

M. P. TEXTILE NEWSLETTER

THE MONTHLY NEWS LETTER OF
THE MADHYA PRADESH TEXTILE MILLS ASSOCIATION



Chairman:
Shri Shreyaskar Chaudhary;
Vice Chairman:
Shri Siddharth Agrawal;
Dy. Chairmen:
Shri Subhash Jain
Shri Tarun Baldua

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ASSOCIATION NEWS

1. World-renowned Management-Guru, author, and speaker Dr. Ram Charan was invited to address the Members of the Managing Committee on 28th March, 2025 at Sagar Manufacturers, Bhopal. He is an expert in corporate governance, business management, and solving business challenges in today's rapidly changing environment. Fortune magazine has recognized him as one of the most influential advisors, while Economic Times named him the Global Indian of the Year for 2010. The discussion covered wide range of topics including the geopolitical landscape, technology, textiles, organizational structure, artificial intelligence, employment, etc.

2. As per information available from sources, during Global Investors' Summit-2025, the Department of Industrial Policy & Investment Promotion has received following proposals for setting up units in PM Mitra Textile Park being developed in Dhar District:

Investor	Product	Proposed Investment Rs. Crore	Tentative Employment
VardhmanTextiles	Textiles	1500	2000
RSWM Ltd.	Yarn,Garments	850	2000
Pasha Polytex	Pol. Fil. Yarn	827	845
Oswal Group	Textiles	650	1500
Best Corp.	Fabric, Apparel	620	5500
Carefit Industries	Textiles	600	1500
Nahar Spinning	Spg, Wvg.	550	2000
Nahar Spinning Mills	VertexRingSpg.	580	450
Ramraj Group	Textiles	500	500
Grace Ventures	Spinning	475	525
Maral Overseas	Yarn, Garments	400	1700
Murugan Textiles	Spg., Wvg.	400	500
Arvind Mills	Garments	350	
NZ Tech.Textiles	Tech. Textiles	300	1500
Bio Spinning Mills	Yarn, Fabric	250	1000
Millineum Babycare	Textile Items	200	500
SKL Group	Garments	200	50000
Rora Gold Tex	Textiles	200	250
SGM Garments	Garments	180	8000
Laxmi Kalpna Mills	Spinning	155	250

Monini Health	Power Loom	125	600
Ayush Spintex Ltd.	Spinning	120	150
Brandies Solutions	Garment	100	2000
Shakti Group	Textiles	100	150
Omvi Ventures	Medical Textiles	75	300
Pratibha Syntex	Garment	50	1000
Brandsmore Ventures	Graments	50	1000
Vedant Cotton	Tech. Textiles	50	300
FamilycareCostumers	Textile Items	50	100
Winner Garments	Garments	35	500

RAW MATERIALS

1. United States Department of Agriculture (USDA) has forecasted Global cotton production in 2024-25 at 121.0 million bales, 8 million above last season's estimate of 113.0 million bales. A large increase in projected yield accounts for the gain, as global harvested area is estimated to decrease slightly (1%) this season. World cotton area is forecast at 30.8 million hectares (76.2 million acres) in 2024-25.



The world cotton yield is projected at a record 854 kilograms (kg) per hectare (762 pounds per acre), an increase of 65 kg per hectare (8%) from last season's 789 kg per hectare (704 pounds per acre). Cotton production for the major-producing countries is mixed in 2024-25, as increases in China, Brazil, the United States, and Australia more than offset reductions for Pakistan and India. Production in China—the leading global cotton producer in 2024-25—is forecast at 31.75 million bales, rebounding 16 % (4.4 million bales) above 2023-24. Harvested area in China is estimated up marginally from 2023-24 at 2.9 million hectares in 2024-25, while yield is projected at a record 2,384 kg per hectare, surpassing the 2022-23 record of 2,160 kg per hectare. China's crop—grown mainly in the high-yielding Xinjiang region—is expected to account for 26% of global production this season, compared with 24% in 2023-24.

For India, 2024-25 cotton production is projected at 25.0 million bales, about 2% below last season's crop. An increase in yield was offset by a decline in harvested area this season, lowering production 400,000 bales. Harvested area in India is estimated to decline to 11.8 million hectares in 2024-25, while yield increased to 461 kg per hectare. India has the highest yield since 2019-20 and the lowest harvested area since 2016-17. Nevertheless, India is forecast to account for approximately 21% of world cotton production in 2024-25, slightly below the year before.



Global cotton mill use in 2024-25 is forecast to rise modestly for a second consecutive year. Mill use in 2024-25 is forecast at 116.5 million bales, 1.5% above 2023-24. With global economic growth projected to stabilize, 2024-25 cotton mill demand is forecast to increase above the long-run (2000-01–2022-23) average rate of 1.2% and help replenish product inventories that were depleted in recent years. This season's world mill use is projected to rise 1.8 million bales, but it remains well below the 2020-21 record of 124.5 million bales. Cotton mill use continues to be concentrated among a few countries, with China and India accounting for 54 % of global mill use in 2024-25, and the top five countries contributing more than 75 % of the world total. In 2024-25, moderate increases are expected for most of the major cotton-spinning countries—with India unchanged and China slightly lower.

Quantity in Mn. of 480 lbs. bales

	2022-23	2023-24	2024-25
Opening Stock	70.88	75.90	73.71
Production	116.30	112.98	120.96
Consumption	112.64	114.78	116.54
Export/Import	37.74	44.61	42.71
Closing Stock	75.90	73.71	78.33

2. The Cotton Association of India (CAI) has lowered its 2024-25 cotton crop estimate by 2% to 295.30 lakh bales due to reduced output in central India. A 10% decline in cultivated area has led to the downward revision from last year's 327.45 lakh bales. Imports are set to double to 32 lakh bales, while exports are projected to drop by 40% to 17 lakh bales. Domestic consumption remains steady at 315 lakh bales. As a result, closing stocks by September 30, 2025, are expected to fall to 23.49 lakh bales, significantly lower than the previous season's 30.19 lakh bales.

3. The Committee on Cotton Production and Consumption, which met on 24th March, 2025 stated Cotton production in the current cotton season that will end in September, 2025 is expected to be 295 lakh bales compared with 325 lakh bales last season. Imports this season will be 25 lakh bales (16 lakh bales in 2023-2024) and exports will be 18 lakh bales. Cotton consumption by the domestic textile industry is expected to be 302 lakh bales, which will be almost seven lakh bales lesser than last season.

4. India's cotton production estimates from different industry and Government organisations vary significantly. However, there are common indications that production is set to decline in the current season (2024-25). India's Ministry of Agriculture has estimated production at 294.25 lakh bales of 170 kg for the current season.

5. A recent comment on Water consumption of cotton plant has been reinvestigated and found out to be disclosed by ICAC as 1214 liters for 1 kg of lint and 2 kg of seeds after a survey of 40 cotton growing countries. Global rain-fed cotton is 16.9 million has which equivalent to be 55.7% of global cotton acreage, where as it was believed to be 20000 liters as per few websites from 2012 to 2021. In irrigated fields, 644 liters are enough by using latest methods like drip irrigation, sprinklers, mulching, Soil & moisture conservation, minimum tillage etc.

6. Bureau of Indian Standard (BIS) has announced the amendment No. 2 (September, 2024) in the Polyester Spun Grey and White Yarn (PSY) QCO (IS 17265:2023), which is set to take effect from 5th March, 2025. Members have raised certain concerns about this amendment and also requested for clarifications from the BIS on this.

In the absence of clear guidelines and instructions from BIS, several industry stakeholders are finding it difficult to obtain the updated BIS license. Based on this, CITI had requested the BIS to provide clear guidelines on this amendment and extend the implementation deadline by at least six months to ensure a smooth transition.

POWER

1. M P Power Management Company has advised DISCOMS to bill to the consumers Fuel & Power Purchase Adjustment Surcharge (FPPAS) @ Minus (-) 0.75 % on energy charges only for one month commencing from 24th March, 2025.

2. The Madhya Pradesh Electricity Regulatory Commission (MPERC) has issued a Public Notice on 29th March, 2025 declaring



tariff for 2025-26. The Tariff for the Textile Industry (HV 3.1) as compared to tariff of 2024-25 is as under:

Fixed Charges KVA of Billing Demand per month	2024-25		2025-26	
11 KV	Rs. 384.00		Rs. 399.00	
33 KV	616.00		631.00	
132/220/400KV	704.00		719.00	
Energy Charges	Up to 50% LF	Above 50% LF	Up to 50% LF	Above 50% LF
	Rs./unit	Rs./unit	Rs./Unit	Rs./Unit
11 KV	Rs.7.30	Rs. 6.30	Rs. 7.50	Rs. 6.50
33 KV	7.26	6.21	7.46	6.41
132 KV	6.85	5.86	7.05	6.06
220 /440KV	6.40	5.40	6.60	5.60

Time of the Day Surcharge/Rebate has been changed as under:

6.00AM to 9.00 AM & 5.00 PM to 10.00 PM	Surcharge of 20% of Normal rate of Energy Charges
9.00 AM to 5.00 PM	Rebate 20% of Normal rate of Energy Charges
10.00 PM to 6.00 AM (Next day)	Rebate of 10% of Energy Charges from June to September
	Rebate of 7.5% of Normal rate of Energy Charges-April to May & October to March

The other terms and conditions are almost as per last order.

MANPOWER

1. As per orders issued by Labour Commissioner on 28th March, 2025, the Dearness Allowance payable to workmen of all the categories has been increased by Rs. 275 per month with effect from April, 2025.

2. The Central Board of Trustees of EPFO has recommended 8.25% annual rate of interest to be credited on EPF accumulations in members' accounts for the financial year 2024-25.

3. As per Economic Survey 2024-25 presented in the State Vidhan Sabha on 11th March, 2025 the Per Capita Income in the State has increased to Rs.1,52,615.



LEGAL & TAXATION

1. Ministry of Micro, Small and Medium Enterprises vide Notification No. SO 1364 (E) dated 21st March, 2025 revised the definition of MSMEs. The amendments are as under :



Type of Enterprise	Investment Threshold Rs		Turnover Threshold Rs	
Micro	1 crore	2.5 crore	5 crore	10 crore
Small	10 crore	25 crore	50 crore	100 crore
Medium	50 crore	125 crore	250 crore	500 crore

This Notification will be effective from. 1st April, 2025.

2. Department of Revenue has amended Rule 164 of CGST Rules, 2017 in respect of Various issues related to availment of benefit of Section 128A of the CGST Act, 2017.



3. On 7th March, 2025, The Industrial Policy & Investment Promotion Department of the State has notified major amendments to MP State Industrial Land & Building Management Rules, 2019, which have come in to effect from 24th February, 2025.

EXPORT & IMPORT

1. The Central Government released the information relating to exports for the month of February, 2025 on 18th March, 2025. India's textile and apparel exports dipped in February, 2025 after impressive growth in January. However, the decline in textile and apparel exports was minimal compared to the overall drop in the country's merchandise exports. The country's T&A exports were down by 2.27 % to US\$ 3,216.01 million. The exports of all goods eased by 10.85% to US\$ 36,912.74 million in the month. Textile and apparel exports gained 7.19 %, reaching US\$ 33,217.23 million in the first eleven months of the current fiscal 2024-25 (April-March), while out bound shipment of all goods inched up by 0.06 % in the same period. The information relating to textile and apparel exports is as under:



Values in US\$ Million

Exports	Apr.-Feb., 2023-24	Apr.-Feb., 2024-25	% Change
Cotton Yarn, Fabric, Made-ups, Handloom Products	10,589.32	10,938.03	3.29
MM Yarn, Fabric Made-ups, etc.	4,239.78	4,432.09	4.54
Jute Products	310.42	349.28	12.52
Carpets	1,266.15	1,403.97	10.88
Handicrafts, etc.	1,522.80	1,635.86	7.42
Textiles	17,928.47	18,759.23	4.63
Apparel	13,059.37	14,458.00	10.71
Textiles & Apparel	30,987.84	33,217.23	7.19
All Commodities	3,95,379.29	3,95,628.70	0.06
% Share of T & C	7.84	8.40	

- During February, 2025 Textiles Exports decreased to US\$ 1,681.07 million registering a de-growth of 7.35% over February, 2024, while Apparel Exports increased to US\$ 1,534.94 million registering a growth of 3.97 % during the same time period.
- Exports of Textiles and Apparel during February, 2025 increased to US\$ 3,216.01 million with a de-growth of 2.27 % over February, 2024.
- Share of T&A has increased to 8.71 % in February, 2025 from 7.95 % in February, 2024.
- During April–February 2024-25, Textiles Exports registered growth of 4.63 % over the previous period, while Apparel Exports registered a growth of 10.71 % during the same time period.
- Cumulative Exports of Textiles and Apparel during April-Feb. 2024-25 have registered a growth of 7.19% as compared to April-Feb., 2023- 24.
- Overall share of Textiles &Apparel, out of total exports is 8.71 % for February, 2025 and 8.40% for the period April-February, 2024-25. The rise in textile and apparel exports can be attributed to—weakening Indian rupee against the US dollar and increase in demand.

2. In February, 2025, imports of textile yarn, fabrics, and made-ups increased by 6.38%, rising from US\$ 185.07 million to US\$ 196.87 million. During February, 2025 the import of raw cotton and waste surged by more than three times by 217.72 %, from US\$ 31.43 million to US\$ 99.86 million. The details of imports in April-February, 2024-25 as compared to the same months of the previous year are under:

Values in US\$ Million

Imports	Apr. - Feb., 2023 -24	Apr. -Feb., 2024 -25	% Change
Cotton Raw & Waste	549.86	1,140.28	107.38
Textile Yarn, Fabrics, Made -ups, etc.	2,116.74	2,282.50	7.83

3. Analysis of USA's total T&A imports from India during 2024 shows that Apparels and Home Textiles accounts to about 81.5% of its total T&A imports from India.

Values in US\$ Million

Items	2020	2021	2022	2023	2024	% Share
Fibre	98.4	174.2	187.3	134.1	157.3	1.5
Filament	40.9	62.4	80.4	62.2	57.4	0.5
Yarn	62.9	102.4	126.3	85.2	95.8	0.9
Fabric	557.0	916.5	1,089.8	780.3	908.8	8.4
Apparel	3,201.6	4,490.7	6,004.9	4,679.5	4,933.1	45.7
Home Textiles	3,089.1	4,550.0	4,110.6	3,653.8	3,874.2	35.9
Others	562.1	852.2	879.6	648.8	776.0	7.2
Total	7,611.9	11,148.4	12,478.9	10,043.9	10,802.6	100.0

4. During January-December, 2024 cumulative imports of Textiles & Apparel by USA from World increased by 3.5% as compared to January-December, 2023. However, the imports from India, Vietnam and China have changed as under:

Values in US\$ Million

Country	2023	2024	% Change
India	10.04	10.80	7.6
Vietnam	15.46	16.61	7.5
China	28.66	30.30	5.7

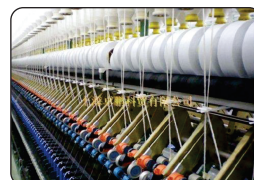
5. DGFT vide Public Notice No.51/2024-25 dated 19th March, 2025 has extended the last date for filing the Annual RoDTEP Return (ARR) for the Financial Year 2023-24 from 31st March, 2025 to 30th June, 2025. Similarly, the applicable grace period is also extended from 30th June, 2025 to 30th September, 2025.

6. Department of Revenue vide Notification NO. 14/2025-Customs (NT) dated 18th March, 2025 issued Customs (Administration of Rules of Origin under Trade Agreements) Amendment Rules, 2025. An importer will now be required to submit 'proof of origin' as against 'certificate of origin' to preferential rate of duty in terms of a trade agreement. Experts feel such a move is aimed at checking imports from China that are routed through third countries.

7. DGFT vide Notification NO. 66/2024-25 dated 20th March, 2025 extended RoDTEP for Advance Authorization Holders, Special Economic Zone and Export Oriented Units up to 5th February, 2025. From 6th February, 2025 exports from these categories will not be eligible for RoDTEP support. DTA shall continue to get support till 30th September, 2025 as per Notification dated 20th March, 2025.

STATE OF INDUSTRY

1. According to data released by the Ministry of Statistics and Programme Implementation (MoSPI) on 12th March, 2025 India's industrial output (General Index) in January, 2025 increased by 5.0 % over January, 2024. The index for manufacture of textiles, which was 109.7 in January, 2024 increased to 113.3 in



January, 2025 showing an increase of 3.3%. The Wearing Apparel Index increased from 117.3 in January, 2024 to 120.7 in January, 2025 recording a growth of 2.9 %. The details of IIP are as under:

Items	For the Month		Cumulative		Growth
	Jan. 2024	Jan. 2025	Apr-Jan. 2023-24	Apr-Jan. 2024-25	Apr-Jan. 2024-25
General	153.6	161.3	145.3	151.4	5.0%
Textiles	109.7	113.3	108.0	109.1	1.0%
Wearing Apparel	117.3	120.7	105.0	113.3	7.9%

2. According to a report of a Parliamentary panel, the withdrawal of the Interest Equalisation Scheme and its merger with the export promotion mission is going to adversely affect the Indian exporters and it should be extended till the operationalisation of the mission. The mission which was announced in the budget has an outlay of Rs 2,250 crore. The Department of Commerce has informed the Standing Committee of Parliament on Commerce that under the export promotion mission (EPM), it is working to carve out an umbrella scheme with various components, in consultation with the ministries of Finance and MSME.

3. The textile industry is expected to recover this financial year after two years of contraction, driven by stable cotton prices, improving exports of readymade garments (RMG) and steady domestic demand. Revival of RMG exports augurs well for the small and medium enterprises (SMEs), which account for 80 % of the textile value chain. This financial year, while domestic demand for cotton yarn is expected to be a tad slower than last financial year, stable prices will support revenue growth. Export of cotton yarn, meanwhile, will decline as Chinese demand normalises.

4. The 12th Asian Textile Conference (ATEXCON 2025), organized by the Confederation of Indian Textile Industry (CITI) on 25th March, 2025 highlighted a strategic roadmap for India's textile and apparel (T&A) sector. India's T&A exports reached 33.2 billion US dollars during April, 2024-February, 2025, registering a 7.2 % increase over the previous year. However, with exports still near the 2015 level, the industry must achieve 18 % annual growth to reach the 100 billion US dollar target by 2030. Based on deliberations at the National Committee on Textiles and Clothing (NCTC) outlined five priority areas:

- Raw Material Availability - Removing import restrictions on cotton, manmade fiber, and specialized yarns to ensure competitive pricing.
- Cotton Import Duty - Eliminating the 10 % duty on cotton fiber to bridge the supply-demand gap of 3.8 million bales and enhance cost competitiveness.
- Investment Incentives - Launching a scheme combining capital subsidies and performance-based incentives, with a special focus on textile processing.
- PM MITRA Parks - Accelerating the implementation of integrated textile parks to strengthen the value chain.
- Trade Agreements-Fast-tracking Free Trade Agreements (FTAs) with the EU and the US to ensure a level playing field for Indian exporters.
- GST on readymade garments should not be increased.

5. The State Government has declared 2025 as the "Year of Industry." In the financial year 2024-25, the secondary sector's GVA has reached Rs 2.73 lakh crore. Infrastructure development in the industrial sector has been allocated Rs 145.13 crore, and investment proposals worth Rs 4.17 lakh crore have been received as of December, 2024.

TEXTILES IN PARLIAMENT

During the current Parliament session, a number of questions were asked by the Members relating to Ministry of Textiles. The replies given to some of the questions raised by various Members are as under:

1. With a view to develop integrated large scale and modern industrial infrastructure facility for the entire value-chain of the textile industry, the Government has approved setting up of 7 (Seven) PM Mega Integrated Textile Region and Apparel (PM MITRA) Parks in Greenfield/Brownfield sites with a scheme outlay of Rs. 4,445 crore for the period 2021-22 to 2027-

28. Once completed, it is expected that each PM MITRA Park will generate 3 lakh (direct/indirect) employment.

2. In order to promote growth and development of the textile sector including exports, the Government is implementing various schemes/initiatives including Scheme for Integrated Textile Park (SITP), Integrated Processing Development Scheme (IPDS), Production Linked Incentive (PLI) Scheme, National Technical Textiles Mission (NTTM), SAMARTH – Scheme for Capacity Building in Textile Sector ATUFS, Silk Samagra-2, National Handloom Development Program (NHDP) and National Handicraft Development Program (NHDP).

3. Government is implementing Rebate of State and Central Taxes and Levies (RoSCTL) scheme for Apparel/Garments and Made-ups in order to enhance competitiveness by adopting principle of zero-rated exports. Further, textiles products not covered under the ROSCTL scheme are covered under Remissions of Duties and Taxes on Exported Products (RODTEP) along with other products. The Ministry of Textiles, under the aegis of NTTM (Component IV), aims to provide training to 50,000 individuals encompassing undergraduates, unskilled workers, professionals seeking upskilling or re-skilling, and personnel engaged in the various application areas of technical textiles.

4. Ministry of Textiles is also implementing skilling scheme commonly regarded as Samarth, aimed to provide demand driven, placement oriented National Skills Qualifications Framework (NSQF) compliant skilling programmes to incentivize and supplement the efforts of the industry in creating jobs in the organized textile and related sectors, covering the entire value chain of textiles, excluding Spinning and Weaving. A budgetary allocation of Rs. 330 crore has been made in the financial year 2025-26.

5. Start-up India initiative, the Government is implementing three flagship Schemes, namely, Fund of Funds for Start-ups (FFS), Start-up India Seed Fund Scheme (SISFS) and Credit Guarantee Scheme for start-ups (CGSS) to support start-ups across categories and sectors at various stages of their business cycle. CGSS is implemented for enabling collateral free loans to start-ups through eligible financial institutions [Member Institutions (MIs)]. The number of entities which have been recognised as start-ups in Textiles Sector by DPIIT over the last five years viz 2020, 2021, 2022, 2023, and 2024 as on 31st December, 2024 is given below:

Industry	2020	2021	2022	2023	2024
Textile & Apparel	204	311	457	703	765

6. As per Annual Survey of Industries (ASI) data, invested capital in manufacturing of textiles and manufacturing of apparels in 2000-01 was Rs. 66,45,908 lakh, while the corresponding figure for 2021-22 was Rs. 3,15,10,814 lakh. The share of total invested capital in the textile sector of the total manufacturing sector for 2000-01 was 11.60% while the corresponding figure for 2021-22 was 5.68%. The total invested capital for the year 2022-23 as per ASI data is Rs. 3,65,07,663 lakh.

7. In order to increase the export potential, India has so far signed 14 Free Trade Agreements (FTAs) including recently concluded agreement with UAE, Australia and TEPA with EFTA countries comprising Switzerland, Iceland, Norway & Liechtenstein; and 6 Preferential Trade Agreements (PTAs) with various trading partners.

For Address