

# 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. On 18th April, 2024 Representatives of Fair Labour Association visited Indore and had an interaction meeting with the Members of the Association regarding potential repercussion of a Primary Investigative Note ("PIN") circulated by Transparentem Limited. Some of the apparel companies contacted the Fair Labour Association (FLA) and requested them to conduct a scoping exercise and develop a road map with two suppliers Pratibha Syntex and Maral Overseas in Madhya Pradesh. Twenty-four companies are participating in the FLA's Harvesting the Future (HTF) – Cotton India Project. The Harvesting the Future (HTF) project has been developed with five focus areas, focusing on the village/farm level:

- Supply Chain Mapping and Supplier Capacity-linkage with ginners and farmers to understand cotton flow.
- Child protection and India's ratification of the ILO convention for this purpose-work at community level to stop engagement of child labour.
- Enhance Income- Work with IDH to increase farmer productivity.
- Farm level monitoring and working conditions improvement.
- Stakeholder Engagement and Advocacy-connecting Members and Government Agencies to promote such activities.

2. In a significant stride toward circularity and environmental responsibility, Grasim Industries Limited, a flagship company of the Aditya Birla Group, inaugurated its Reviva-M unit on 8th April, 2025 at Nagda plant. This state-of-the-art facility marks a pivotal shift in sustainable textile production, with the capability to process 15 tons of fibre per day, derived from post-consumer textile waste. The unit mechanically processes discarded consumer textiles into high-quality fibres that are biodegradable, ecological, and natural—setting a benchmark for responsible manufacturing not only in India but globally. **Congratulations.**

3. Vardhman Textiles is constructing OPD Building consisting of 5 Rooms, Waiting area and Toilets, at a cost of Rs. 56.00 lakh at Mandideep Hospital for the wellbeing of the local community, as a part of its ongoing commitment to Corporate Social Responsibility initiative. **Congratulations.**

## RAW MATERIALS

1. On 10th April, 2025, United States Department of Agriculture (USDA) in its World Supply and Demand Estimates (WASDE) for 2024–25, World cotton production in 2024-25 is forecast at 120.9 million bales, slightly below last month estimate but still 7.9 million bales (7 %) above last year. An 8 % increase in the global yield is expected to negate the small decrease (1%) in harvested area this season. World cotton area is forecast



at 30.8 million hectares (76.1 million acres) in 2024-25. The world cotton yield is projected at a record 854 kilograms (kgs) per hectare (762 pounds per acre), an increase of 65 kgs. per hectare from last season's 789 kgs. per hectare (704 pounds per acre). Cotton production for the major-producing countries is mixed in 2024-25, although the majority are estimated to increase. Year over year 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 32.0 million bales, a 17 % (4.7 million bale) increase above 2023-24. Harvest area in China is estimated to increase nearly 2 % from 2023-24 to 2.9 million hectares in 2024-25, while yield is projected at a record 2,402 kg per hectare, surpassing the 2022-23 record of 2,160 kgs. per hectare as excellent growing conditions prevailed this season. China's crop—grown mainly in the high-yielding Xinjiang region—is expected to account for 26.5 % of global production this season, compared with 24 % in 2023-24.

For India, 2024-25 cotton production is projected at 25.0 million bales, 1.6 % below last season's crop. A year over year decrease in harvested area was slightly offset by an increase in yield, resulting in a 400,000-bale decrease this season. Harvested area in India is estimated to decline to 11.8 million hectares in 2024-25, while yield is forecast 25 kgs. per hectare (5.7 %) higher at 461 kg per hectare. India is projected to have its highest yield since 2019-20 and the lowest harvested area since 2016-17. Nevertheless, India is forecast to account for 21 % of world cotton production in 2024-25, a little more than a percent drop from last year.

World cotton mill use in 2024-25 is projected at 116.0 million bales—520,000 bales below the March forecast. The decline is mainly the result of lower projected use by China, considerably higher U.S. import tariffs in place, cotton mill use by China is expected to decrease. Nevertheless, global cotton mill use in 2024-25 is forecast 1.1 % (1.2 million bales) above last season and equal to the long-run (2004-05–2023-24) average growth rate. The modest growth is supported by recent yarn inventory reductions but tempered by economic headwinds that have limited global cotton mill use in recent years. World mill use is forecast at its highest level since 2020-21. The top five consuming countries are again projected to account for more than 70 % of global cotton mill use in 2024/25. China and India remain the largest users, combining for 54 % of the total, despite lower or flat use this season. Moderate increases are expected for the other major cotton-spinning countries, which also includes Turkey.

Quantity in Mn. of 480 lbs. bales

	2022-23	2023-24	2024-25
Opening Stock	70.88	75.90	73.74
Production	116.30	112.98	120.89
Consumption	112.64	114.80	116.02
Export/Import	37.74	44.61	42.33
Closing Stock	75.90	73.74	78.86



2. The Cotton Association of India (CAI) has released its March estimate of the cotton pressing numbers for 2024-25 season on 10th April, 2025. The Association has reduced its cotton pressing estimate for 2024-25 season by 4.00 lakh bales to 291.30 lakh bales of 170 kgs. each from its previous estimate of 295.30 lakh bales of 170 kgs. each. Imports for the season estimated at 33.00 lakh bales of 170 kgs. each as against 15.20 lakh bales during the last season. The exports for the season 2024-25 are estimated at 16.00 lakh bales of 170 kgs. each as against 28.36 lakh bales estimated for 2023-24 season. The CAI has maintained cotton consumption for 2024-25 season at 315.00 lakh bales of 170 kgs. each i.e. same as estimated previously.

3. In current cotton season 2024-25, up to 31st March, 2025, Government of India, through its nodal agency, the Cotton Corporation of India Ltd. (CCI) under Ministry of Textiles has procured 525 lakh quintals of seed cotton, equivalent to 100 lakh bales, under Minimum Support Price(MSP) operations. This procurement accounts for 38% of the total cotton arrivals of 263 lakh bales and 34% of the estimated total cotton production of 294.25 lakh bales in the country.

4. The Committee on Cotton Production and Consumption (COCPC), headed by the Union Textile Commissioner discussed the matter of relaxation in import duty on cotton on 16th April, 2025. Taking a cue from the past precedent, the Committee recommended to the Ministry of Textiles for taking up the issue for relaxation in import duty on cotton with Department of Revenue for a period of six months till next cotton season 2025-26, commencing in the month of October, 2025, as was done in the year 2022.

5. According to the US Department of Agriculture's (USDA) data, Exports from US to India from February to April, 2025 jumped to 155,260 running bales, from 25,901 shipped during the same period a year ago.

India mainly imports Extra Long Staple (ELS) cotton from the US, benefiting from a 10 % duty exemption, unlike short staple cotton which has an 11 % import duty. The US ELS cotton remains cost-effective for many Indian buyers due to its higher ginning efficiency, better lint yield, and superior fibre quality

6. Cotton candy prices edged higher by 0.51% to settle at Rs. 56,000, supported by expectations of reduced domestic production and lower closing stocks. The Cotton Association of India (CAI) revised its 2024-25 cotton crop estimate downward by 4 lakh bales, mainly due to decreased output in Maharashtra.

7. According to Ashok Malhotra, Mission Director of the National Technical Textile Mission (NTTM), there is an urgent imperative for India to accelerate its growth in MMF, aiming for a significant increase in market penetration to achieve global competitiveness and capabilities to end the global dominance of China in polyester production.

## POWER

The M P Power Management Company has advised DISCOMs to bill to the consumers Fuel & Power Purchase Adjustment Surcharge (FPPAS) @ 3.92 % on energy charges only for one month commencing from 24th April, 2025.



## MANPOWER

In order to simplify and make the entire process of allotment and activation of UAN more robust the Employees Provident Fund Organisation has issued a Circular on 8th April, 2025, the Members themselves have to download UMANG app using their smartphones without any intervention of EPFO/Employer.



## LEGAL & TAXATION

1. The Directorate General of Trade Remedies (DGTR) has announced the initiation of an anti-dumping investigation concerning imports of Viscose Rayon Filament Yarn (VFY) above 75 deniers originating in or exported from China. The action follows a petition filed by the



Association of Man-Made Fibre Industry of India and Grasim Industries Limited, who have alleged that the domestic industry is suffering material injury due to dumped imports from China.

2. The Director General of Foreign Trade has issued a Public Notice on 15th April, 2025 regarding Amendment in Appendix 2KL (Scale of User Charges and Process for Deposit/Refund of Application Fee/Penalty, etc.) of Foreign Trade Policy -2023.

3. The Department of Revenue has substituted Regulation 5 of Goods Imported (Conditions of Transshipment) Regulations, 1995 on 24th April, 2025, as such now no fee will be charged in respect of application for transshipment of the goods imported for all custom stations.

4. The Department of Revenue has notified on 24th April, 2025 the Goods and Services Tax Appellate (Procedure) Rules, 2025 in terms of Section 111 of the Central Goods and Services Tax Act, 2017 ('CGST Act').

## EXPORT & IMPORT

1. The Central Government released the information relating to exports for the March, 2025 on 15th March, 2025. The country's T&A exports were down by 1.63 % to US\$ 3,387.21 million in March, 2025. The exports of all goods increased by 0.66 % to US\$ 41,968.30 million in the month. Textile exports decreased by 5.81 %, while apparel exports increased by 3.97 % during the month of March, 2025 as compared to the same month of 2024. The information relating to textile and apparel exports is as under:



Values in US\$ Million

Exports	2023-24	2024-25	% Change
Cotton Yarn, Fabric, Made-ups, Handloom Products	11,683.50	12,055.88	3.19
MM Yarn, Fabric Made-ups, etc.	4,679.14	4,869.44	4.07
Jute Products	338.85	384.10	13.35
Carpets	1,395.15	1,541.09	10.46
Handicrafts, etc.	1,802.29	1,766.57	(- )1.98
<b>Textiles</b>	<b>19,898.93</b>	<b>20,617.08</b>	<b>3.61</b>
<b>Apparel</b>	<b>14,532.19</b>	<b>15,989.33</b>	<b>10.03</b>
<b>Textiles &amp; Apparel</b>	<b>34,431.12</b>	<b>36,606.41</b>	<b>6.32</b>
All Commodities	4,37,072.03	4,37,416.52	0.08
<b>% Share of T &amp; C</b>	<b>7.88</b>	<b>8.37</b>	

- During March, 2025 Textiles Exports decreased to US\$ 1,855.88 million registering a de-growth of 5.81 % over March, 2024, while Apparel Exports increased to US\$ 1,531.33 million registering a growth of 3.97 % during the same time period.
- Exports of Textiles and Apparel during March, 2025 decreased to US\$ 3,387.21 million with a de-growth of 1.63 % over March, 2024.
- Share of T&A has decreased to 8.07 % in March, 2025 from 8.26 % in March, 2024.
- During 2024-25, Textiles Exports registered growth of 3.61 % over the previous year, while Apparel Exports registered a growth of 10.03 % during the same time period.
- Cumulative Exports of Textiles and Apparel during 2024-25 have registered a growth of 6.32% as compared to 2023-24.
- Overall share of Textiles & Apparel, out of total exports is 8.37 % for the year 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 March, 2025, imports of textile yarn, fabrics, and made-ups increased by 19.98 %, rising from US\$ 160.82 million to US\$ 192.95 million, whereas imports of Cotton & Waste increased by 61.97 % rising from US\$48.80 million to US\$ 79.04 million. The details of imports of these two items are as under:





#### Values in US\$ Million

Imports	2023-24	2024-25	% Change
Cotton Raw & Waste	598.66	1,212.32	103.67
Textile Yarn, Fabrics, Made-ups, etc.	2,277.57	2,475.53	8.69

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.

4. The Director General of Foreign Trade has issued a Trade Notice on 11th April, 2025 stating that it has operationalized a dedicated Global Tariff and Trade Help Desk to assist exporters in relation to tariff changes, import surges and export related Challenges.

5. The DGFT has granted three months extension (up to 30th June, 2025) on 19th March, 2025 to the industry for filing the Annual RODTEP Return (ARR) for financial year 2023-24.

6. According to the circular of the Department of Revenue dated 21st April, 2024, proof of origin means a certificate or declaration issued in accordance with a trade agreement certifying that the goods fulfil the country of origin criteria. An exporter has to submit the certificate at the landing port of the importing country. The document is important to claim duty concessions under free trade agreements. This certificate is essential to prove where the goods come from.

7. According to Notification No. 05/2025-26 dated 23rd April, 2025, DGFT has imposed Minimum Import Price of \$3.5 per kg on HSN codes 60019200, 60053600, 60053790, and 60053900 for synthetic knitted fabric. These codes cover products made from manmade or synthetic fibres (unbleached or bleached). Synthetic knitted fabrics attract a 20 % duty on their value. Following the imposition of the MIP, the duty will be based on the determined minimum import value or the actual import value (whichever is higher). The restriction will be in vogue till 31st March, 2026. The Minimum Import Price (MIP) condition is not applicable for Advance Authorization holders, Export-Oriented Units and units in the Special Economic Zones.

8. As per S. And. O. No. 106-Act/2025/07/Customs dated 13th April, 2025, issued by the National Board of Revenue (NBR), Bangladesh, the export of cotton yarn from India to Bangladesh has been suspended with immediate effect through the following land ports: Benapole, Bhomra, Sonamasjid, Banglabandha, and Burimari.

Trade data suggests that Bangladesh has been the fastest growing market for India's cotton yarn with its exports growing at a Compound Annual Growth Rate (CAGR) of 25% during the last five years. Close to 32 % of yarn exported to Bangladesh is by land. The restrictions imposed on the export of cotton yarn is a matter of deep concern. Textile mills in the north prefer to ship by land as it is cost effective. They will now have to export through the Mundra, Thoothukudi, or Nhava Sheva ports and it will lead to higher costs. Readymade garment exporters in Bangladesh, who are using imported yarn from India will also have to pay higher price due to hike in logistics cost and will have to face delays.

9. China and Bangladesh are main markets for Indian yarn. In recent years, China's imports of Indian yarn reduced substantially. With Bangladesh closing its land ports for yarn exported by India, textile mills in India are examining alternative modes of transport while also urging the Government to take up the issue with Bangladesh. Almost 32% of India's yarn, mainly dyed and special yarn, exported to Bangladesh was being transported via land ports. The problem in sending the goods in containers by sea is the lead time. Even now, 70% of the Indian yarn to Bangladesh goes by sea. Those who exported throughland ports will also use the sea now. There are smaller ships that go from Kolkata.

10. The recent US tariffs could create a favorable environment for India's textile industry, potentially reshaping the global trade landscape. Higher tariffs on competing countries could give Indian exporters a competitive edge, enabling them to gain market share in the US. However, it's crucial to balance short-term gains with long-term strategic planning. Neglecting vital investments in research and development could undermine the industry's long-term sustainability. Focused research is essential for crafting effective policies that leverage this momentum and drive sustainable growth.

11. Global textile industry contributed to US\$ 592.8 billion in textile exports in 2024, with China leading the way with US\$ 286 billion, followed by Bangladesh at US\$ 46.2 billion, Vietnam US\$ 43.7 billion, India US\$ 41.4 billion and

Germany US\$ 40.4 billion. This is followed by Turkey, Italy, US, Spain and Pakistan. These are the top 10 textile manufacturing countries of the World. Quick look back to 2010, China was still the leader, followed by India, then Vietnam and Bangladesh and Indonesia. In the last 20 years or so, we have lost a lot of ground and are continuing to slide back.

## STATE OF INDUSTRY

1. According to data released by the Ministry of Statistics and Programme Implementation (MoSPI) on 28th April, 2025, the IIP growth rate for the month of March, 2025 is 3.0%, which was 2.9 % in the month of February, 2025. The index for manufacture of textiles, which was 106.9 in March, 2024 increased to 112.1 in March, 2025 showing an increase of 4.9 %.

The Wearing Apparel Index increased from 143.0 in March, 2024 to 144.8 in March, 2025 recording a growth of 1.3 %. The details of IIP are as under:



Items	For the Month		Cumulative		Growth
	Mar. 2024	Mar. 2025	Apr-Mar. 2023-24	Apr-Mar. 2024-25	Apr-Mar. 2024-25
General	160.0	164.8	146.7	152.5	4.0 %
Textiles	106.9	112.1	107.6	109.2	1.5 %
Wearing Apparel	143.0	144.8	109.9	116.7	6.2 %

1. 2.The Indian Domestic Textile & Apparel market has grown from US\$ 106 billion in 2019-20 to US\$ 147 billion in 2024-25 registering a CAGR of 7 %. The market need to grow at 9 % CAGR from 2024-25 to reach US\$ 250 billion by 2030-31, the target fixed by Ministry of Textiles. The breakup of domestic market is as under:

#### Value in US\$ Billion

Year	Apparel	Technical Textiles	Home Textiles	Total
2019-20	78	20	8	106
2020-21	55	18	7	80
2021-22	80	22	8	110
2022-23	92	24	9	125
2023-24	102	26	10	138
2024-25	108	28	11	147
2030-31	180	54	16	250

3. On the basis of an assessment of the current and evolving macroeconomic situation, the Monetary Policy Committee (MPC) of Reserve Bank of India decided on 9th April, 2025 to reduce the Policy Repo Rate by 25 basis points to 6 % with immediate effect. Consequently, the Standing Deposit Facility (SDF) rate under the Liquidity Adjustment Facility (LAF) shall stand adjusted to 5.75 % and the Marginal Standing Facility (MSF) rate and the Bank Rate to 6.25 %. This decision is in consonance with the objective of achieving the medium-term target for Consumer Price Index (CPI) inflation of 4 % within a band of +/- 2 %, while supporting growth.

4. 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. In 2023-24, the SMEs were hit hard as a 25 % drop in cotton prices and weak RMG exports pulled down the industry revenue despite steady domestic demand. 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 normalizes.

5. Quality Control Orders (QCOs) on textile raw materials such as polyester fibre and yarn, and viscose fibre, have once again come into the spotlight amid the US' imposition of reciprocal tariffs. India risks missing an opportunity to capture diverted orders from China following the imposition of

a 145 % reciprocal tariff, as Indian garment exporters may remain uncompetitive due to higher raw material prices. Even if the Indian Government were to remove QCOs immediately, the brief 90-day window provided by the US may not allow sufficient time to benefit.

6. In 2024, India exported textiles and garments worth over \$8 billion to the U.S. Given the sector's narrow profit margins and sensitivity to price fluctuations, even a tariff increase of 10-20% could make Indian products less competitive compared to those from countries with lower reciprocal tariffs. However, India may have a competitive edge over other Asian nations like Bangladesh (37%), Sri Lanka (44%), and Vietnam (47%) due to the comparatively lower tariff rate.

7. Indian exporters must closely review their production processes. There must be real manufacturing or transformation of inputs, like making key parts, programming or chemical changes. Products must clearly qualify as "Made in India", backed by strong documentation. If there's any doubt, exporters can request a binding ruling from US Customs for clarity and legal certainty. India has discussed introducing non-preferential RoOs, but could not finalise them. It should do so now because US non-preferential RoOs could be a more effective tool than tariffs in limiting Chinese inputs in exports from other countries. If this becomes clear to US, it might scale back its aggressive tariff strategy.

8. The recent hikes in the U.S. import tariffs represents a substantial policy shift with far-reaching implications for global trade. These changes are poised to reshape sourcing strategies, cost structures, and trade dynamics, particularly impacting Asian suppliers including India who have long been central to the U.S. textile and apparel imports.

The Ministry of Commerce and Industry in India is carefully evaluating the implications of these tariffs while exploring opportunities arising from this policy shift. Recent discussions between Indian and U.S. trade teams have focused on expediting a multi-sectoral Bilateral Trade Agreement (BTA). The Council has been actively consulting with key stakeholders such as the Ministry of Textiles, Ministry of Commerce, Invest India, CII, and CITI to align strategies and mitigate the impact. In light of these developments, India's industry must adapt boldly and confidently to navigate the evolving global trade landscape while striving for self-reliance and resilience in business dealings.

9. According to the Global Textile Industry Survey (GTIS) for March, 2025 released by International Textile Manufacturers Federation (ITMF), after a slow but steady recovery since November, 2023, the global business situation in the textile industry has slightly deteriorated in March, 2025. While East Asia and North & Central America reported modest improvements, they remain at rather low levels. Garment producers continued to show the most stable performance across the value chain. Despite the current challenges, expectations for the 4th quarter of 2025 remained positive. Optimism was highest in Africa and the Americas, while East Asia stood out with a more pessimistic outlook. Producers of garments, fibers, and finished fabrics were the most hopeful, in contrast to technical and home textiles, where expectations remained subdued.

10. According to Economic Survey of Madhya Pradesh for 2024-25, the year-wise amount of Subsidy disbursed to the Textile Industry is as under:

**Amount Rs. in crore**

2020-21	2021-22	2022-23	2023-24	2024-25
102.32	162.28	352.73	98.58	252.69

## TEXTILES IN PARLIAMENT

During the last Parliament session, a number of questions were raised by the Members. Replies to some of the questions were given as under:

1. The Government is focusing on high tech and high growth product segment to achieve Textile 2030 vision. The Government is leveraging large scale plug and play infrastructure, keeping sustainability at the core, while ensuring large-scale livelihood opportunities. The initiatives by the Government are providing impetus to traditional sectors including handloom and handicrafts and becoming Atma-nirbhar in raw material value chain by implementing various schemes/initiatives across the country

2. In order to effectively implement the PM MITRA Scheme, MoUs as well as JV agreements have been signed between Government of India and PM MITRA States. Special Purpose Vehicles (SPVs) have been incorporated in all Greenfield PM MITRA Parks with State Governments' holding 51% stake in the SPV and remaining 49% being held by the Government of India. To encourage private sector participation in the scheme, a Master Developer (MD) led model for developing PM MITRA Park on a Design-Build-Finance-Operate-Transfer (DBFOT) basis has been envisaged in addition to other models of development.

3. India has signed 14 Free Trade Agreements (FTAs) and 6 Preferential Trade Agreements (PTAs) with its trading partners to give boost to India's exports. India's export of Cotton, Man-made, Wool, Silk during the last three years:

**Value in US \$ Million**

Item	2021-22	2022-23	2023-24
Cotton Yarn	5,498	2,752	3,780
Other textile yarn, fabrics, made-up etc.	650	730	731
Cotton Raw Including .Waste	2,816	781	1,117
Cotton Fabrics, Made-ups, etc.	8,201	6,821	6,630
<b>Cotton Textiles</b>	<b>17,166</b>	<b>11,085</b>	<b>12,258</b>
Manmade Staple Fibre	680	463	402
Manmade Yarn, Fabrics, Made-ups	5,615	4,949	4,679
<b>Man</b>	<b>6,294</b>	<b>5,412</b>	<b>5,081</b>
<b>Wool &amp; Woolen textiles</b>	<b>166</b>	<b>205</b>	<b>192</b>
<b>Silk Products</b>	<b>109</b>	<b>95</b>	<b>119</b>

India's export of Technical textiles in last three years:

**Value Rs. in crore**

Item	2021-22	2022-23	2023-24
Technical Textiles	21,194.62	20,095.32	21,407.38

4. The Government is implementing Production Linked Incentive (PLI) Scheme for Textiles on Pan India basis. PLI scheme is aimed at promoting the production of MMF Apparel, MMF fabrics and products of Technical Textiles to achieve size and scale and to become competitive. As per Ministry's Budget Estimate 2025-26, approx. 22% of the budget is dedicated for PLI Scheme for Textiles. Out of the 74 applicants selected under the scheme, 24 are MSMEs. Turnover of Rs. 2,16,760 crore including exports is projected for the scheme period.

For Address