TEXTILE TIMES

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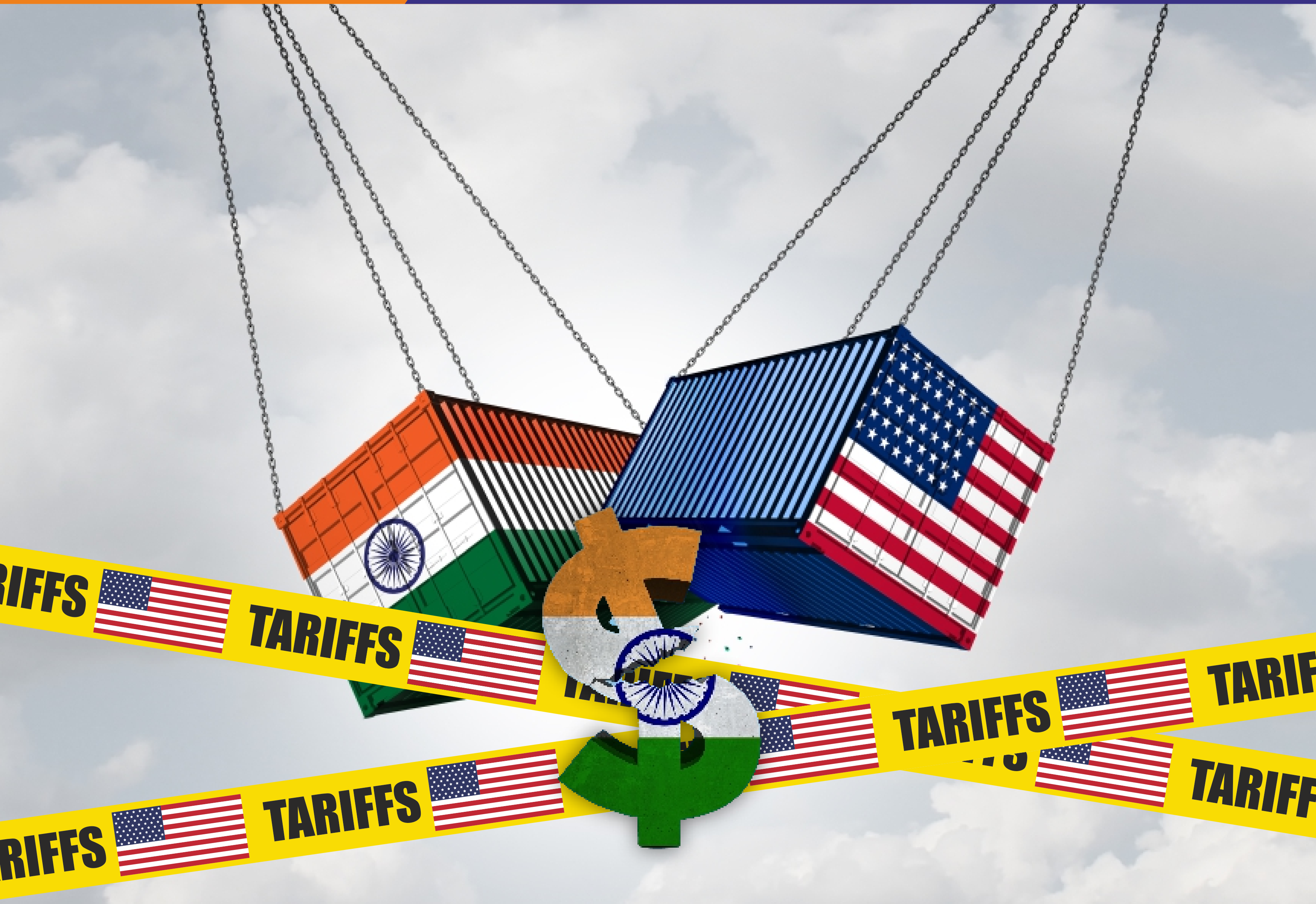
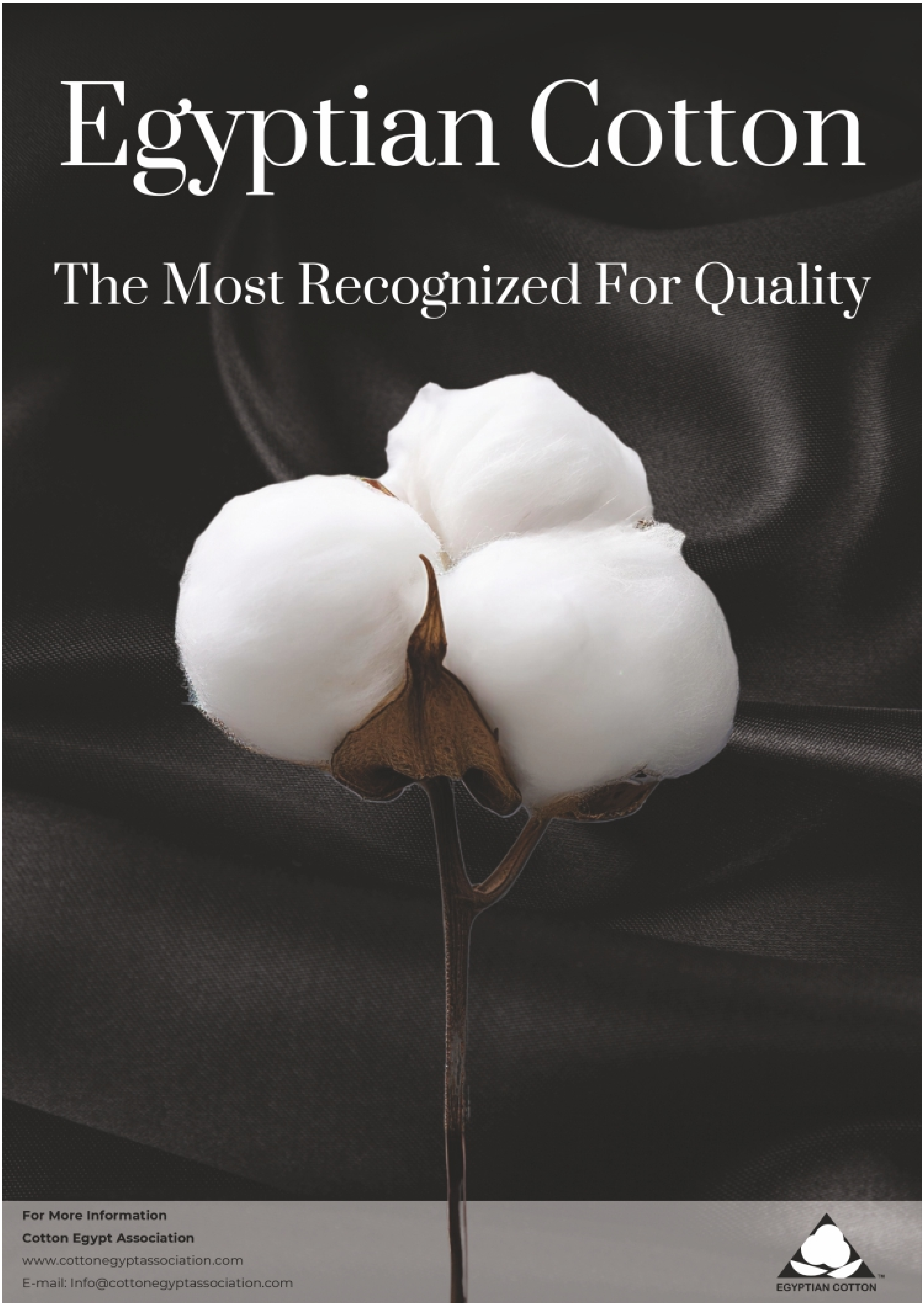


NAVIGATING TARIFFS AND COMPETITIVENESS


Egyptian Cotton
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EGYPTIAN COTTON

Dear readers,

The continuing uncertainty surrounding the US tariff issue continues to be a huge cause of concern for India's textile and apparel sector as we head into 2026.

While we had hoped that some rollback of the 50% tariff would take place due to the ongoing discussions between the US and India, those expectations have not been met.

The impact of the 50% US tariff has already been seen in India's export data for October 2025. The sharp drop in Indian textile and apparel exports in October 2025 is largely attributable to the high US tariff. Textile exports in October 2025 fell 12.92% compared to October 2024. Apparel exports declined 12.88% during the same period.

I shudder to think about the fate of India's textile and apparel exporters if this 50% US tariff continues for much longer.

So far, India's textile and apparel exporters have been doing all they can to ensure that their US customers don't look elsewhere by sharing a significant portion of the tariff burden. However, this arrangement cannot go on for too long.

Accounting for almost 28% of India's textile and apparel exports, the US is the single-largest market for our textile and apparel products, and its importance can never be undermined. To add context to this, I would like to highlight that India's textile and apparel exports to the US were valued at nearly $11 billion in the financial year 2024-25.

A fair, balanced, and equitable trade deal between India and the US offers the best solution to the tariff issue. A trade deal being signed soon is something we are clearly looking forward to.

On the domestic front, the spate of reforms announced recently brings some cheer among the prevalent despondency around the US tariff challenge and the fall in the IIP numbers in the "manufacture of textiles" and "manufacturing of wearing apparel categories" in October 2025, compared to October 2024.

Combined, these measures spanning GST, Production Linked Incentive (PLI) Scheme, Export Package, revocation of multiple Quality Control Orders (QCOs), RBI's trade relief measures, and the Labour Codes have the potential to contribute significantly to raising the global competitiveness of India's textile and apparel sector in the medium to long-term.

The recent repo rate cut by the RBI is also encouraging.

The landmark GST reforms will boost affordability and domestic demand for textile and apparel products. It would also eliminate duty inversion to ease cash flow and working capital for companies, ensure fibre neutrality, make registration and compliance procedures easier for small businesses, encourage more investments, and, also, importantly, promote job creation.

The new PLI Scheme for Textiles will encourage wider participation and hugely benefit smaller players in the textile ecosystem. The expanded coverage of the PLI Scheme 2.0, following the addition of 8 new HSN (Harmonised System of Nomenclature) codes for MMF (Man-made Fibre) Apparel and 9 new HSN codes for MMF Fabrics, will provide tremendous impetus to the MMF segment in India. The move would spur the production of high-value MMF apparel and fabrics in India.

The Export Package, approved by the Union Cabinet on November 12, 2025, will ensure that our textile and apparel sector is better placed to leverage the opportunities opening through the FTAs and diversify into newer markets. CITI looks forward to a swift implementation of this Package.

The rescinding of Quality Control Orders (QCOs) on many key inputs comes as a great relief, as it has been a long-awaited demand of all the user industries.

The RBI's Trade Relief measures, also announced in November 2025, will aid exporters affected by global headwinds. On this, though, CITI expects the spinning, weaving and processing sectors also to be added in the list of eligible sectors for trade relief.

Even as we await the Rules for the newly notified Labour Codes, CITI is in full alignment with the underlying principle behind the Codes of creating a win-win scenario for both employers and employees. We are hopeful that the Rules will be designed in a way that would adequately protect worker interests and provide companies with the opportunity to undertake better workforce management.

On the RBI rate cut, CITI expects that this move would result in lower borrowing costs and MSMEs in the textile and apparel sector finding it easier to access capital.

With the consultation process for the next Union Budget having started, I would like to take this opportunity to highlight the major expectations of the textile and apparel sector from the FY27 Budget.

The next Budget, coming up with measures that could spur manufacturing, making the availability of raw materials at internationally competitive prices easier, promoting sustainability by enabling MSME units also to make an easier transition to clean energy, and encouraging innovation, is something that we would dearly look forward to from the textile and apparel sector.

The permanent removal of import duty on cotton will be a major help towards increasing the global competitiveness of the Indian textile and apparel sector.

Ashwin Chandran
Chairman - CITI

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As we draw the curtain on 2025, a look back at the year shows a story of resilience, uncertainties, call for innovation and new pathways for growth in India's textile and apparel sector. With landmark FTAs inked or on advanced stages of negotiation, emerging international trends in the areas on AI driven innovations and more defined call for traceability and sustainability, India's story was one leveraging these trends with the India USPs that we have or are developing – fast.

At CITI we worked on various areas of competitiveness over the year, especially in terms of capacity building of the industry on the emerging requirements and trends. CITIs take on sustainability as a comprehensive tool for financial viability and maximum gains to the stakeholder community at large was central to many of our activities. As the Union Textiles Ministry Additional Secretary Shri Rohit Kansal – who chairs the ESG Task Force at the Ministry – pointed out at a webinar on "Industry Transition Readiness Index for Decarbonisation of the Textile sector" jointly organised by CITI and Swaniti Initiative in November, Indian companies need to view sustainability not simply from the prism of compliance. Sustainability should be seen as a potential "strategic differentiator" that can enhance the global competitiveness of India's textile and apparel companies.

There is a strong business rationale for Indian companies to further improve their act on sustainability – be that in the transition to clean energy, becoming more resource-efficient, or increasing focus on skill development – especially in the backdrop of the free trade agreement (FTA) currently under negotiation with the European Union and the one inked with UK.

A look at the dedicated chapters on Labour, Trade, and Gender Equality in the Comprehensive Economic and Trade Agreement (CEPA) between India and the United Kingdom highlights this point. The Chapter on Labour in India UK FTA is the first standalone chapter on Labour negotiated by India in a trade agreement. The chapter covers commitments and cooperation elements related to labour, including the promotion of internationally recognized labour rights. It also includes binding obligations on non-derogation and effective enforcement of labour laws if they are taken to encourage trade or investment between the two countries.

Again, the Chapter on Trade and Gender Equality (TGE) is the first standalone chapter on Gender negotiated by India in a trade agreement. In this chapter, the two countries have agreed to integrate a gender perspective in advancing their trade relations. The chapter aims to promote opportunities and benefits to women arising from the agreement. It embodies a cooperative approach aiming to integrate women into international trade and overall Global Value Chains (GVCs).

These are important developments which indicate the direction in which future trade agreements will view market access and competitiveness issues and India needs to build understanding and capacity to not just meet these expectations but to have a leadership position. The recently announced labour codes have been brought in partially in recognition of these trends. While they are yet to be fully decoded, CITI looks forward to them to help in aligning international expectations on social due diligences and Indian norms.

As the bulwark of the Indian economy and a huge job generator, MSMEs across the board – including those in the textile and apparel sector – deservedly need timelier, tangible, proactive, and measurable assistance on matters related to these changes as like strengthening labour practices as also issues related to the carbon emissions and shifting to clean energy sources.

A combination of monetary support and assistance in the form of knowledge sharing and technical know-how is what they require so that they can make the course corrections necessary to thrive in a changing world order. The government providing strong handholding support on the sustainability aspect to textile and apparel sector MSMEs is highly desirable.

At CITI, we are doing our bit to make India's textile and apparel sector MSMEs become more globally competitive and sustainable businesses driven by the belief that aligning with global ESG standards is a competitive necessity for realising India's ambitions in textile and apparel exports.

As part of these efforts, CITI has joined hands with the Global Reporting Initiative (GRI) to launch – Improving Transparency for Sustainable Business (ITSB) – in India. Supported by the Swedish International Development Cooperation Agency (Sida), the ITSB initiative is designed to elevate sustainability practices and transparency across South Asia's textile and apparel sector, positioning it for long-term resilience, profitability, and global leadership.

As part of ITSB's India-specific implementation, GRI and CITI will focus efforts on selected textile clusters, driving localised engagement and capacity building. By anchoring the initiative in these hubs of innovation and production, ITSB seeks to catalyse a movement that will ripple across the sector, making sustainability and transparency a strategic advantage for India's textile and apparel industry in the global marketplace.

CITI has also started work with International Trade Centre, Geneva on areas of self-assessment by the industry on their preparedness in these areas. The coming year will be continuation of many of these partnerships and more work in the direction of strengthening Industry's agility and responsiveness to the changing expectations of global and domestic buyers.

CITI is also working closely with industry stakeholders on the textile decarbonisation index. The decarbonisation index will enable companies to quickly identify specific areas where they can improve production practices and do so in accordance with industry best practices. It would ultimately serve as a platform for peer-to-peer learning.

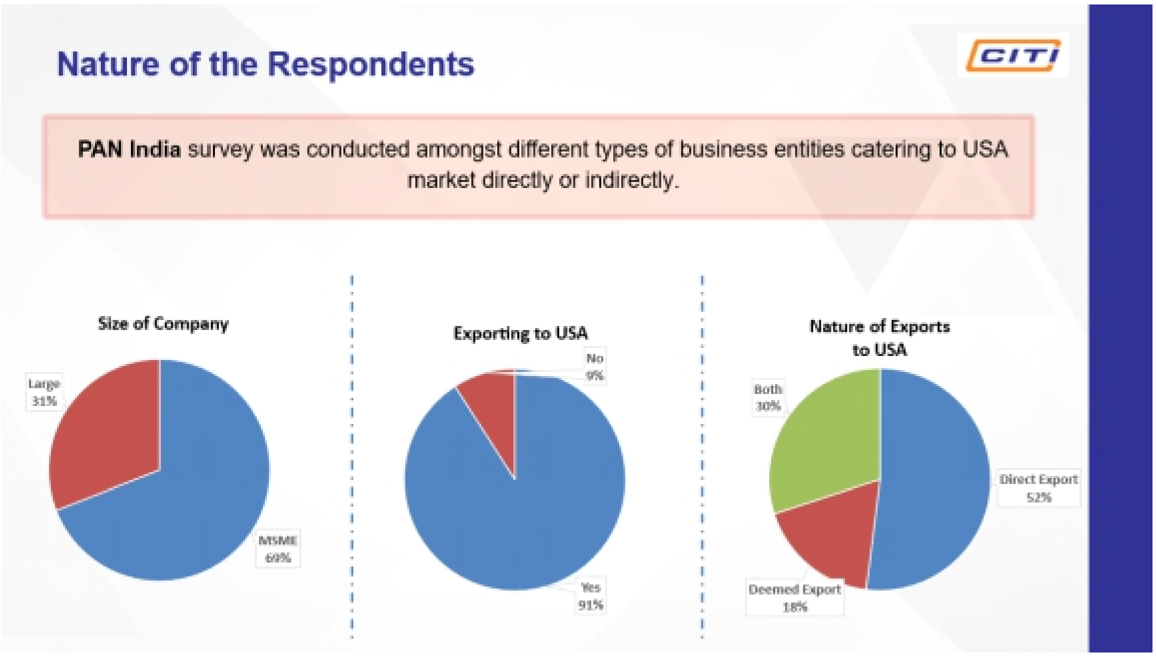
Let's welcome 2026 with renewed optimism, based on our vision to become a recognised sustainable sourcing powerhouse.

Chandrima Chatterjee
Secretary General - CITI

NAVIGATING THE U.S. TARIFF CHALLENGE:
INDUSTRY SURVEY–BASED POLICY RECOMMENDATIONS
A SURVEY CONDUCTED BY - CONFEDERATION OF INDIAN TEXTILE INDUSTRY

Background of the Survey

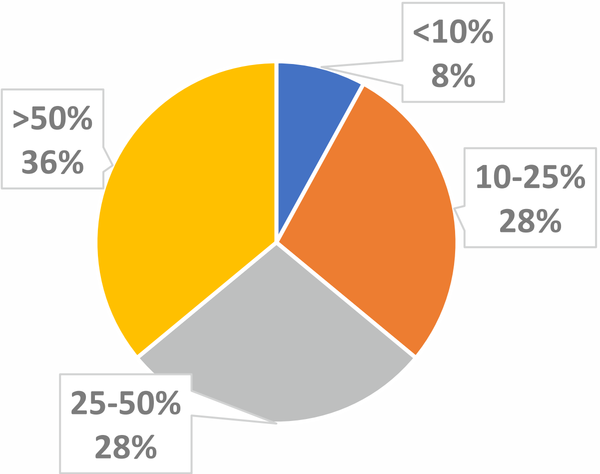
- United States is the top exporting destination for India's Textile & Apparel (T&A) products **accounting to about 28% of India's global** T&A exports.
- Recent imposition of **25% additional ad valorem tariff and 25% penalty** (adding to 50% additional tariff) has significantly undermined the competitiveness of Indian T&A exports to USA.
- To understand the magnitude and nature of the **economic and operational** impact in T&A industry and to identify priority policy interventions needed to mitigate adverse effects and restore competitiveness, CITI conducted a survey amongst all the segments of the T&A industry.



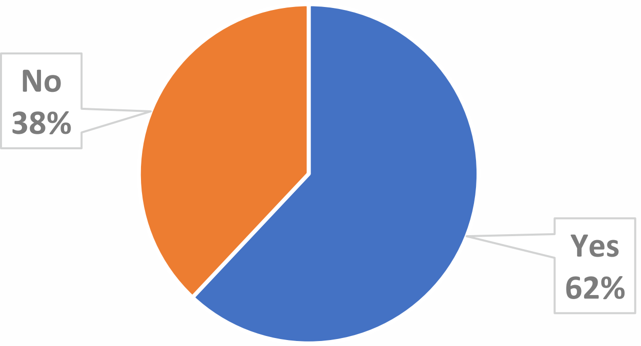
Impact on Business Due to US Tariffs

- **About 1/3rd** of the respondents reported that their turnover has been adversely reduced **by more than 50%**.
- The major factors contributing to this decline include:
  - Requests for **discounts** by U.S. buyers – **30%**
  - **Cancellation or postponement** of orders – **25%**
  - **Reduction** in order volumes – **20%**
  - About 85% of the respondents have reported **an inventory buildup** due to the reduction in orders.
  - **About 2/3rd of the respondents** have to offer a discount to their buyers, majority of which are offering it to the **tune of 25%** to remain competitive.

Impact on Turnover



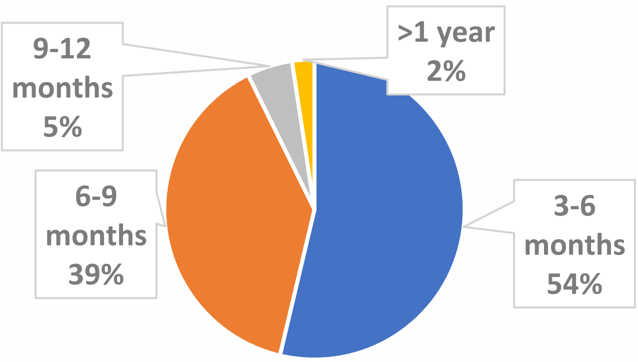
Businesses offering discount to USA buyers



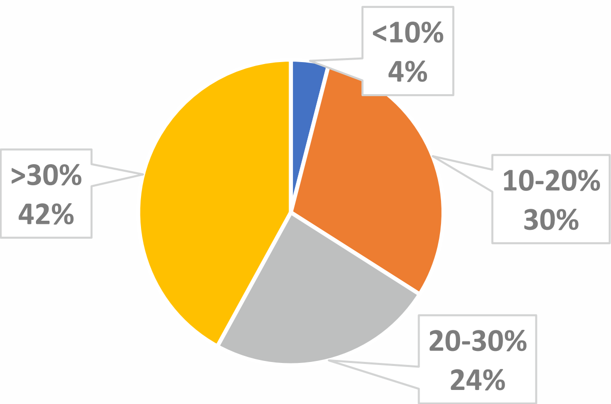
Impact on Working Capital due to US Tariffs

- A significant **82% of respondents** reported experiencing **an extended credit cycle** across the supply chain as a result of the recent impact.
- Among them, **over half** indicated that the credit period has **increased by 3 to 6 months**, reflecting a substantial strain on liquidity.
- Additionally, **around 40% of respondents** reported a rise in working capital requirements **by more than 30%,** further highlighting the growing financial stress within the sector.

Duration of Increase in Credit Cycle



Extent of increase in Credit Cycle



Policy Measures Requested to Mitigate the Impact

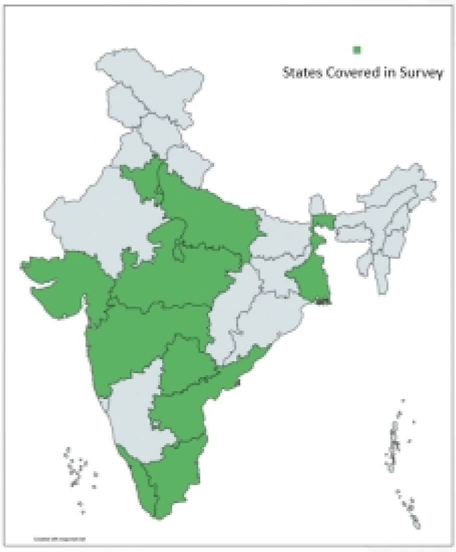
- More than **one half** of the respondents have urged the Government to **announce a moratorium on repayment of existing loans**, while **42%** have recommended the introduction of **collateral-free loans** to help address the surge in working capital requirements.
- Moreover, **about one half** of the respondents emphasized the need to **enhance raw material competitiveness** by **removing import barriers** such as **QCOs, import duties, and related restrictions**, which they believe would help mitigate the adverse impact.
- **46%** of the respondents also expressed intent to **diversify their export markets** and sought **Government support and facilitation** to explore new destinations and opportunities.

Other Suggestions emerged during the survey:

- Providing support for export diversification and market development initiatives
- Expedite FTAs with key major markets like EU and more.
- Increasing RoDTEP and RoSCTL rates and enhancing duty drawback benefits.
- Offering interest subvention and other financial relief measures to ease liquidity constraints
- Support in form of Focus Market Incentive Scheme for US bound shipments
- Reduction of corporate income tax or granting tax holidays (to reduce financial crisis)

States Covered in the Survey

States
Andhra Pradesh
Chandigarh
Delhi/NCR
Gujarat
Haryana
Kerela
Madhya Pradesh
Maharastra
Tamil Nadu
Telengana
Uttar Pradesh
West Bengal



MINISTRY OF TEXTILES CELEBRATES 'WORLD COTTON DAY' 2025

- **Government aims not only to expand exports and textile markets but also to achieve carbon neutrality by 2030: Shri Giriraj Singh, Union Minister of Textiles**
- **Kasturi Cotton Bharat will be India's pride — a symbol of purity, quality, and sustainability**
- **Industry signs several Memorandum of Understandings to promote Indian Kasturi Cotton Brand**

Background

World Cotton Day Celebrations 2025 coinciding with 4th Global Cotton Conference was jointly organized by the Ministry of Textiles and Confederation of Indian Textile Industry (CITI) on October 7, 2025 in New Delhi focusing on the theme "Cotton 2040: Technology, Climate & Competitiveness." Indian Chamber of Food and Agriculture (ICFA) supported as the Knowledge Partner of this important event.

The **4th Global Cotton Conference**, held alongside the **World Cotton Day 2025** celebrations, brought together government leaders, industry experts, and international stakeholders to chart India's roadmap for sustainable, technology-driven cotton growth.

The event was graced by **Hon'ble Union Minister of Textiles Shri Giriraj Singh**, who emphasized collective climate responsibility, reaffirmed India's commitment to carbon neutrality by 2030, and highlighted the need to enhance cotton productivity, expand the Kasturi Cotton Bharat initiative, and promote traceability, mechanization, and seed quality. **Hon'ble Union Minister of State for Textiles Shri Pabitra Margherita** and **Dr. M. Beena, Textile Commissioner**, underscored innovation, modernization, and climate resilience, while **Dr. Terry Townsend**, Global Consultant, Cotton Analytics, USA presented the **White Paper on Cotton 2040**, detailing a vision for productivity, sustainability, and global competitiveness.

Senior officials including **Ms. Neelam Shami Rao (Secretary, MoT)**, **Ms. Padmini Singla (Joint Secretary, MoT)**, and **Shri Ashwin Chandran (Chairman, CITI)** reinforced India's strong standing—covering 38% of global cotton area and ranking second in production—and highlighted key programs such as the **Five-Year Mission on Cotton Productivity**, **PM MITRA Parks**, and **Special Cotton Project (Phase 3)**.

Sessions covered mechanization, biotech innovation, digital farming, and supply chain resilience. Industry and institutional leaders including **CITI, CCI, TEXPROCIL, ILO, FSII,** and the **Organic Cotton Accelerator** stressed collaboration, farmer empowerment, and sustainable practices as pillars of long-term growth.

The conference concluded with a shared commitment to make **Indian cotton globally trusted, environmentally responsible, and farmer-centered**, steering the nation toward a resilient and inclusive cotton ecosystem by 2040.

Opening Session

The inaugural ceremony began with a warm gesture as bouquets were presented to the dignitaries, honoring their presence and contributions to the event. This was followed by the traditional lighting of the lamp, symbolizing an auspicious and bright beginning to the event. This meaningful sequence of events highlighted the importance of the occasion and the esteem held for the distinguished guests.

Shri Ashwin Chandran, Chairman of CITI and CMD of Precot Ltd., opened the session with a powerful address

Shri Ashwin Chandran, Chairman, **Confederation of Indian Textile Industry (CITI)** and **CMD, Precot Ltd.**, delivered the **Welcome Address**, setting the tone for the session by highlighting the importance of innovation, sustainability, and collaboration in strengthening India's textile and cotton sectors.

Dr. Terry Townsend, Former Executive Director, ICAC, gave a presentation on "Global Cotton Outlook for 2040," highlighting long-term trends in technology, climate, and competitiveness. His insights offered a comprehensive view of the evolving global cotton landscape, providing valuable perspectives for policymakers, researchers, and industry leaders on building a resilient and sustainable cotton sector.

Shri Lalit Kumar Gupta, **CMD**, **Cotton Corporation of India**; **Shri Ravi Sam**, **Vice Chairman**, **TEXPROCIL**; and **Dr. Rajvir Singh Rathi**, **Vice Chairman**, **Federation of Seed Industry of India (FSII)**, graced the dais and shared their perspectives on strengthening India's cotton value chain and promoting sustainability across the sector.

Dr. M. Beena, Textile Commissioner, Ministry of Textiles, shared insights on advancing cotton productivity and sustainability

Dr. M. Beena, Textile Commissioner, Ministry of Textiles delivered her special address focusing on enhancing cotton productivity and sustainability through policy and innovation. She highlighted the government's Five-Year Mission on Cotton Productivity, which aims to improve traceability, mechanization, and seed quality across the cotton value chain. Dr. Beena emphasized the importance of aligning India's cotton sector with global standards and stressed the need for climate-resilient practices and farmer-centric policies. Her remarks reinforced the role of institutional support and targeted interventions in driving India's leadership in sustainable cotton production.

Shri Pabitra Margherita, Hon'ble Union Minister of State for Textiles & External Affairs, delivered the inaugural address

Shri Pabitra Margherita, **Hon'ble Union Minister of State for Textiles & External Affairs, Government of India** in his inaugural address delivered a forward-looking address that emphasized India's strategic vision for cotton leadership. He highlighted the importance of farmer empowerment, positioning farmers at the heart of India's cotton transformation. Shri Margherita underscored the role of technological innovation and traceability in aligning India's cotton sector with global standards.

His remarks reflected a strong commitment to modernizing the cotton value chain through sustainable practices, digital tools, and policy support, ensuring that Indian cotton remains competitive and trusted in international markets.

Further, to reflect a collaborative vision to position India as a global leader in sustainable cotton by 2040, the **White Paper on Cotton 2040 developed** jointly by the **Indian Chamber of Food and Agriculture (ICFA)** and **Confederation of Indian Textile Industry (CITI)** was unveiled by **Shri Pabitra Margherita**, **Dr. M. Beena** in presence of other distinguished members on the dais.

This White Paper has drawn on extensive stakeholder consultations and the Cotton Round Table earlier this year, with ICFA contributing insights on climate resilience, mechanization, biotechnology, policy reforms, and farmer-centric strategies. Its key recommendations include biochar and carbon credits, high-density planting, genome research, revisions to the Cotton Seed Price Control Order, and global branding initiatives such as declaring an "International Year of Cotton.

Shri Dinesh Nolkha, Deputy Chairman of CITI and CMD of Nitin Spinners Ltd., delivered the Vote of Thanks

Shri Dinesh Nolkha, Deputy Chairman, **Confederation of Indian Textile Industry (CITI)** and **CMD, Nitin Spinners Ltd.**, delivered the **Vote of Thanks**, expressing gratitude to the distinguished speakers, partners, and participants for their valuable contributions to the session.

The White Paper on Cotton 2040, developed by ICFA and CITI, was unveiled by Shri Pabitra Margherita and Dr. M. Beena in the presence of distinguished dignitaries on the dais

Key Takeaways

- Sustainability & Traceability: Reinforced through initiatives like Kasturi Cotton Bharat and Cotton 2040, setting India on a path toward environmentally responsible and globally trusted cotton.
- Technology & Innovation: Seen as the backbone for improving productivity, adapting to climate change, and enhancing competitiveness worldwide.
- Farmer-Centric Approach: Every stakeholder—from policymakers to exporters—stressed that farmers remain the core of India's cotton ecosystem.
- Global Leadership: India's scale, research, and ongoing government missions position it to lead the global cotton sector in both quality and sustainability.
- Challenges & Solutions: Issues such as contamination and high costs persist, but digitization, paperless systems, and sustainable farming practices are driving long-term solutions.
- Collaborative Action: The joint efforts of CITI, CCI, TEXPROCIL, FSII, ILO, and the Ministry of Textiles reflect a unified vision—enhancing productivity while safeguarding both people and the planet.

Session I: Enhancing Sustainability & Traceability

An engaging panel discussion moderated by Dr. Siddhartha Rajagopal, Executive Director of TEXPROCIL, featuring insights from industry leaders — Mr. Rahul Bhajekar (GOTS India), Ms. Brooke Summers (Cotton Australia, Virtual), Mr. Khaled Schuman (CEA), Dr. Rossitza Krueger (GIZ),

Moderator:

Dr. Siddhartha Rajagopal – Executive Director, TEXPROCIL

Panelists:

Mr. Rahul Bhajekar – Managing Director, GOTS, India

Ms. Brooke Summers – Supply Chain Consultant, Cotton Australia (Virtual)

Dr. Rossitza Krueger – Project Manager India, GIZ

Ms. Jyoti Narain Kapoor – Country Director (India) Better Cotton Initiative

Mr. Khaled Schuman – ED, Cotton Egypt Association

Key Discussion

The session highlighted Kasturi Cotton Bharat as a global brand emphasizing sustainability, innovation, and transparency. Speakers discussed aligning India's cotton with global standards via technology, certification, and integrated supply chains. Key points included GOTS certification (**Mr. Rahul Bhajekar**), digital farmer-market connections (**Ms. Brooke Summers**), traceability and alternative markets (**Dr. Rossitza Krueger**), Better Cotton's global share (**Ms. Jyoti Narain Kapoor**), and quality assurance with 30 lakh bales already in circulation (**Mr. Khaled Schuman**).

Key Takeaways

- Sustainability & Global Branding: Kasturi Cotton Bharat emerged as the centerpiece for positioning India as a leader in sustainable and traceable cotton, strengthening the country's global identity.
- Technology & Traceability: Digital tools, blockchain applications, and data driven systems were recognized as essential for ensuring transparency and accountability across the upply chain.
- Certification & Compliance: Frameworks like GOTS and Better Cotton were highlighted for setting social, environmental, and regulatory benchmarks that enhance India's redibility in international markets.
- Farmer Empowerment: Connecting farmers directly with brands and markets was seen as key to improving livelihoods, efficiency, and traceability.
- Collaborative Growth: The session showcased the importance of partnerships among industry bodies, certification agencies, and global organizations to scale sustainability efforts.
- Market Expansion: With 30 lakh bales of Kasturi Cotton already in circulation, India is steadily building momentum toward a globally recognized, ethically produced cotton ecosystem.

Session II: Evolving Trends in Cotton Farming

A dynamic session moderated by Dr. Rajvir Singh Rathi (FSII & Bayer Crop Science), featuring an expert panel including Dr. S.K. Shukla (ICAR-CIRCOT), Dr. Rajendran Ramasami (Rasi Seeds), Dr. Paresh Verma (Shri Ram Bioseeds), Dr. Venkatram Vasantavada (Seedworks International), Dr. Y.G. Prasad (CITI-CDRA), Dr. C.D. Mayee (Indian Society for Cotton Improvement)

Moderator:

Dr. Rajvir Singh Rathi – Vice Chairman, FSII & Head- Public Affairs, Bayer Crop Science

Panelists:

Dr. S.K. Shukla – Director, ICAR - CIRCOT

Dr. Rajendran Ramasami – Managing Director, Rasi Seeds

Dr. Paresh Verma – CEO, Shri Ram Bioseeds

Dr. Venkatram Vasantavada – CEO, Seedworks International

Dr. Y.G. Prasad – Former Director, ICAR-CICR, Nagpur & President, CITI-CDRA

Dr. C.D. Mayee – Former Chairman, ASRB, President, Indian Society for Cotton Improvement

Key Discussion

The session examined mechanization, biotechnology, and digital innovation in Indian cotton farming. Speakers emphasized modernized ginning, mechanical harvesting, AI/ML applications, and data-driven approaches to boost productivity and resilience. Key points included upgrading ginning units (**Dr. S.K. Shukla**), government-backed mechanization and FPO involvement (**Dr. Rajendran Ramasami**), AI/ML adoption (**Dr. Paresh Verma**), combining Bt cotton with advanced ginning (**Dr. Venkatram Vasantavada**), soil health and cluster-based strategies (**Dr. Y.G. Prasad**), and ensuring technology adoption, scientific consistency, and traceability (**Dr. C.D. Mayee**).

Key Takeaways

- Mechanization & Modernization: Upgrading ginning infrastructure and promoting mechanical harvesting are crucial to reducing labor intensity and improving efficiency.
- Technology Integration: Digital tools, AI/ML models, and biotech innovations like Bt and HT Bt cotton will drive productivity, reduce pesticide use, and strengthen competitiveness.
- Climate & Soil Focus: Enhancing soil organic matter and adopting region specific, cluster-based strategies are vital for long-term sustainability.
- Farmer Empowerment: Involvement of FPOs and targeted government support will help farmers access modern technology and improve profitability.
- Productivity & Resilience: The decline in yields and rising import dependency highlight the need for immediate technological and policy intervention.
- Scientific & Traceable Growth: Strengthening traceability and scientific consistency across the value chain will ensure quality and global trust in Indian cotton.

Session III: De-risking Cotton Supply Chain

A thought-provoking session moderated by Mr. Manish Daga (CAI & AIFCA), with panelists Mr. Vivek Mathur (ICFA), Mr. Abhishek Govilkar (BigMint Technologies), and Mr. Kiran Bhadra (Shivji Kanji & Co. & Sukhin Global Logistics) sharing valuable insights.

Moderator:

Mr. Manish Daga – Director , CAI & President & Coordinator, AIFCA

Panelists:

Mr. Vivek Mathur – Executive Director, ICFA

Mr. Abhishek Govilkar – Head – Agribusiness, BigMint Technologies Pvt Ltd

Mr. Kiran Bhadra – Managing Partner - Shivji Kanji & Co & Managing Director - Sukhin Global Logistics LLP

Key Discussion

The session addressed risk management across India's cotton supply chain, emphasizing transparency, traceability, and collaborative systems. **Mr. Manish Daga** highlighted non-negotiable transparency, **Mr. Vivek Mathur** discussed analyzing risk factors and controlling farmer costs, **Mr. Abhishek Govilkar** focused on financial sustainability and price volatility, and **Mr. Kiran Bhadra** covered trade disruptions, freight costs, and efficient logistics.

Key Takeaways

- Transparency & Traceability: Reinforced as essential to building a resilient and trustworthy cotton supply chain.
- Risk Management: Requires coordinated action on pricing, forecasting, and documentation to reduce exposure to market fluctuations.
- Financial Stability: Farmers face high production and input costs; financial planning and support mechanisms are critical for sustainability.
- Global Trade Challenges: Rising freight costs, longer transit times, and import dependencies call for better logistics and policy interventions.
- Collaborative Approach: Government, industry, and FPO partnerships can strengthen risk mitigation, improve access to credit, and enhance efficiency.
- Develop an integrated risk management framework combining data analytics, transparent contracting, and digital traceability to stabilize the cotton ecosystem from farm to export.

Session IV: The Fabric of Our Lives – Cotton

A compelling session chaired by Mr. Insaf Nizam (ILO) and moderated by Ms. Bansari Nag (ILO India), featuring panelists Ms. Chandrima Chatterjee (CITI), Mr. Kuldeep Singh Gurjar (BMS, Madhya Pradesh), and Ms. Shankhamala Sen (Organic Cotton Accelerator)

Chairperson:

Mr. Insaf Nizam – Regional Specialist, FPRW, ILO, DWT for South Asia and CO India

Moderator:

Ms. Bansari Nag – National Project Coordinator,

FPRW in Cotton Supply Chain, ILO India

Panelists:

Ms. Chandrima Chatterjee – Secretary General, CITI

Mr. Kuldeep Singh Gurjar – State General Secretary, BMS, Madhya Pradesh

Ms. Shankhamala Sen – Program Implementation Manager – India, Organic Cotton Accelerator

Key Discussion

The session highlighted collaborative initiatives to improve livelihoods, productivity, and social protection in India's cotton sector. **Mr. Insaf Nizam** emphasized multi-stakeholder approaches, **Ms. Chandrima Chatterjee** stressed sustainability, farmer-industry linkages, and access to finance, **Mr. Kuldeep Singh Gurjar** discussed seasonal cultivators and government schemes, and **Ms. Shankhamala Sen** focused on digital payments, eliminating child labor, and farm-level health and safety practices.

Key Takeaways

- Empowering Farmers: Multi-stakeholder collaborations like Rise for Impact are improving productivity, income, and welfare for cotton farmers.
- Sustainability & Ethics: Strengthening industry-farmer connections and eliminating child labor are central to building a responsible cotton value chain.
- Access to Finance: Expanding institutional finance and digital payment systems will enhance inclusion and transparency.
- Worker Welfare: Focus on occupational health, safety, and social protection reinforces the human side of cotton production.
- Rising Costs & Policy Support: Escalating production costs call for stronger government-backed schemes and farmer assistance.
- Scale collaborative models combining sustainability, ethical labor practices, and financial inclusion to create a socially responsible and globally competitive cotton ecosystem.

World Cotton Day Celebrations 2025

The highlight of the conference was the **celebration of World Cotton Day**, held in the presence of Shri Giriraj Singh, Hon'ble Union Minister of Textiles Ms. Neelam Shami Rao, IAS, Secretary, Ministry of Textiles, Ms. Padmini Singla, IAS, Joint Secretary, Ministry of Textiles and other esteemed guests.

In her welcome address, Ms. Padmini Singla, IAS, Joint Secretary, Ministry of Textiles, acknowledged the contribution of over 65 lakh cotton farmers.

In her welcome address **Ms. Padmini Singla, IAS, Joint Secretary, Ministry of Textiles**, recognized over 65 lakh farmers for their contribution to India's cotton sector and discussed productivity enhancement.

Shri Ashwin Chandran, Chairman of CITI and CMD of Precot Ltd., emphasized the importance of collaboration, sustainability, and traceability across the cotton value chain

Shri Ashwin Chandran, Chairman, CITI & CMD, Precot Ltd., stressed collaboration across associations, sustainability, and traceability in the cotton value chain.

Shri Lalit Kumar Gupta, CMD of Cotton Corporation of India, addressed key challenges in the sector

Shri Lalit Kumar Gupta, **CMD**, **Cotton Corporation of India**, highlighted challenges such as low productivity, pest resistance, and climate risks. He emphasized accessible MSP and best farming practices under **Kasturi Cotton Bharat**. In his **presentation on "Contribution of CCI for Empowerment of Cotton Farmers and Cotton Productivity,"** he outlined strategies to enhance farmer empowerment, improve cotton yields, and promote sustainable practices across the sector.

Shri Ravi Sam, Vice Chairman of TEXPROCIL, emphasized the need for investment in quality seeds.

Ms. Neelam Shami Rao, IAS, Secretary, Ministry of Textiles, highlighted India's strong global standing in the cotton sector.

Shri Ravi Sam, **Vice Chairman, TEXPROCIL**, called for investment in quality seeds, mechanization, and contamination control to strengthen cotton quality across the value chain.

Ms. Neelam Shami Rao, IAS, Secretary, Ministry of Textiles, highlighted India's strong global position in cotton, progress under the Kasturi Cotton initiative, and focus on reducing contamination through better plucking machinery and farmer safety measures.

In his Keynote Address, **Shri Giriraj Singh, Hon'ble Union Minister of Textiles**, delivered a powerful keynote address that set the tone for India's cotton future. He announced the government's ambitious plan to **double cotton production**, reinforcing India's commitment to becoming a global

In his Keynote Address, Shri Giriraj Singh, Hon'ble Union Minister of Textiles, outlined the government's vision to double India's cotton production leader in sustainable cotton. He emphasized the nation's goal of achieving **carbon neutrality by 2030**, positioning cotton as a climate-resilient crop. Shri Singh also advocated for **improved seed quality**, **mechanization**, and the expansion of the **Kasturi Cotton Bharat** initiative, highlighting the importance of innovation and traceability in strengthening India's cotton value chain.

Kasturi Cotton MoUs – World Cotton Day 2025

During the World Cotton Day 2025 celebrations, several MoUs were exchanged under the **Kasturi Cotton Bharat initiative** across three categories:

Commercial:

- **Arvind Ltd.** – for the procurement of 5,000 bales of Kasturi Cotton, exchanged by Shri Ankur Trivedi, Senior VP – Corporate Affairs, Arvind Ltd
- **Nitin Spinners** – for the procurement of 10,000 bales of Kasturi Cotton, exchanged by Shri Pratyush Nolkha, Executive Director, Nitin Spinners
- **RSR International** – for the manufacture and supply of 50,000 garments made of Kasturi Cotton for domestic and international brands, exchanged by Shri Rajan Rikhi, MD, RSR International

Community:

- **ICAR-CIRCOT** – for the development of tracer technologies, exchanged by Shri S.K. Shukla, Director, ICAR-CIRCOT
- **Beetle Regen Solutions** – for the supply of 5,000 bales per season of Regenerative + Kasturi Cotton meeting defined quality and traceability standards, exchanged by Shri Amol Mishra, CEO of Beetle Regen
- **Hohenstein India** – for testing, certification, and co-branding support, exchanged by Shri Vinod Kumar, MD (India & Sri Lanka), Hohenstein
- **All India Cotton FPO Association** – for supporting sustainable agronomy and farmer collectives, exchanged by Shri Manish Daga, President of AIFCA

Council:

- **Noida Apparel Export Cluster (NAEC)** – for promoting the use of Kasturi Cotton in garment manufacturing and exports, exchanged by Shri Lalit Thukral, President of NAEC

These MoUs collectively underscore the commitment of partners to enhance Indian cotton's sustainability, traceability, and global branding.

Shri Dinesh Nolkha, Deputy Chairman of CITI and CMD of Nitin Spinners, concluded the day by reflecting on key insights and emphasizing the need for collaboration.

Closing Remarks

Shri Dinesh Nolkha, **Deputy Chairman**, **Confederation of Indian Textile Industry (CITI)** & **CMD, Nitin Spinners**, concluded the day by summarizing key discussions, acknowledging the contributions of all stakeholders, and emphasizing collaboration, sustainability, and innovation in India's cotton sector.

NEW LEADERSHIP TEAM OF CITI FOR 2025-26

Shri Ashwin Chandran takes over as CITI Chairman

Shri Dinesh Nolkha CITI Deputy Chairman

Shri Shreyaskar Chaudhary CITI Vice Chairman

Shri Ashwin Chandran has taken over as the new Chairman of the Confederation of Indian Textile Industry (CITI) starting September 18, 2025.

Shri Chandran takes over the chairmanship from Shri Rakesh Mehra whose term ended on September 18 following the conclusion of CITI's 67th AGM which was held during the day.

Shri Dinesh Nolkha would become the new Deputy Chairman of CITI.

Shri Shreyaskar Chaudhary will take over as the new Vice Chairman of CITI.

A distinguished textile industry leader, Shri Chandran is Chairman & Managing Director of Precot Limited, one of the leading cotton mills in India which operates units in Tamil Nadu, Kerala, Andhra Pradesh and Karnataka. A former Chairman of the Southern India Mills Association (SIMA), he is also a member of the Cotton Textiles Export Promotion Council (TEXPROCIL). Shri Chandran holds a B.Sc. (Hons) degree in Textile Technology of UMIST, UK, and, also, a Post Graduate degree in Management from the University of Illinois, US.

An eminent presence in the textile sector, Shri Nolkha is Chairman & Managing Director of the Bhilwara-based Nitin Spinners Ltd., one of the leading manufacturers of cotton yarn, blended yarn, knitted fabrics and finished woven fabrics. Shri Nolkha is a former President of the Mewar Chamber of Commerce and Industry and has also been Chairman of the Northern India Textile Research Association (NITRA). Shri Nolkha is a Fellow Member of the Institute of Chartered Accountants of India and The Institute of Cost & Management Accountants of India.

A noted personality in the sphere of sustainability, Shri Chaudhary is Managing Director of the Madhya Pradesh-based Pratibha Syntex Limited which is committed to transforming the textile industry through innovation, ethical practices, and a strong focus on environmental stewardship. Pratibha Syntex is India's first Apparel Manufacturing Fair Trade Certified factory. The company is also India's first ZDHC Certified Apparel Manufacturer. Shri Chaudhary has a background in Textile Technology from UMIST, UK.

Underlining the priorities of his CITI Chairmanship, Shri Ashwin Chandran said there was an immediate priority and a longer-term one.

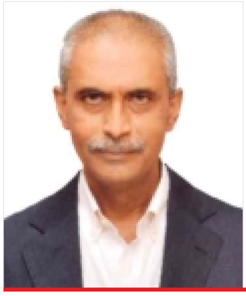
The new CITI Chairman said the pressing priority was to work closely with all stakeholders, including the government, to address the grave challenge which has been posed to the Indian textile and apparel sector through the United States (the single-largest market for India's textile and apparel exports) imposing a 50% tariff on Indian products with effect from August 27, 2025.

The longer-term focus would be on futureproofing India's textile and apparel sector – the bulk of which is made up of MSMEs – to improve the global competitiveness of local textile and apparel companies. Greater emphasis would be laid on innovation, sustainability, capacity building (including through skill development), and knowledge sharing so that Indian textile and apparel enterprises can grow the size of their businesses both within India and overseas, and get to a position where they can derive the fullest benefits from the free trade agreements (FTAs) already signed by India and those on the anvil.

"CITI remains fully committed to be an important contributor to the Viksit Bharat mission," Shri Chandran added.

India aims to create a $250 billion domestic textile industry by 2030. The country is also aspiring to more than double textile and apparel exports to $100 billion by 2030.

ITMF PRESIDENT URGES URGENT INDIA-US TRADE DEAL



Dr K V Srinivasan
President, ITMF

International Textile Manufacturers Federation (ITMF) President Dr KV Srinivasan believes it is imperative that a trade deal between India and the United States is worked out at the shortest possible time as only such an agreement can ensure that many India's textile and apparel exporters do not effectively find themselves shut out from their single-largest market.

The US contributes almost 28% to the total sales of India's textile and apparel exporters. The 3rd biggest exporter of textile and apparel products to the US after China and Vietnam, India's textile and apparel exports to the US stood at close to $11 billion in the financial year 2024-25.

Effective August 27, Indian goods face a 50% US tariff. The US tariff rate for India's closest competitors in the textile and apparel sector, on the other hand, are significantly lower, with that for both Vietnam and Bangladesh being 20%.

In an interaction with Textile Times, Dr Srinivasan said that US buyers – while willing to show patience in the short run – are unlikely to wait indefinitely for the tariff issue to get sorted out and would expect to see some visible forward movement on the trade negotiations between India and the US soon. Indian exporters could find the going very difficult if more prospective and even existing US buyers felt that their needs could be met by other countries, the ITMF President added.

Dr Srinivasan said that while the importance of the US market for India's textile and apparel exporters can never be undermined, India should simultaneously aim to get the free trade agreement (FTA) with the European Union in place at the earliest. An FTA with the EU can ensure that India's textile and apparel exporters can obtain a level-playing field and potentially derive maximum advantage of the opportunities which exist in the 27-country bloc.

India and the EU are currently engaged in FTA-related negotiations. The India-EU FTA is expected to be in place by the end of this year.

The ITMF President said it is also vitally essential for the growth of India's textile and apparel sector that raw materials are available at internationally competitive prices. There is a need to develop competitiveness on the cotton front so that high domestic prices do not come in the way of India's textile companies being able to achieve their highest potential. Cotton yields in India also need to improve substantially, he added.

On August 28, it was announced, “To augment availability of cotton for the Indian textile sector, the Central Government had temporarily exempted the import duty on cotton from 19th August 2025 till 30th September, 2025. In order to support exporters further, the Central Government has decided to extend the import duty exemption on cotton (HS 5201) from 30th September 2025 till 31st December 2025.”

India's cotton value chain provides direct employment to nearly 35 million people and dominates the country's total textile and apparel exports. India aims to more than double textile and apparel exports to $100 billion by 2030.

An analysis by the Confederation of Indian Textile Industry (CITI) has shown that between 2015/16 and 2024/25, cotton imports have on an average only met 5.8% of the total cotton demand. There has also been limited correlation between cotton import volumes and the imposition of import duty. On the other hand, removal of tariff barriers helps in stabilising domestic prices.

TO INCREASE INDIA'S GLOBAL COMPETITIVENESS, MORE FOCUS ON QUALITY NEED OF THE HOUR

Dr S K Sundararaman
Former Chairman, SIMA

Identifying segments within the textile and apparel value chain where it can achieve dominance and striving towards that end, supplemented by the development of a culture where everyone in the enterprise, including the factory worker, lives and breathes quality can help India emerge far stronger globally in the textile and apparel domain. So feels former Southern India Mills Association (SIMA) Chairman Dr S.K. Sundararaman.

Sharing his perspective with Textile Times on how India's textile and apparel sector can increase its global competitiveness, Dr Sundararaman said that Indian companies moving up the value chain with quality acting as a key cornerstone in the step-up process can ensure that they not only have better leverage in target markets but can also increase their revenue earning potential. Such an approach can help Indian enterprises also derive maximum advantage from the opportunities opening through the free trade agreements (FTAs) already signed by India and those on the anvil, the former SIMA Chairman added.

The former SIMA Chairman said that, on the issue of FTAs, it was important to be mindful of the fact that while trade deals open doors, they offered no guarantee that it would automatically result in companies getting more orders. Enterprises would still need to go out and secure the business. It was also necessary to take cognizance of the reality that each FTA could bring with it certain challenges which companies need to prepare for, he added.

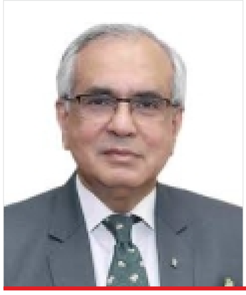
In July, India signed the Comprehensive Economic and Trade Agreement (CETA) with the United Kingdom. Once operational, the CETA is expected to remove the duty disadvantage which India's textile and apparel exporters faced in the UK vis-à-vis their key competitors from other nations. India is also negotiating FTAs with several other countries and blocs, including the European Union. Courtesy the India-UK CETA, India's textile and apparel exports to the United Kingdom have the potential to increase up to 25% in a year's time, Dr Sundararaman said.

The former SIMA Chairman said he remained hopeful that the US tariff issue would get resolved soon. The US is the single-largest market for India's textile and apparel exports, accounting for almost 28% of the total sales of India's textile and apparel exporters. India's textile and apparel exports to the US in the financial year 2024-25 was close to $11 billion.

Dr Sundararaman said the government should provide visible handholding support to the textile and apparel exporters to mitigate the impact of the crisis which has arisen for Indian textile and apparel companies due to the high US tariff. A moratorium on loans should also be considered along with the other measures which are being contemplated by the authorities, the former SIMA Chairman added.

India's textile and apparel sector is one of the biggest providers of jobs and livelihoods in the country, providing direct and indirect employment opportunities to more than 100 million people. India has set itself a target to more than double its textile and apparel exports to $100 billion by 2030.

SHIFT FROM REGULATORY TO PROMOTIONAL FORM OF GOVERNANCE NECESSARY



Dr Rajiv Kumar
Former Vice Chairman, Niti Aayog

A new governance model coupled with a private sector willing to raise the bar are what India needs to produce more companies which are globally competitive and can hold their own against peers worldwide under any circumstance, feels former Niti Aayog Vice Chairman Dr Rajiv Kumar.

The noted economist is also of the view that India being able to attract large "anchor investors" in the textile and apparel sector can contribute to increasing the competitiveness of local companies in this arena.

Building globally competitive Indian companies will mean more innovation, jobs, and long-term economic strength rooted at home. Despite India being one of the largest economies worldwide, there are only two India-headquartered companies in the list of the global top 100.

In an interaction with Textile Times, Dr Kumar – currently Chairperson of the noted Delhi-based think tank Pahle India Foundation – said a shift from a "regulatory" to a "promotional" form of governance, including critically at the level of states, is called for at the earliest. Visible, proactive measures are necessary on the 'ease of doing business' front since the surfeit of rules and regulations which businesses must comply with often takes away valuable time which entrepreneurs could have better utilized to grow their business instead, the noted economist pointed out.

Incidentally, NITI Aayog is currently developing an 'Investment Friendliness Index' which would assess the investment potential of states by looking at key aspects such as regulatory frameworks, infrastructure, policies, and incentives offered.

Dr Kumar said it was important that the private sector worked with the authorities on the "basis of trust" as trust is the foundational principle on which the success of governance reforms depends. Private companies being content with the status quo would never make Indian businesses globally competitive.

Sharing his perspective on what the government could do for the textile and apparel sector, the former Niti Aayog Vice Chairman said it is essential to reduce the cost of capital for enterprises engaged in this domain, especially those which fall in the MSME category. Banks should be more supportive in this connection, he pointed out.

India has set itself a target of growing its textile industry to $350 billion by 2030. The proposed establishment of 7 PM Mega Integrated Textile Region and Apparel (PM MITRA) Parks is expected to play a significant role in achieving this objective.

India's textile and apparel exports, though, are expected to take a huge hit if the 50% US tariff on Indian goods (which came into effect on August 27) persists for some time as the United States is the single-largest market for India's textile and apparel exports. Around 28% of India's textile and apparel exports go to the US. India's exports of textile and apparel items to the US in the financial year 2024-25 was close to $11 billion. India aims to more than double its textile and apparel exports to $100 billion by 2030.

CITI ACTIVITIES

A WEBINAR ON "UNLOCKING MSME GROWTH THROUGH THE RAISING AND ACCELERATING MSME PROGRAMME (RAMP)"

Shri S. R. Meena, General Manager
Small Industries Development Bank of India (SIDBI)

On 20th August 2025, the Confederation of Indian Textile Industry (CITI), with the support of the **Ministry of MSME** and the **Small Industries Development Bank of India (SIDBI)**, organized a webinar on *"Unlocking MSME Growth through the Raising and Accelerating MSME Programme (RAMP)"*. The session highlighted the government's commitment to empowering MSMEs with access to finance, sustainable practices, and capacity-building initiatives, thereby strengthening their role in India's industrial and export growth.

Key Highlights of the Webinar
Objective: To create awareness among textile and apparel MSMEs about growth opportunities under the **RAMP programme**, while introducing specialized schemes such as **MSE-GIFT (Green Investment and Financing for Transformation)** and **MSE-SPICE (Scheme for Promotion and Investment in Circular Economy)**.

- **MSE-GIFT:** Designed to promote sustainable and eco-friendly practices in the MSE sector by providing concessional financial assistance for green technologies and processes. With over **891 eligible technologies** and wide coverage across 28 states, the scheme supports MSEs in enhancing competitiveness in global value chains while reducing environmental impact.
- **MSE-SPICE:** Aimed at incentivizing MSEs to adopt **circular economy practices** through capital subsidies for projects focusing on the 3Rs — *Reduce, Reuse, Recycle*. The scheme supports compliance with **Extended Producers Responsibility (EPR)**, adoption of waste management technologies (plastic, e-waste, scrap metal, solar panel recycling, wastewater treatment, etc.), and maximization of efficiency while reducing manufacturing costs.

Distinguished Speakers:
- **Keynote Address:** Shri Rakesh Mehra, Chairman, CITI
- **Presentation on MSE-GIFT and MSE-SPICE Schemes:** Shri S. R. Meena, General Manager, SIDBI

Industry Interaction:
Prominent leaders from the Indian Textile & Apparel sector shared their perspectives and suggestions on MSME. The speakers included:
- Shri Ashish Gujarati, Past President, SGCCI
- Shri Parvinder Singh, Founder-Director, Global Alliance for Textile Sustainability Council
- Shri Aseem Kr. Singla, Owner, Fashion Images Overseas
- Shri Mahesh Sanil, Executive Director, Powerloom Development and Export Promotion Council

Takeaway: The webinar emphasized that schemes like **MSE-GIFT and MSE-SPICE** are crucial enablers for MSMEs to embrace sustainability, improve operational efficiency, and remain competitive in global markets. The dialogue strengthened industry understanding of government-backed financial tools and circular economy initiatives, ensuring MSMEs are better equipped to scale sustainably.

CITI-GRI LAUNCH SIGNATURE SUSTAINABILITY INITIATIVE FOR INDIA'S TEXTILE SECTOR

New Delhi, September 10, 2025: The Confederation of Indian Textile Industry (CITI) and Global Reporting Initiative (GRI) on September 10 jointly launched a pivotal sustainability initiative – Improving Transparency for Sustainable Business (ITSB) – for the textile and apparel sector in India to ensure that textile and apparel companies are better equipped to meet global standards on environmental, social and governance (ESG) norms and also buyer expectations.

Simultaneously, the GRI's Draft Sector Standards for the Textile and Apparel Sector were also unveiled by Ms Gelkha Buitrago, Director (Sector Standards), Global Reporting Initiative.

Moreover, a panel discussion on sustainability involving Tiruppur Exporters Association President Shri K M Subramanian, Powerloom Development & Export Promotion Council (PDEXCIL) Chairman Shri K. Sakthivel, Garments Exporters & Manufacturers Association (GEMA) General Secretary Shri Animesh Saxena, and Shahi Exports Associate Vice President Shri Rajneesh Rai was held as part of the launch event, where speakers underlined how focusing on sustainability could provide companies a competitive edge.

“The ITSB initiative will help in future-proofing India's textile and apparel sector, open new avenues for growth, and help India's textile and apparel companies being seen as responsible and sustainable manufacturers and exporters,” said Shri Ashwin Chandran, Deputy Chairman, Confederation of Indian Textile Industry.

Welcoming the ITSB initiative, Tiruppur Exporters Association President Shri K M Subramanian said that Tiruppur is aiming to become a “Net Zero” cluster by 2030. Incidentally, India has committed to become Net Zero by 2070.

Supported by the Swedish International Development Cooperation Agency (Sida), the ITSB initiative is designed to elevate sustainability practices and transparency across India's textile and apparel sector.

Sigificantly, the ITSB would serve as a critical enabler for inclusive growth, helping small businesses transition to sustainable models without being left behind.

India's textile and apparel sector contributes nearly 2% to the country's GDP. The bulk of companies in this sector fall in the MSME category.

In India, ITSB will serve as a dynamic multi-stakeholder platform, engaging businesses, industry bodies, worker associations, regulators, investors, and data users. The initiative will build capacities for impact reporting on critical environmental and social issues such as climate change, circularity, waste, diversity and inclusion, and biodiversity. It will also deepen transparency on employment, health and safety practices, and economic and tax-related impacts. India will be well-positioned to showcase its achievements to the world and contribute valuable lessons from its own experience to the global community.

ITSB will offer tangible benefits for a wide spectrum of stakeholders. Reporting organizations will gain tools, training, and frameworks to improve ESG disclosures and meet global buyer expectations. Industry associations will be able to strengthen collective action, knowledge- sharing, and advocacy on sustainability practices.

Investors will benefit from more consistent and credible ESG data to inform responsible decision-making, while worker associations will see greater transparency on employment practices, health and safety standards, and inclusion, fostering better dialogue and accountability. At the same time, regulators and policymakers will gain access to standardized sustainability data to guide evidence-based policy development and governance.

As part of its India-specific implementation, GRI and CITI will focus efforts on the selected textile clusters, driving localized engagement and capacity building. By anchoring the initiative in these hubs of innovation and production, ITSB seeks to catalyse a movement that will ripple across the sector, making sustainability and transparency not just a compliance requirement, but a strategic advantage for India's textile and apparel industry in the global marketplace.

SUPPLIER DIALOGUE:
MAKING HUMAN RIGHTS DUE DILIGENCE (HRDD) WORK"
ON 17TH SEPTEMBER 2025 IN TIRUPUR

CITI, in collaboration with the Fair Wear Foundation and supported by the Tirupur Exporters Association (TEA), organized the *"Supplier Dialogue: Making Human Rights Due Diligence (HRDD) Work"* on 17th September 2025 in Tirupur. The session brought together key stakeholders from the textile and apparel sector to discuss integrating HRDD into supply chains and preparing for the EU Corporate Sustainability Due Diligence Directive (CSDDD). This initiative reinforces CITI's commitment to empowering exporters with knowledge, tools, and practical insights to align with global sustainability and ethical business practices.

Objective:

- Enhance suppliers' understanding of HRDD and its role in strengthening supply chains.
- Provide practical insights into compliance with evolving global sustainability legislations such as the CSDDD.
- Facilitate dialogue between exporters, associations, and experts to align industry practices with international buyer requirements.

Key Speakers:

The event featured insightful contributions from eminent speakers, including:

- **Ms. Chandrima Chatterjee**, Secretary General, CITI
- **Mr. V Elangovan,** Vice President, Tirupur Exporters Association
- **Mr. K.M Subramanian,** President, Tirupur Exporters Association
- **Ms. Sofia Menfalout,** Equitable Sourcing Expert, Fair Wear Foundation
- **Mr. Daniel Schonfelder,** Lead European Legal Advisor, Responsible Contracting Project at centre for corporate law and governance at Rutgers Law School, New Jersey
- **Mr. M Anand**, Chairman, Branding, Business Promotion & Sustainability Subcommittee, Tirupur Exporters Association

Their expertise and insights enabled meaningful discussions on challenges, opportunities, and solutions for the industry in navigating HRDD requirements.

Session Agenda and Highlights

- **Detailed Presentation on HRDD Frameworks** Covering key principles, step-by-step approaches, and implications under EU legislations like the CSDDD.
- **Industry Inputs from Exporters & Associations** Focused on the unique challenges faced by Tirupur exporters and opportunities to integrate HRDD into daily operations.
- **Interactive Q&A with Experts** Participants engaged directly with experts, raising practical concerns and receiving actionable guidance.

Outcomes and Way Forward:

- Improved understanding of HRDD and its application in textile supply chains.
- Greater clarity on compliance requirements linked to international trade and buyer expectations.

The event marked another crucial step in CITI's efforts to support Indian exporters in building responsible, future-ready, and globally competitive businesses.

SUPPLIER DIALOGUE:
MAKING HUMAN RIGHTS DUE DILIGENCE WORK
ON 19TH SEPTEMBER IN NOIDA

The Confederation of Indian Textile Industry (CITI), in collaboration with Fair Wear Foundation, successfully organized the *Supplier Dialogue* : Making Human Rights Due diligence work on 19th September in Noida.

The event brought together key stakeholders from the textile and apparel industry for an interactive and action-oriented discussion on integrating Human Rights and Environmental Due Diligence (HRDD) into supply chains. This initiative is part of CITI's continued efforts to prepare exporters for the EU Corporate Sustainability Due Diligence Directive (CSDDD) and to build supply chains that are sustainable, transparent, and ethically driven.

Objectives of the Dialogue:

- ☑ Enhance suppliers' understanding of HRDD and its role in strengthening supply chains
- ☑ Share practical insights on compliance with global legislations like the EU CSDDD
- ☑ Facilitate dialogue to align industry practices with international buyer requirements

Distinguished Speakers:

- Ms. Chandrima Chatterjee, Secretary General, CITI
- Mr. Lalit Thukral, President, NAEC, MD Maharana of India
- Ms. Sofia Menfalout, Equitable Sourcing Expert, Fair Wear Foundation
- Ms. Mousumi Sarangi, Country Manager (India), Fair Wear Foundation
- Mr. Animesh Saxena, Honorary General Secretary of GEMA, MD Neetee clothing
- Mr. Sanjay Janghala, Consultant, Noida Apparel Export Cluster (NAEC)

Key Themes & Insights:

- ☑ **Contracts as Enablers** – More than legal paperwork, contracts are tools to embed due diligence, risk management, and long-term trust between buyers and suppliers.
- ☑ **Traditional vs Responsible Contracting** – Moving beyond one-sided agreements to shared responsibility and fairer commercial terms.
- ☑ **EU CSDDD & Opportunities for Exporters** – The upcoming directive places obligations on buyers to support suppliers, creating a more balanced relationship.
- ☑ **Supplier Empowerment** – Legislation strengthens suppliers' voices in negotiations on price, timelines, and compliance support.

Interactive Dialogue:

Exporters, associations, and global experts shared challenges and solutions—from **cost-sharing for compliance** to **practical tools like model contract clauses** that align with UNGPs, OECD Guidelines, and EU law.

✨ **Key Outcomes:**

- ✔ Improved understanding of HRDD in textile supply chains
- ✔ Clarity on compliance requirements linked to global trade and buyer expectations
- ✔ Reinforcement of the need for collaborative efforts across the supply chain
- ✔ Recognition of responsible contracting as a pathway to **fairer partnerships and sustainable growth**

Mr. Lalit Thukral, President, NAEC, delivering the welcome address for the session

A WEBINAR ON

"GST 2.0 & US TARIFF AND THEIR TWIN IMPACT ON THE INDIAN TEXTILE AND APPAREL SECTOR"

INDIA'S TEXTILE & APPAREL SECTOR AT CRITICAL CROSSROAD | EY INDIA PARTNER PRASHANT RAIZADA

New Delhi, September 26, 2025: India's pivotal textile and apparel sector stands at a critical crossroad. While the landmark GST reforms will yield long-term structural gains, the immediate external risk in the form of the 50% US tariff on Indian goods remains a critical area of concern.

Such is the view expressed by EY India Partner – Indirect Tax & Incentives, Shri Prashant Raizada. Shri Raizada was addressing a webinar on GST 2.0 & US tariff and their twin impact on the Indian textile and apparel sector jointly organized by the Confederation of Indian Textile Industry (CITI) and EY India on September 26.

To help the textile and apparel sector, the GST changes announced on September 3 have eliminated duty inversion to ease cash flow and working capital, ensured fibre neutrality with Man-Made Fibre having the same GST rate as cotton, and eased registration and compliance procedures to benefit small businesses. Moreover, starting September 22, textile and apparel items priced up to Rs 2,500 would be charged a 5% GST. Earlier, this 5% rate was only applicable for textile and apparel products priced up to Rs 1,000.

Effective August 27, the US has imposed a 50% tariff on Indian goods. The US is the single-largest market for India's textile and apparel exports, contributing close to 28% of the revenue of Indian textile and apparel exporters. India's textile and apparel exports to the US in the financial year 2024-25 was nearly $11 billion.

Shri Raizada said the GST reforms would lead to increased consumer spending thereby benefitting textile and apparel companies. However, he pointed out that companies should evaluate the potential implications of delayed utilization of Input Tax Credits (ITCs), reassess purchase orders made earlier, and sensitize the dealer network about the need to pass on the GST benefits to customers.

The EY India Partner said he remained hopeful that the US tariff issue would be sorted out soon. That said, he pointed out that given the uncertainty around the issue, Indian textile and apparel companies should study the possibilities of shifting production bases and at joint venture opportunities.

CITI Chairman Shri Ashwin Chandran said the 50% US tariff would make Indian textile and apparel exporters uncompetitive in the world's No. 1 economy, and companies here would have to rethink their strategies to address the current grave challenge. The GST reforms, though, were a huge positive for India's textile and apparel sector, Shri Chandran added.

CITI LEADS INDIAN TEXTILE DELEGATION TO ITMA ASIA + CITME 2025 IN SINGAPORE

Union Textiles Ministry Additional Secretary Mr. Rohit Kansal speaking at the ITMA Asia + CITME 2025, Singapore

The Confederation of Indian Textile Industry (CITI) lead an official textile delegation to ITMA ASIA+CITME 2025, Singapore — the premier exposition was held from October 28-31 showcasing the latest in textile machinery, innovation, and sustainable manufacturing technologies.

The delegation included noted textile entrepreneurs and industry leaders, representing India's growing prowess in sustainable and smart textile manufacturing.

CITI Secretary General Chandrima Chatterjee along with industry leaders at the ITMA Asia + CITME 2025, Singapore

The visit, witnessed the Indian delegation's interaction with some of the most innovative textile companies worldwide, aiming to strengthen India's engagement with global technology leaders, exploring investment and collaboration opportunities, and accelerating the modernization of the Indian textile value chain. CITI organized various association level meetings.

On October 28, Union Ministry of Textiles Additional Secretary Shri Rohit Kansal inaugurated the 'Indian Pavilion' at the ITMA ASIA +CITME 2025, Singapore. In his inaugural address, Shri Kansal highlighted India's aim to create a $350 billion textile and apparel industry in India by 2030, including $100 billion of exports.

The size of India's domestic textile and apparel industry in the financial year 2024-25 was close to $180 billion, while exports from the country were around $38 billion.

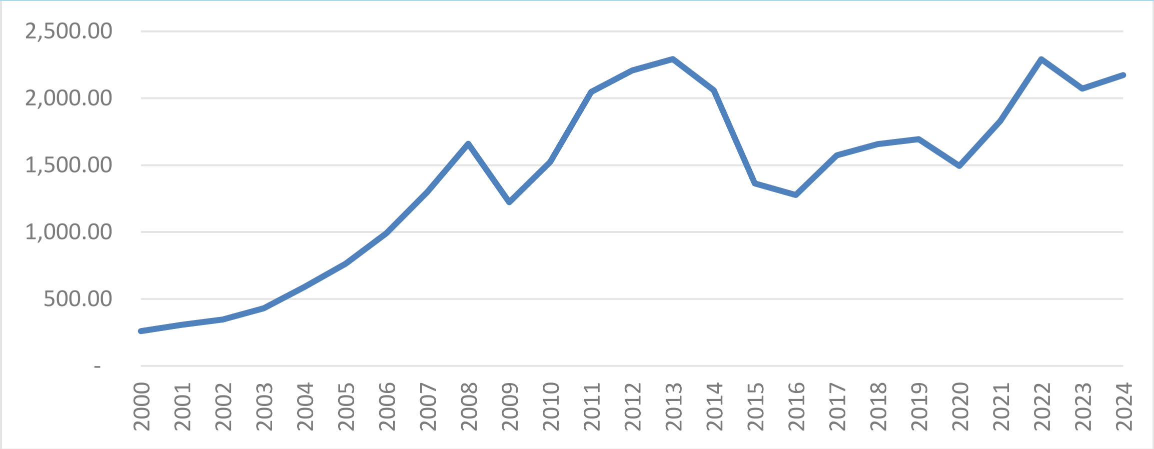
As part of the India engagement with ITMA ASIA + CITME 2025, Mr. Kansal also delivered a special address on “Accelerating Green Transition” at the ITMA Sustainability Forum held on October 30.

Market Watch

RUSSIA

With a GDP of about US$ 2,173.4 bn in 2024, Russia was the 11th largest economy in the world. It is recognized as a high-income, industrialized, mixed market economy with strong foundations in energy, mining, manufacturing, and an increasingly diversified services sector and it continues to play a pivotal role in global commodity markets. Supported by vast natural resources, a highly educated workforce, and a growing technology base, Russia continues to play a significant role in shaping global economic and trade dynamics.

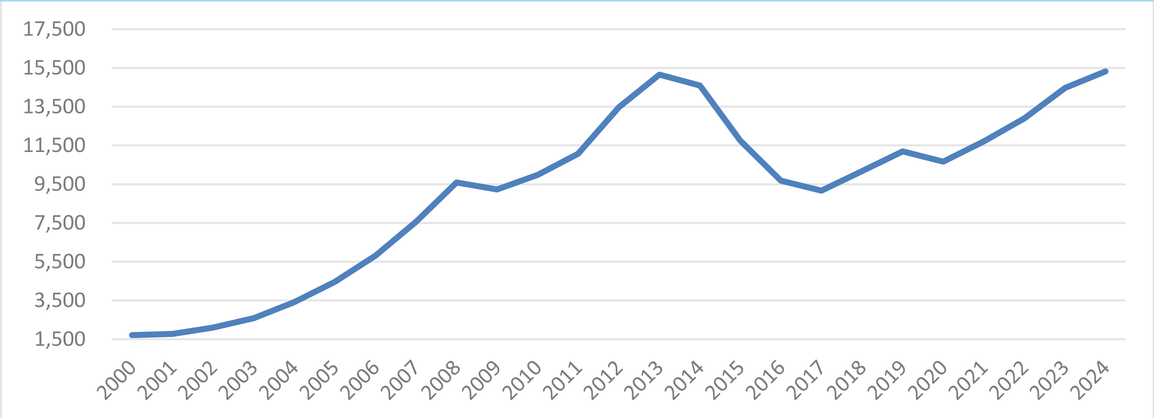
GDP (Current US$) of Russia (US$ Billion)



Source: World Bank and CITI Analysis

Russia's Gross National Income per capita has shown steady growth in recent years, reaching about US$15,320 in 2024. The country is classified as a high-income economy, supported by its strong resource base and diversified industrial structure. With favourable macroeconomic conditions and rising consumer purchasing power, Russia represents a potentially attractive market for higher-end textile products.

Gross National Income (GNI) Per Capita, of Russia (US$)



Source: World Bank and CITI Analysis
GNI is as per the Atlas method (Current US$)

Overview of the Global Textile & Apparel Trade of Russia

Russia is a net importer of Textile & Apparel (T&A) products. In 2024, the country exported T&A commodities worth about US$ 1.09 billion, reflecting a declining trend with a CAGR of –2.5% during 2020–2024. In contrast, its imports of T&A products stood at about US$ 12.75 billion, having grown at a CAGR of 2.6% over the same period. This consistent trade deficit underlines Russia's dependence on global markets to meet its textile and apparel demand.

Total Textile & Apparel (T&A) Trade of Russia (US$ Bn)

Year	2020	2021	2022	2023	2024	CAGR
Exports	1.21	1.44	0.72	0.70	1.09	-2.5%
Imports	11.51	13.05	11.12	13.26	12.75	2.6%
Trade Balance	-10.30	-11.62	-10.40	-12.56	-11.65	

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that Apparel was the largest imported T&A category by Russia from the world and had a share of about 55.74% in Russia's total T&A imports from the world during 2024.

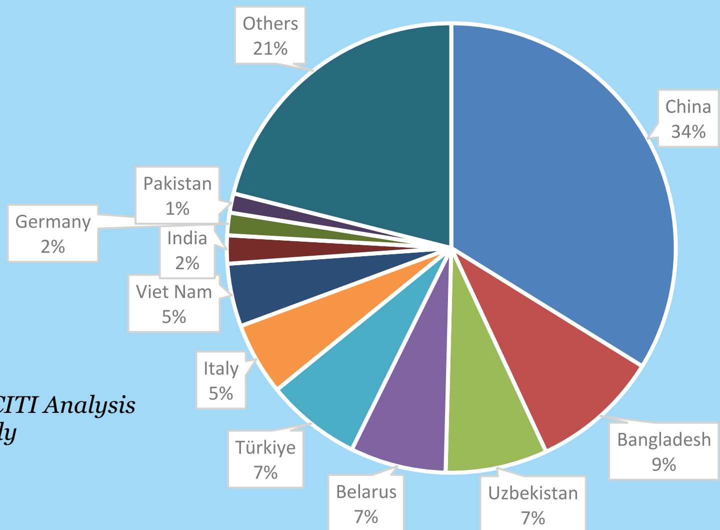
Category Wise Imports of T&A by Russia in 2024 (US$ n)

Particular	2020	2021	2022	2023	2024	Share 2024
Fibre	339.96	442.23	287.92	400.34	473.52	3.72%
Filament	238.51	297.14	217.55	213.70	201.86	1.59%
Yarn	450.91	618.57	836.27	603.81	733.29	5.76%
Fabric	1,441.60	1,899.02	2,538.49	2,586.21	2,564.80	20.15%
Apparel	6,913.52	7,952.65	5,783.97	7,857.00	7,093.94	55.74%
Home Textiles	506.32	618.43	628.31	764.33	884.49	6.95%
Others	1,619.71	1,225.38	819.70	833.40	776.06	6.10%
Total T&A	11,510.53	13,053.43	11,112.20	13,258.78	12,727.95	

Source: ITC Trade Map & CITI Analysis

China was the leading supplier of T&A commodities to Russia and had a share of about 33.8% in Russia's total T&A imports from the world during 2021 followed by Bangladesh and Uzbekistan with a share of about 9.2% and 7.3% respectively. The top 10 countries accounted for about 80% of Russia's total T&A imports from the World during 2021.

Share of Top Suppliers of T&A Commodities to Russia



Source: ITC trade map and CITI Analysis
Data is available till 2021 only

Categorical analysis of Russia's imports shows that the top 10 T&A commodities accounted for about 48% of its total T&A imports from the world in 2024. Within this basket, HSN 6204 (Women's or girls' suits, ensembles, jackets, dresses, skirts, trousers, etc.) remained the single largest import category, contributing 6.7% of total imports, despite a negative CAGR of −2.2% during 2018–2022.

Notably, HSN 6109 (T-shirts, singlets and vests, knitted or crocheted) and HSN 6110 (jerseys, pullovers, cardigans, knitted) registered strong import levels with shares of 6.4% and 6.1% respectively in 2024. While HSN 6110 had earlier shown significant growth, its CAGR has now stabilized at −0.1%, whereas HSN 6109 continued to expand robustly at a CAGR of 11.2%.

Among the fastest-growing categories were HSN 6302 (bedlinen, table linen, toilet and kitchen linen), which recorded a CAGR of 27.6%, and HSN 5407 (woven fabrics of synthetic filament yarn) with a CAGR of 21.1%, reflecting increasing consumer and industrial demand for home textiles and synthetic-based products.

Imports of Top 10 T&A Commodities by Russia (US$ Mn)

HS Code	Product label	2020	2021	2022	2023	2024	CAGR	Share 2024
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	935.0	1,120.8	682.9	956.3	854.2	-2.2%	6.7%
6109	T-shirts, singlets and other vests, knitted or crocheted	528.1	689.7	453.3	713.9	808.8	11.2%	6.4%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	781.9	1,021.3	573.9	823.9	779.4	-0.1%	6.1%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches, etc.	520.9	619.9	404.3	846.3	641.0	5.3%	5.0%
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery,etc.	370.1	448.1	634.5	709.9	626.3	14.1%	4.9%
5407	Woven fabrics of synthetic filament yarn, incl. monofilament of >= 67 decitex	240.2	317.9	509.8	575.1	517.3	21.1%	4.1%
5205	Cotton yarn other than sewing thread, containing >= 85% cotton by weight	247.5	369.5	524.2	338.4	503.0	19.4%	4.0%
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile material	180.0	200.7	344.3	438.8	477.0	27.6%	3.7%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	363.4	502.0	369.6	471.3	465.8	6.4%	3.7%
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, etc.	543.0	670.2	493.7	562.1	438.2	-5.2%	3.4%

Source: ITC Trade Map & CITI Analysis

Textile & Apparel Trade Between India and Russia

India is one of the major suppliers of T&A products to Russia. During 2024, India exported T&A commodities worth US$ 172.7 mn to Russia which has grown at a CAGR of 12% during 2020-2024

During the above time frame, exports of fabric, though lesser in trade volume has shown the maximum growth followed by filaments.

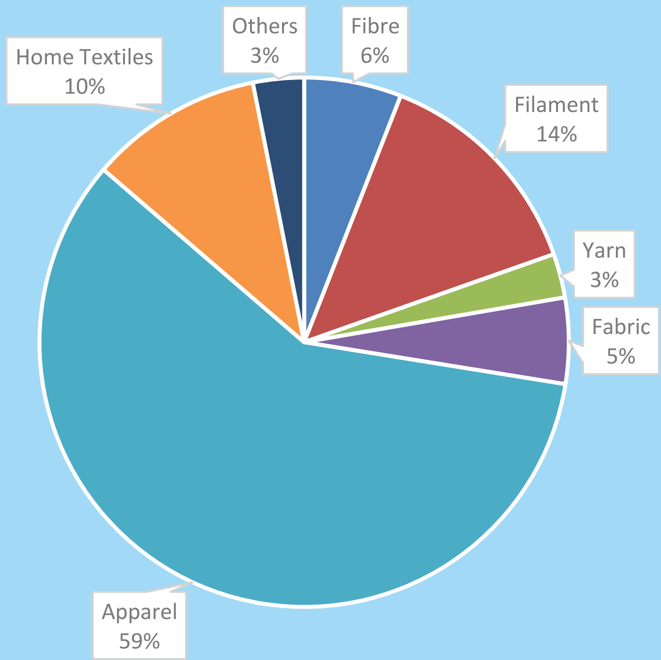
India's exports of T&A products to Russia (US$ Mn)

Row Labels	2020	2021	2022	2023	2024	CAGR
Fibre	11.8	20.4	9.7	9.6	10.3	-3.4%
Filament	11.4	24.4	10.4	12.9	23.6	20.0%
Yarn	3.8	9.3	4.0	4.8	4.6	5.0%
Fabric	3.0	4.4	5.1	7.5	9.1	32.3%
Apparel	57.5	66.4	29.2	41.2	101.5	15.2%
Home Textiles	16.6	22.1	11.3	17.8	18.3	2.4%
Others	5.5	5.7	4.3	4.3	5.4	-0.5%
Total T&A	109.6	152.5	74.1	98.0	172.7	12.0%

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that apparel was the largest exported T&A commodity by India to Russia which accounted for about 59%% of total T&A exports by India to Russia. It was followed by Filament and Home Textiles with 14% and 10% share respectively.

Category Wise Share of Exports of T&A from India to Russia



Source: ITC Trade Map & CITI Analysis

The top 10 commodities exported by India to Russia accounted for about 75% of India's total T&A exports to Russia in 2024. HSN 6203 was the largest exported T&A category by India to Russia which accounted for about 39% of India's total T&A exports to Russia.

Top 10 T&A commodities exported by India to Russia (US$ Mn)

HS Code	Commodity	2020	2021	2022	2023	2024	CAGR	Share 2024
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches, etc.	13.2	12.5	2.2	13.7	67.1	50.2%	38.9%
5402	Synthetic filament yarn, incl. synthetic monofilaments of < 67 decitex	11.4	22.3	9.5	12.3	23.1	19.3%	13.4%
6109	T-shirts, singlets and other vests, knitted or crocheted	8.3	11.9	5.6	7.0	10.4	5.7%	6.0%
6304	Articles for interior furnishing, of all types of textile materials	3.5	4.4	2.3	4.0	5.2	9.8%	3.0%
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, etc.	1.8	2.0	1.1	1.3	4.6	25.6%	2.6%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers,	8.3	10.3	7.8	5.6	4.5	-14.3%	2.6%
5305	Coconut, abaca "Manila hemp or Musa textilis Nee", ramie, agave and other vegetable textile	3.6	4.2	3.5	3.1	4.4	5.6%	2.6%
5504	Artificial staple fibres, not carded, combed or otherwise processed for spinning	4.2	5.2	4.1	3.5	3.6	-3.7%	2.1%
5701	Carpets and other textile floor coverings, of textile materials, knotted, whether or not made	2.6	3.6	2.5	3.5	3.2	4.9%	1.9%
5407	Woven fabrics of synthetic filament yarn, incl. monofilament of >= 67 decitex	0.5	1.0	1.5	2.2	2.4	44.2%	1.4%

Source: ITC Trade Map & CITI Analysis

Way Forward:

Russia is a net importer of Textile & Apparel products from world. As far as trade between India and Russia is considered, India is a net exporter of T&A products to Russia. However, the present T&A trade between the two countries is not significant.

Trade analysis shows that India is having the required potential to cater to Russia's T&A import needs, yet its share has been continuously low in Russian market over past years. Though both the countries are big economies and are of historical significance for each other, yet their trade, particularly for T&A has been limited till now.

Indian T&A industry which is dominated by MSME often face challenges in terms of lack of a stable INR-RUB payment mechanism as also complex certification and technical standards also act as a barrier for Indian MSMEs while doing T&A trade with Russia. To improve trade between the two countries, Government may take necessary actions like:

- Mutual recognition of testing certificates from NABL-accredited testing laboratories in India.
- Establishing a Stable Bilateral Payment Mechanism
- Streamlining cargo movement through Authorised Economic Operator (AEO) Scheme

Moreover, to increase trade between the two countries, Market diversification and strategic product positioning are also critical. The industry should focus on categories that show strong demand in Russia, such as home textiles, synthetic filament-based fabrics, and apparel basics like T-shirts and jerseys. Indian exporters can position their products as high-quality, value-for-money alternatives to other competitors like China, Bangladesh, etc.

CITI ANALYSIS OF EXPORTS AND IMPORTS OF T&A FOR OCTOBER 2025

- During Oct'25, Indian Textiles exports registered a degrowth of -12.92% over the previous year while Apparel exports registered a degrowth of -12.88% during the same time period.
- Cumulative Exports of Textiles and Apparel during Oct'25 have registered a degrowth of -12.91% over Oct'24.
- During Apr-Oct'25, Indian Textiles exports registered a degrowth of -3.54% over the previous year while Apparel exports registered a growth of 1.13% during the same time.
- Cumulative Exports of Textiles and Apparel during Apr-Oct'25 have registered a degrowth of -1.57% as compared to Apr-Oct'24.

Monthly Export Updates of Textile and Clothing (Value in USD Mn.)

Export category	Oct-24	Oct-25	% Change	Apr-Oct'24	Apr-Oct'25	% Change
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	1,045.67	906.48	-13.31%	6,995.20	6,702.85	-4.18%
Man-made Yarn/Fabs./made-ups etc.	438.01	386.53	-11.75%	2,843.65	2,787.39	-1.98%
Jute Mfg. including Floor Covering	32.82	23.87	-27.27%	212.65	213.70	0.49%
Carpet	146.79	123.59	-15.80%	892.54	857.42	-3.93%
Handicrafts excl. handmade carpet	170.67	156.52	-8.29%	1,050.29	1,008.03	-4.02%
Sub-Total Textiles	**1,833.96**	**1,596.99**	**-12.92%**	**11,994.33**	**11,569.39**	**-3.54%**
Apparel	**1,227.58**	**1,069.42**	**-12.88%**	**8,733.72**	**8,832.56**	**1.13%**
Textile and Clothing	**3,061.54**	**2,666.41**	**-12.91%**	**20,728.05**	**20,401.95**	**-1.57%**
All Commodity	**38,983.08**	**34,375.16**	**-11.82%**	**2,52,660.98**	**2,54,253.90**	**0.63%**
% of T&C in Total Exports	**7.85%**	**7.76%**		**8.20%**	**8.02%**	

Source: Press Information Bureau

Monthly Imports Updates of Textile and Clothing (Value in USD Mn.)

Imports category	Oct-24	Oct-25	% Change	Apr-Oct'24	Apr-Oct'25	% Change
Cotton Raw & Waste	127.70	234.02	83.26%	605.09	910.73	50.51%
Textile yarn fabric, made-ups	229.23	226.55	-1.17%	1,426.36	1,543.67	8.22%

Source: Press Information Bureau

QUICK ESTIMATES OF IIP FOR TEXTILE AND CLOTHING SECTOR (T&C): SEPTEMBER 2025

Quick Estimates - Index of Industrial Production - Textiles & Clothing

Description	Weights	Index			Cumulative Index		
		Sep 24	Sep 25	% Change	April – Sep 2024-25	April – Sep 2025-26	% Change
Manufacture of textiles	3.291	109.3	110.6	1.2%	107.7	107.2	-0.5%
Manufacture of wearing apparel	1.322	103.7	100.8	-2.8%	113.2	114.8	1.4%

Source: CITI Analysis & Ministry of Statistics Planning & Implementation

- The General Index for the month of September 2025 is 4.0% percent higher as compared to the level in the month of September 2024.

- Textiles was increased by 1.2% percent, While Wearing Apparel decreased by -2.8% percent in September 2025 over the same month previous year.