	2,16,921.00	64,875.00	62,811.00	48,370.00	3,92,977.00
2018-19	2,01,394.00	33,886.00	55,415.00	NA	2,90,696.00
2019-20	NA	NA	NA	50,951.00	50,951.00
2020-21(10 Mills)	2,02,184.61	71,269.21	21,003.88	31,170.00	3,25,627.70
2021-22(13 Mills)	4,15,561.58	102,742.65	27,752.20	69,054.00	6,15,110.43
2022-23(13 Mills)	3,26,036.87	93,117.45	37,306.21	46,000.00	5,02,460.53
2023-24 (13 Mills)	3,20,035.71	1,29,395.04	26,018.04	50,217.24	5,25,666.03

*Includes cotton exports Rs. 2,217.24 lakh.

The above figures would have been much higher had all the Member-Mills reported the export data to the Association.

IMPORT OF TEXTILES IN THE COUNTRY:

With the removal of quantitative restrictions on imports, Indian markets are flooded with imported textile products. India's textile imports have gone up substantially. The growth pattern of import of textile products in the Country for last seven years is as under:

Commodity	Value in US \$ Million						
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Ready Made Garments	773	1,106	1,145	881	1,265	1,755	1,489
Cotton Textiles	2,448	2,067	2,759	1,528	2,143	3,404	2,443
Man – made Textiles	2,265	2,670	2,682	2,334	3,433	3,783	3,275
Woolen Textiles	372	425	332	200	320	358	347
Silk Product	251	202	210	99	148	271	209
Handloom Products	11	15	10	6	2	1	2
Carpets	94	101	118	72	100	36	34
Jute Products	181	170	242	176	248	294	301
Total Textiles & Apparel	6,395	6,756	7,498	5,296	7,659	9,902	8,100
Handicrafts	923	794	764	577	534	579	848
Total T&A(including Handicrafts)	7,318	7,550	8,262	5,873	8,193	10,481	8,948

Source: DGCIS

TAXATION

CENTRAL TAXES:

UNION BUDGET PROPOSALS FOR 2024-25:

- A. In view of the Lok Sabha Election in April- May, 2024, the Hon'ble Union Minister of Finance & Corporate Affairs, Smt. Nirmala Sitharaman presented digital Interim Union Budget for 2024-25 on 1st February, 2024. Major highlight of this Budget relating to Textile Industry are as under:
- **RoDTEP:** Allocation of funds for Remission of Duties and Taxes (RoDTEP) Scheme increased from Rs. 15,669 crore to Rs. 16,575 crore.
 - **RoSCTL:** Allocation of funds for Rebate of State and Central Taxes and Levies (ROSCTL) scheme increased from Rs. 8,404.66 crore to Rs. 9,246 crore and continuation of the **RoSCTL** Scheme up to 31st March, 2026 for a duration of two years.
 - **ATUFS:** Allocation of funds for Amended Technology Upgradation Fund Scheme (ATUFS) remained the same at Rs. 675 crore.
 - **PM MITRA:** Allocation of funds for PM MITRA scheme increased from Rs. 52.30 crore to Rs. 300 crore.
 - **Interest equalization scheme:** Allocation of funds for Interest equalization scheme reduced from Rs. 3700 crore to Rs. 1700 crore.
 - **MAI grants:** Allocation of funds for MAI grants decreased from Rs. 250 crore to Rs. 200 crore.
 - **National Technical Textile Mission:** Allocation of funds for NTTM increased from Rs. 170 crore to Rs. 375 crore.
 - **Textile Cluster Development Scheme:** Allocation of funds for TCDS increased from Rs. 70 crore to Rs. 100 crore.
 - **Integrated Processing Development Scheme:** Allocation of funds for IPDS increased from Rs. 26 crore to Rs. 30 crore.
 - **Raw Material Supply Scheme:** Allocation of funds for RMSS increased from Rs. 160 crore to Rs. 172.17 crore.
- B. The Hon'ble Finance Minister presented the final Budget for 2024-25 on 23rd July, 2024. Major highlight of this Budget relating to Textile Industry are as under:
- The import duty on "Methylene Diphenyl Disocyanate" (MDI-used for manufacture of Spandex yarn) reduced to 5% from the current 7.5% to rectify inversion in duty.
 - Filling material from duck or goose for use in manufacture of garments for exports reduced to 10% from the current 30%.
 - Plans to introduce new tariff lines for technical textiles.
 - Government will reimburse EPFO contributions of employers up to Rs. 3,000 per month for two years for all new hires.
 - One-month wage to new entrants in all formal sectors in three installments up to Rs. 15,000.
 - Incentive to both employee and employer for EPFO contributions in the specified scales for the first four years.
 - Credit Guarantee Scheme for facilitating term loans to MSMEs for purchase of Machinery and equipment without collateral or third party guarantee.
 - New mechanism for facilitating continuation of bank credit to MSMEs during stress period.
 - The allocation for various Schemes of Textile Ministry in the Budget is as under:

Rs. in crore

Scheme	2023-24	2024-25
National Technical Textile Mission	170.00	375.00
Integrated Scheme for Skill Development	115.00	166.00
Textile Cluster Development Scheme	70.00	100.00
PM MITRA Park Scheme	52.30	300.00
ATUFS	675.00	635.00
Integrated Processing Development	26.00	30.00
Production Linked Incentive Scheme	5.00	45.00

TRADE NOTICES, CIRCULARS, STANDING ORDERS, PUBLIC NOTICES, ETC:

Trade Notices, Circulars, Public Notices, Standing Orders, etc. issued by the Commissioner, Customs and GST, Indore /Bhopal Central Board of Indirect Taxes & Customs, the Ministry of Finance, Director General of Foreign Trade, Reserve Bank of India, Commercial Taxes Department, Government of Madhya Pradesh, etc. during the year in relation to Textile Industry were circulated to Member Mills, as soon as these were received/known. Some of the important notifications/ circulars issued and judgments delivered during the year are given below:

- The concessional Customs Duty for key textile machineries were to expire on 31st March, 2023 after which 8.25% customs duties were to be charged on these machineries. The Union Finance Ministry on 30th March, 2023 decided to extend the concessional customs duty on textile machineries till March, 2025.
- The Supreme Court on 28th April, 2023 upheld the validity of mandatory fulfillment of a pre-import condition that allowed exporters to claim credit of raw materials bought before actually exporting the product. It set aside the Gujarat High Court ruling that held that such fulfillment in order to claim exemption of Integrated Goods and Services Tax (IGST) and GST compensation cess on input imported for the production of goods to be exported on the strength of an Advance Authorization (AA) was arbitrary and unreasonable.
- As per Notification dated 10th May, 2023, it has been made mandatory for all businesses with annual turnover of over Rs 5 crore to move to e-invoicing for business to business transaction under Goods & Services Tax (GST) from 1st August, 2023
- The Income Tax Appellate Tribunal, New Delhi in the matter of the A.C.I.T. Central Circle, New Delhi v/s M/s Shahi Exports Pvt. Ltd., New Delhi held that interest reimbursement under Technology Upgradation Scheme is Capital Receipt.
- Ministry of Finance vide its Notification No. 52/2023 - Customs dated 5th September 2023 amended Notification No. 50/2017 - Customs, dated 30th June, 2017 and extended the exemption on Basic Customs Duty (BCD by changing the speed specification of the shuttleless looms from RPM to "Meters Per Minute" against the items in S.No. 460. The amended list is as given below:
 - Shuttleless Rapier Looms (above 650 meters per minute);
 - Shuttleless Waterjet Looms (above 800 meters per minute);
 - Shuttleless Airjet Looms (above 1000 meters per minute);
 - Parts and components for use in the manufacturing of shuttleless looms
 - Parts and components for use in the manufacturing of shuttle less looms.
- The GST Authority decided to impose a time limit of 30 days for reporting of invoices from date of invoice, on e-invoice portals. This time limit is applicable for taxpayers with AATO greater than or equal to Rs. 100 crore. Earlier the time limit proposed by the Central Board of Indirect Taxes and Customs (CBIC) was seven days.
- The Andhra Pradesh High Court ruled that the Goods and Services Tax (GST) Authorities cannot seize items in transit without first conducting an inquiry into the authenticity of the transaction, even if the original supplier does not have GST registration. The case relates to a trader who bought iron scrap from a company in Vijayawada, Andhra Pradesh, and subsequently sold it to another company based in Medak district, Telangana. The officials can, however, initiate an inquiry against both the trader and the driver, providing them with an opportunity to establish their case.
- The Central Government, on the recommendation of the Goods and Services Tax Council, vide Notification No. SO 4073 (E) dated 14th September, 2023, constituted State Bench of the Goods and Services Tax Appellate Tribunals. One of such Tribunals is to be located at Bhopal. Union Finance Minister announced in the Lok Sabha that a Bench of GST Appellate Tribunal will be opened in Indore. This will be the second Bench in the State after Bhopal.

- The Ministry of Finance exempted payments made for goods imported through ocean freight from 5 per cent Integrated GST with effect from 1st October, 2023.
- The Directorate General of Foreign Trade issued Public Notice No. 34/2023 dated 13th October, 2023 in respect of availing of Input Tax Credit in respect of transfer of Duty free imported or indigenously procured material, on which GST has been paid, between the units located in same or different States, the availment of input Tax Credit shall be governed as per provisions of the GST Law and Rules made there under.
- The Department of Revenue by Notification No. 10/2023 - Customs (ADD) dated 12th October, 2023 levied Anti-dumping Duty on import of Flax Yarn below 70 Lea (42nm) from China for a period of 5 years
- In the case of M/s Nahar Industrial Enterprises Limited on 31st October, 2023, Hon'ble Rajasthan High Court has upheld the claim of ITC refund despite their being multiple inputs and output supplies subject to fulfillment of precondition that accumulated ITC has arisen due to rate of GST on inputs being higher than the rate of GST on output supplies. Further, Hon'ble High Court has held the ground of having closing stock for rejection of refund claim as legally unsustainable.
- In the matter of Indian Flexible Intermediate Bulk Container Association V/s Director General of Foreign Trade on 7th November, 2023 Hon'ble Delhi High Court held that the Notification dated 29th January 2020, retrospectively revoking the benefit under the Merchandise Exports from India Scheme (MEIS) with effect from 7th March, 2019, is unjustified and unsustainable in law.
- The Reserve Bank of India (RBI) on 17th November, 2023 with a view to provide greater operational flexibility to exporters, permitted banks maintaining special rupee vostro account as per the provisions of the RBI Circular dated 11th July, 2022 to open an additional special current account for its exporter constituent exclusively for settlement of their export transactions. The RBI says that the idea is to provide greater operational flexibility to exporters.
- In the matter of M/s Sun craft Energy Private Limited (MAT 1218 of 2023) Calcutta High Court held that before directing the appellant to reverse the Input Tax Credit, the Department should have taken an action against the supplier. Unless and until the Department is able to bring out the exceptional case, where there has been collusion between the supplier and respondent, no proceedings can be initiated against the appellant. The Department filed the SLP against the order issued by Hon'ble High Court However, Hon'ble Supreme Court as dismissed the SLP filed by the Department and upheld the order of Hon'ble Calcutta High Court.
- Central Board of Indirect Taxes & Customs on 28th December, 2023 issued Notification extending the time limit specified under sub- section (10) of section 73 for issuance of order under sub-section (9) of section 73 of the said Act, for recovery of tax not paid or short paid or of input tax credit wrongly availed/utilized for the financial years 2018-19 and 2019-20 till 30th April, 2024 and 31st August, 2024 respectively.
- In case of M/s Eicher Motors Limited, (W.P. Nos.16866 & 22013 of 2023 W.M.P Nos.17280, 16111, 21382 & 21384 of 2023) Madras High Court held that, if the GST was collected by a registered person, is credited to the account of the Government before last date for filing the monthly returns, to that extent, the tax liability of such registered person will be discharged from the date, when the amount was credited to the account of the Government. And taxpayer is not liable for Interest, to that extent; return is filed after the date.
- A new Regulation for the assessment year 2024-25 has been conferred by the Central Government mandating that purchasers settle payments for goods procured from MSMEs within 45 days for delivery. Furthermore all outstanding dues to MSMEs must be cleared before 31st March, 2024. Failure to adhere to these timelines will result in the pending payment being treated as income subject to taxation.
- In the matter of DCIT Vs Saint-Gobain India Pvt. Ltd. Income Tax Appellate Tribunal (ITAT), Chennai held that the Government subsidy received for investment promotion is indeed a capital receipt. This decision was grounded in the principle that the purpose and nature of the subsidy—aimed at encouraging significant investments in the State—align with the characteristics of a capital receipt.
- According to the Guidelines issued on 30th March, 2024, when a taxpayer is simultaneously being investigated by the State GST and DGGI officers on different subject matters, the Principal Commissioner will “consider the feasibility” of only one of the offices pursuing all the cases with respect to the taxpayer. The Guidelines have also set a deadline for tax officers to conclude an investigation within one year of their initiation. CBIC further said that in initiating an investigation with respect to a listed company or PSU or seeking details from them, the CGST officers should issue “official letters instead of summons” to the designated officer of the entity, detailing the reasons for investigation and seeking submission of documents within a “reasonable time period”.

IMPORT DUTY ON TEXTILE PRODUCTS :

S.No.	Product	BCD (%)
1	Cotton +10% SWS on BCD & AIDC)	11%(5% BCD + 5% AIDC
2	Cotton Waste	10
3	Cotton Yarn	10
4	Cotton Fabric	10
5	Polyester/Viscose Fibre	5
6	Polyester /Viscose Waste	5
7	Polyester / Viscose Yarn	5
8	Polyester / Viscose Fabrics	20
9	Garments	10
10	Made-ups	10
11	Textile Machinery	7.5
12	Shuttless Looms and its Parts/components	Nil upto 31 st March, 2025

GOODS & SERVICE TAX IN THE TEXTILE SECTOR:

The Goods & Services Tax (GST) was introduced in the Country with effect from 1st July, 2017. The tax is to be equally apportioned as CGST and MPGST between Centre and State. In inter-state trade this tax is levied as IGST. The present rates of GST applicable to Textile Sector are as under:

Product	Rate(%)
Cotton	5
Cotton Cone Yarn	5
Cotton Hank Yarn	5
Cotton Waste	5
Cotton Fabric	5(No refund of ITC accumulated)
Cotton Garment/Made-Ups Without brand name having retail sale price below Rs.1000 (per piece)	5
Cotton Garment/Made-Ups with brand name having retail sale price of Rs.1000and above (per piece)	12
Polyester Garment/Made-Ups Without brand name having retail sale price below Rs.1000 (per piece).	5
Polyester Garment/Made-Ups With brand name having retail sale price of Rs.1000 (per piece) and above.	12
Polyester Fibre & Waste	18
Polyester Yarn	12
Polyester Fabric	5(No refund of ITC accumulated.)

Blended Textile Products (Yarn/Garment Made- ups)	Cotton predominant –5 Polyester Predominant -12
Textile Machinery	18
Handloom Machinery	0
Scrip under Foreign Trade Policy	0
Job Work of all Textile Products (Cotton & Synthetic)	5
GTA Services including Transport of Cotton	5
Commission Agent Transaction	18
Testing Service	18
Security Service	18
Hank Yarn Obligation	18
Polypropylene/polypropylene woven and non- Woven bags and sacks whether laminated or not used for packing of goods.	12/18* *Effective from 01.01.2020

STATE TAXES:

As per amendment dated 14th August, 2023 to The Madhya Pradesh Investment Facilitation Act, 2008, “ Any entrepreneur, who fails to comply with the conditions or the undertaking in the self- certification given to the Nodel Agency or the other Department or authorities shall be liable for a penalty imposed by the Competent Authority , which may extend to fifty thousand rupees for the first failure and for the second or subsequent failures with a penalty which may extend to one lakh rupees”.

As per Press Note dated 21st July, 2023 of the Department for Promotion of Industry & Internal Trade the period of validity of Industrial License is being extended from three years to fifteen years for all kind of Licenses henceforth to be granted under Industries (Development & Regulation) Act in line with the validity of Licenses being issued for Defense items as a measure for Ease of Doing Business. An extension of three years may be granted by concerned Administrative Ministry/Explosive Section (DPIIT) as per the guidelines.

MANPOWER

INITIATIVES BY UNION MINISTRY OF LABOUR:

Ministry of Labour & Employment has taken an initiative for consolidating various labour laws by notifying following Labour Codes, which have been passed by the Parliament:

- The Code on Wages, 2019.
- The Occupational Safety, Health and Working Conditions Code, 2020.
- The Code on Social Security, 2020.
- The Industrial Relations Code, 2020

The Rules under these codes are yet to be finalized by State/Union Territories and as such there is delay in implementation of these codes.

STEPS TAKEN BY MINISTRY OF TEXTILES TO PROVIDE FRESH IMPETUS TO GENERATE EMPLOYMENT:

The Union Minister of State for Textiles has taken a number of steps to support employment generation and provide livelihood in the Textile Sector. Textile Sector in India provides largest source of employment in the Country with over 4.5 million people employed directly including large number of women and rural population through various schemes and public programmes.

The Government with a view to enhance the skills of the workforce in the textile sector has formulated **Samarth Scheme** under a broad skilling policy framework with the objective of providing opportunity for sustainable livelihood. The implementation period of the scheme has been extended till 31st March, 2026.

The scheme aims to provide demand driven and placement oriented National Skill Qualification Framework (NSQF) compliant skilling programmes to incentivize and supplement the efforts of the industry in creating jobs in the organized textile sector and related sectors, covering the entire value chain of textiles excluding spinning & weaving and in addition is also provides skilling and skill-up-gradation in the traditional textile sectors.

The skilling programme under the scheme is implemented through Implementing Partners (IPs) comprising Textile Industry/Industry Associations, State Government agencies and Sectoral Organizations of Ministry of Textiles. Under the Scheme 2,47,465 persons have been trained as on 11th December, 2023.

In a Meeting of the Empowered Committee for Scheme for Capacity Building in Textiles Sector (SAMARTH) held on 11th July, 2023, the panel of implementing partners has been broadened with empanelment of 43 new implementing partners and additional target of training around 75,000 beneficiaries. The Funding pattern has also been revised with an increment of 5% in cost norms, which will give much needed additional financial support to industries imparting skill under this Scheme. The Ministry has partnered with 157 Textile Industries / Industry Associations, 16 Central /State Government Agencies and 3 Sectoral Organizations of the Ministry for undertaking training programmes under SAMARTH. 1,83,844 beneficiaries trained across 1880 centers under the Scheme for Capacity Building in Textile (including 3691 beneficiaries at 41 centers in Madhya Pradesh), which consist more than 85% of the beneficiaries being women. More than 70% of the beneficiaries trained have been provided placement.

INDUSTRIAL RELATIONS:

By and large industrial relations in the Member-Mills remained peaceful and cordial during the year.

LABOUR POLICY OF THE STATE:

The Labour Policy of State notified in 2007 continuous. Some of the highlights of the Policy are:

- Efforts to be made to train the workers with co-ordination of Department of Industries and Department of Technical Education for the industries.
- Considering the global competitiveness, preference to be given to industry which can employ maximum workers and help development of ancillary Industries.
- Strict compliance of Provisions of Contract Labour (Regulations & Abolition) Act to be ensured.
- Provisions of MP Industrial Relations Act, 1960 to be reviewed.
- Demands raising unnecessary disputes not to be considered closure and layoff to be allowed considering the advantages and disadvantages.
- Powers to renew licenses under the Factories Act, 1948 to the factories employing upto 500workmen to be vested with Joint Director/Deputy Director.
- The three stage inspection system to be abolished except in hazardous and most hazardous factories.
- Labour Courts to be placed under the State High Court.

THE MADHYA PRADESH LABOUR WELFARE BOARD:

The rate of employees' contribution to Labour Welfare Fund continues to be Rs.10 per employee and the employers' contribution to Rs.30 per employee payable for every six months with effect from 2nd February, 2013. The minimum employers' contribution is Rs. 1500 for each of the half year. The employees drawing upto Rs. 10,000 p.m. have been included.

The Labour Department of the State has compounded offences under Section 31 (1) and (2) of the Madhya Pradesh Labour Welfare Fund Act, 1952 by monetary penalties ranging from Rs. 10,000 to Rs. 40,000.

PAYMENT OF WAGES ACT, 1936:

The Central Government has specified Rs. 24,000 p.m. as the wages under section 1(6) of the Act, effective from 28th August, 2017. The State Government has specified that pay/ wages to the persons employed by any factory or their Contractor shall be paid only by cheque or by crediting the wages in their bank accounts.

CONSUMER PRICE INDEX:

The Consumer Price Index Numbers for Industrial Workers (Base 2016=100 from September, 2020) of All India and various Centres in Madhya Pradesh during the year 2023- 2024 have been as under:

	All India	Chhindwara	Bhopal	Indore	Jabalpur
Linking factor to 1982 series	4.63	4.03	4.83	4.73	4.53
Linking factor to 2016 series	2.80	2.94	3.11	2.70	3.00
April, 2023	134.2	129.6	129.5	127.4	134.5
May	134.7	130.4	130.1	127.6	139.7
June	136.4	135.4	131.6	128.2	141.0
July	139.2	137.5	135.5	130.9	143.0
August	139.2	137.3	136.8	132.5	143.0
September	137.5	136.5	135.1	130.4	140.0
October	138.4	137.4	135.2	131.1	140.4
November	139.1	140.3	135.8	133.8	141.3
December	138.8	139.6	135.4	131.9	140.8
January, 2024	138.9	140.0	135.0	132.7	141.7
February	139.2	143.00	134.2	134.0	141.3
March	138.9	142.2	135.00	133.0	140.8

THE MINIMUM WAGES IN THE STATE:

Minimum wages were revised by the State Government with effect from 1st October, 2014. Rise above 241 points of All India Consumer Price Index is to be compensated half yearly based on average rise in July-December and January-June Index @ of Rs.25 per point. The minimum wages payable to various categories of workmen with effect from 1st October, 2014 onwards with half yearly increase in Dearness Allowance are as under:

With effect from	Highly Skilled		Skilled		Semi-Skilled		Unskilled	
	p.m.	p.d.	p.m.	p.d.	p.m.	p.d.	p.m.	p.d.
	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.
1 st October, 2014	9735	374	8435	324	7057	271	5939	228
1 st April, 2015	10035	386	8735	336	7357	283	6239	240
1 st June, 2015	10035	386	8735	336	7357	283	6500	250
1 st October, 2015	10110	389	8810	339	7432	286	6575	253
1 st April, 2016	10385	399	9085	349	7707	296	6850	263
1 st October, 2016	10485	403	9185	353	807	00	6950	267
1 st April, 2017	10660	410	9360	360	7982	307	7125	274
1 st October, 2017	10660	410	9360	360	7982	307	7125	274
1 st April, 2018	10860	418	9560	368	8182	315	7325	282
1 st October, 2018	10910	420	9610	370	8232	317	7375	284
1 st April, 2019	11235	432	9935	382	8557	329	7700	296
1 st October, 2019	11485	442	10185	392	8807	339	7950	306
1 st April, 2020	11810	454	10510	404	9132	351	8275	318
1 st October, 2020	11935	459	10635	409	9257	356	8400	323
1 st April, 2021	12235	471	10935	421	9557	368	8700	335
1 st October, 2021	12335	474	11035	424	9657	371	8800	338
1 st April, 2022	12660	487	11360	437	9982	384	9125	351
1 st October, 2022	12860	495	11560	445	10182	392	9335	359
1 st April, 2023	13185	507	11885	457	10507	404	9650	371
1 st October, 2023	13360	514	12060	464	10682	411	9825	378

The State Government revised Minimum wages with effect from 1st April, 2024. The variable Dearness Allowance up to 311 points of All India Consumer Price Index for Industrial Workers was merged with Basic pay and difference of 311 points to 400 points @ Rs 25 per point amounting to Rs.2,225 per month was allowed as variable Dearness Allowance. Thus revised Monthly wages are fixed as under:

	Unskilled Rs.	Semi Skilled Rs.	Skilled Rs.	Highly Skilled Rs.
Basic	9,575	10,571	12,294	13,919
Variable Dearness Allowance	2,225	2,225	2,225	2,225
Total Per Month	11,800	12,796	14,519	16,144
Total per day	454	492	558	621

Any increase above 400 points as half yearly average of All India Consumer Price Index for Industrial Workers during January- June and July- December will be paid @ Rs 25/- per point increase as variable Dearness Allowance.

The Association filed a Writ Petition in Madhya Pradesh High Court; Indore Bench against Minimum Wage Revision Order dated 4th March, 2024 of the State, whereby the minimum wages were increased by about 25% w.e.f. 1st April, 2024. The High Court granted stay against implementation of this Order. On 1st August, 2024, the High Court directed the Office of Labour Commissioner to convene a Meeting of the petitioners and stakeholders for consideration of classification of wages Industry wise and Region wise and complete the exercise within two months and the stay continues. Due to Stay of the Order dated 24th March, 2024, the Labour Commissioner of the State has issued another Order on 24th May, 2024 declaring normal increase of Variable Dearness Allowance of Rs. 350 per month from 1st April, 2024 on 14 points increase @ Rs.25 per point detailed as under:

	Unskilled Rs.	Semi Skilled Rs.	Skilled Rs.	Highly Skilled Rs.
Basic	6,500	7,057	8,435	9,735
Variable Dearness Allowance	3,675	3,975	3,975	3,975
Total Per Month	10,175	11,032	12,410	13,710
Total Per Day	391	424	477	527

VARIABLE DEARNESS ALLOWANCE UNDER SETHI AWARD :

For the employees of the Textile Mills, who were signatories to the submissions made to Shri P. C. Sethi, the then Chief Minister of Madhya Pradesh, the rate of Dearness Allowance underwent the following changes during the year 2023-24:

Quarter	For Indore, Ujjain, Nagda Ratlam Sanawad, Khandwa and Burhanpur Centre	For Bhopal Centre.
April-June 2023	Rs. (+) 26.20	Rs. (+) 120.38
July-September, 2023	(+) 133.37	(+) 191.94
October-December, 2023	(+) 252.45	(+) 527.04
January-March, 2024	(+) 71.44	(-) 32.53
April – June, 2024	(+) 69.07	(-) 71.57

PAYMENT OF BONUS ACT, 1965 :

The Payment of Bonus Act, 1965 was last amended on 1st January, 2016. Eligibility limit of salary or wage for payment of bonus is Rs. 21,000 per month (section 2 (13)). Ceiling of salary or wage for calculation of bonus is Rs. 7,000 per month or minimum wages, whichever is higher (section 12). Minimum bonus payable @ 8.33% of salary or wage continues.

EMPLOYEES' PROVIDENT FUND AND MISCELLANEOUS PROVISIONS ACT, 1952:

- Rate of contribution is 12% of pay from 22nd September, 1997, which is payable on maximum ceiling of Rs. 15,000 from 1st September, 2014.
- From 1st June, 2018, the rates of Provident Fund Administrative Charges is 0.50% of pay, Minimum Administrative Charges for non- functioning establishments are Rs. 75/- per month and for the operational establishment/factories, Rs 500 per month. For establishments exempted under EPF, Inspection charges @ 0.18% minimum Rs. 500 is payable in place of Administrative charges. In case of establishment exempted under EDLI Scheme, Inspection Charges of 0.05% minimum Rs. 1.00 is payable.
- By Notification dated 28th April, 2021 issued by the Ministry of Labour & Employment the amount of maximum benefit under Employment Deposit Linked Insurance has been increased from Rs. 6.00 lakh to Rs. 7.00 lakh to the family members of deceased employee. The Minimum assurance benefit of Rs. 2.50 lakh is available to eligible family members of deceased employee, who was a member for a period of 12 months in one or more establishments preceding his death.
- The Employees Provident Fund Organization issued on 14th June, 2023 the Form of Joint Option and list of admissible documents as proof of joint option under Para 26(6) of Employees Provident Fund Scheme, 1952 for of contribution on salary exceeding Rs. 15,000 p.m. and eligibility of pension on actual salary under Employees' Pension Scheme, 1995.
- EPFO vide circular dated 24th July, 2023 declared interest for the financial year 2022-23 @ 8.15% to be credited to account of each member. The Central Government has approved rate of interest of 8.25% for financial year, 2023-24.
- Hon'ble Supreme Court in the matter of Assistant Provident Fund Commissioner, Gurgaon V/s G4 Security Services (India) Ltd., which was decided on 17th August, 2023, held that definition of "basic wages" contained in Employees Provident Fund & Miscellaneous Provisions Act, read with Section 6 of this Act, excludes various allowances particularly, House Rent Allowance, conveyance allowance and washing allowance from the definition and as such no PF contribution are liable to be paid by the employer in the Fund. The appeal of APFC, Gurgaon was dismissed.
- On 16th January, 2024 the Employees Provident Fund Organisation had issued instructions that Aadhar will no longer be considered as proof for Date of Birth/Change of Date of Birth.

EMPLOYEES' PENSION SCHEME, 1995:

- Minimum Pension of Rs. 1,000/- per month is payable in respect of a member widow(er)/nominee/dependent parents, whereas children and orphan pension of Rs.250/- per month and Rs. 750/- per month respectively is payable with effect from 1st September, 2014.
- The Employees Provident Fund Organization issued instructions on 20th February, 2023 in respect of employees and employers, who had contributed under para 26(6) of the EPF Scheme on salary exceeding Rs. 5,000/6,500 and did not exercise option under Para 11(3) of the pre-amendment Scheme, while being members of EPS, 1995 and were members prior to 1st September, 2014 and continued to be members on or after 1st September, 2014 can now submit their options to avail pension on salary exceeding Rs. 5,000/6,500.

- On 3rd May, 2023 the Ministry of Labour & Employment has issued two Notifications making amendments to Employees Provident Fund & Miscellaneous Provisions Act and Employees' Pension Scheme **with** reference to Supreme Court judgment dated 4th November, 2022. In respect of members who have exercised joint option for contributing under para 11 of the Employees' Pension Scheme and found eligible, the employer's contribution shall be 9.49% of the basic salary and allowances exceeding Rs. 15,000 per month. This amendment is applicable from 1st September, 2014.
- In order to ensure that employers process remaining Applications for Validation of Options/ Joint Options of Employees/Pensioners, (who have opted for pension on higher wages) of Employees Pension Scheme, the Chairman, Central Board of Trustees of Employees Provident Fund approved the proposal to grant another extension of time for the employers for uploading wage details online etc till 31st May, 2024.

EMPLOYEES' STATE INSURANCE ACT, 1948:

- With effect from 1st October, 2016, ESI Scheme introduced in all the Districts of Madhya Pradesh. Rate of Contribution Employer 3.75% + Employee 0.75% of wages. The wage ceiling for coverage under the Scheme is Rs. 21,000/- per month.
- The Ministry of Labour & Employment issued a Gazette Notification on 7th March, 2022 amending Rule 55(1) of Employees State Insurance (Central) Rules, 1950 by inserting a new proviso, according to which an insured woman, who is in receipt of maternity benefit and due to reason of which a shorter contribution period is available to her in the contribution period in which the maternity benefit falls, she will be qualified to claim sickness benefit in the corresponding benefit period, if the contribution in respect of her was payable for not less than half the number of days available for working in such contribution period. The amendment is applicable from 20th January, 2022.
- The Employees' State Insurance Corporation notified on 10th October, 2023 its decision not to claim interest payable due to delayed payment of contribution for any reason in any contribution period (taken as a whole), which does not exceed Rs. 300. This comes in force from 1st November, 2023.
- The Employees State Insurance Corporation (ESIC) issued a Circular on 13th November, 2023 extending the portability in service delivery of ESIC on pan India basis. It has been decided that IPs and beneficiaries may visit dispensary/hospital across India for consultation and issuance of medicines through 'Dhanvantari' module only, irrespective of dispensary allotted on the beneficiary card.
- On 14th March, 2024 the Employees State Insurance Corporation had issued instructions that Aadhar will no longer be considered as proof for Date of Birth/Change of Date of Birth.

ATAL BEEMIT VYAKTI KALYAN YOJNA:

Atal Beemit Vyakti Kalyan Yojana (ABVKY) is a welfare measure for the employees covered under the Employees' State Insurance (ESI) Act, 1948 in the form of cash compensation up to 90 days once in lifetime of the worker in the contingency of Insured Persons' (IPs') unemployment.

The Scheme came into force on 1st July, 2018 and extended twice from 1st July, 2020 to 30th June, 2021 and from 1st July, 2021 to 30th June, 2024 in order to provide relief to those IPs, who became unemployed during the Covid-19 pandemic.

INDUSTRIAL DISPUTES ACT, 1947:

The Madhya Pradesh Labour Laws (Amendments) and Miscellaneous Provisions Act, 2015 issued on 27th November, 2015 provides for:

- For retrenchment, three months' notice to a workman to be retrenched is required as against one month's notices earlier (Section 25F)
- At the time of retrenchment, a worker has to be paid 15 days average pay for every completed year of continuous service or any part in excess of six month or an amount equivalent to three months average pay, whichever is more (Section 25F).
- The provisions of Chapter V-B will apply to an establishment in which not less than 300 workmen are employed on an average per working day for preceding twelve months. Earlier it was applicable in case of establishment employing not less than hundred workmen (Section 25K).

TRADE UNIONS ACT, 1926:

In the matter of All Escorts Employees' Union v/s State of Haryana, the Supreme Court has held that the Bye-laws of the Union cannot be amended to allow erstwhile employees of the group to continue as members, even if they pay subscription fees. The various provisions of the Trade Union Act implicitly confine the membership to those, who are workmen of the industry, where they are employed.

Factories Act, 1948:

- On 16th March, 2021 State Government amended Factory Rule 6(2) to clarify that the Factory License can be issued for up to ten years or more.
- The State Government vide Order dated 23rd June, 2011, allowed employment of women workers in all the shifts in the Textile Industry (including in night shifts from 10:00 P.M. to 5:00 A.M.). State Government notified on 24th June, 2016 conditions for ensuring Safety of Workers required to work between 8.00 PM to 6.00 AM.
- Factories Act, 1948 was amended by the State on 27th November, 2015 to allow:
 - i. Work for more than 48 hours in a week subject to working of not more than 12 hours in a day (13 hours including interval for rest), 60 hours in a week including overtime, no working for more than seven days at a stretch. Total hours of overtime not to exceed 125 in a quarter.
 - ii. Every workman, who works for 180 days or more in a calendar year will get in the same calendar year one day leave with wages for every 20 days work. 180 days to include lay-off, maternity leave and leave earned in the year prior to that in which leave is enjoyed
- Under the Madhya Pradesh Lok Sevaonke Prabandhan ki Guarantee Adhiniyam, 2010, a Notification was issued on 10th March, 2022 whereby the time limit for issuing various certificates under Factories Act, Contract Labour (Regulation & Abolition) Act, etc. have been prescribed to be 30 days
- As per Notification dated 2nd June, 2023 issued under Madhya Pradesh Panchayat Raj evam Gram Swaraj Adhiniyam, 1993 the permission to erect a building or to make alteration or addition to an existing building or to reconstruct a building in the Industrial Areas notified by Industries Department or MSME Department will be presumed to have been granted, if no refusal of such permission is communicated by the concerned Authority within 30 days of the receipt of application.

BUILDING & OTHER CONSTRUCTION WORKERS WELFARE CESS ACT, 1996:

As per the judgment passed by the Supreme Court in the matter of UPPTCL vs CG Power and Industrial Solutions regarding the levy of Cess amount under BOCW Act, BOCW Cess is not leviable on the supply of equipment. While discussing some landmark Supreme Court decisions, it was observed that the object of the Act was the welfare of workers engaged in building and construction work, and the clear statutory scheme of the Act excludes a supply contract from within its ambit. The charging section provides for the levy and collection of Cess at such rate not exceeding 2% of the cost of construction incurred by the employer. The condition precedent for the levying BOCW Cess under the Act was construction, repair, demolition or maintenance. Mere installation or erection, which did not involve construction work, was not amenable to BOCW Cess.

PAYMENT OF GRATUITY ACT, 1972:

With an amendment to Payment of Gratuity Act with effect from 3rd April, 1997, the definition of employee under Section 2(e) of the Act includes all the employees who are employed for wages. With effect from 29th March, 2018, the ceiling on amount payable under the Act has been increased to Rs. 20.00 lakh.

INTER-STATE MIGRANT WORKMEN ACT, 1979:

The factories may have to recruit workmen brought only licensed or registered human resources agents and may have to maintain a register of every Inter State Migrant Workmen, they employ.

CONTRACT LABOUR (REGULATION & ABOLITION) ACT, 1970:

As per State Government amendment dated 5th May, 2020, the license granted under Rule 25 or renewed under Rule 29 shall be valid for the period of the contract for which it is made, under Contract Labour (Regulation & Abolition) Madhya Pradesh Rules, 1973.

APPRENTICES ACT, 1961:

The Central Ministry of Skill Development & Entrepreneurship have amended Apprenticeship Rules, 1992, which came into force with effect from 25th September, 2019.

The major amendments include:

- Apprenticeship Training shall be from 6 months to 3 years.
- Apprentice undergoing training shall be a trainee and not a worker and labour laws will not apply to him.
- Employers with four or more workers are eligible to engage apprentices and for establishments having more than 30 workers, it shall be obligatory.
- In no month number of apprentices should be less than 2% and more than 18% of total strength.
- Minimum rate of stipend shall vary from Rs.5,000 to Rs.9,000 p.m. based on the qualification of the apprentice.
- In the 2nd year, the stipend payable shall be increased by 10% and in the 3rd year by further 15%.
- Apprentices during basic training for a period up to 3 months shall be paid 50% of stipend.

The Ministry of Skill Development and Entrepreneurship (MSDE) made the National Apprenticeship Promotion Scheme (NAPS) as part of the Direct Benefit Transfer (DBT) Scheme, providing direct Government benefits to all apprentices to prevent delay in payments as well as significantly reduce any leakages in the system. Direct Benefit Transfer (DBT) under the National Apprenticeship Promotion Scheme (NAPS) has been implemented from 1st July, 2023. This transition involves significant changes:

- New Contracts: All new NAPS contracts will be DBT-based, with stipends directly transferred to apprentices.
- Ongoing Contracts: Establishments may choose DBT or non-DBT for ongoing contracts.
- Reimbursement: Establishments with NAPS contracts can claim reimbursement for stipends paid until 30th June, 2023.

IMPORTANT DECISIONS OF COURTS:

The Association has been circulating quarterly summary of important decisions of the Supreme Court and the High Courts on labour matters. Certain important decisions are also being circulated separately and gist of some others included in the Monthly News Letters.

On 2nd May, 2023 the Supreme Court turned down the plea of workmen to give priority to their dues in case of liquidation of an insolvent company. It upheld Section 53 of the Insolvency & Bankruptcy Code, which limits the dues to 24 months preceding the date of order of liquidation and then rank their dues with the Secured creditors. It stated the waterfall mechanism and the hierarchy prescribed to the workmen's dues should be seen in the overall objective of the Code, which is to explore whether the corporate debtor can be revived so that their jobs are not lost.

TEXTILE SECTOR SKILL COUNCIL:

The Textile Sector Skill Council (TSC) was set up on 22nd August, 2014 under the aegis of National Skill Development Corporation and promoted by CITI, 14 leading Textile Industry Associations (including MPTMA) and Export Promotion Councils. It is committed to develop World Class Skilled Manpower for all segments of Textile Industry.

EMPLOYMENT:

As per Economic Survey 2023-24 in terms of sectoral share of factory employment (total persons engaged), the Textile Industry's share is 10 percent and that of Wearing Apparel is 7 percent in the Country. However, the data relating to the State is not available.

MISCELLANEOUS:

Three Apparel Training & Design Centres (Sponsored by Apparel Export Promotion Council and Ministry of Textiles) are functioning at Indore, Dewas and Chhindwara in the State. National Institute of Fashion Technology sponsored by Ministry of Textiles is working at Bhopal since 2008.

POWER

The law relating to Electricity in the State is governed by the Madhya Pradesh Vidyut Sudhar Adhiniyam, 2000, along with provisions of the Electricity Act, 2003 and Rules made there under.

POWER TARIFF 2023- 24 AND 2024-25:

The Madhya Pradesh Electricity Regulatory Commission (MPERC) notified Tariff for the rates for 2023-24 on 28th March, 2023 and made applicable from 5th April, 2023. The rates for 2024-25 were notified on 6th March, 2024 and made applicable from 1st April, 2024.

A comparative statement of Tariff (HV-3.1: Industrial) applicable to Textile Industry for the year 2023-24 and those for 2024-25 are as under:

HV-3.1 Industrial	2023-24 From 5 th April, 2023		2024-25 From 1 st April, 2024	
1. Fixed Charges Rs./KVA of Billing Demand p.m.:				
11 KV Supply	Rs. 384.00		Rs. 384.00	
33 KV Supply	616.00		616.00	
132 KV Supply	704.00		704.00	
220 KV/400 KV Supply	704.00		704.00	
2. Energy Charge Rs./Unit :	Up to 50% L.F	Above 50 L.F.	Up to 50% L.F.	Above 50% L.F.
11 KV Supply	Rs. 7.30	Rs. 6.30	Rs.7.30	Rs. 6.30
33 KV Supply	7.26	6.21	7.26	6.21
132 KV Supply	6.85	5.86	6.85	5.86
220 KV/400 KV Supply	6.40	5.40	6.40	5.40
3. Average Monthly Factor Incentive:				
96%	1% on E C		1% on E C	
97%	2% on E C		2% on E C	
98%	3% on E C		3% on E C	
99%	5% on E C		5% on E C	
100%	7% on E C		7% on E C	
4. Power Factor Penalty :				
For each 1% decrease in Average monthly power Factor				
Below 90%	1% on E C for each 1% fall		1% on E C for each 1fall	
" 85%	5% + 2% for each 1% fall		5% + 2% for each 1% fall	
" 70%	Disconnection		Disconnection	

5. Billing Demand :	Actual Maximum KVA or 90% of CD, whichever is higher	Actual Maximum KVA or 90% of CD, whichever is higher
6. Load factor calculation:	$\frac{\text{Monthly Cons(kwh)} \times 100}{\text{No. of Hrs. in Billing Month} \times \text{Demand (KVA)} \times \text{P.F.}}$	$\frac{\text{Monthly Cons.} \times 100}{\text{No. of Hrs. in Billing Month} \times \text{Demand(KVA)} \times \text{P.F.}}$
7. Time of the day Surcharge/Rebate : 6 PM to 10 PM Full year 10 P.M to 6 A.M. Rebate (April. –October) 10 PM to 6 AM Rebate (November-March)	Normal Rate of E.C. 10% of Normal E.C. 20% of Normal E.C.	See Note No. 5 below
8. For excess Demand : a) Energy Charges b) Fixed Charges	No Extra Charge (i) Up to 120% Normal Charge (ii) @ 1.30 times the charges for demand over 120% of CD when MD is up to 130% (iii) @ 2.00 times the charges (when MD exceeds 130%) for demand recorded over & above 130% of CD in addition to (i) above	No Extra Charge (i) Up to 120% Normal Charge (ii) @ 1.30 times the charges for demand over 120% of CD when MD is Up to 130%. (iii) @ 2.00 times the charges (when MD exceeds 130%) for demand recorded over & above 30% of CD in addition to (i) above.

Notes for 2023-24 / 2024-25:

1. Rebate of Rs.1.00 per unit in Energy Charges is applicable for incremental consumption with reference to consumption of 2015-16 same months.
2. Rebate of Rs. 1.00 per or 20%, whichever is lower to new HT Connection/Green Field Connections for which Agreements finalized during and after 2016-17.
3. Rebate of Rs. 2.00 per unit Captive Consumers, who have reduced their Captive Consumption and taken power from DISCOM, Base year shall be financial year preceding the year of request for switchover.
4. Rebate of Rs.1.00 per unit for those Open Access Consumers, who have reduced their Open Access consumption, which have been availing Open Access during 2022-23/ 2023-24 and recorded incremental consumption in any month of the current year
5. TOD Surcharge/ Rebate for 2024-25:

	Peak/ Off-Peak Hours	Surcharge/ Rebate on Normal Rate
1.	Peak Hours:(06:00 AM to 09:AM & 5:00 PM to 10:00 PM)	Surcharge of 20% of Normal rate of Energy Charge.
2.	Off- Peak/Solar Hours.(09:00 AM to 5:00 PM)	Rebate of 20% of Normal rate of Energy Charge.
3.	Off-Peak Hours-(10:00 PM to 6:00 AM next day)	Rebate of 10% of Normal rate of Energy Charge.

METERING CHARGES:

Metering Charges from the consumers' have been abolished with effect from 26th December, 2020:

FIRST AMENDMENT TO MADHYA PRADESH ELECTICITY REGULATORY COMMISSION (TERMS & CONDITIONS FOR DETERMINATION OF TARIFF FOR SUPPLY AND WHEELING OF ELECTRICITY AND METHODS AND PRINCIPLES OF FIXATION CHARGES) REGULATION, 2023:

These Regulations were notified on 17th March, 2023 and will be valid till March, 2027. Accordingly, Fuel & Power Purchase Adjustment Surcharge (FPPAS) is to be applicable on monthly basis for increase in cost of power, supplied to consumers, due to change in Fuel Cost and Power Purchase Cost with reference to cost of supply approved by Commission. The rate of Fuel & Power Purchase Adjustment Surcharge (FPPAS) has been notified as under:

Billing Period one month from	Rate Percent Charge on Energy Charges
24 th April, 2023	*5.0
24 th May, 2023	8.41
24 th June, 2023	6.16
24 th July, 2023	3.15
24 th August, 2023	4.86
24 th September, 2023	1.78
24 th October, 2023 to 24 th February, 2024	Zero
24 th March, 2024	(-) 4.72
24 th April, 2024	1.78
24 th May, 2024	3.92
24 th June, 2024	1.03
*On Fixed charges as well as Energy Charges	

POWER TARRIF 2023-24 AND 2024-25 FOR SEZ, PITHAMPUR:

The Rates for the year 2023-24 from 7th April, 2023 and those for 2024-25 from 1st April, 2024 were made applicable -:

Category	2024-25		2023-24	
	Fixed Charges per KVA	Energy Charges per Unit	Fixed Charges per KVA	Energy Charges per KVA
11 KV Supply	Rs. 193.00	Rs.3.77	Rs. 193.00	Rs. 3.65
33KV Supply	230.00	3.76	228.00	3.74

ELECTRICAL INSPECTION FEES:

Electrical Inspection fees have been provided in Notification dated 29th November, 2011 for various classes of installations. Inspection and testing of electrical installations only above 33 Kilo Volt will be carried out as stated in Notification dated 14th August, 2015.

The Levy of Fees for Inspection and Approval of Electrical Installation (Madhya Pradesh) Rules, 2017 continue to prevail.

ELECTRICITY SUPPLY CODE – 2021:

The MP Electricity Supply Code, 2021 came into force w.e.f. 12th August, 2021 to align with the Electricity Rules, 2020 notified on 31st. December, 2020 by Union Ministry of Power.

On 7th December, 2023, the Madhya Pradesh Electricity Regulatory Commission (MPERC) notified, First Amendment to Electricity Supply Code, 2021, which has been made effective from 8th December, 2023. Second and Third Amendments have been notified on 26th January, 2024 and 31st May, 2024 and made applicable from the date of notification.

On 13th December, 2023 the MPERC has dismissed the Petition filed by three Discoms under Clause 17 read with Clause 7(A) 6 of MPERC (Grid Interactive Renewable Energy System and Related Matters) Regulations 2022 and under Clause 6.40 of Madhya Pradesh Electricity Supply Code, 2021 for seeking levy of Grid Support Charges on all categories of consumers.

STATE ADVISORY COMMITTEE OF MPERC:

State Advisory Committee of MPERC has been reconstituted on 5th January, 2022, Our Industry is represented by Shri Mahendra P. Khante, Vice President, Vardhman Fabrics, for a period of three years.

ELECTRICITY DUTY:

Electricity Duty @ 9% is payable by the Textile Industry on purchase of power from DISCOMs, but Duty @ 12% is payable on Captive Power Consumption with effect from 1st April, 2016 (earlier it was 15%). Duty is also levied on open access purchase at the rates, as if the power is purchased from DISCOMs.

The State Government has exempted Solar, Wind and Bio mass based generating stations from payment of Electricity Duty for a period of ten years vide Notification dated 18th June, 2014 as amended on 8th January, 2016.

ENERGY DEVELOPMENT CESS:

Energy Development Cess of 15 paise per unit w.e.f. 10th August, 2011, is payable by every generating company or a person owning or operating a captive generating plant on the total units of electricity sold or supplied to a distribution licensee or a consumer. This Cess is not payable on self-consumption as per Notification dated 11th January, 2013. The Cess is being levied on open access purchase of electricity as per clarification issued by Chief Engineer (Electrical Safety & Chief Electrical Inspector) on 18th June, 2013.

MPERC (RECOVERY OF EXPENSES & OTHER CHARGES FOR PROVIDING ELECTRIC LINE OR PLANT USED FOR PURPOSE OF GIVING SUPPLY) REGULATIONS, 2022:

The MPERC notified revised Rules on 31st May, 2022, whereby almost all the charges have been revised upwards. The process of revision of the charges is pending and the Draft Regulations have been issued.

MPERC (FEES, FINES AND CHARGES (REVISION-II) REGULATIONS, 2024:

The new Regulations revising Fees, Fines and Charges have been notified and made applicable from 28th June, 2024.

M.P. INTIMATION OF ELECTRICITY ACCIDENTS (FORMS & SERVICE OF NOTICE) RULES, 2016:

Energy Department of the State notified these Rules on 24th June, 2016, whereby, if any accident occurs in connection with generation, transmission or use of electricity, the intimation of such accident is to be given to the Chief Electrical Inspector within 24 hours of such fatal or other accident.

MADHYA PRADESH RENEWABLE ENERGY POLICY- 2022:

The State Government notified this Policy on 18th August, 2022, which will remain in operation for a period of five years. This Policy repeals earlier Wind Power Policy- 2012; Policy for Implementation of Solar Power Projects – 2012; Small Hydro Policy – 2011 and Bio mass Policy- 2011.

The Ministry of Power vide its Circular dated 25th October, 2023 clarified that the power to levy taxes/ duties are specifically stated in the VII Schedule. List-II of the VII Schedule lists the powers of levying of taxes/ duties by the States in entries-45 to 63. No taxes / duties, which have not been specifically mentioned in this list, can be levied by the State Governments under any guise whatsoever- as Residuary powers are with the Central Government. Entry-53 of List-II (State List) authorizes the States to levy taxes on consumption or sale of electricity in its jurisdiction. This does not include the power to impose any tax or duty on the generation of electricity.

RENEWABLE ENERGY PURCHASE OBLIGATION:

MPERC vide its Orders dated 31st August, 2017 and 2nd November, 2021 amended Renewable Energy Purchase Obligation (REPO) on captive consumers and open access consumers with effect from financial year 2010-11. Energy prescribed for purchase from Solar and Non – Solar sources from 2015-16 to 2026-27 is as under:

Financial Year	Quantum - %		
	Solar	Non- Solar	Total
2015-16	1.00	6.00	7.00
2016-17	1.25	6.50	7.75
2017-18	1.50	7.00	8.50
2018-19	1.75	7.50	9.25
2019-20	4.00	8.00	12.00
2020-21	6.00	8.50	14.50
2021-22	8.00	9.00	17.00
2022-23	9.00	9.50	18.50
2023-24	10.00	10.00	20.00
2024-25	11.00	10.50	21.50
2025-26	12.00	11.00	23.00
2026-27	13.00	11.50	24.50

As per Hon'ble Supreme Court decision in the matter of Hindustan Zinc Limited v/s Rajasthan Electricity Regulatory Commission (RERC) the REPO applicability on Captive and Open Access Power Consumers is held to be well within the ambit of Electricity Act, 2003.

SUBMISSION OF REPORT ON STATUS OF ENERGY CONSUMPTION:

The Bureau of Energy Efficiency vide its Notice published in various New Papers asked Textile Mills having threshold energy consumption in 3,000 metric tons of oil equivalent per year to file applicable Performa of Form-I for the financial years 2022-23 and 2023-24 by 30th June, 2024.

Under National Mission for Enhanced Energy Efficiency- there are 168 energy intensive textile units in the country notified under Perform, Achieve, Trade (PAT) Scheme having an annual threshold level of energy consumption of more or equal to 3,000 tons of oil equivalent. This has resulted in saving of 0.313 Million Toe (1 Toe= 11.6 mwh) in energy saving consequently reducing 1.551 million tons of CO₂ in the Sector.

INSTALLED CAPACITY OF MILLS AS ON 31ST MARCH, 2024.

Sr. No.	Name of Unit	Spindles	Rotors	Auto Looms	Knitting Machines	Stenter Machines	Others
1	Anant Spinning Mills	1,29,024					
2	BEST Lifestyle Apparel Pvt. Ltd.						Apparel
3	Bhaskar Industries Pvt. Ltd.	20,064	2,088	306			
4	Bio Spun Pvt. Ltd.	50,400					
5	Candor Textiles Pvt. Ltd.					2	
6	Deepa Textiles Pvt. Ltd.			36			
7	Deepak Spinners Ltd	38,736					
8	Gokaldas Exports Acharpur Pvt.Ltd.						Apparel
9	Grasim Industries Ltd Staple Fibre Division						1,62,425 Tons-VSF
10	Grasim Industries Ltd (Vikram Woollens)	9,984					
11	Industrial Filters & Fabrics Pvt. Ltd.						Tech.Textiles
12	Jaideep India Pvt. Ltd.	25,200					
13	Kamal Cotspin Pvt. Ltd.	47,520					
14	Kashida Apparel Pvt Ltd.						Apparel
15	Kohinoor Elastics Pvt. Ltd.			100			
16	Lion Fabrics Pvt. Ltd	-	-	80		1	
17	Madhumilan Industries Ltd.	23,264					
18	Mahima Fibres Pvt. Ltd.	50,400					
19	Manjeet Cotton Pvt. Ltd.	11,136	1,796				
20	Manjeet Global Pvt. Ltd.	24,960					
21	Maral Overseas Limited	79,776			62	3	
22	Mayur Uniquoters Ltd.						Tech.Textiles
23	Mohini Health & Hygiene Pvt. Ltd.	-	-	-	-	-	Tech.Textiles
24	Nahar Spinning Mills Ltd.	1,63,344					
25	Neo Stretch Pvt. Ltd.	38,000					
26	PBM Polytex Limited	22,944					
27	Pratibha Syntex Limited	70,846	720	-	71	3	
28	Prem Textiles (Intl.) Pvt. Ltd.	13,200	1,080	40		2	
29	Ramesh Textiles India Pvt. Ltd.	-	-	24			
30	Raymond Limited	36,396	-	113		7	
31	Sagar Manufacturers Pvt. Ltd.	1,90,944	-	-	30		
32	Satyam Spinners Pvt. Ltd.	15,338					
33	Shree Geeta Textile Pvt. Ltd.	15,840			12		
34	SRF Limited	5,652	-	16	-	-	Tech.Textiles
35	Swastik Spintex Ltd.	5,760	600	-	-	-	-
36	Swaraj Suitings Pvt. Ltd.						
37	Threads of Harman						
38	TDB Spinning Pvt. Ltd.	-	1,590	-	-	-	-
39	Vardhman Fabrics	2,08,656	5,640	814		8	
40	Vardhman Yarns	4,08,170					
41	Vippy Spinpro Ltd.		5,160				

The Madhya Pradesh Textile Mills Association



OUR CHAIRMEN

Years	Name
1932	Shri Rao Raja Sir Seth Hukamchand
1949	Shri Rai Bahadur Kanhaiyalal Bhandari
1950	Shri R. C. Jall
1955	Shri Rai Bahadur Lalchand B. Sethi
1956	Shri D. P. Mandelia
1957	Shri Rai Bahadur Hiralal Kasliwal
1958	Shri Pyarelal Seksaria
1959	Shri Omraosingh Gupta
1960	Shri Mahavir Prasad Morarka
1961	Shri Raja Bahadur Singh
1962	Shri B. M. Bhandari
1963	Shri Tejkumar Sethi
1964	Shri Surendra M. Bhandari
1965	Shri Kailash Agrawal
1966	Shri K. A. Desai
1967	Shri B. M. Bhandari
1968	Shri Kailash Agrawal
1971	Shri K. A. Desai
1972	Shri M. D. Vora
1975	Shri Kailash Agrawal
1991	Shri O. P. Jain
1991	Shri Vikas S. Kasliwal
2003	Shri Nitin S. Kasliwal
2008	Shri S. K. Chaudhary
2012	Shri T. K. Baldua
2012	Shri S. Pal
2014	Shri Piyush Mutha
2016	Shri Akhilesh Rathi
2023	Shri Shreyaskar Chaudhary

