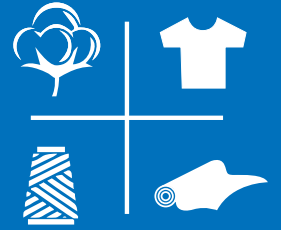




M. P. TEXTILE NEWSLETTER

THE MONTHLY NEWSLETTER OF THE MADHYA PRADESH TEXTILE MILLS ASSOCIATION



Chairman:
Shri Shreyaskar Chaudhary;
Vice Chairman:
Shri Siddharth Agrawal;
Dy. Chairmen:
Shri Subhash Jain
Shri Mohit Maheshwari

ASSOCIATION NEWS

1. The Association submitted a Representation to the Labour Commissioner on 24th March, 2026, in respect of "The Madhya Pradesh Code on Empowering Work Space-2026" stating that a separate State Code is not necessary for industrial establishments and the proposed Code should only apply to Shops & Establishments not covered by Central legislation. Discrepancy in various provisions was also pointed out for amendment/rectification.

2. The Confederation of Indian Textile Industry (CITI), in partnership with the International Labour Organization (ILO), has been implementing a community awareness programme across five districts of Madhya Pradesh - Dhar, Ratlam, Jabua, Alirajpur and Barwani-since 22nd July, 2024. The programme focuses on strengthening awareness and on-ground implementation of the five pillars of Fundamental Principles and Rights at Work (FPRW), alongside promotion of sustainable cotton cultivation practices among farming communities. During the period 22nd July, 2025 to 21st January, 2026. CITI-CDRA had implemented the following extension programmes under the CITI-ILO collaboration:

- District-level trainings: 10 programmes across 5 districts.
- Cluster-level trainings: 10 programmes.
- ILO Mobile Van awareness campaign.
- 15 days' Workshop on Contract Farming.
- 1 day Learning and Experience-sharing Workshop: ensuring localized, village-level sensitisation on FPRW.

The ILO Mobile Van Awareness Campaign was conducted during October–November, 2025 across the five districts. The campaign covered 131 villages and reached 2,930 farmers through direct interactions, including participation of approximately 483 women farmers. The outreach focused on key labour and safety standards, including:

- Elimination of child labour in agriculture • Prevention of forced and bonded labour • Non-discrimination and equality at the workplace • Freedom of association and collective participation, and • occupational Safety and Health (OSH) practices.

RAW MATERIALS

1. According to the 2nd March, 2026 release by International Cotton Advisory Committee, Global cotton production is projected to decline by 4% in the 2026-27 season to 24.8 million tons, while consumption is expected to remain relatively steady at 25.0 million tons. Lower cotton prices, shifting planting intentions in major producing countries, and weaker demand — particularly



from China — are contributing to the projected reduction in output. With production currently exceeding consumption in 2025-26, the anticipated decline next season could bring global supply and demand closer to balance. China is expected to remain the world's largest producer and consumer of cotton, though its use of cotton is projected to decline modestly as manmade fibers gain market share. India, Brazil, and the United States continue to play central roles in global supply, while Bangladesh and Vietnam remain key drivers of import demand. World cotton lint trade in 2026-27 is projected at 9.6 million tons. Brazil is expected to remain the world's largest exporter, followed by the United States. Recent trade policy developments — including new US tariff measures and updated trade agreements involving Bangladesh, India, and the European Union — introduce additional uncertainty into the global cotton market. The full implications of these measures will depend on implementation and market response.

2. As per USDA press release dated 10th March, 2026, in 2025-26 world cotton Balance Sheet, the global production forecast is raised over 1.1 million bales because of higher production in Brazil (larger area) and China (higher yield), partially offset by lower production in Argentina (reduced area). The world consumption forecast is down 140,000 bales with mill use projected lower in several countries, partially offset by higher consumption in China. Trade is increased by 200,000 bales as higher imports by India are partially offset by small reductions for several countries. The forecast for world ending stocks is raised almost 1.3 million bales to 76.4 million with India and Brazil accounting for much of the increase. The global stocks-to use ratio for 2025-26 is raised by one percentage point from last month to 64 %.

Quantity -Million 480-Pound Bales

World	2023-24	2024-25	2025-26
Opening Stock	75.86	73.30	73.76
Production	112.23	118.54	120.99
Consumption	114.99	118.94	118.58
Export/Import	44.06	42.41	43.91
Closing Stock	73.30	73.76	76.39

3. According to the International Cotton Advisory Committee (ICAC) World Textile Demand report, cotton's market share in global fibre consumption has dropped to below 25 % in recent years from nearly 40 % in the early 2000s. The US Department of Agriculture said: "This limits the potential growth for cotton product imports despite record consumer demand for apparel and home textiles. Competition with MMF (Man-Made Fibre) products is especially challenging with respect to Chinese MMF product exports."

4. As per USDA Report dated 10th March, 2026 for India, 2025-26 cotton production is projected at 23.5 million bales, about 1 % above last season's crop. A yield increase more than offset a slight decline in area harvested this season, boosting production by 300,000 bales. Harvested area in India is estimated to decline to 11.2 million hectares in 2025-26, while yield is



forecast to increase 4 % to 457 kg per hectare. India's cotton harvested area continued a downward trend and is the country's lowest since 2016-17, while the yield is forecast at its highest level in 6 years. India is forecast to account for approximately 19.5 % of world cotton production in 2025-26, slightly below the previous year. Cotton mill use in India is forecast to remain at 25.0 million bales, the average of the last 4 years but below the 2020-21 record of 26.0 million bales. India is expected to contribute 21% of the 2025-26 global total. India's cotton imports are expected to reach a record 4.0 million bales-up 1 million bales from 2024-25-to help support the robust textile industry as area devoted to cotton has recently shifted to alternative crops. 2025-26 ending stocks are forecast to increase, with stocks-rising nearly - 12 %.

5. The Cotton Corporation of India for the ongoing marketing season 2025-26 has procured 104.1 lakh bales of 170 kg. each. This is about 4 % higher than last year's 100.16 lakh bales. In Madhya Pradesh, the procurement has exceeded 5.55 lakh bales.

6. The Cotton Association of India (CAI) has released on 13th March, 2026, its latest estimate of India's total cotton pressing numbers for 2025-26 season, which began on 1st October, 2025. It has been increased estimates by 3.50 lakh bales to 320.50 lakh bales of 170 kgs. each. Cotton production in Madhya Pradesh has been estimated at 18 lakh bales. CAI has increased India's total cotton consumption during 2025-26 i.e. up to 30th September 2026 by 10.00 lakh bales to 315.00 lakh bales. Cotton import estimates have been increased to 47 lakh bales and exports to 15 lakh bales.

7. As per reports from Government sources, with cotton productivity remaining volatile due to challenges including erratic weather and pest attacks, the country's area under cotton has fallen by nearly a fifth to 11.2 million hectares in 2025-26 from 13.4 million hectares in 2019-20.

8. Sharp fluctuations in the prices of key polyester raw materials—Purified Terephthalic Acid (PTA) and Mono Ethylene Glycol (MEG)—have created uncertainty across India's synthetic textile value chain, with downstream manufacturers warning of rising cost pressures. Prices of PTA and MEG, essential inputs used in the production of synthetic fibres, filament and yarn, increased by Rs. 20.48 (US \$0.22) per kilogram on 10th March before falling by Rs. 14 (US \$0.15) per kilogram on 12th March, 2026.

9. India's textile industry is grappling with a sharp surge in input costs, with more than half of manufacturers reporting a 20-25% rise in raw material expenses. The spike is largely attributed to the recent increase in crude oil prices which has inched above \$100/ barrel amid geopolitical tensions, which has significantly pushed up the cost of petroleum-derived inputs used across the textile value chain. Nearly 60% of India's textile output is dependent on synthetic fibres such as polyester and nylon, both of which are crude derivatives. As a result, any movement in oil prices has a direct bearing on production costs. With prices of Man Made Fibres (MMF) such as polyester moving up in tandem with crude following the ongoing war in West Asia, cotton stake holders see demand coming back to the natural fibre. Polyester fibre prices have moved up by 10-25 % within days of crude moving up.

POWER

1. The M P Power Management Company has advised DISCOMs to bill to the consumers Fuel & Power Purchase Adjustment Surcharge (FPPAS) @ minus (-)0.63 % on energy charges only for one month commencing from 24th March, 2026.



2. The Madhya Pradesh Electricity Regulatory Commission has issued a Public Notice on 26th March, 2026 declaring Tariff for 2026-27, which will be applicable from 3rd April, 2026. The Tariff for the Textile Industry (HV 3.1) as compared to tariff for 2025-26 is as under:

Fixed Charges Rs. /KVA of Billing Demand per month	2025-26		2026-27	
11KV	Rs. 399.00		Rs. 409.00	
33KV	631.00		641.00	
132 132/220/400KV	719.00		729.00	
Energy Charges Rs. per unit	Up to 50% LF	Above 50% LF	Upto 50% LF	Above 50% LF
11KV	7.50	6.50	7.79	6.79
33KV	7.46	6.41	7.75	6.70
132KV	7.05	6.06	7.34	6.35
220/400KV	6.60	5.60	6.89	5.89

The other terms and conditions are similar to those of 2025-26

MANPOWER

1. Shri Ashish Paliwal In-charge Dy. Labour Commissioner, Government of Madhya Pradesh appointed as Certifying Officer under Section 3 (a) of Industrial Employment (Standing Orders) Act, 1961 vide Notification dated 26th February, 2026.



2. The Labour Commissioner has announced increase of Rs.275 per month in Variable Dearness Allowance w.e.f. 1st April, 2026 and as such wages payable for the Textile & Apparel Sector workmen from 1st April, 2026 are as under:

Category	Wages Rs. Per month			Wages/day Rs.
	Minimum	DA	Total	
Unskilled	6,500	4,300	10,800	415
Semiskilled	7,057	4,600	11,657	448
Skilled	8,435	4,600	13,035	501
Highly Skilled	9,735	4,600	14,335	551

3. The Report, 'Breaking Point: Heat and the Garment Floor', by Tata Institute of Social Sciences and Heat Watch, documents widespread heat stress and major gaps in workplace protections across factories in Tamil Nadu, Delhi-NCR and Gujarat. Based on surveys of 115 workers and 47 in-depth interviews, along with factory case studies, the study highlights how extreme heat combines with production pressure and gendered workplace dynamics to intensify risks. Survey findings reveal limited access to basic protections. Over 36 % of workers reported irregular or unclean drinking water, 78 % struggled to access toilets, and 80 % said their workstations lacked air movement. Nearly 88 % felt completely drained during peak summer months, while 87 % reported heat-related ailments such as headaches, dizziness and muscle cramps in the past year. Women workers reported acute impacts, with 96.8 % experiencing burning sensations during urination and 92.6 % reporting menstrual disruptions linked to heat and production pressure.

LEGAL & TAXATION

1. The Central Board of Indirect Taxes & Customs (CBIC) by Circular No. 10/2026-Customs dated 10th March, 2026 has clarified that where amendment or cancellation of export documents becomes necessary solely due to force majeure circumstances, the proper officer may allow such amendment or cancellation without insisting on payment of the prescribed fee under the Levy of Fees (Customs Documents) Regulations, 1970.



2. The CBIC issued Circular No. 9/2026-Customs dated 8th March, 2026 regarding closure of the Strait of Hormuz and the consequent disruption in maritime routes, certain vessels carrying export cargo from India are unable to reach their destination ports and are returning to Indian ports. The Board in exercise of the powers conferred under Section 143AA of the Customs Act, 1962 has prescribed the detailed procedures in this respect.

EXPORT & IMPORT

1. India's textile and apparel exports witnessed a significant decline in February, 2026 due to geopolitical disturbances amid the US-Israel-Iran conflict. According to the quick estimates data released by the Ministry of Commerce & Industry on 16th March, 2026, India's Textile and Apparel (T&A) exports registered a decline in February, 2026 compared with the same period last year. However, it is cautioned March could be 'challenging' as the crisis in the Middle East has disrupted freight movements through the Strait of Hormuz.





- During February, 2026 Textiles exports registered a de-growth of 0.31 % over the same month of previous year, while Apparel exports registered a de-growth of 8.60 % during the same time period.
- Cumulative Exports of Textiles and Apparel during February, 2026 have registered a de-growth of 4.26% over February, 2025.
- During April – February, 2025-26 Textiles exports registered a de-growth of 2.17% over the previous year, while Apparel exports registered a growth of 0.51% during the same time.
- Cumulative Exports of Textiles and Apparel during April – February, 2025-26 have registered a de-growth of 1.00 % as compared to April – February, 2024-25.

The information relating to textile and apparel exports during the period April-February, 2025-26 as compared to exports in same period of the previous year is as under:

Value in US\$ Million

Exports	Apr.-Feb. 2024-25	Apr.-Feb. 2025-26	% Change
Cotton Yarn, Fabrics, Made-ups & Handloom Products	10,938.42	10,584.05	(-) 3.24
MMF Yarn, Fabrics, Made-ups, etc.	4,433.45	4,452.96	0.43
Jute Products	349.51	330.51	(-)5.44
Carpets	1,403.69	1,336.96	(-) 4.75
Handicrafts, etc	1,636.40	1,650.95	0.89
Textiles	18,761.87	18,355.43	(-) 2.17
Apparel	14,458.02	14,531.65	0.51
Textiles & Apparel	33,219.89	32,887.08	(-) 1.00
All Commodities	3,95,656.98	4,02,930.22	1.84
% Share of T & C	8.40	8.16	

2. Imports of cotton (raw and waste) decreased by 59.44% in February, 2026 compared to February, 2025. Imports of Textile yarn, Fabric, Made-ups increased by 5.50% compared to February, 2025. The details of imports in April-February, 2025-26 as compared to the same period of previous year are as under:

Value in US\$ Million

Imports	Apr.-Feb. 2024-25	Apr.-Feb. 2025-26	% Change
Cotton Raw & Waste	1,140.28	1,833.76	60.82
Textile Yarn, Fabrics, Made-ups, etc.	2,282.25	2,403.51	5.31

3. India's Textile & Apparel exports to EU-27 have grown at a CAGR of 6.6% over 2020-21 and 2024-25. The year wise details of exports from 2021-22 to 2024-25 are as under:

Value in US \$ Million

Items	2021-22	2022-23	2023-24	2024-25	% Share
RMG	4172.6	4584.1	4078.6	4553.3	59.8
Cotton Textiles	1504.1	1309.2	1239.8	1283.2	16.8
Man-made Textiles	1094.3	908.3	880.6	947.4	12.4
Handicrafts	385.5	333.5	282.1	309.6	4.1
Carpets	365.6	270.6	284.5	308.6	4.1
Jute Products	160.8	124.8	102.3	111.4	1.5
Wool & Woollen Textiles	48.2	70.5	61.4	45.7	0.6
Handloom Products	78.2	58.4	45.6	45.4	0.6
Silk Products	9.0	11.0	10.2	13.3	0.2
Total	7818.3	7670.4	6985.2	7618.0	100.0

4. As per information given in the Lok Sabha on 10th March, 2026 the Export and Import of Technical Textiles have been as under:

Value in US\$ Million

Technical Textiles	Exports	Imports	Trade Balance
2022-23	23,050	21,809	+1,241
2023-24	24,724	21,132	+3,592
2024-25	28,392	22,865	+5,527
2025-26 (Apr-Dec)	21,970	18,953	+3,017

5. The Director General of Foreign Trade (DGFT) vide Trade Notice No. 32/2025-26 dated 6th March, 2026 has launched support for emerging Export Opportunities under the Export Promotion Mission (EPM) – Niryat Protsahan with immediate effect.

6. Exporters have been given significant relief by the DGFT vide Public Notice No. 51/2025-26 dated 6th March, 2026 to Authorizations under Advance and Export Promotion Capital Goods schemes, which are automatically extended. This applies to authorizations expiring between 1st March and 31st May, 2026. The extension is granted without any composition fee.

7. The DGFT vide Notification No. 65/2025-26 dated 19th March, 2026 has provided A time-bound Resilience & Logistics Intervention for Export Facilitation (RELIEF) under the Export Promotion Mission to address export risks from Gulf and West Asia maritime disruptions. ECGC is appointed the nodal implementing agency to administer three components:

- enhanced war/political risk support for exporters already insured with ECGC for consignments with on-board bill of lading or airway bill in the eligible window with *reimbursement for compensation beyond existing cover;
- encouragement of ECGC standalone coverage for upcoming exports with premium protection and enhanced cover; and
- reimbursement to eligible non-ECGC-insured MSME exporters for extraordinary freight and insurance surcharges, subject to documentary proof and per-exporter limits.

8. The DGFT issued Trade Notice No. 33/2025-6 dated 20th March, 2026 in respect of amendment of guidelines for Interest Subvention Support under the Export Promotion Mission (EPM) to provide operational clarity. It clarifies that export credit eligibility depends on prevailing RBI directions, and subvention is not available once a loan becomes an NPA. Exporters must ensure aggregate claims remain within Rs. 50 lakh per IEC, supported by bank undertakings.

9. As per the Notification No. 66/2525-26 dated 23rd March, 2026, the RoDTEP rates and value caps have been restored to the levels applicable as on 22nd February 2026. Accordingly, exporters will be eligible to claim RoDTEP benefits at these restored rates for all eligible export products for the period 23rd February 2026 to 31st March 2026. Now the Scheme has been extended till 30th September, 2026.

10. The Ministry of Textiles have extended RoSCTL Scheme till 30th September, 2026

11. According to the USDA's latest global market analysis, India has displaced China as the largest supplier of cotton products such as apparel and home textiles to the United States during 2025. The US cotton product imports were flat in calendar year 2025 at 3.3 million tons, equal to the 15-year average. Imports from China reduced to about 0.5 million tons in 2025, while imports from India were around 0.6 million tons during the year. India benefits from a vertically integrated textile supply chains that enhance firms' ability to comply with traceability standards.

12. According to the Apparel Export Promotion Council (AEPCC), the ongoing conflict in West Asia is increasing costs for India's apparel exporters, with additional logistics expenses estimated to add between Rs. 12 (US \$0.13) and Rs. 55 (US \$0.60) to the cost of each garment shipped. The industry body said the increase is largely due to longer shipping routes and war related surcharges imposed by shipping companies, which have raised freight costs for exporters sending cargo to the Gulf region.

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edition of Bharat Tex asked the industry on 11th March, 2026 to capture at least \$200 billion from the \$465 billion market access provided by free trade agreements. "Currently, much of India's production is oriented towards summer garments, catering to roughly eight months of global demand. Going forward, the industry must expand capabilities to produce garments suitable for all twelve months." India's share in the global textile trade should increase to 14.7% from 4.7% now.

4. India Ratings and Research (Ind-Ra) has maintained a neutral sector outlook and a stable rating outlook for India's apparel retail sector for fiscal 2026-27. Ind-Ra expects sector revenues to grow around 9 % year on year (YoY) in 2025-26 and 10.5 % YoY in 2026-27 following uneven and subdued growth through 2023-24 and early 2024-25; the growth in 2024-25 was 8 % YoY. Premium, branded and ethnic players are expected to see steadier, high single-digit growth trends as consumer confidence rebuilds with a better spread out wedding calendar than in 2025-26 and early signs of normalisation seen in the first nine months of 2025-26.

5. In an escalation of trade tensions that could raise fresh concerns for Indian exporters, the US has launched investigations into India and 15 other economies over alleged "structural excess capacity" in manufacturing that it says is distorting global markets and threatening American industries. The move could further slow negotiations on the proposed India-US Bilateral Trade Agreement (BTA) by increasing tariff-related uncertainty. The investigation, initiated under Section 301 of the Trade Act of 1974 on 11th March, 2026 targets sectors in India including textiles.

6. During 2023-24 Madhya Pradesh exported Cotton Textiles & Apparel valued at US\$ 970 million from the State (8.4% of Country), which consisted of Fibre 8%, Yarn 45%, Fabric 11% and Made-ups 36%. The details are as under:

Value in US\$ Million

Exports	India	Madhya Pradesh	In Top Ten Districts in India	
			Value	District
Fibre %	1,117 100%	75 6.7%	39 3.5%	Barwani Cotton
Yarn %	3,792 100%	436 11.5%	287 7.6%	Raisen Grey Yarn
Fabric %	2,243 100%	108 4.8%	72 3.2%	Sehore 3/4Thead Twill
Made -ups %	4,376 100%	351 8.0%	308 7.0%	Sehore BathTerry Towel
Total Cotton Textiles	11,527	970	706	

7. As per information given by the Union Minister of Textiles in Lok Sabha on 17th March, 2026 in Madhya Pradesh for PM Mitra Park 2, 158 Acres of land has been acquired and as on 31st January, 2026, works worth Rs. 817.19 crore are under execution, for development of core and external infrastructure. 1,130.28 acres of land has been allotted to investors with proposed investment of Rs. 21,436.91 crore.

For Address

STATE OF INDUSTRY

1. According to data released by the Ministry of Statistics and Programme Implementation (MoSPI) on 29th March, 2026, India's industrial production growth improved to 5.2% in February, 2026. IIP for the manufacture of textiles was up by 0.4% in February, 2026 as compared to February, 2025. IIP for wearing apparel was down by 16.6 % in February, 2026 as compared to same month of last year. The details of IIP for the period April-February, 2025-26 as compared to those of same period of 2024-25 are as under:



Items	For the Month		Cumulative		Growth Apr.-Feb. 2025-26
	Feb. 2025	Feb. 2026	Apr.-Feb. 2024-25	Apr.-Feb. 2025-26	
General	151.1	159.0	151.4	157.6	4.1 %
Textiles	106.7	107.1	108.9	108.0	(-)0.8 %
Wearing Apparel	121.4	101.2	114.1	109.4	(-)4.1 %

2. The Report titled "Mapping of Textile Waste Value Chain in India" released by the Hon'ble Textile Minister, on 10th March, 2026 provides a comprehensive assessment of textile waste generation, recovery pathways, recycling technologies and opportunities to strengthen circularity across India's textile value chain. India's textile recycling market could reach \$3.5 billion by 2030, with the potential to generate around one lakh green jobs. India generates approximately 70.73 lakh tons of textile waste annually. Of this, 42 % originates from pre-consumer sources such as manufacturing waste, while 58 % arises from post-consumer disposal.

3. The Union Textiles Minister Shri Giriraj Singh while launching the third