



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. Confederation of Indian Textile Industry –Cotton Development & Research Association (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 two years, 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.

CITI-CDRA successfully implemented the Special Project on Cotton for the 2024-25 season under NFSM, covering 1780.2 hectares and benefiting 2,366 farmers across Ratlam, Dhar, Jhabua, Alirajpur and Khargone districts. The project was executed in 25 villages.

Collaborative Project with CSR Support was implemented in Ratlam, Dhar and Jhabua districts in 5 clusters of Sailana, Bajna, Rajoda, Tirla and Petlawad involving 21,720 hectares in 150 villages and 9,449 farmers. Under Other Initiatives and Good Practices included Kasturi Qualifying Bales through Awareness and Training for 259 farmers of which 92 farmers were certified.

2. Shri Sarvapriya Bansal, Director, Mohini Health & Hygiene Private Limited has donated an Ambulance Van equipped with laser surgery worth Rs. 42 lakh to Choithram Eye Hospital. Congratulations.

RAW MATERIALS

1. On 12th May, 2025 the USDA issued its first complete set of estimates for an upcoming crop year. In 2025-26, the USDA expects lower global production (from 121.1 million bales in 2024-25 to 117.8 million) and higher global mill-use (from 116.7 million bales in 2024-25 to 118.1 million in 2025-26). These early projections suggest production and mill-use will be in relative balance. The result is a prediction that global ending stocks will hold at a level consistent with the current crop year (78.4 million bales). This volume ranks as the highest outside of COVID (2019-20) and the period (2012-13-2015-16), when the Chinese reserve system was holding an exceptional amount of cotton. The largest year-over-year country-level changes in production are expected in China (-3.0 million bales to 29.0 million), India (-500,000 bales to 24.5 million), Brazil (+1.3 million to 18.3 million), the U.S. (+100,000 to 14.5 million), Pakistan (+500,000 to 5.5 million), Australia (-1.5 million to 4.1



million), and Turkey (-400,000 to 3.6 million). For mill-use, the largest changes are for China (-500,000 bales to 36.5 million), India (+500,000 to 26.0 million), Bangladesh (+200,000 to 8.5 million), Turkey (+400,000 to 7.5 million), Vietnam (+300,000 to 8.0 million), and Brazil (+200,000 to 3.5 million). The global trade forecast suggests a 2.3 million bales increase (to 44.8 million in 2025-26). Chinese imports are projected to increase one million bales to 7.0 million. Increases in imports are also expected for Bangladesh (+300,000 to 8.5 million), Vietnam (+300,000 to 8.0 million), Turkey (+700,000 to 5.0 million), and India (+400,000 to 3.0 million). The largest decrease in imports is projected for Pakistan (-800,000 bales to 5.0 million). In terms of exports, the largest changes are expected for the U.S. (+1.4 million bales to 12.5 million), Brazil (+1.1 million to 14.0 million), Australia (-400,000 to 4.9 million), and the African Franc Zone (+400,000 bales to 4.6 million). The World Cotton Balance Sheets are drawn as under:

Quantity in Mn. of 480 lbs. bales				
	2022 -23	2023 -24	2024 -25	2025 -26
Opening Stock	70.88	73.93	73.77	78.40
Production	116.30	112.97	121.07	117.81
Consumption	112.64	114.80	116.68	118.08
Export/Import	37.74	44.59	42.40	44.83
Closing Stock	75.90	73.77	78.40	78.38

2. Production in India—the second-largest cotton-producing country—is projected at 24.5 million bales in 2025-26, 2 % (500,000 bales) below 2024-25 and the second-lowest crop since 2009-10. The expected decline for 2025-26 is the result of a lower yield forecast. India's cotton harvested area is projected to remain unchanged at 11.8 million hectares in 2025-26. Despite the lower national yield forecast of 452 kg per hectare, it is still above the 3-year average. India's cotton mill use, on the other hand, is forecast to increase 500,000 bales (2 %) in 2025-26 to 26.0 million bales, matching 2020-21's record. Stocks in India are projected to remain flat at 10.0 million bales in 2025-26.

3. In the Cotton Association of India's press release of 26th May, 2025, the cotton pressing numbers for 2024-25 season are estimated at 291.35 lakh bales of 170 kgs. each up from its previous estimate of 291.30 lakh bales of 170 kgs. each due to increased output in Odisha. Cotton consumption estimate for 2024-25 season reduced by 8.00 lakh bales to 307.00 lakh bales of 170 kgs. each from 315.00 lakh bales of 170 kgs. each estimated previously. Cotton exports for the 2024-25 season are projected at 15.00 lakh bales of 170 kgs. each against 16.00 lakh bales of 170 kgs. each projected last month.

The cotton imports for the 2024-25 season are maintained at 33.00 lakh



bales of 170 kgs. each. Higher imports by the world's second-largest producer of the fibre could support global prices, which fell to their lowest in more than four years after top consumer China levied duties on imports from the United States. India could import 3 million bales in the current marketing year ending on 30th Sept., up from 1.52 million bales imported a year ago.

4. According to Shri Atul S Ganatra, President, Cotton Association of India (CAI), "Cotton area will be down in central India, which accounts for about 66 % of the area and crop in the country. However, in north and south India, it may increase. The overall cotton area in the country may come down by 7-8%."Farmers are not interested in growing cotton because of low yields, higher expenses and cost of labour.

5. The Union Ministry of Agriculture has released the third advance estimates for agricultural production for the year 2024–25. Cotton production in the country has also been hit, falling from 32.522 million bales to 30.692 million bales (each bale weighing 170 kilograms). This marks the second consecutive year of decline in cotton production.

6. On 27th May, 2025 Union Minister of Textiles, Shri Giriraj Singh, chaired the Textile Advisory Group (TAG) meeting on Cotton and MMF to review the progress of initiatives aimed at strengthening the entire textile value chain. He highlighted the Mission for Cotton Productivity, and underscored the critical need to enhance cotton productivity and quality to match the 5F vision of Hon'ble Prime Minister. He emphasized that innovation and collaboration will be centric to boosting farm productivity and ensuring benefits are received at all levels of the value chain. The Union Minister also suggested that data mapping will ensure a more targeted and data-driven approach to policy interventions. In his address, the union Minister of Textiles, also called upon all stakeholders to conduct a comprehensive gap analysis across the demand-supply spectrum of the industry.

7. On 28th May, 2025 the Cabinet Committee on Economic Affairs chaired by the Prime Minister, Shri Narendra Modi has approved the increase in the Minimum Support Prices (MSP) for Cotton for Marketing Season 2025-26 by 11.84% Rs. 579.00 per quintal. However, the increase in cotton MSP has not been well received by the trading community. Traders believe that excessive MSP hikes make Indian cotton uncompetitive in the global market and place the Indian textile industry in a difficult position.

POWER

The M P Power Management Company has advised DISCOMs to bill to the consumers Fuel & Power Purchase Adjustment Surcharge (FPPAS) @ 2.51 % on energy charges only for one month commencing from 24th May, 2025.



MANPOWER

1. In exercise of the powers conferred upon it under sub section (1) of section 97 of the Employees' State Insurance Act 1948 (34 of 1948) on 28th April, 2025, the Employees' State Insurance Corporation has extended Atal Beemit Vyakti Kalyan Yojana for the period 1st July, 2024 to 30th June, 2026.



2. The Union Minister of Textiles Shri Giriraj Singh interacted with Industry partners and beneficiaries under the Samarth Scheme on 23rd May, 2025. He told so far under the Samarth Scheme, 4.32 lakh beneficiaries trained, 3.20 lakh have received placements with 88% of women beneficiaries. By empowering women in textile production, craftsmanship, and innovation, the scheme is driving gender-inclusive development. The scheme extends across India, making skill development accessible from Jammu & Kashmir to the Andaman & Nicobar Islands. The Government focus on Increasing textile manufacturing, modernizing infrastructure, fostering innovation, upgrading technology through skilled manpower will strengthen India's position as a global textile hub.

3. The Employees Provident Fund Organisation has conveyed approval on 26th May, 2025 to credit interest @ 8.25% to the account of each member of EPF Scheme.

LEGAL & TAXATION

1. In the matter of *Sri Sai Vishwas Polymers v. Union of India and Another* [Writ Petition (MB) No. 103 of 2025], the Uttarakhand High Court has set aside the order passed by invoking provisions of Rule 96(10) of the CGST Rules, 2017 after its deletion. The omission of Rule 96(10), Rule 89(4A) and Rule 89(4B) shall benefit exporters by simplified refund procedures, reduced capital blockages and boosting export competitiveness. Exporters can now claim IGST refunds without the previous limitations, thereby enhancing ease of doing business.



EXPORT & IMPORT

1. The Central Government released the information relating to exports for April, 2025 on 15th April, 2025. The country's T&A exports were up by 7.45 % to US\$ 2,983.93 million in April, 2025. The exports of all goods increased by 9.02 % to US\$ 38,487.74 million in the month. Textile exports increased by 2.16 %, while apparel exports increased by 14.43 % during the month as compared to the same month of 2024. The information relating to textile and apparel exports is as under:



Values in US\$ Million

Exports	April, 2024	April, 2025	% Change
Cotton Yarn, Fabric, Made -ups, Handloom Products	946.77	962.97	1.71
MM Yarn, Fabric Made -ups, etc.	368.40	383.80	4.18
Jute Products	27.11	28.35	4.57
Carpets	111.18	114.87	3.32
Handicrafts, etc.	125.09	122.60	(-)1.99
Textiles	1,578.55	1,612.59	2.16
Apparel	1,198.40	1,371.34	14.43
Textiles & Apparel	2,776.95	2,983.93	7.45
All Commodities	35,303.60	38,487.74	9.02
% Share of T & C	7.90	7.80	

Share of T&A has decreased to 7.80 % in April, 2025 from **7.90 %** in April, 2024.

2. In April, 2025, imports of textile yarn, fabrics, and made-ups increased by 19.20 %, rising from US\$ 162.01 million to US\$ 193.12 million, whereas imports of Cotton & Waste increased by 129.17 % rising from US\$ 37.91 million to US\$ 86.88 million. The details of imports of these two items are as under:

Values in US\$ Million

Imports	April, 2024	April, 2025	% Change
Cotton Raw & Waste	37.91	86.88	129.17
Textile Yarn, Fabrics, Made-ups, etc.	162.01	193.12	19.20

3. The month wise imports of Textile & Apparel by USA from Bangladesh, China, India and Vietnam during the period January- March, 2025 have been as under:



Value in US \$ Billion

	January	February	March	Total
Bangladesh:				
2024	0.56	0.66	0.59	1.81
2025	0.82	0.72	0.74	2.28
% Change	46.4	8.9	25.5	25.9
China:				
2024	2.17	1.83	1.51	5.51
2025	2.43	1.89	1.40	5.72
% Change	11.8	2.9	-7.1	3.6
India:				
2024	0.67	0.75	0.89	2.31
2025	0.87	0.88	1.03	2.77
% Change	28.3	17.6	15.9	20.1
Vietnam:				
2024	1.30	1.26	1.14	3.70
2025	1.56	1.29	1.37	4.22
% Change	20.0	2.3	20.3	14.0

From the above table, it would be observed that exports from India to USA have increased by over 20% during January-March, 2025 as compared to the same period of 2024.

4. India's cotton yarn exports over 2014-15 to 2023-24 show no consistent upward trend, with volatile year-on-year movement. Despite a peak in 2021-22, the industry remains susceptible to global demand shifts, price sensitiveness, and trade policies. The data of Cotton yarn exports as under:

Value in US\$ Million

2014 -15	2015 -16	2016 -17	2017 -18	2018 -19
3,957	3,624	3,353	3,443	3,910
2019-20	2020-21	2021-22	2022-23	2023-24
2,774	2,807	5,518	2,765	3,792

5. Indian garment makers, whose products often lost out to cheaper goods from Bangladesh, can now hope to gain some shelf space in London stores, thanks to a 10% duty cut under the trade deal with the UK. "It will create infinite possibilities for the labour-intensive apparel sector by reducing trade barriers, fostering greater market access and boosting employment generation, besides providing a level-playing field vis-a-vis competing countries like Bangladesh and Vietnam. UK imports approximately US\$ 26.95 billion worth of Textiles and Clothing of which India's share is at 6.64% with US\$ 1.8 billion and Bangladesh has a share of 14.8% with US\$ 4 billion. Pakistan and Vietnam, who are also beneficiaries of the duty-free access have a share of 5.96% (US\$ 1.6 billion) and 4.45% (US\$ 1.2 billion) respectively in UK's imports of Textile and Clothing. With the FTA now creating a level playing field for Indian exporters - particularly in home textile and garment sector – there is a huge potential to grow our market share exponentially to approximately 10% to 12% over the next three years.

6. On 6th May, 2025, India and the UK concluded a landmark free trade agreement (FTA), marked as a historic milestone by Prime Minister Narendra Modi. With the FTA, India gets preferential treatment with zero-tariff entry which can be a game changer vis-à-vis its competitors. To take advantage of this, we need to set a few things in order in the T&A value chain. India's T&A sector has three structural challenges.

- First is the fragmented manufacturing base, with micro, small, and medium enterprises operating in silos across states.
- Second is the disjointed value chain. Cotton is grown in states like Gujarat and Maharashtra, yarn is spun in Tamil Nadu, fabric is processed in other parts, and garments are stitched across India. This geographical dispersion raises logistics costs and causes delays — a lead time of 63 days from order to delivery, compared to 50 days in Bangladesh (Bangladesh Garment Manufacturers and Exporters Association, 2022).

- Third, India's policies on man-made fibres (MMF) lag global preferences, hampered by an inverted goods and services (GST) structure and restrictive quality norms.

7. The Confederation of Indian Textile Industry (CITI), quoting trade data, said India imported readymade garments worth \$634 million in 2024, which saw 19% CAGR growth in the last 10 years. Total textile and apparel exports from India to Bangladesh in 2024 were \$3.2 billion and exports from Bangladesh to India were \$1.07 billion. Though India has a trade surplus with Bangladesh in textiles and apparel, its exports grew 4.97% (CAGR) between 2015 and 2024, while Bangladesh's exports to India grew 12.87%. The DGFT decision will reduce the backdoor entry of Chinese fabrics that were getting converted in Bangladesh and entering India without duty.

8. The Directorate General of Foreign Trade (DGFT) vide its Notification dated 07/2025-26 dated 17th May, 2025 has restricted the imports of certain goods, including all types of Ready-made Garments and cotton & cotton yarn waste, through land ports from Bangladesh. These products are now permitted to be imported only via the seaports of Nhava Sheva and Kolkata. However, such said port restriction will not apply to Bangladesh goods transiting through India but destined for Nepal and Bhutan. It is applicable with immediate effect.

9. On 26th May, 2025, the Government of India has announced the restoration of benefits under the Remission of Duties and Taxes on Exported Products (RoDTEP) Scheme for exports made by Advance Authorization (AA) holders, Export-Oriented Units (EOUs), and units operating in Special Economic Zones (SEZs). The benefits will be applicable for all eligible exports made from 1st June, 2025 onwards.

10. With an objective of promoting sustainability built-environment through efficient use of energy, water, waste, and selection of advanced technology for monitoring and increase the number of LEED certified garment factories in India; Apparel Export Promotion Council (AEPIC) signed a MoU with Green Business Certification Institute Pvt Ltd (GBCI). Shri Mithileshwar Thakur, Secretary General, AEPIC stated that, "We only have 13 LEED certified garment factories in India as against around 250 in Bangladesh. LEED certification is a globally recognized rating system for evaluating a building's environment performance and sustainability and indicates building's adherence to green building principles promoting energy efficiency, resource conservation and healthier indoor environments. There is a greater emphasis from the reputed brands globally on sustainability and we need to quickly catch the boat for staying competitive in the international market."

STATE OF INDUSTRY

1. According to data released by the Ministry of Statistics and Programme Implementation (MoSPI) on 28th May, 2025, the IIP growth rate for the month of April, 2025 is 2.7 %, which was 4.00% for the financial year 2024-25. The index for manufacture of textiles, which was 105.3 in April, 2024 increased to 107.1 in April, 2025 showing an increase of 2.7 %. The Wearing Apparel Index increased from 105.1 in April, 2024 to 116.5 in April, 2025 recording a growth of 10.8 %. The details of IIP are as under:



Items	For the Month		Cumulative		Growth
	April 2024	April, 2025	Apr.-Mar. 2023-24	Apr.-Mar. 2023-24	April, 2025
General	148.0	152.0	146.7	152.6	2.7 %
Textiles	105.3	107.1	107.6	109.3	1.7 %
Wearing Apparel	105.1	116.5	109.9	116.7	10.8 %

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1210 -1212, Dalarnal Tower, 'A' Wing, 12th Floor, Plot No. 211, Nariman Point, Mumbai - 400 021, India
+91 022 49724603 / +91 85919 51770 | awards@india-itme.com | www.awards.india-itme.com

2. In India, the cotton textile industry is more than just a sector—it's a lifeline for nearly 60 million people. From the 6.5 million hardworking cotton farmers nurturing their crops under the sun, to the countless hands involved in processing, trading, and crafting fabrics, this industry weaves together the livelihoods of millions. According to rating agency Crisil Ratings main reason for expected revenue boost in financial year 2025-26 is the recovery in yarn exports to China. Exports make up about 30% of the industry's total revenue, with China contributing around 14%. Last year, India's yarn exports to China declined due to an unusually high cotton output in China, which caused a 5–7% drop in India's total yarn exports. However, this trend is expected to reverse this year, with exports projected to grow by 9.11% as China's cotton production returns to normal. "This recovery will benefit Indian spinners, who can take advantage of steady domestic cotton production and reclaim market share. Also, India's competitiveness in textile exports to the US remains strong, especially with higher tariffs imposed on Chinese exports. This will support 6–8% revenue growth in downstream segments like home textiles and readymade garments."

3. India's cotton yarn industry is expected to witness a revenue growth of 7–9 % in the current fiscal, a marked improvement from the modest 2–4 % growth recorded in the previous year. This uptick will be driven primarily by higher volumes, aided by a modest rise in yarn prices and strong domestic demand. Operating margins, which had already shown recovery last fiscal, are projected to improve by another 50–100 basis points this year. This will be supported by stable cotton yarn spreads and improved cotton availability through procurement by the Cotton Corporation of India (CCI). The key growth catalyst for fiscal 2026 (FY26) will be a rebound in yarn exports to China. Exports constitute around 30 % of the industry's revenue, with China accounting for nearly 14%.

4. Primus Partners, a leading Indian management consulting firm, has unveiled a comprehensive "Roadmap for USD 100 Bn. Exports in 5 Years". Anchored in a six-point strategy, the roadmap outlines key recommendations to diversify export offerings, integrate Industry 4.0, increase skilled manpower, enhance infrastructure, and build industry capacity. Launched at a time of shifting global trade dynamics and new tariff alignments, the roadmap positions India to become a preferred sourcing destination and a global leader in textile manufacturing. Six

Recommendations that will drive the Textile Industry' talk about:

- **Integration of Industry 4.0 in the Textile Sector:** will lead to approximately a 15% reduction in operational waste;
- **Encouraging Free Trade Agreements and Market:** will boost India's Textile Competitiveness;
- **Strengthening existing Operational Subsidies:** will enhance Textile Industry advantage;
- **Establishing Specialized Training Centres in Key Textile Hubs, focusing on Tier 2 & Tier 3 Cities:** will raise the Skilled Workforce Share to 50%;
- **Transforming Textile MSMEs to Global Giants:** By Moving from Small to Scalable Enterprises; Focus on Driving growth & exports through Technical Textiles: will reinforce share in global Technical Textile Market.

5. Wazir Advisors, a leading management consulting firm specializing in the textile and apparel sector, has released its latest white paper "Yarn Realization - Key to Profit in the Global Competitive Landscape for Indian Spinners". The white paper presents a detailed analysis of key levers of yarn realization, such as raw material quality, SOPs, process optimization etc., and their critical role in operational improvements. In a time, when margins are razor-thin and volatility is the new normal, focus on enhancing yarn realization is no longer a strategic choice, it's a necessity for sustained profitability. In today's competitive, cost-sensitive, and dynamic global textile landscape, spinning mills are under immense pressure due to rising input costs and shrinking fibre to yarn spread. This white paper emphasizes the growing need for Indian spinners to move beyond reactive cost control and adopt a more proactive, efficiency-driven approach. It explores how yarn realization serves as a critical metric for operational performance and profitability. Even marginal improvements in realization can lead to direct bottom line improvement.

6. As per reports, the Government has set up an Inter-Ministerial Group (IMG) to assess the Quality Control Orders (QCOs) proposed by various Ministries. The IMG will examine the possibility of graded standards or exempting Indian manufacturers, who met a 'de minimis' standard from the requirement of obtaining BIS license or third party certification. The terms of reference of the IMG include evaluation of QCOs and making recommendations examining requests from Ministries and Departments for reconsideration and review of existing QCOs.

7. The United States publicly condemned the European Union, China and India, among other countries, for what it has called "unfair trade practices" that are hurting the country's own textile and clothing industry. Specifically impacting southeast sectors, the Office of the United States Trade Representative (USTR) said in a special media statement that these steps have led to closure of 28 US textile mills in less than two years. India, meanwhile, came under fire for undermining American exporters with exorbitant taxes, ambiguous quality control regulations and complex system of erratic import licensing requirements. Additionally, Washington took issue with India 'production Linked Incentive (PLI) programs, claiming they provide Indian Textile producers an unfair advantage in international trade.

8. The State Government is in the process of developing Ready Made Garment Park at Satgarhi, Bhopal on an area of 61 hectares and Plug & Play Garment Complex in Ready Made Garment Park at Pardesipura, Indore.

For Address