TEXTILE TIMES

CITI
CONFEDERATION OF INDIAN TEXTILE INDUSTRY
www.citiindia.org

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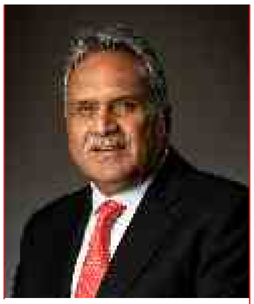
Bharat TEX 2025
TEXTILES | FASHION | SUSTAINABILITY



Dear readers, as we are progressing through 2025, we are witnessing the impact of some of the transformative megatrends reshaping the global textile and apparel industry that took place in the last few years. The global political and economic volatilities have shown us some opportunities that we leveraged and some we missed. At CITI, we remain committed to advancing these shifts, aligning our strategic goals to ensure India is at the forefront of this dynamic landscape.

2025 has seen a good start for the textile industry, with some strong budget proposals for revival and growth of this sector, mega events like Bharatex 2025 – an emphatic demonstration of India's position, prospects, intent and strength in the textile sector and India showing resilience in some of the important markets like US, in spite of several challenges.

Some of the important policy measures that are aimed at lending competitiveness to the industry are Mission for Cotton productivity, revision in classification of MSMEs, Minimum Import Price (MIP) on MMF Knitted Fabrics, Skilling initiatives and increased focus on technical textiles as also alternate natural fibres.

The Mission on Cotton Productivity is a timely and much needed programme to address Indian's falling productivity in cotton. With the largest acreage of 38% but nearly half of the world's average yield, the Mission's objective of increasing yield through focus on seed technology, mechanisation and cleaner processing of cotton are well placed. CITI has also requested for greater market linkages, focus on social sustainability and regenerative agri practices to ensure that the productivity and quality enhancement is supplemented with better position of the cotton and aligned to global requirements. It is good to see the early start to implement this Programme. We look forward to faster implementation of the other policy support measures also, especially those aimed at investment incentivisation.

Our Budget memorandum for this year had sought for reintroduction of investment incentivising schemes, with focus on encouraging technologies and production that encourage energy optimisation, resource optimisation, supply chain efficiencies and overall cost competitiveness.

At policy level, CITI’s one point request was availability of raw material at internationally competitiveness prices through removal of duties or reducing trade barriers wherever applicable across the value chain.

A look at the CITI's activities over the last one year clearly shows our focus on aligning industry's awarenesses and capacities for the various emerging requirements, domestically and globally.

One such important step was CITI's Management Development Program on ESG (MDP-ESG), which was launched in 2024. It underscored the importance of social due diligence within the framework of the EU's Corporate Sustainability Due Diligence Directive (CSDDD). Participants were educated on the implications of this directive for brands, which include obligations to conduct thorough due diligence on human rights and environmental impacts, both in direct operations and within supply chains. Key sessions addressed the roles and responsibilities of business partners, brand obligations, integration of due diligence practices into company policies, and the stringent monitoring and sanctioning mechanisms by authorities. Additionally, the directive's climate change combat plan outlines strategies to reduce environmental footprints, compelling businesses to adopt sustainable practices that meet these comprehensive requirements.

With encouraging trade figures and trade agreements such as the India-Australia ECTA and the India-UAE CEPA and EFTA in play, we are poised to seize this momentum, driving export growth and expanding our global footprint. We plan to continue with this Programme this year, in partnership with some of our partner associations.

CITI's partnership with Fair Wear Foundation and International Labour Organisation for creating awareness at the industry level and farm level respectively, reinforces our commitment in this regard.

Cotton remains at the heart of our industry, sustaining millions of livelihoods and forming the backbone of India's textile sector. At the 66th Annual General Meeting of CITI, and our Annual team meet of CITI-CDRA earlier this year at Nagpur, we highlighted our progress over the past year, particularly in advancing cotton quality and productivity through the CITI Cotton Development and Research Association (CDRA) in partnership with our various national and international partners. CDRA's foray into social and environmental compliance aspects of cotton production and ecosystem is aimed at addressing. The forthcoming needs for demonstrating Indian cotton industry's commitment to these issues across the value chain.

2025-26 is expected to take forward some of the growth trends seen in 2024-25. PM Mitra Parks are expected to roll out in some states, product diversification in the areas of alternative fibers like jute, hemp, banana and bamboo, technological advancements and automation with greater adoption of automation and digitisation of the processes, data driven decision making and supply chain optimisation are some of the expected trends that will take industry stride forward towards the targets set till 2030. Competitive raw material costs, pace of new investments and capacity building and alignment to the environmental concerns of the global markets can be key to how the market grows for India and how many opportunities are seized.

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Rakesh Mehra
Chairman - CITI

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As the FY 2024-25 ends and we prepare for FY 2025-26, a quick look at the year gone by. Textile and Apparel (T&A) exports rebounded after a sluggish start backed by good relative performance in markets like US, new partnerships like the EFTA forged, strong resilience to global adversities like the Ukraine war or the unrest in our neighbouring country. However, the growth rates are still very modest compared to the target set as also historical highs. Domestically, while our market is growing steadily, it is overshadowed by faster-moving sectors like electronics and consumer durables. This decline in T&A's share in India's production and exports calls for new growth strategies and corrections in some of the existing ones.

For CITI 2024-25 was an eventful year, with several of our initiatives taking a good start or maturing some of which are:

- **Strengthening Labour Rights in Cotton Farming:** One of the key milestones of the year was the signing of an MoU with the International Labour Organisation (ILO) to promote Fundamental Principles and Rights at Work (FPRW) in India's cotton sector. This initiative focused on creating farmer awareness and enabling access to fundamental labour rights in key cotton-producing districts of Madhya Pradesh. Thousands of farmers have already benefited, and 2025-26 will witness an expansion of activities alongside an impact assessment of the progress made.

- **Preparing for EU's Corporate Sustainability Due Diligence Directive (CSDDD):** CITI entered into a strategic partnership with the Fair Wear Foundation for a proactive response to the developments in the EU with regard to Corporate Sustainability Due Diligence Directive (CSDDD) and ensuring supplier voices in the negotiations. This initiative is crucial as we navigate the forthcoming EU due diligence frameworks and amplify suppliers' voices in consultations. With the CSDDD enacted in May 2024, European companies are mandated to enforce rigorous human rights and environmental due diligence across global supply chains. While several cluster level workshops were conducted during the last year in major textile clusters, to get supplier feedback on the legislations CITI is planning to reach new clusters, action plan of which will be rolled out shortly.

- **Empowering Sustainability Leaders Through MDP on ESG:** Recognizing the growing importance of ESG (Environmental, Social, and Governance) reportings and data driven plans, CITI had initiated a Management Development Program (MDP) for sustainability professionals in the textile sector, for developing a pool of experts who have well rounded knowledge and tools for better reportings and for fostering industry-wide sustainability leadership.

- **Recognizing Excellence in sustainability:** The CITI Textile Sustainability Awards have been growing as a platform to map the good practices in various spheres of the textile and apparel value chain and with new partners it is effectively disseminating documented evidence of good initiatives being taken towards good HR practices, material management, water and carbon reduction, waste management, recycling and many more.

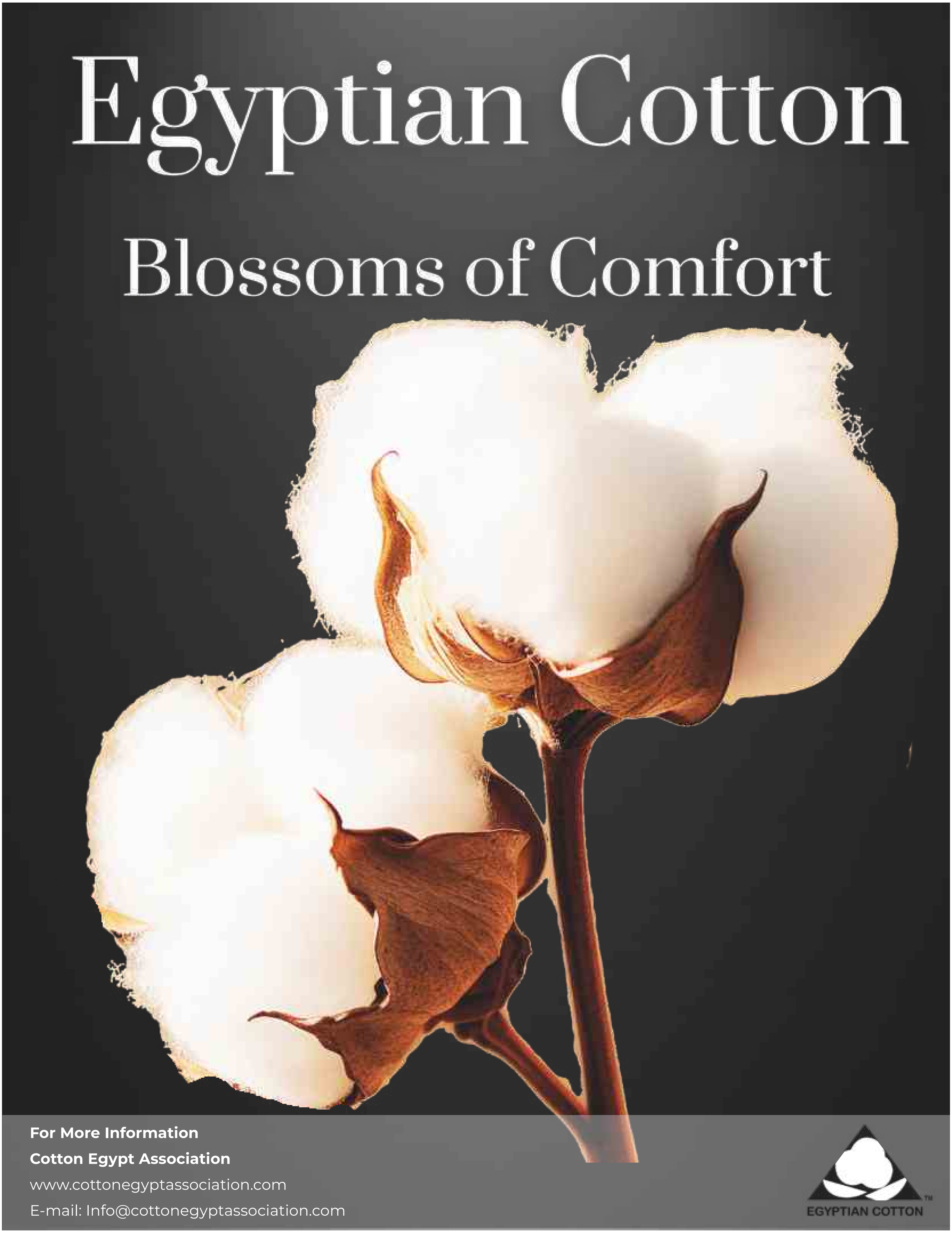
Several geo-political developments have increased volatility in the global markets. The recent Bangladesh crisis underscores the need for diversification of manufacturing hubs as also diversification of trade partners. India is well poised in this direction. With concluded FTAs like the India-Australia ECTA and the India-UAE CEPA, and efforts for FTAs with two most important textile markets of USA and EU, Indian textiles should gear up for taking the opportunities that can open up in the coming months.

How does 2025-26 look for the Indian textile industry? Several reports forecasts that India's textile industry is poised for significant growth in 2025-26, driven by strategic initiatives, technological advancements, reshoring and rebalancing of supplying sources with importing countries expanding and diversifying their supply chains should be an opportunity for India. Increasing mainstreaming of sustainability in business strategies – be it fibre use, energy or water use or waste management and growing culture of reporting are going to strengthen India's positioning.

But the most important thing will be our preparedness to leverage the opportunities that come our way. The industry had several opportunities in the last one decade or more – be it China vacating space in the textile and apparel sector since 2014 or the recent US tariff war with high tariff imposed on some of our competitors. Better still, India can create new opportunities in the emerging areas like technical textiles, recycled fiber based products, greater diversification in natural fibres through improved finishes and functionalities and higher value fashion and functional products.

With a renewed focus on innovation, sustainability, and strategic global positioning, the Indian textile industry is well-equipped to harness emerging opportunities. As we step into FY 2025-26, the collective efforts of policymakers, industry stakeholders, and organizations like CITI will be instrumental in shaping a more resilient and competitive textile ecosystem.

Chandrima Chatterjee
Secretary General - CITI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INTERACTIVE SESSION

"MEGATRENDS SHAPING THE TEXTILE AND APPAREL INDUSTRY"

organised by CITI YEG

Young Entrepreneurs Group (YEG) of Confederation of Indian Textile Industry organized a Session on "Megatrends Shaping the Textile & Apparel Industry" on 25th April 2024 on Virtual Platform.

In his Opening Remarks Mr. Rajjnish Aroraa, Chairman of the Young Entrepreneurs Group welcomed the participants to the session and highlighted the importance of understanding and adapting to megatrends in the textile and apparel industry.

Mr. Arvind Singhal, Chairman, Technopak Advisors made a presentation on the "Megatrends Shaping the Textile & Apparel Industry" and shared trends related to textiles and apparel trade, sustainability, technology, consumer behaviour, market dynamics, and regulatory changes.

Mr. Arvind Singhal, with his expertise and experience in the retail and textile sectors, provided an in-depth analysis of the megatrends impacting the textile and apparel industry. He offered insights into the key drivers behind these megatrends, their implications for businesses, and potential strategies for adaptation and growth.

He explained how these megatrends are specifically impacting the Indian textile industry, considering factors such as market demand, competitive landscape, supply chain dynamics, and government policies.

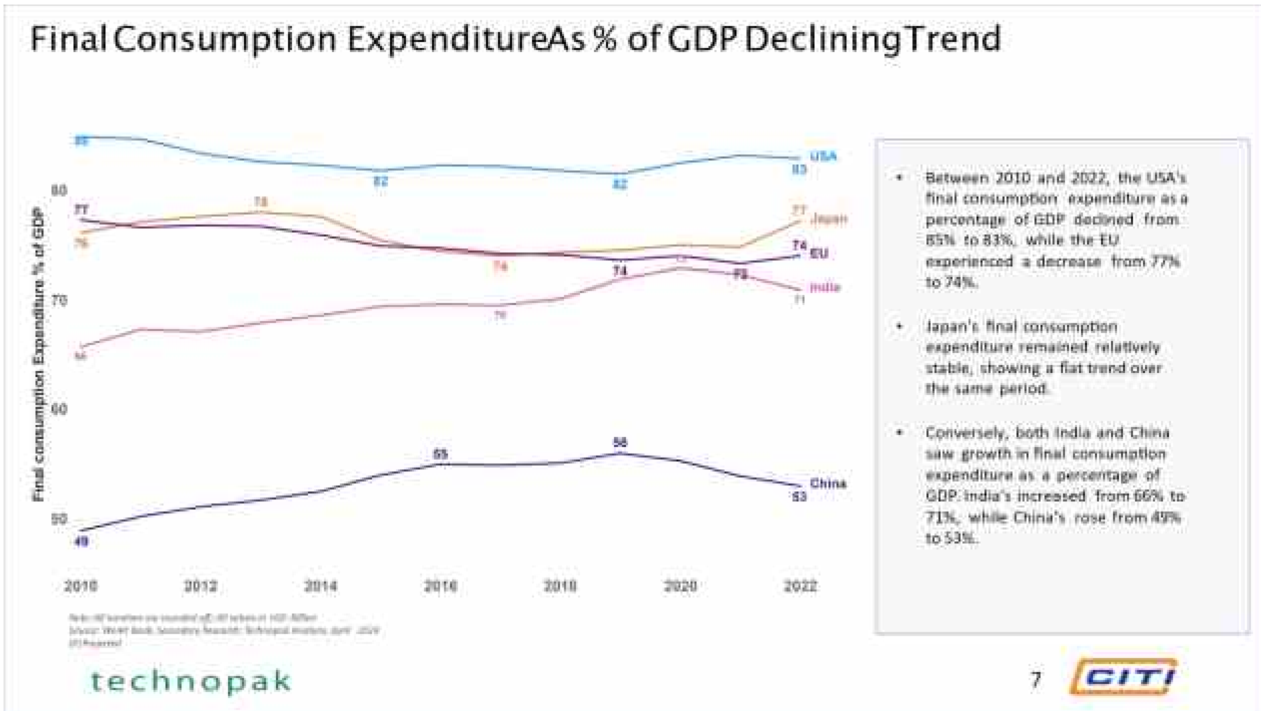
The session explored how digitalization and technology are transforming the textile and apparel industry, including topics such as e-commerce, digital marketing, virtual design and prototyping, smart textiles, and Industry 4.0 technologies.

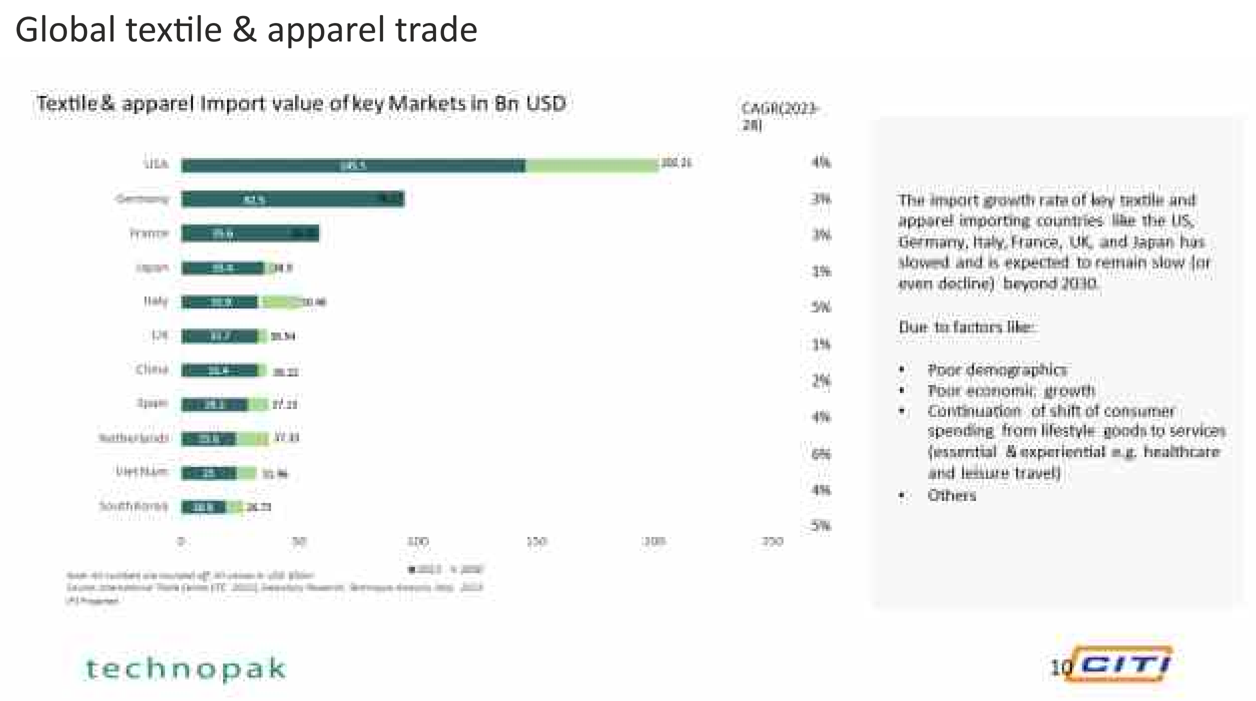
He further delved into evolving consumer trends and preferences in the textile and apparel sector, including shifts in fashion, lifestyle changes, demand for customization, and the growing importance of ethical and transparent supply chains.

Here is a deeper look at the key takeaways of Presentation made by Mr. Singhal:

Global Market Dynamics:

- **Shifting Demand:** While overall apparel consumption might be stagnant in developed economies, the sportswear segment is booming, offering a lucrative niche for Indian manufacturers.
- **Price vs. Growth:** The global CAGR (Compound Annual Growth Rate) has reached 5.5%, but this is primarily due to price increases, not a surge in demand.





India's Growth Potential:

- **Economic Driver:** India's projected GDP of US$ 9.5 trillion by 2034 presents a massive domestic market for textile and apparel products.
- **Outperforming Exports:** While domestic demand is strong, India's textile exports haven't kept pace with major competitors.
- **Focus and Differentiation:** The Indian market shows steady growth, but at a lower rate than other sectors. Apparel manufacturers can address this by focusing on specific niches and offering differentiated products.

A. 2024 – 2034 : Potential To Touch ~US$ 9.5 Trillion Nominal GDP

Base Case	Mar-24	FY 2025	26	27	28	29	30	31	32	33	34	35
FY 2024 GDP (US$)	3.85 Trillion											
Real GDP Growth Rate	%	6.5	6.5	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0
Inflation	%	5.0	5.0	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5
Nominal GDP growth		11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5
Rupee depreciation	%	3.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nominal GDP		4.2	4.6	5.0	5.5	6.0	6.6	7.2	7.9	8.6	9.5	10.4
Delta Over FY 21 GDP		0.3	0.7	1.2	1.6	2.2	2.7	3.4	4.0	4.8	5.6	6.5

- GDP estimated at US$ 3.73 Trillion in December 2023 as per Forbes (https://www.forbesindia.com/article/explainers/gdp-india/85337/1)

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Indian textile & apparel retail

- India's domestic apparel market is expected to grow at a CAGR of about 8%. The growth will be driven by an increase in both the per capita consumption and the average spend on apparel.

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The challenges with India's Textile & Apparel industry:

- **Incomplete Ecosystem:** Compared to China, India lacks a complete textile value chain, hindering its global competitiveness across all fibre types and clothing categories.
- **Scale and Response Time:** There are few large-scale players in India's upstream and garment manufacturing segments, and their response times often lag behind competitors like Bangladesh and Vietnam.
- **Attracting Investment:** The industry struggles to attract large investments due to factors like the PLI scheme's (Production Linked Incentive) lacklustre performance and a limited presence of foreign direct investment (FDI) and international manufacturing setups.

- **Attracting Investment:** The industry experiences difficulty in attracting significant investments. Factors contributing to this include the PLI scheme's (Production Linked Incentive) underwhelming performance, a lack of substantial foreign direct investment (FDI), and limited interest from international players in setting up manufacturing bases in India.

- **Local Brand Strength:** The relatively small scale of domestic apparel brands and retailers creates a situation where large garment manufacturers have minimal incentive to establish new India-focused manufacturing capabilities.

Actionable Strategies:

- **Consolidation:** Mergers and acquisitions can help create larger, more competitive players in yarn, fabric, and apparel segments.

- **Strategic Partnerships:** Identify the biggest manufacturers of textile machinery auxiliary speciality fibre in the world and make a PLI scheme.

- **Consumer-Centric Approach:** Understanding domestic consumer trends and retail landscapes can help apparel manufacturers develop targeted products to meet evolving preferences.

- **Investing in Manufacturing:** In some cases, strategic capital investments in manufacturing can provide a strong competitive advantage.

- **Talent and Technology:** Attracting skilled personnel and implementing technology across operations are crucial for T&A industry's growth.

- **Governance and Systems:** Strong corporate governance practices, including high-quality advisory boards and robust financial systems, can build trust and attract investment.

Shifting Material Preferences:

- **Synthetic Fibres:** The global textile industry is witnessing a trend towards synthetic fibres, which offer advantages like performance and functionality in sportswear.

- **Cotton's Future:** Though synthetic fibres are gaining ground, cotton is unlikely to become a luxury item due to its natural properties. However, its overall consumption percentage might decrease.

All the participants actively participated in the deliberations during the Q&A Session.

At the end of Session Mr. Gautam Ganeriwal, Vice Chairman, YEG proposed Vote of Thanks.

By organizing sessions like this, the Young Entrepreneurs Group of CITI provides a platform for knowledge sharing, collaboration, and innovation among young entrepreneurs in the Indian textile industry. It enables members to stay informed about industry trends, build valuable connections, and gain inspiration for driving positive change and growth in the sector.

About CITI YEG:

The Young Entrepreneurs Group (YEG) of Confederation of Indian Textile Industry has grown substantially since its inception in March 2003. The Group comprises of young entrepreneurs in the textile & apparel value chain holding management positions. Any entrepreneur less than 45 years of age and holding a management position in an Indian textile & apparel company is eligible to join the Group. For joining the Group, please send an email to mail@citiindia.org.

Disclaimer:

The views expressed by the speakers in the article are independent and not necessarily endorsed by the organizing bodies, while also emphasizing the importance of critical evaluation and independent research by readers.

WALKING FASHION'S SUSTAINABILITY TIGHTROPE

Mr. Robert P. Antoshak
Partner, Gherzi Textil Organisation

Can the fashion industry finally overcome the disconnect between wanting to sell as much as possible while fulfilling new sustainability objectives, asks Gherzi Textil Organisation partner Robert P. Antoshak.

As a consultant, clients ask two questions more than any other: How do we become more environmentally sustainable, and when will the apparel market turn around?

Not surprisingly, these are the central questions of our times. Still, they set up a seemingly interconnected relationship between sustainability initiatives and business objectives.

For an industry that prides itself on good fit, it's striking how some environmental advocates misjudge the practicalities facing clothing brands these days. It's not a case of proposing new ideas that fall on deaf ears but instead of those ideas failing to be realised in the context of a brand's business objectives. Most strikingly, many new ideas are challenging to scale while failing to fit the needs of making a profit.

There's no shortage of new ideas, that's for sure. However, because it's difficult to get brands to adopt these ideas, many initiatives have struggled to gain traction in the industry. No wonder there are so many initiatives; it isn't easy to scale to an all-encompassing standard. Consequently, the industry is left with overlapping or competing standards, which are sometimes misused in marketing campaigns by brands looking for cover in sustainability messaging with their customers.

We end up with greenwashing. Yet, the lack of a universal standard emanating from the environmental community ironically encourages terrible behaviour on the part of some brands. The more well-meaning an environmental programme is, the greater the odds some brands may misuse its goals, kick it to the curb, dress it up with cynical marketing — and a load of hooey.

Please don't misunderstand. The struggle to clean up the industry is essential. Besides the ethical issues posed by indiscriminate destruction of the environment, the realities of our industry's seeming disregard for its impact on the planet are appalling. If not by the advocates inside of brands, then they should be addressed by government regulators. Greenwashing and misuse of sustainability goals need to end.

But how does an advocate gain genuine buy-in through brand management? It's not easy, but there is a road map. I suggest checking out a new study recently published by Fashion Makes Change entitled "Scaling Sustainability Solutions in Fashion." This is essential reading for any sustainability person working at a brand.

After all, business is business

But we still have the business case to consider. Philosophical question of the day: does sustainability matter if there's no business? It's worth pondering. Our industry is predicated on overproduction. That's no secret. It all comes down to ensuring clothes are on the racks when anticipating demand. The last thing any brand wants to face is empty shelves and lost sales opportunities – like what happened during the pandemic. Yet, overproduction, by its very nature, is wasteful. And the rush to make stuff faster and faster bakes in new and inventive ways of cutting corners. When clothing doesn't sell, so much ends up in landfills, burnt, or in an ocean.

So, we have an industry that wants and needs to make money but, thanks to environmentalists' advocacy, has come to grips with the reality that it makes too much stuff and pollutes the planet. Environmentalists may be less interested in the profitability of businesses than in their mission to clean up the industry. Still, without sound economics, there is no business.

A look at the US apparel market

Let's consider the current state of the clothing market. What are the factors affecting the business? The US apparel market, for instance, has been terrible. Yet, how do we make sense of it these days? The market is no longer going in reverse but is stuck in low gear. There's growth, albeit modestly. The freefall witnessed after the bust-and-boom cycle of the pandemic has been marked by a return to normalcy. Let's look at some standard measures of market performance.

Many things are happening and there are other factors we could include in the market snapshot. Even so, the key takeaway from the data is that the market is recovering. Indeed, it's far from booming, but it has stabilised and shows modest improvement.

So, what's the narrative about the market? Here you go: Demand has improved, the pandemic-induced supply chain quagmire is history, inventories are down, and inflation and prices remain low, suggesting there's room for more clothing to be sold and, perhaps, at better prices as demand accelerates. The bottom line for our industry is to be patient. The market is mending. Baselines have been re-established, and demand has improved. Consumers are still spending on clothes, attitudes are better, and wallets are still open to purchase new clothes.

But this brings us back to sustainability. What's the narrative for that? Here you go: When the pandemic squashed the market, advocacy within brands for new sustainability programmes was a Sisyphean struggle at best. Companies struggled to survive; sustainability was a luxury they could not afford. But today, that will be less the case as the market improves.

The intersection of business and sustainability

Any such discussion about business and sustainability is risky, requiring a stroll on a tightrope. An improved market should cheer everyone. For sustainability advocates, will a reenergised market increase willingness to incorporate sustainability programmes substantively, or will things remain as before? The latter is more likely than the former unless something changes. A recovered market takes away the argument that we can't afford sustainability.

For a notoriously cheap industry, consumers keep their wallets open to buy your stuff; now it's time to put a crowbar into the industry's collective wallet and pay for sustainability. It's better for the industry, better for its customers, and better for the planet.

CITI ACTIVITIES

MEETING FOR RATIONALIZATION OF TSRS (TEXTILES STATISTICAL RETURNS SYSTEM) DATA COLLECTION

As the industry is aware the Office of Textile Commissioner (OTXC) maintains a Textiles Statistical Returns System (TSRS) which captures and releases the data about various textile items in the form of production, consumption, capacity, etc, which not helps the Government in devising the various policy measures but also helps the industry in planning their production schedule well in advance. The primary objectives of the TSRS are as below:

- Ease of doing business in facilitating units to file returns
- Timely flow of data
- Creating a digital repository of vital textile statistics which would result in evidence-based policymaking

During the meeting, it was reported that till 10th April 2024, only about 6398 units have registered themselves under TSRS. OTXC has taken several measures to improve the response under TSRS such as:

- Preparation and circulation of guide user manual through TSRS
- Dedicated email id for promptly resolving the various technical issues faced by units
- System-generated mails/alerts for timely submission of returns
- Textile Unit Id (TUID) made mandatory for new units filing Hank Yarn Obligation Returns

Cluster-wise awareness programs cum workshops on TSRS

For the past few years, there has been some gap in the TSRS and industry, in the form of data collection by OTXC and reporting by the industry. To understand this gap and discuss on how to rationalize the TSRS Data Collection, OTXC held a virtual meeting on 15th April 2024 with the various industry stakeholders. The meeting was attended by various industry associations, TRA's, and industry representatives, etc. During the meeting, various industry stakeholders discussed the below-given suggestions towards strengthening the existing TSRS:

- Provide adequate training to the industry for registering themselves for TSRS and filling up the data.
- Bring more categories under the TSRS to capture data on all specialized textile products being manufactured in India.
- Refine and use the GST data of the industry to capture certain categories of data already reported there and avoid duplication of work for the industry.
- Industry also requested to be provided with the option of Edit Data while filling data in the TSRS portal
- Making it mandatory for the industry to register and report data on TSRS to avail the benefits of the various textile-related schemes of the Government.

OTXC took note of the industry suggestions and assured their full support and cooperation towards making the TSRS more industry-friendly.

Industry is requested to register themselves on the TSRS, report the necessary data, and share their suggestions (if any) towards making the TSRS more industry-friendly so that the same can be shared with the OTXC for necessary action.

CITI TEXTILE CEO DELEGATION STRENGTHENS GLOBAL TIES AT TECHTEXTIL 2024

India has recently signed the Trade and Economic Partnership Agreement (TEPA) with EFTA countries comprising Switzerland, Iceland, Norway & Liechtenstein. Even before the signing of TEPA, CITI has been working on strategies to promote business collaborations between India and Switzerland and has also signed an MoU with Swiss Textiles for the same. In this context, the CITI mounted a delegation to Techtextil 2024, the premier international trade fair for technical textiles and nonwovens, held in Germany from April 23 to 26, 2024.

With an aim of fostering collaboration and advancing the global textile industry, the CITI delegation led by MD, Shiva Texyarn - Dr. S.K. Sundararaman, actively participated in a series of engagements, especially with Textile companies and associations in Switzerland.

During the visit, a B2B meeting was also organized on the sidelines of Techtextil for CITI members to delve into the full spectrum of technical textiles, nonwovens, functional apparel textiles, and textile technologies. A tour of Swiss Textiles facilitated by the Chairman of Swiss Textiles was also conducted which offered insights into the latest innovations and developments in the textile industry, fostering networking and knowledge-sharing opportunities among industry leaders.

CITI delegation led by MD, Shiva Texyarn - Dr. S.K. Sundararaman during the B2B meeting

The CITI delegation was the first of many such engagement programs planned for enhancing the strategic partnership between the members of CITI and Swiss Textiles towards their shared commitment to advancing the textile sector.

The participation of CITI members in Techtextil 2024 reaffirms the organization's commitment to leveraging international platforms for driving innovation, collaboration, and growth within the global textile industry.

MEETING OF THE NATIONAL COMMITTEE ON TEXTILES AND CLOTHING (NCTC)

As envisaged by the Government to represent the issues related to the textile & apparel value chain in a single voice, a meeting of the National Committee on Textiles & Clothing (NCTC) was held on 18th May 2024 at Mumbai in MATEXIL (formerly SRTEPC) office. The meeting was attended by representatives of various major textile export promotion councils and industry associations like AMFII, ASFI, CITI, CMAI, ITTA, PDEXCIL, SRTEPC and TEXPROCIL, and also by several special invitees from associations like SIMA, ASSOCHAM, FIEO, NITMA, SGCCI etc.

During the meeting, the members discussed the various issues and challenges being faced by the Indian textile & apparel industry that have resulted in stagnation in the overall market including exports.

While members brainstormed the policy measures required to overcome such issues, it was also decided to use NCTC platform to represent such identified policy measures to the Government in a single voice and work with improved collaboration among the various sectors to move together towards the target of US$ 350 bn textile industry by 2030.

POST BUDGET WEBINAR ON AGRICULTURE AND RURAL PROSPERITY

Based on the industry's demand to enhance India's cotton productivity, during the Budget Speech 2025-26, the Hon'ble Union Finance Minister, Ms. Nirmala Sitharaman announced a Mission for Cotton Productivity thus benefitting lakhs of cotton growing farmers. This 5-year mission will facilitate significant improvements in productivity and sustainability of cotton farming, and promote extra-long staple cotton varieties. Under the mission the best of science & technology support will be provided to farmers. Aligned with the integrated 5F vision for the textile sector, this will help in increasing incomes of the farmers, and ensure a steady supply of quality cotton for rejuvenating India's traditional textile sector.

The outline of the mission was also discussed in the post-budget webinar on "Agriculture and Rural Prosperity", which was organized by the Ministry of Agriculture & Farmers Welfare in collaboration with the Ministry of Textiles on 1st March 2025. The event was aimed to engage stakeholders in focused discussions and strategize the effective implementation of the 2025 Budget announcements, with an emphasis on key areas such as agricultural growth and rural prosperity, ensuring a collaborative approach to realize the vision outlined in the budget.

During the webinar, Hon'ble Prime Minister of India, Shri Narendra Modi addressed the attendees on the theme.

The webinar took place in across different 10 sub-themes that were held parallelly and anchored by the respective Secretaries. It also included a theme on "Mission for Cotton Productivity", which was anchored by Secretary (Textiles), Ms. Neelam Shami Rao and was attended by various senior Government officials, agronomists, scientists, ginners, farmers, as also industry representatives.

During this sub theme discussion different stakeholders presented their various suggestions to make the mission more impactful.

On behalf of CITI, the webinar was attended by Chairman-CITI Standing Committee on Cotton, Shri T. Rajkumar who presented the below given actionable solutions:

Hon'ble Prime Minister of India, Shri Narendra Modi addressing during the webinar

1. **Enhanced focus on Advanced Seed Varieties:** Emphasis on research on seed varieties will be critical for the success of the mission. we propose to also focus on developing new seed varities such as with higher yield and improved fibre quality parameters, herbicide tolerant, geographical adaptable varieties, etc.
2. **Reinforcing Market Linkages:** To strengthen direct market linkages between cotton growers and buyers, ensuring a more efficient and transparent supply chain. It will empower farmers by enabling direct sales for better price realization while also helping the industry plan purchases in advance
3. **Focus on Social Sustainability and Regenerative Agri Practises:** The textile industry today is undergoing a paradigm shift wherein compliances such as Fundamental Principles and Rights at Work (FPRW), Occupational Safety Regulations, Traceability, Environmental sustainability, etc. are emerging in our major export markets like EU, UK, etc. and hence the same may be integrated as a key component in the mission.

During the plenary session respective Secretaries summed up all the suggestions received by various stakeholders across the different sub themes to the Hon'ble Minister of Agriculture & Farmers Welfare, Shri Shivraj Chauhan. The Hon'ble Minister ensured all the stakeholders that all their suggestions will be taken care of by the Government towards Agriculture and Rural prosperity.

CITI AND SWISS TEXTILES CO-HOST SUCCESSFUL B2B WEBINAR, UNVEILING OPPORTUNITIES IN INDO-SWISS TEXTILE & APPAREL TRADE

Deputy Chairman CITI- Delivering the Welcome Address

Confederation of Indian Textile Industry (CITI) and Swiss Textiles Association, the leading Associations of T&A, signed an MoU in November 2023 intending to promote bilateral trade and investment as also engage for more product-specific B2B interactions' knowledge sharing, & capacity building, etc. based on the respective core competencies of both the countries. To mark a significant step towards achieving the required objective, CITI in association with Swiss Textile has decided to host a series of B2B webinars that will provide a platform for unlocking synergies and driving growth between the two countries.

The first webinar of the series was organized on 16th May 2024 on the virtual platform and was titled "Enhancing Indo-Swiss Textile & Apparel Trade".

The webinar served as a platform to explore and strengthen the textile and apparel trade relations between India and Switzerland, two significant players in the global textile industry. With the recent signing of the India-European Free Trade Association Trade and Economic Partnership Agreement (TEPA), there are newfound opportunities for collaboration and growth between the two nations. The discussions delved into market dynamics, regulatory frameworks, innovation, and potential avenues for mutually beneficial partnerships between Indian and Swiss companies in T&A Sector.

The webinar started with the opening remarks of SG CITI, Ms. Chandrima Chatterjee where she welcomed all the participants and also shared a presentation on "Collaboration Opportunities to Enhance Trade Between India and EFTA Countries".

In his welcome address, Deputy Chairman-CITI, Shri Ashwin Chandran, underscored the significance of India's regional trade agreements, particularly emphasizing the transformative potential of the EFTA-TEPA Agreement in facilitating market access.

While sharing industry insights and best practices, Managing Partner, Patodia Overseas Exports & Vice Chairman & MD, Prime Urban Development India Ltd, Shri Manoj Patodia, emphasized India's sustainability efforts and digital transformation, aligning with Swiss support.

From the Swiss side, Mr. Peter Flückiger, Chairman of the Board, SWISS TEXTILES, emphasized the profound potential of Indo-Swiss trade ties, focusing on sustainability and bilateral cooperation, especially with the impending ratification of TEPA in 2025.

Ms. Annabelle Hutter, Managing Director, Säntis

Textiles, championed recycling and circular economies in the textile industry, highlighting Säntis Textiles' innovative approaches towards sustainable textile production.

Mr. Wolfgang Haberl, Sales Director, Textilcolor, discussed advancements in textile chemistry, focusing on sustainability and energy-saving technologies.

The webinar developed a consensus on the immense potential for mutual growth and innovation within the Indo-Swiss textile and apparel trade landscape and was ended with the concluding remarks of Vice Chairman-CITI, Shri Dinesh Nolkha, who expressed optimism for synergistic collaborations and extended gratitude to Swiss Textiles for their innovative contributions, emphasizing the pivotal role of investment, regulatory alignment, and sustainability in fostering a vibrant trade ecosystem.

Over 100 participants registered for the webinar. The industry is requested to share their opinion/ suggestions for the 2nd webinar of the series so that both countries can collectively chart a course toward a more vibrant and resilient textile ecosystem.

26TH MEETING OF THE TEXTILE DIVISON COUNCIL

Textile Divison Council, responsible for the standardization in the field of textiles and apparel covering natural and man-made fibres and their products, dyestuffs, textile specialty chemicals, textile machinery, and technical textiles holds yearly meeting to discuss the yearly roadmap as also to give information on the yearly activities carried out by the various sectional committees of BIS.

The latest yearly meeting of the Textile Divison Council was organized by BIS on 4th June 2024 in the hybrid mode and was attended by various industry associations and representatives who are part of the various sectional committees of the BIS. On behalf of CITI, the meeting was attended by Secretary General CITI, Ms. Chandrima Chatterjee.

During the meeting, various agenda items such as the appointment of the chairperson of various sectional committees, review of the constitution of various sectional committees, transfer/withdrawal of various Indian standards, integration of R7D projects in the standardization, roadmap for various sectional committees, etc were discussed.

During the meeting, it was informed that the Bureau of Indian Standards (BIS) has initiated a series of process and structural reforms in standard formulation aligned with the ambition to establish BIS as one of the premier National Standards Bodies globally. These reforms are designed to ensure the successful implementation of the SNAP 2022-27, streamline the standardization activities, and position BIS as a future-ready organization.

Discussing the QCOs. It was informed that in the next phase, the Government is considering issuing QCO on 38 more textile items in the areas of buildtech, indutech, ropes and cordages, floor coverings and other conventional textiles such as polyester textured yarns, HDPE Woven fabrics, Polyester blended woven suiting and shirtings for uniform, knitted gents pullover, Vests, Cotton, Plain (Single Jersey) Knitted, Mens Cotton Knitted Sports Shirt T-Shirt, Gents cotton briefs – rib knitted and plain knitted, etc.

Additionally, it was also informed that to address the issue of sustainability in Indian Standards, the Consultative Groups on sustainability having a pool of experts from industries and civil society groups has been created. BIS is looking to broad base the existing composition to ensure that national standards facilitate the achievement of Sustainable Development Goals. Members may kindly take note of the above.

WEBINAR ON INNOVATIVE PROJECTS UNDER THE PAMC FOR THE SCHEME FOR RESEARCH AND DEVELOPMENT FOR THE TEXTILES INDUSTRY

Ministry of Textiles has established the Project Appraisal and Monitoring Committee (PAMC) under the Scheme for Research and Development in the Textiles Industry to advance research, innovation, and technology transfer across the sector. Chaired by the Textile Commissioner, Ms. Roop Rashi, the PAMC has been instrumental in evaluating and approving research proposals, allocating funds, and monitoring the progress of diverse projects that align with the industry's strategic goals.

Under the scheme, various institutions, including premier research bodies like IITs, NIFT, and specialized textile research institutions such as the Bombay Textile Research Association (BTRA), are undertaking innovative projects.

CITI has planned a series of webinars for wider dissemination of these innovations to the industry and the stakeholders and explore the possibility of large-scale commercialization of the same.

The first webinar of the series was scheduled on 6th December 2024 in association with Bombay Textiles Research Association (BTRA) and covered the below given innovative processes developed by BTRA:

- Development of highly efficient and functional finished reusable protective face mask
- Plasma-mediated natural dyeing of Khadi of Cotton and Silk
- Eco-friendly Natural Dyeing of Cotton and Silk using Rare Earths Metal Salts as Mordants

The webinar started with the opening remarks of SG CITI, Ms. Chandrima Chatterjee wherein she welcomed all the participants and apprised participants about the objective of the webinar series.

Deputy Chairman CITI, Shri Ashwin Chandran, delivered the keynote address during the webinar and emphasized that to achieve the US$ 350 bn market size by 2030, the Industry must focus on Research, Innovation, and Sustainability, as these pillars are not just drivers of growth but imperatives for survival and competitiveness in the rapidly evolving global textile and apparel landscape.

Additionally, it was also informed that to address the issue of sustainability in Indian Standards, the Consultative Groups on sustainability having a pool of experts from industries and civil society groups has been created. BIS is looking to broad base the existing composition to ensure that national standards facilitate the achievement of Sustainable Development Goals. Members may kindly take note of the above.

The event was graced by the presence of Textile Commissioner, Ms. Roop Rashi. She informed that the Office of Textile Commissioner holds several patents and urged the industry to stay focused and explore ways to integrate these innovations into the products and processes within the industry. She also requested the industry to bring to the notice of the Government various technologies that are not available domestically but are of critical importance for the industry and assured full Government support in developing those domestically.

During the webinar, BTRA team gave a demonstration of the products developed using the above-mentioned technologies. Indian Textile Industry appraised the technology developed by BTRA and some industry members also expressed their willingness to work with BTRA to explore the possibilities of further advancement of such technologies.

The webinar concluded with the closing remarks of Shri Ashish Gujarati, Past president-SGCCI.

Members are requested to take note of the above technologies and explore possibilities of the mass commercialization of the same as also the other technologies which will be discussed in future webinars.

CITI will provide the necessary support to the industry for the same.

WEBINAR ON BUSINESS EXPANSION IN USA - COMPANY SETUP AND WAREHOUSING WITH PICK-PACK-SHIPENTRY USA

In response to the evolving needs of Indian manufacturers, exporters, and tech startups looking to expand into the U.S. market, CITI has partnered with Entry USA to organize a series of webinars. M/s Entry USA assists foreign companies in establishing and expanding their business operations in the United States.

The objective behind starting thisseries of webinars is to empower Indian businesses with the information they need to succeed and grow their market presence in the United States and will provide valuable insights into critical areas like U.S. company formation, warehousing, L1-A visa for executives, and sales support.

Chairman CITI-Shri Rakesh Mehra delievering the welcome address during the webinar

The first webinar of the series was organized on 4th December 2024.

Chairman-CITI, Shri Rakesh Mehra delivered a welcome address during the event wherein he welcomed all the participants and emphasized that this webinar is being organized at an opportune time, when the Indian T&A industry is performing better in the USA market compared to its competitors and with the upcoming new administration, the Indian T&A industry is optimistic about expanding its role as an alternative supplier to China.

The team of Entry USA discussed and explained to the participants the various critical areas such as insights into US market expansion, covering company formation (LLC vs. C-Corp), compliance, and banking. They also highlighted the 3PL warehousing solutions for storage, labeling, and order fulfillment, alongside strategies to build trust, hire local teams, and leverage on-shoring opportunities. Emphasizing practical steps, the session offered a roadmap to overcome challenges and achieve sustainable growth in the US market.

Chairman YEG, Shri Rajnish Arora proposed the vote of thanks during the event.

Industry may take note of this initiative and may give their suggestions for the upcoming webinars.

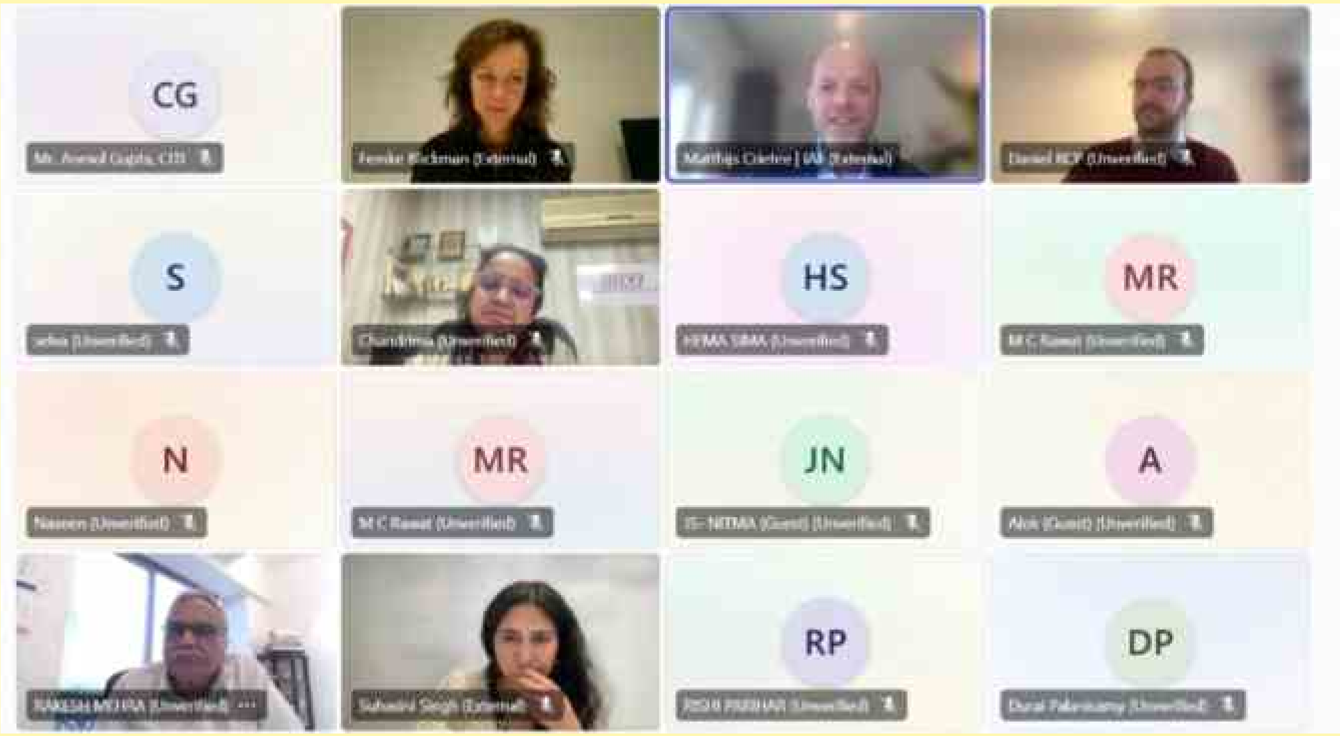
WEBINAR ON VARIOUS UPCOMING LEGISLATIONS LIKE CORPORATE SUSTAINABILITY DUE DILIGENCE (CSDD)

The Confederation of Indian Textile Industry (CITI) has been taking an active role in the dissemination of the fourth coming EU legislation and its impact on the suppliers in the textile value chain of India. In this regard, CITI has partnered with the Fair Wear Foundation and organized several cluster-level capacity-building workshops. Now the International Apparel Federation (IAF) and Fair Wear Foundation have together approached CITI to partner in taking forward this dialogue that plays the concerns of the suppliers as well as with the aim to improve the purchasing practices.

In this regard, a webinar was organized on various upcoming legislations on 5th December with selected Board Members of CITI/Committee Members. The Head of IAF Secretariat and Fair Wear Foundation Secretariat along with the legal expert on EU legislation also gave a presentation on the implications of the forthcoming EU legislation and the rights of the suppliers in India.

The session provided a platform to raise our concerns as well as any supplier's concerns to be included in the legislation for improving India's marketing concerns.

CITI is planning to organize more such webinars/events in future and invites members suggestions for the same.



SG-IAF, Mr. Matthijs Crietee sharing his thoughts on the upcoming regulations in EU.

BHARATTEX 2025 - BHILWARA ROADSHOW
ORGANIZED IN BHILWARA, RAJASTHAN

Trade Advisor - Ms. Shubra addressing the gathering during the roadshow program

The Confederation of Indian Textile Industry (CITI), in association with The Cotton Textiles Export Promotion Council (TEXPROCIL), Rajasthan Textile Mills Association (RTMA), and Mewar Chamber of Commerce & Industry (MCCI), successfully hosted the BharatTex 2025 - Bhilwara Roadshow today. The event witnessed the participation of over 100 key stakeholders from Rajasthan's textile value chain, marking a significant step towards the highly anticipated BharatTex 2025.

Ms. Shubhra, Trade Advisor, Ministry of Textiles, Government of India, was the Chief Guest at the roadshow. In her address, she reaffirmed the government's unwavering commitment to fostering the growth of the textile sector and stressed the importance of industry collaboration to make BharatTex 2025 a landmark event for India's textile industry. Shri Damodar Agarwal, Member of Parliament, Bhilwara, Rajasthan, attended as the Guest of Honour, emphasizing Bhilwara's crucial role in shaping India's textile future.

Key industry leaders delivered impactful presentations, including:

- Shri Rakesh Mehra, Chairman, CITI, underscored BharatTex 2025 as a unique opportunity to position India's textile industry on the global stage. In his address, he stated, "BharatTex 2025 will not only showcase the strength and capabilities of India's textile sector but will also serve as a platform to elevate our global competitiveness. Bhilwara, as one of the key textile hubs of India, plays a pivotal role in driving this narrative forward. We look forward to the active participation of all stakeholders in making BharatTex a resounding success."
- Dr. S.N. Modani, Chairman, RTMA, shared insights on innovations within the domestic textile sector.
- Shri B.M. Sharma, President, MCCI, emphasized the importance of value chain integration for sustainable growth.
- Dr. Siddhartha Rajagopal, Executive Director, Texprocil, and Ms. Chandrima Chatterjee, Secretary General, CITI, provided a comprehensive overview of BharatTex 2025, outlining the event's objectives to enhance India's textile exports and drive sustainable practices across the sector.

The gathering also witnessed dynamic discussions between Bhilwara's key industrialists and the dignitaries, where critical challenges facing the textile and apparel value chain were addressed. These discussions reaffirmed the industry's collective commitment to making BharatTex 2025 a global success.

The event concluded with a vote of thanks delivered by Shri Dinesh Nolkha, Vice Chairman, CITI & MD, Nitin Spinners Ltd., who expressed his gratitude to all participants and emphasized the need for continued cooperation to elevate India's textile sector to new heights.

The Bhilwara Roadshow has set a strong foundation for BharatTex 2025, with enthusiastic participation and robust support from industry leaders.

CITI CDRA: A YEAR OF IMPACT AND GROWTH - 2024-25

In the 2024-25 cotton season, CITI CDRA continued to drive transformative change in cotton farming across rural India. With a focus on sustainability, productivity, and farmer empowerment, the organization had a significant presence in Rajasthan, Maharashtra, and Madhya Pradesh, improving the livelihoods of thousands of cotton farmers.

Key Highlights of the Year

CITI CDRA's initiatives focused on High Density Planting System (HDPS) and improving the quality of cotton through Extra Long Staple (ELS) and KASTURI cotton. These efforts helped farmers increase their yields, improve income, and align with the growing demand for high-quality cotton in the industry, all while maintaining environmental sustainability.

- Rajasthan: Bhilwara, Chittorgarh, Rajasamand, Banswara
- Maharashtra: Wardha, Nagpur, Yavatmal
- Madhya Pradesh: Ratlam, Dhar, Jhabua, Alirajpur

CITI CDRA engaged 32,865 farmers across 851 villages in 51,627 hectares of cotton cultivation.

Expanding Reach and Impact

CITI CDRA reached over 32,000 farmers across 50,000 hectares through various initiatives, including NFSM projects and collaborative CSR efforts, providing training and resources to boost cotton production.

Key projects included:

- **Special Project on Cotton under NFSM by MoA&FW and MoT**: Improving cotton production across Rajasthan, Maharashtra, and Madhya Pradesh.
- **CSR Collaborative Projects:** Extending CITI CDRA's support to even more farmers, helping them adopt best practices in cotton farming and produce better quality cotton.
- **Labor Rights and Safety: ILO Collaboration:** CITI CDRA also made significant strides in improving labour rights and safety in cotton farming through its partnership with the International Labour Organization (ILO). The project focused on promoting the Fundamental Principles and Rights at Work (FPRW) and ensuring occupational health and safety for farmers, including both direct and indirect beneficiaries.

  In total, the project reached 1,500 direct farmers and benefited 7,500 indirect farmers. Through this initiative, CITI CDRA raised awareness about workers' rights, child labor, and provided safer working conditions, helping to create a more equitable and secure working environment within cotton farming communities.

Sustainability in Farming

A standout initiative in CITI CDRA's work this season is regenerative farming practices, FLDs on biochar and azolla production for soil health and carbon sequestration. These techniques improve both the productivity and sustainability of cotton farming, ensuring long-term benefits for farmers and the environment. 259 farmers benefitted and 92 farmers certified under Regenerative Farming.




Extra Long Staple (ELS) Cotton: A Key Industry Demand

CITI CDRA's focus on meeting the industry's growing need for ELS cotton, a variety known for its superior fiber quality, length, and strength. ELS cotton is essential for producing high-quality textiles and is in constant demand within the industry. CITI CDRA's work with farmers in promoting ELS cotton ensured that they could meet these demands, resulting in higher income and access to premium markets for their cotton.

KASTURI Cotton

While Extra Long Staple (ELS) cotton is prized for its length and strength, KASTURI cotton is a premium, high-quality cotton grown and processed under sustainable conditions. KASTURI cotton meets strict industry standards, making it ideal for the high-end textile market.

Farmers trained under CITI CDRA and Associated Ginner in Maharashtra have been able to produce KASTURI cotton (approx. 400 bales. This is especially important as the textile industry continues to demand high-quality cotton.

Empowering Women and Farmers

Over 1,700 women farmers participated in CITI CDRA's training and education programs, gaining valuable skills that empowered them to improve their cotton farming practices. One of the most notable successes was a woman farmer who achieved the highest yield of 482 kg lint/acre of ELS cotton under the NFSM project, demonstrating the growing impact of women in cotton production.

Training and Education

CITI CDRA's educational initiatives included 30+ awareness programs, 145+ farmer training sessions, 50+ field days and 10+ Kisan Melas, all aimed at equipping farmers with the knowledge and skills they needed to improve their cotton production and adopt sustainable practices.

Awards and Recognition

CITI CDRA's commitment to sustainable farming was recognized at the Bharat Tex 2025 event, where its farmer practices were honored with the Best Sustainability Award for their work in regenerative cotton farming.

Success Stories

One of the standout success stories came from Mr. Dilip Pohane from Wardha, Maharashtra. By adopting High Density Planting System (HDPS), Mr. Pohane achieved a 41% increase in yield, producing 726 kg lint/acre compared to just 462 kg lint/acre in non-control fields, showing the significant benefits of CITI CDRA's educational & training programs.

Looking Ahead

As CITI CDRA looks to the future, the focus will remain on increasing cotton yields, improving farmers' incomes, and ensuring the sustainability of cotton farming practices. The continued emphasis on KASTURI cotton and ELS cotton will help meet the demands of the textile industry while supporting farmers' transition to more sustainable, profitable farming.

Active Areas

	Rajasthan	Maharashtra	Madhya Pradesh
Special Project on Cotton under NFSM			
Districts	Bhilwara, Chittorgarh, Rajasamand & Banswara	Wardha, Nagpur & Yavatmal	Ratlam, Dhar, Jhabua, Alirajpur & Khargone
Clusters	Ashahholi, Asind, Bagor, Dhosar, Kangani, Karoi, Koshithal, Potla, Sawaipur, Pahuna, Rashmi, Railmagra, Abapura, Chhoti Sarvan, Chhoti Sarwa, Kushalgarh, Padla, Timeda	Arvi, Aasti, Deoli, Hingagnghat, Karanja, Wardha, Seloo, Hingna, Katol, Nagpur, Parshiwani, Umred, Kalmeshwar, Narkhed, Saoner & Ghatanji	Bajna, Ratlam, Sailana, Sarwan, Shivgarh, Badnawar, Jhabua, Kalyanpura, Meghnagar, Petlawad, Rama, Ranapur, Thandla, Dholyawad, Para, Ranapur, Alirajpur, Jobat, Sondawa, Udhaigarh, Jhirniya, Lohari, Keli, Bhagwanpura & Bamnala
Area (hectares)	820	964.4	1780.2
Villages	162	127	324
Farmers	1700	1094	2366
	Rajasthan	**Maharashtra**	**Madhya Pradesh**
Collaborative Project with CSR support			
Districts	Bhilwara	Wardha, Nagpur, Chandrapur, Yavatmal & Amravati	Ratlam, Dhar & Jhabua
Clusters	Kotri, Banera and Shahpura	Deoli, Wardha, Kalmeshwar, Hingana, Warora, Bhadravti, Ralegaon, Kalamb, Tiosa, Dhamngao, Amravati and Chandur	Sailana, Bajna, Rajod, Tirla, Petlawad
Area (hectares)	3241	23101	21720
Villages	165	160	150
Farmers (Nos)	3039	15207	9449
Project on Fundamental Principles and Rights at Work and Occupational Health and Safety in collaboration with International Labour Association			
Districts			Ratlam, Dhar, Jhabua, Alirajpur
Farmers			1500 – Direct farmers 7500 – Indirect farmers
Other Initiatives and Good Practices			
KASTURI QUALIFYING BALES THROUGH AWARENESS & TRAINING			
Regenerative Cotton Farming & Carbon Sequestration			259 farmers 92 farmers certified
Dada Lad Cotton Technique		40 hectares	

CITI'S PAN-INDIA WORKSHOPS ON HRDD AND CSDDD IN THE INDIAN TEXTILE SECTOR

As we look back on a transformative year for the Indian textile sector, it is encouraging to witness the industry's resilience and adaptability in the face of evolving global trends and challenges. With an increasing emphasis on sustainability, transparency, and ethical practices, the sector has consistently met these imperatives, strengthening its position as a global leader. The industry's proactive approach in embracing these priorities reflects its commitment to driving growth while aligning with international standards and expectations.

At CITI, we have remained steadfast in our commitment to empowering the industry through strategic initiatives, collaborative programs, and capacity-building workshops. This year, we organized a series of impactful events across key textile hubs in India, focusing on Human Rights Due Diligence (HRDD) and the Corporate Sustainability Due Diligence Directive (CSDDD). These workshops have not only raised awareness but also equipped stakeholders with actionable strategies to navigate the complexities of sustainability and compliance.

Our partnership with the esteemed Fair Wear Foundation has been instrumental in raising awareness about Human Rights and Environmental Due Diligence (HRDD) and the Corporate Sustainability Due Diligence Directive (CSDDD). This collaboration empowers stakeholders with the knowledge and tools needed to address critical challenges, such as ensuring ethical practices, safeguarding worker rights, and adhering to emerging global standards. With several European countries introducing mandatory guidelines for reporting on due diligence across ESG parameters, companies—including brands and retailers—must align their operations with frameworks like the United Nations Guiding Principles on Business and Human Rights (UNGPs), the OECD Due Diligence Guidance for Responsible Supply Chains in the Garment Sector, and existing or forthcoming Human Rights and Environmental Due Diligence (HREDD) legislations. These responsibilities encompass assessing, identifying, preventing, mitigating, and remediating risks and violations within their supply chains, reinforcing the importance of proactive and responsible business practices.

Given the growing need for awareness and capacity building in this area, CITI successfully organized a series of workshops in collaboration with the Fair Wear Foundation over the past year. This strategic initiative aimed to raise awareness on Human Rights Due Diligence (HRDD), enhance industry engagement, and foster informed due diligence actions, while supporting effective reporting practices within the textile sector.

The collaborative activities undertaken included:

- CITI, in partnership with Fair Wear, facilitated discussions with senior management from leading suppliers to better understand the challenges and requirements of implementing the HRDD framework.
- A series of focused, cluster-level workshops were held in key textile and apparel hubs including Coimbatore, Bangalore, Ahmedabad, Mumbai, and Delhi, aimed at providing industry members with critical HRDD training.
- To ensure the continued dissemination of HRDD knowledge, CITI has committed to providing sustained support through its dedicated efforts, offering ongoing assistance for industry queries, capacity-building needs, and initial guidance for members seeking to implement the HRDD framework.
- In collaboration with Fair Wear, CITI facilitated supplier-facing learning and capacity-building events to strengthen the implementation of HRDD across the supply chain.
- After the first cluster meeting held in Delhi on 1st March 2024, CITI organized four pivotal workshops: on 24th July 2024 at The Southern Gujarat Chamber of Commerce and Industry (SGCCI) in Surat, on 26th July 2024 at the Southern India Mills Association (SIMA) in Coimbatore, on 5th November 2024 at Texprocil in Mumbai, and on 7th November 2024 at Holiday Inn in Bengaluru. These workshops were designed to deepen participants' understanding of the Corporate Sustainability Due Diligence Directive (CSDDD) and Human Rights Due Diligence (HRDD) within the textile sector, reflecting a significant shift towards enhanced regulatory compliance and sustainability practices.

SG CITI, Ms. Chandrima Chatterjee and President SGCCI, Shri Vijay Mevawala felicitating the speakers at Surat workshop.

SIMA Chairman, Dr S K Sundararaman addressing the participants during the workshop held at Coimbatore.

Dr. Siddhartha Rajagopal, Executive Director, The Cotton Textiles Export Promotion Council (TEXPROCIL) felicitating the speakers at Mumbai workshop.

Ms. Mousumi Sarangi Country Manager India & Coordinator of Supplier Engagement at Fair Wear Foundation, contributing as a distinguished panellist and expert during the workshop.

Ms. Chandrima Chatterjee, SG CITI, delivering the keynote address on HRDD and honouring the esteemed speakers and participants at the Bengaluru workshop.

Ms. Annabel Meurs, Associate Director at Fair Wear Foundation, contributing as a distinguished panellist and expert during the workshop.

Participants Actively Engaging with Experts During the Q&A Session for Enhanced Clarity and Understanding

Participants Actively Engaging with Experts During the Q&A Session for Enhanced Clarity and Understanding

Group photo capturing the esteemed panellists, organizers, and participants at the workshop, symbolizing collective efforts toward advancing HRDD and sustainable practices in the textile and apparel sector.

Highlights from the Bangalore Workshop on HRDD and CSDDD, featuring distinguished speakers and panellists: Ms. Chandrima Chatterjee, Secretary General, Confederation of Indian Textile Industry (CITI), Shri HS Devaprasad, Regional Chairman, CMAI-SR, Mr. Venkatesh S, Chief Compliance Officer, Shahi Exports Pvt Ltd., Ms. Mousumi Sarangi, Country Manager India & Coordinator of Supplier Engagement, Fair Wear Foundation, Ms. Annabel Meurs, Associate Director, Fair Wear Foundation – Netherlands, Shri Balaji Rajagopalan, Regional Secretary-South Region, CMAI, Mr. Dora Babu- AEPC

During the workshops, a detailed session on chemical compliance and regulatory standards like REACH and consumer product safety legislation, as well as voluntary certifications such as OEKO-TEX®, ZDHC, GOTS, and bluesign® was also organized with insights from the Regulatory Representatives and Managers Association (RRMA). The session emphasized the European Green Deal and the EU Chemicals Strategy for Sustainability as key drivers of change, equipping attendees with a comprehensive understanding of the regulatory landscape and best practices for managing chemicals in the textile supply chain.

The workshops witnessed enthusiastic participation from industry stakeholders, fostering an engaging environment for dialogue and learning. These sessions included dynamic question-and-answer discussions, where participants actively sought clarity on complex aspects of the Corporate Sustainability Due Diligence Directive (CSDDD) and Human Rights Due Diligence (HRDD). The interactive exchanges not only deepened understanding but also encouraged collective problem-solving and the sharing of best practices. Building on the momentum from these cluster-level workshops, CITI is planning to establish a dedicated Helpdesk to provide ongoing updates, address queries, and support stakeholders in navigating the nuances of the legislation effectively.

The increasing complexity and mandatory nature of compliance requirements highlight the necessity of collaborative platforms that equip the textile industry with the knowledge and tools needed for effective adaptation.

As we look ahead to a new year, CITI remains steadfast in its commitment to empowering the textile sector by fostering sustainable practices, encouraging innovation, and building an inclusive future. We invite all our members to actively participate in our initiatives, contribute their insights, and join hands in navigating the evolving landscape of global standards and responsibilities.

CITI'S MANAGEMENT DEVELOPMENT PROGRAM ON ESG

As markets like the EU are increasing their focus on various due regulations and compliances towards safeguarding human rights and the environment with an increased focus on sustainability, circularity, and recyclability. Moreover, closer home national legislation changes are also making it imperative for the industry including the textile industry to know and to understand the ESG requirements and reporting frameworks.

To enable the industry to have sustainability managers who are informed and equipped to draw up a target based ESG roadmap and good reporting systems, CITI has started the customised Management Development Program for textile and apparel industry managers.

The Inaugural batch of CITI's MDP-ESG was held from August 29 to August 31, 2024, at the Bombay Textile Research Association (BTRA), Mumbai.

The inaugural batch of CITI's MDP held at Mumbai during 29th – 31st August 2024

This three-day program served as a pivotal platform, bringing together industry leaders, experts, and academics to engage in deep discussions and knowledge sharing on critical ESG topics relevant to the textile sector.

3 days residential program of CITI's MDP was concluded with the Certificate Distribution Ceremony held in the presence of the Chief Guest, Ms. Roop Rashi (Textile Commissioner).

During the 3 days of the CITI's MDP program, the Subject Matter Experts from institutes like IIM Mumbai, Monash University Australia, ILO, Regulatory Representatives and Managers Association (RRMA), Toxic Links, Partner in Change as also industry experts from TEXPROCIL, Indo-Count, Sulochna, etc touched upon the various crucial aspects of ESG such as:

- Sustainable Water Management and Circular Economy,
- Social aspects, Chemical Compliance, and Hazardous Materials Management,
- Real-life scenarios of Life Cycle Assessment,
- Different reporting frameworks for MSMEs, etc.
- Environmental Regulations & Compliance
- Extended Producer Responsibility (EPR)
- Disclosure on Environmental Impact, Social Responsibility, and Integrated Reporting
- Effectiveness of various frameworks,
- Understanding National Guidelines for Responsible Business Conduct (NGRBC) and Business Responsibility and Sustainability Reporting (BRSR), etc

The event was a great success with active participation from the representatives of the well-known textile companies and looking at the success of the event, CITI is looking to hold the 2nd batch of the MDP program soon in Bangalore, the other important textile cluster of India.

Textile Commissioner Ms. Roop Rashi distributing the certificate to the MDP Participants

Textile Commissioner Ms. Roop Rashi delivering a keynote address on the critical importance of ESG.

Session Highlights

Mr. Rakesh Mehra Chairman CITI, delivering a keynote address on the critical importance of ESG in driving sustainable growth and compliance

Ms. Bharti Birla, ILO, providing expert perspectives on health and safety standards, emphasizing the role of decent work conditions in fostering a sustainable and responsible textile industry.

Dr. Anju Singh, Professor at IIM Mumbai, delivering an insightful session on ESG strategies and their impact on sustainable business practices."

Mr. R Sabhari Girish, Head of Sustainability at Sulochana Cotton Spinning Mills P Ltd, shared the organization's journey towards achieving Net Zero & Beyond, highlighting innovative strategies and initiatives aimed at reducing carbon emissions and promoting sustainable practices in the textile industry.

The inaugural batch of CITI's Management Development Program on ESG, held in August 2024, marked a successful step in empowering sustainability managers within the textile industry. The program effectively addressed critical ESG topics, providing participants with the knowledge and tools needed to create impactful ESG roadmaps and establish robust reporting systems. The event received enthusiastic participation and feedback from key stakeholders, reinforcing the industry's commitment to sustainable practices and compliance with evolving regulations.

Building on this success, CITI looks forward to continuing its efforts by organizing additional batches of the MDP-ESG program in key textile and apparel hubs across India, further strengthening the industry's capacity to navigate the growing demands for sustainability and responsible business practices in the coming year.

WORLD COTTON DAY 2024 CELEBRATION

Theme: "MEGATRENDS SHAPING TEXTILE VALUE CHAIN"

On the occasion of World Cotton Day 2024, Ministry of Textiles, Confederation of Indian Textile Industry (CITI) and Cotton Corporation of India (CCI) jointly organized a conference themed at "Megatrends Shaping Cotton Textile Value Chain".

The event was graced by the presence of the Hon'ble Union Minister of Textiles, Shri Giriraj Singh and was also attended by senior Government officials from the Ministry of Agriculture and Farmers Welfare and the Ministry of Textiles including Secretary (Textiles), Smt. Rachna Shah, Additional Secretary (MoAF&W), Smt. Shubha Thakur, Additional Secretary (Textiles), Shri Rohit Kansal, Joint Secretary (Textiles), Smt. Prajakta Verma. Key representatives from CCI, CICR, ICAR, etc were also present.

The conference attracted over 300 delegates, including prominent stakeholders from the Indian and global cotton value chains, fostering a rich exchange of insights and discussions on the future of the industry.

On the sidelines of the event, a dedicated exhibition was organized, showcasing cutting-edge cotton agronomy practices, advanced testing equipment, innovative cotton-based products and the latest cotton-growing technologies.

Session-wise details of the event are as under:

Opening Session

The inaugural session was graced by the presence of Additional Secretary (Textiles) Shri Rohit Kansal and Joint Secretary (Textiles), Smt. Prajakta Verma who were warmly welcomed by Chairman CITI, Shri Rakesh Mehra and Deputy Chairman CITI- Shri Ashwin Chandran respectively.

The celebration of World Cotton Day started with the welcome address of Deputy Chairman CITI, Shri Ashwin Chandran who welcomed all the participants and highlighted the importance of cotton for the Indian economy and the Indian Textile Industry. Highlighting the work of CITI-CDRA, which has been carried out since 1970, for uplifting the Indian cotton farmers socio-economically. Shri Ashwin appealed to the participants to commit to working toward the growth and sustainability of the cotton industry.

Dr Terry Townsend, Global Consultant Cotton Analytics, USA highlighted the cotton scenario in the USA and expressed his concerns over the declining cotton prices, cotton production, and stagnation in cotton yield in the USA, which is one of the major producers of cotton in the world. He also shared his insights on the Sustainability Silos.

Managing Director - India, Eurofins Modern Testing Services, Shri Vipul Bhardwaj highlighted the increasing importance of Traceability in the cotton supply chain. He showcased Eurofins' range of traceability services, designed to help the Indian cotton sector meet the increasing global demand for transparency and accountability.

Smt Prajakta Verma, Joint Secretary, Ministry of Textiles, in her address cited that enhancing sustainability is paramount and therefore Ministry has encouraged a collaborative approach through the

Release of the White Paper titled "Who's Winning the Race? - Which States Offer the Best Government Incentives in India's Textile & Apparel Sector?". The paper highlighted the comparative advantages that various Indian State Governments are offering towards investment in the textile sector and was aimed at helping the textile industry make a suitable decision pertaining to location for their upcoming investments.

formation of Textile Advisory Group (TAG) where the challenges of Textile Industry are being addressed through a participative approach. She also highlighted inter-ministerial coordination in launching the initiative of a holistic plan to increase cotton production and yield which enables the farmers to increase their income. She also highlighted about the Kasturi Cotton Bharat Program of the Ministry of Textiles

During the opening session Shri Rohit Kansal, Additional Secretary, Ministry of Textile in his Keynote Address highlighted that the country has set a target of creating a Textile Ecosystem of USD 350 bn by 2030 from the current USD 176 bn. He urged the stakeholders of the cotton textile value chain to be cognisant of the challenges that are being posed by current and potential competing fibers so that cotton will be the legacy sector of the Indian Textile Industry, further, he emphasized that sustainability is a sine qua non for the cotton textile value chain.

During the session, Shri Rakesh Mehra and other dignitaries also released a White paper titled "Who's Winning the Race? - Which States Offer the Best Government Incentives in India's Textile & Apparel Sector?" which was prepared by Texcoms Textile Solutions, Singapore.

Session I:

Enhancing Sustainability & Traceability in the Textile Industry

The session I of the event was focussed on Enhancing Sustainability & Traceability in the Textile Industry. The session was Chaired by Additional Secretary (Textiles) Shri Rohit Kansal and was moderated by Chairman, CITI's Standing Committee on Cotton Shri T. Rajkumar.

During the session, stakeholders discussed the increasing role of Sustainability & Traceability in the Textile Industry.

Director, Sussman International Company, Shri Mark Sussman highlighted the increasing importance of Sustainability & Traceability and discussed the various data points towards Environmental and Social compliance that the Indian industry can capture and showcase for the same and called upon the Indian manufacturers to come up with simplified solutions for showcasing the Sustainability & Traceability in their value chain.

Chairman SIMA, Dr S.K. Sundararaman, highlighted that Indian industry is working in synchronization with the Government and requests the industry to work towards the value preposition of cotton by integrating sustainable practices.

Eminent Panellists of the Session 1: (from Left to Right) Group Leader, Triburg - Shri Gaurav Sharma, Director, Sussman International Co.-Mr. Mark Sussman, MD, GOTS-Mr. Rahul Bhajekar, President & Coordinator, All India Cotton Farmer Producer Organisation Association-Shri Manish Daga, Additional Secretary (Textiles)-Shri Rohit Kansal, Chairman, CITI's Standing Committee on Cotton -Shri T. Rajkumar, Chairman SIMA-Dr S.K. Sundararaman, Managing Director, Pearl Global Industries Ltd-Shri Pallab Banerjee and ED, TEXPROCIL-Dr. Siddhartha Rajagopal.

Managing Director, Global Organic Textile Standard (GOTS), Mr. Rahul Bhajekar while highlighting the importance of various certifications towards traceability opined to create a centralized database to avoid any duplicity of data.

Executive Director, TEXPROCIL, Dr. Siddhartha Rajagopal highlighted the Kasturi Cotton Bharat (KCB) Program and how it is working towards meeting the objectives of Sustainability and Traceability in the Indian cotton value chain. He requested the industry to associate themselves with the KCB program through the already available Kasturi portal and work towards increasing traceability.

Sharing the farmers perspective on these emerging compliances, President & Coordinator, All India Cotton Farmer Producer Organisation Association, Shri Manish Daga called upon to industry to ensure fair prices for the Indian Cotton farmers enabling them to meet these emerging compliances.

Sharing his experience about traceability and sustainability, Shri Gaurav Sharma, Group Leader, Triburg shared his experience where brands agreed to pay a premium towards sustainability and traceability and called upon the buying houses/brands to encourage traceability and sustainability by paying some premium towards the same. The concept was also supported by Managing Director, Pearl Global Industries Ltd, Shri Pallab Banerjee, and he opined that traceability should start at the Ginning level and for the same initially Ginners should be geo-tagged details of which can be made available through a centralized system which can be easily accessed.

Session II:

Decent Work in The Cotton Supply Chain

This session was moderated by the National Project Coordinator, ILO, Ms. Bansari Nag.

The session started with the remarks of Mr. Insaf Nizam, Specialist, FPRW who highlighted the critical aspects of Fundamental Principles and Rights and Work (FPRW) and the different activities being undertaken by the ILO toward promoting FPRW at the cotton growing community.

Principal Scientist, ICAR-NIAP, Dr. Khem Chand highlighted that in the absence of the knowledge of FPRW and other basic occupational safety and health norms, Indian cotton commodity used to be to affected a lot. He appreciated the work of ILO towards FPRW and highlighted the importance of the same being recognized and implemented at the entire textile value chain. He also called upon the industry to join hands with ILO to strengthen the Indian cotton Textile value chain to address such vulnerabilities.

General Secretary, INTUC, Mr. R D Chandra Shekar shared the experience of the work done by the ILO towards promoting FPRW in the state of Telangana. He

Eminent Panellists of Session (from left to right) General Secretary, INTUC, Mr. R D Chandra Shekar, Mr. Insaf Nizam, Specialist, FPRW, National Project Coordinator, ILO, Ms. Bansari Nag, Principal Scientist, ICAR, Dr. Khem Chand and SIMA Chairman, Dr. S. K. Sundararaman

cited that as a result of the activities of ILO, school dropouts of the kids of cotton farmers have reduced as also there has been a considerable improvement in the health of cotton farmers. He urged the cotton farmers to increase the value prospects of the cotton-growing community starting from the farm stage.

SIMA Chairman, Dr. S. K. Sundararaman opined that textile industry should ensure that there is no child labour or any type of discrimination at any stage of textile value chain and requested the industry to follow the law of land towards the same. should be abolished from every sector of the textile value chain.

Session III:

Evolving Trends in Cotton Farming

The session was chaired by Dr. Y.G. Prasad, Director ICAR-CICR, and was moderated by Head- Public Affairs, Science & Sustainability IBSL, Dr. Rajvir Singh Rathi.

During the session, panelists such as the Chairman-Federation of Seed Industry of India (FSII)-Shri Ajai Rana, Founder & Chairman-Rasi Seeds, Dr. M. Ramasami, Project Coordinator (Maharashtra), CITI CDRA-Shri Govind Wairale highlighted the importance of newer seed varieties towards improving cotton productivity. They opined that policy support is essential for the timely approval of these varieties which would enable farmers to improve their cotton productivity.

President, Global Corporate & Industry Affairs, UPL Ltd, Shri Sagar Kaushik made a presentation highlighting the various Agricultural and Crop Nutrition solutions solution of UPL

Director of International Relations Abrapa - Brazilian Cotton Growers Association, Mr. Marcelo Duarte Monteiro made a detailed presentation on the Brazilian Cotton Sector. He cited that in 2006 only 6% of Brazil's cotton was GMO based, which increased to 94% in 2023. He also discussed some of the good practices related to cotton farming such as: Use of drones, Weather Stations, Precision farming, etc.

Eminent Panellists of Session (from left to right) Project Coordinator (Maharashtra), CITI CDRA-Shri Govind Wairale, Chairman-Federation of Seed Industry of India (FSII)-Shri Ajai Rana, Head- Public Affairs, Science & Sustainability IBSL, Shri Ajai Rana, Director CICR-Dr. Y.G. Prasad, Chairman TEXPROCIL, Shri Sunil Patwari, Founder & Chairman-Rasi Seeds, Dr. M. Ramasami, Director of International Relations Abrapa - Brazilian Cotton Growers Association, Mr. Marcelo Duarte Monteiro, President, Global Corporate & Industry Affairs, UPL Ltd, Shri Sagar Kaushik

Session IV:

Cotton Trading and Risk Management

The session was moderated by MD TT Ltd., Shri Sanjay Jain. He highlighted that in the present scenario when cotton is a globally traded commodity there are several risks associated with its trading and in such a scenario risk management becomes critical. He said that in the present scenario, absolute prices no longer determine competitiveness but relative price does, and opined that a global cotton contract should be launched on MCX platform.

Addl. Vice president, the Cotton Association of India, Shri Vinay Kotak cited that profit in cotto trading is low, however, it is prone to a number of risks such as market-related risks, capital risks, buyer risks, transactions risks, etc, and gave the below few mantras related to cotton risk management:

- Do not put all eggs in a single basket
- Trend is the key
- Market is wiser of all
- Always set a stop-loss
- Adopt Flexibility

Director-DDPL, Shri Mahesh Sharda, while discussing cotton trading and risk management, highlighted that cotton accounts for about 65% of the cost of yarn and hence cotton should be treated as a sensitive commodity. He opined that any policy of the Government related to cotton should be pro-active in nature and such policies should be based on actual data and not on anything else.

Head of Department – Agri, MCX, Mr. Abhishek Govilkar discussed the major structural changes happened on the MCX cotton contract. While discussing the various features of the cotton contract, he called upon the industry and other stakeholders to increase their participation on the MCX cotton contract.

Eminent Panellists of Session engaged in discussion (from left to right) Director-DDPL, Shri Mahesh Sharda, Addl. Vice president, the Cotton Association of India, Shri Vinay Kotak, MD TT Ltd. Shri Sanjay Jain, Head of Department – Agri, MCX, Mr. Abhishek Govilkar

Valedictory Session (I)

The session started with a presentation on a "Special Project on Cotton for Improving Yield and Increasing Farmers' income" made by Director, ICAR-CICR, Dr. Y G Prasad. Giving the overview of the project and he discussed the advantages and comparative economics of the technologies such as HDPS with the conventional farming.

Continuing the discussion on the Special Project on Cotton, SG CITI, Ms. Chandrima Chatterjee made a detailed presentation "e-Cotton: Enhancing Market linkages under Special Project on Cotton". Highlighting the objectives and salient features, Ms. Chatterjee showcased the various functionalities of the web-portal and mobile application which has been developed for the effective monitoring and implementation of project activities. Detailing various modules of the portal, she called upon the industry to visit the portal and extend their contribution towards purchasing cotton from beneficiary farmers by using the existing "e-Market" module of the portal.

CMD, Cotton Corporation of India, Dr. Lalit Kumar Gupta made a detailed presentation on the Contribution of CCI for the Empowerment of Cotton Farmers and enhancing Cotton Productivity. Dr Gupta highlighted the various contributions of CCI towards the upliftment of Indian cotton sector such as MSP procurement, Cott-Ally Mobile App, On-spot Aadhar Based Farmer Registration, QR based bale identification and Traceability System (BITS), etc. He also highlighted CCI's contribution for promoting Sustainability and Awareness in Cotton Value Chain.

Economist & Senior Journalist, Shri G. Chandrashekhar expressed his concern on the stagnation in the acreage of cotton and shared some initiatives to boost cotton production such as:

- Focus on cotton seed technology
- Educating farmers about best agronomics practices
- Climate Smart Agriculture
- Replication of models of successful high-yielding areas
- Long-term policies to support R&D in seeds

SG CITI, Ms. Chandrima Chatterjee making a presentation on "e-Cotton: Enhancing Market linkages under Special Project on Cotton"

CCI CMD, Dr. Lalit Gupta making a presentation on Contribution of CCI for the Empowerment of Cotton Farmers and Cotton Productivity

Valedictory Session (II)

The session was graced by the presence of Hon'ble Minster of Textiles, Shri Giriraj Singh, Secretary (Textiles), Smt. Rachna Shah, Additional Secretary (MoAF&W), Smt. Shubha Thakur, and Joint Secretary (Textiles), Smt. Prajakta Verma.

Session started with the opening remarks of the Joint Secretary (Textiles), Ms. Prajakta Verma wherein she shared the importance of the World Cotton Day. Discussing about the importance of cotton for Indian economy, she highlighted inter-ministerial coordination in launching initiative of holistic plan to increase cotton production and yield which enable the farmers to increase their income.

Shri Rakesh Mehra thanked the Hon'ble Minister of Textiles for joining the celebrations of World Cotton Day 2024 and emphasized that cotton being the oldest fibre in the textile industry plays a significant role in driving economic growth, employment generation, provides livelihood to farmers, and women empowerment. He cited that ample availability of cotton at internationally competitive prices is a must to enable the industry to achieve the desired target of US$ 350 bn industry. Committing full support on behalf of the industry to improve cotton productivity, Shri Mehra requested the Hon'ble Minister to announce the Technology Mission on Cotton 2.0 at the earliest as also to ensure cost competitiveness of domestically grown cotton.

Smt. Shubha Thakur, Additional Secretary, MoA&FW while discussing on the initiatives of the government in increasing the yield of cotton, reaffirmed the ministry's commitment to work in close coordination with the Ministry of Textiles, in adopting best farm practice by the farmers so as to improve livelihood of the farmers.

In her special address, Secretary (Textiles), Smt. Rachna Shah mentioned the importance of the cotton economy, which provides livelihood to six million cotton farmers directly and another employment to 45 million people engaged directly or indirectly in various other activities in the cotton value chain. She urged that all the stakeholders of the cotton value chain to concentrate in increasing cotton productivity, as India ranks 35th in terms of yield. She appealed all stakeholders to adopt a collaborative approach to address this serious challenge of productivity, being faced by the entire cotton value chain.

In the valedictory address Hon'ble Union Minister of Textiles, Government of India, Shri Giriraj Singh, while addressing the august gathering in his valedictory address reiterated the commitment of the government to achieve the target of USD 350 billion by 2030 including the export target of USD 100 billion. He urged the stakeholders in the cotton value chain to join hands together for the same. He also shared the experience that how adoption of best farm practices like high-density planting, closer spacing, drip fertigation etc., can increase the yield to even 1500 Kgs per hectare as against the present national average yield of about 450 kgs. Therefore, there is a dire need to adopt best farm practices in saturation mode, he cited.

He also expressed his concern about the problem of weed management in cotton farming which increases labor costs to cotton farmers. He opined that efforts be made to help cotton farmers to overcome weed management problems by adopting suitable new seed varieties and he appealed to take this issue with all seriousness and examine the suitability of this new seed technology available in the world like HT BT for adoption in our country.

The event ended with the concluding remarks by Chairman, TEXPROCIL, Shri Sunil Patwari who thanked the Hon'ble Minister of Textiles, Shri Giriraj Singh for gracing the event and all the officials of the Ministry of Agriculture, Ministry of Textiles as also all the stakeholders for their support towards making the program a huge success.

During the valedictory session, TEXPROCIL signed 7 MoU related to

- Commitment for purchase of Kasturi Cotton
- Adopting Sustainable agronomy practices for production of Kasturi Cotton
- Brand Promotion in Indian and Global Markets

TEXPROCIL Chairman, Shri Sunil Patwari and Vice Chairman – Corporate Advisory Board Trident Group, Dr. P K Aggarwal exchanging MoU on commitment for purchase of Kasturi Cotton.

Trident has graciously committed to utilising 5,00,000 bales or more of Kasturi Cotton as per availability during the next two cotton seasons to produce a variety of home textile product

TEXPROCIL Chairman, Shri Sunil Patwari and Director-Vardhman Textiles, Shri Sushil Kumar Jhamb exchanging MoU on commitment for purchase of Kasturi Cotton.

Vardhman has shown their commitment to the programme by penning down the utilisation of 21,000 of bales to produce a variety of textile products

TEXPROCIL Chairman, Shri Sunil Patwari and Chairman-CITI's Standing Committee on Cotton, Shri T. Rajkumar exchanging MoU on commitment for adopting sustainable agronomy practices for production of Kasturi Cotton.

CITI-CDRA will create awareness among Indian farmers and the supply chain to improve the quality of cotton and cotton products so that they can get the valued Kasturi Cotton mark thereby enabling them to get better returns for their produce.

TEXPROCIL Chairman, Shri Sunil Patwari and Chief Operating Officer-CottonConnect, Shri Kinner Lakhani and his colleague exchanging MoU on commitment for adopting sustainable agronomy practices for production of Kasturi Cotton.

Under the MoU CottonConnect will enable farmers and producers to work sustainably and responsibly and enjoy better livelihoods

TEXPROCIL Chairman, Shri Sunil Patwari and Chief Mentor-CMAI, Shri Rahul Mehta exchanging MoU on commitment Brand Promotion in Indian and Global Markets.

Under the MoU, CMAI WILL promote the brand across various platforms to facilitate the marketing & co-branding of such products created out of Kasturi Cotton.

TEXPROCIL Chairman, Shri Sunil Patwari and Country Director-Better Cotton Initiative (BCI), Ms. Jyoti Kapoor and her colleague exchanging MoU on commitment for adopting sustainable agronomy practices for production of Kasturi Cotton.

Under the MoU, BCI will promote sustainably grown cotton and sourced cotton which is one of the key pillars of the Kasturi Cotton programme.

TEXPROCIL Chairman, Shri Sunil Patwari and Founder and National General Secretary of the Brands & Sourcing Leaders Association, Shri Raman Dutta and his team exchanging MoU on commitment Brand Promotion in Indian and Global Markets.

Under the MoU, BSL will make all efforts to promote the brand across various platforms to facilitate the marketing & branding Kasturi Cotton in the domestic and international markets. BSL will also work towards providing designing services required for the creation of various product lines made with certified "Kasturi Cotton" as part of the efforts to promote and popularise the brand.

The event concluded with the visit of the Hon'ble Minister and delegates to the stall of the various exhibitors showcasing their products and services during the event.

Major takeaways of the World Cotton Day 2024 related to Indian cotton sector are:

1. Adopt Best Farm Practices

- Promote the adoption of best farm practices such as high-density planting, closer spacing, and drip fertigation to significantly increase cotton yields, targeting an increase to 1,500 kg per hectare.
- Focus on developing strategies to help cotton farmers manage weeds effectively, including evaluating the adoption of new seed technologies like HT BT
- Consider adopting Brazilian cotton farming practices such as the use of drones, weather stations, and precision farming techniques to improve productivity and sustainability in Indian cotton farming.

2. Ensure ample availability at internationally competitive prices

- To enable the industry to achieve the required target of US$ 350 bn industry by 2030, Government may ensure ample availability of cotton fibre at internationally competitive prices and for the same Government may come up with a Technology Mission on Cotton 2.0 with a focus on seed technology, at the earliest.

3. Focus on Sustainability and Traceability with Simplified solutions with a Centralized Traceability Database

- There is a dire need for integrating Sustainability and traceability efforts in the Indian cotton supply chain focusing on compliance with environmental and social standards.
- Stakeholders may work together to find a simplified solution, for capturing various databases on environmental and social compliance. There may be a centralized repository for the same to avoid any duplicity of the data.

4. Enhance Industry-Government Synchronization as also Inter-Ministerial Coordination

- Increased Inter-ministerial coordination is needed to make a holistic plan to increase cotton production and yield as also increase the value proposition of cotton.
- Strengthen collaboration between the Ministry of Textiles and Ministry of Agriculture & Farmers' Welfare to implement best farming practices aimed at improving cotton yield and farmer livelihoods.

5. Brands may increase Support for Traceability with Premium Pricing

- Brands may come forward to support the industry as well as farmers by paying a premium to the industry and farmers adhering to the various new compliance standards towards sustainability and traceability.

6. Work towards promoting Fundamental Principles and Rights at Work (FPRW) in Cotton Supply Chain

- Industry and various stakeholders of the cotton value chain may collaborate to implement FPRW within cotton communities as also work towards improving compliance with labor laws and ensuring fair practices.

7. Policy Advocacy for Seed Varieties

- Government may expedite the approvals for newer cotton seed varieties, ensuring farmers can access improved seeds for enhancing productivity. Additionally, the Government may also explore the potential for increasing the use of GMO-based cotton varieties in India, similar to Brazil's successful transition.

8. Work towards having robust Risk Management Strategies

- Encourage stakeholders to adopt comprehensive risk management strategies to mitigate various risks associated with cotton trading.
- Government may launch a global cotton contract on MCX to enhance market stability ancompetitiveness

9. Enhance Data-Driven Decision Making

- Advocate for policies and trading practices to be informed by actual market data and conditions and not on sentiments. It will ensure that strategies are responsive to market realities.

CITI TEXTILE SUSTAINABILITY AWARDS 2025

CELEBRATING EXCELLENCE IN TEXTILE SUSTAINABILITY

Since 1993-94, the Confederation of Indian Textile Industry (CITI) has been fostering excellence across the textile production value chain through the prestigious CITI BIRLA Awards.

However, starting with the year 2023, an attempt is being made to expand the areas of focus, with special emphasis on Sustainability, Circularity, and Traceability through the CITI Textile Sustainability Awards. These awards have been launched to nudge the industry to chart out a more aggressive path with both the planet and people at the centre of all activities.

Past Chairman, CITI and MD, TT Ltd. Shri Sanjay Jain, giving his welcome address

During the Bharat Tex 2025, CITI organized the CITI Textile Sustainability Awards 2024-25 on 17th February 2025 at Bharat Mandapam, New Delhi.

This year the awards were given across the 4 main categories:

1. Exemplary Service to Textile Industry Awards
2. CITI Birla Economic & Textile Research Foundation Award
3. CITI Textile Sustainability Awards
4. Award for responsible Business Membership Organizations (BMOs)

Honourable Minister of State for Textiles, Shri Pabitra Margherita was the Chief Guest for the day and Secretary (Textiles), Ms. Neelam Shami Rao, was the Guest of Honor for the event.

Panelists of the session (from left), Mr. Marius Golden, COO and Co-Founder- Reverse Resources, Mr. Sunil Patwari, Past Chairman -TEXPROCIL, DR. Arindam Basu DG-NITRA (moderator), Mr. Jagjeet Singh Kandal, Country Director, India - IDH and Mr. Navodit B., CTO - Green Story

The award ceremony started with the opening remarks of Mr. Sanjay Jain, Past Chairman, CITI and MD, TT Ltd., wherein he emphasized the need for collective responsibility, and called for an industry-wide commitment to incremental improvements and a 'glass-half-full' approach to sustainability.

During the awards a session on “Mapping best practices” was also organized in which the panel emphasized on sustainability and efficiency in the textile industry.

Key discussion points included improving cotton-picking methods, transitioning to regenerative agriculture for better yields and resilience, and ensuring fair wages for workers. Circularity was highlighted through large-scale textile waste recycling initiatives.

During the session, digitalization and traceability were recognized as essential for optimizing resources, while quantifiable sustainability efforts, such as life-cycle assessments, were emphasized to align with evolving regulations. The session concluded with a call for broader knowledge sharing, reinforcing collaboration and innovation.

During the event, Mr. Manu Gahlowt, Director – Softlines, Intertek gave a detailed presentation on Upcoming sustainability Requirements and good practices.

The inaugural session of the award started with the welcome address of Chairman- CITI, Shri Rakesh Mehra. He cited that The younger generation is shifting towards sustainability, with a growing interest in buying preloved clothes and hence the industry must encourage more eco- frinedly choices.

Guest of Honor, Secretary (Textiles), Ms. Neelam Shami Rao giving her keynote address

Chief Guest, Honourable Minister of State for Textiles, Shri Pabitra Margherita delievering the inaugural address

Chief Guest, Honourable Minister of State for Textiles, Shri Pabitra Margherita in his inaugural address lauded India's textile sector for its remarkable strides in sustainable manufacturing and global competitiveness. “The textile industry is the backbone of our economy, and sustainability is key to its future resilience,” he stated.

Guest of Honor, Secretary (Textiles), Ms. Neelam Shami Rao in her keynote address cited that sustainability must extend beyond environmental goals to ensure social and economic well-being within the workforce.

During the event, Shri Rohit Kansal, Additional Secretary, Ministry of Textiles, echoed the need for stronger industry-government collaboration to meet international sustainability benchmarks. Building on the same, Ms. Prajakta Verma, Joint Secretary, Ministry of Textiles, highlighted the role of innovation and digitalisation in reducing the sector's environmental footprint.She pointed to the integration of AI-driven analytics and smart manufacturing as key drivers of efficiency and environmental responsibility.

Shri Rohit Kansal, Additional Secretary, Ministry of Textiles giving his address

CITI AWARDS 2025

The CITI Textile Sustainability Awards 2024-25 recognized outstanding contribution to sustainability in the textile sector, honoring 56 winners across 4 major categories and 18 sub-categories covering the entire value chain from farm to fashion, including academic institutions and Business Membership Organizations (BMOs).

A total of 300+ applications were received across the award categories which were eveluated through a 2-stage process: Initially through a panel of eminent jury members and then by a 3rd party validation to verify all claims.

Honourable State Minister of Textile, Shri Pabitra Margherita along with winners. Also in frame, Joint Secretary, Ms. Prajakta Verma, Textile Commissioner, Ms. Roop Rashi, Chairman CITI, Shri Rakesh Mehra, SG-CITI, Ms. Chandrima Chatterjee and DG-NITRA, Dr. Arindam Basu

Winners details are as below:

Category 1: Exemplary Service to Textile Industry Awards

During the awards function Exemplary Service to Textile Industry awards were conferred to 4 industry stalwarts for their contribution towards social and environmental cause that have significantly impacted the Indian textile sector, details of which are given below:

Shri P D Patodia, Past Chairman CITI and Chairman & MD - Prime Urban Development India Ltd for pioneered initiatives to enhance cotton productivity in Rajasthan and beyond

Shri R K Dalmia, Past Chairman – CITI and MD - Aditya Birla Real Estate Ltd. (formerly Century Textiles & industries Ltd.) for spearheading innovations in textiles as a trustee of CITI's Birla Economic & Textile Research Foundation.

Mr S. P. Oswal, Chairman & MD - Vardhman Textiles Ltd. for championed sustainability with initiatives like Project Nandini and ReNova,

Shri Jagadish Chandran, Chairman Premier Group for key reforms like 24-hour operations in spinning mills, 100% women employment in textiles, world-class dormitory systems, etc.

Category 2: CITI Birla Economic & Textile Research Foundation Award

Award Sub Category	Winners
2.1. Award for Innovative Water Management and Conservation for companies implementing advanced water conservation and reuse for sustainability	• WINNER - Jeyavishnu Clothing Private Ltd. • 1st RUNNER UP- RSWM Ltd. • 2nd RUNNER UP- SCM Garments Pvt. Ltd.
2.2. Award for Leadership in Renewable Energy Integration for firms leading in renewable energy adoption and carbon footprint reduction.	• WINNER- Premier Mills Pvt Ltd • 1st RUNNER UP- Madura Coats Pvt. Ltd. • 2nd RUNNER UP- Victus Apparel Pvt. Ltd.
2.3. Award for Excellence in Carbon Emissions Reduction for organizations excelling in green technologies and net-zero initiatives	• WINNER - Radnik Exports Global Pvt. Ltd. • 1st RUNNER UP - Sulochana Mills Ltd. • 2nd RUNNER UP - Pratibha Syntex Ltd.
2.4. Award for Excellence in Waste Reduction and Circular Innovation Leadership for acknowledging textile firms driving waste reduction and circular economy practices.	• WINNER - Indo Count Industries Ltd.

Category 3: CITI Textile Sustainability Awards

Award Sub Category	Winners
3.1. CITI- Reverse Resources Best Recyclers for textile-to-textile recycling and circular business models. **Knowledge Partner:** Reverse Resources	• WINNER - Sitaram Spinners Private Limited • 1st RUNNER UP- Oasis Textiles • 2nd RUNNER UP- Maleema eco weaves
3.2. CITI- IDH Best Alternate Materials Use for leaders in recycled fibres and next-gen sustainable materials. **Knowledge Partner:** IDH	• WINNER - Raymond UCO Denim Private limited • 1st RUNNER UP- USHA YARNS LTD • 2nd RUNNER UP- Banofi Leather **Special Award** for use of technology- Tooused
3.3. CITI- BSL Best Sustainable Retail Practices for retailers reducing environmental impact and promoting sustainability **Knowledge Partner:** Brands and Sourcing Leaders Association (BSL)	• WINNER - Indo Count Industries Ltd • 1st RUNNER UP- Eastman Exports Global Clothing Pvt Ltd • 2nd RUNNER UP- M/s Lafaani
3.4. CITI- Aalekh Foundation Textile Heritage Reviver to recognize efforts to revive India's textile heritage and empower communities **Knowledge Partner:** Aalekh Foundation	• WINNER - Dastkar • 1st RUNNER UP- 23:23 Designs & Sourcing Pvt Ltd • 2nd RUNNER UP- Lahe Lifestyle **Special Award** for exceptional work towards textile heritage reviver- Meghalaya Government
3.5. CITI- Rajesh Bheda Consulting Best HR Practices Award for organizations prioritizing inclusive and sustainable HR practices **Knowledge Partner:** Rajesh Bheda Consulting (RBC)	• WINNER - Gokaldas Exports Limited • 1st RUNNER UP- Raymond UCO Denim Pvt. Ltd. • 2nd RUNNER UP- Banswara Syntex Ltd., Garment Division
3.6. CITI- Best academic institution educational contribution to textile and clothing sustainability Award for institutions leading in sustainable textile research and education	• WINNER – NIFT Gandhinagar (Best academic institution (Textile) Educational contribution sustainability Award) • WINNER – Goa Institute of Management (Best academic institution Educational contribution sustainability Award) • 1st RUNNER UP- Vimala College, Thrissur, Kerala

Award Sub Category	Winners
3.7. CITI- CDRA Best Regenerative Farmer for farmers excelling in sustainable cotton farming and community welfare. **Knowledge Partner:** CITI - Cotton Development & Research Association (CITI-CDRA)	• WINNER - Shri Swapnil Gunwant Shelki (Supporting Agency – CITI CDRA) • 1st RUNNER UP- Shri Pavra Mohit (Supporting Agency: Indocount Industries) • 2nd RUNNER UP- Shri Rama (Supporting Agency: Pratibha Syntex) • 3rd RUNNER UP- Ms. Hema Devi (Supporting Agency: CITI CDRA) • 4th RUNNER UP - Shri Tulsiram (Supporting Agency-Beetle Regen)
3.8. CITI-TEXPROCIL Leading Kasturi Ginner to recognize excellence in quality, sustainability, and traceability in cotton ginning **Knowledge Partner:** TEXPROCIL	• WINNER - Ram Agro, • 1st RUNNER UP- Jayesh Cotsyn, • 2nd RUNNER UP- Gimatex Industries Pvt Ltd.
3.9. Special Award for Women Entrepreneur to honour the women who through their outstanding leadership drive innovation and sustainability in industry.	• Kevisedenuo Margaret Zinyu

To celebrate the efforts of cotton farmers towards environmental stewardship CITI also honoured the cotton farmers from major cotton producing states who are doing exceptional work towards regenerative cotton farming. The highlight of the award category was the lady farmer Ms. Hema Devi, a farmer from Sirohikhera village in Rajasthan, who not only achieved the highest cotton yield in her area—14.50 quintals from one acre but also improved soil health and productivity through her various regenerative practises which she learnt from through participating in projects and training programs of CITI - Cotton Development & Research Association (CITI-CDRA).

Category 4: CITI-FMC Award for responsible Business Membership Organizations (BMOs)

This year in association with Foundation for MSME Clusters (FMC), CITI also organized Award for responsible Business Membership Organizations (BMOs). BMOs are industry associations and chambers of commerce which provide a variety of business-related services to promote the competitiveness of their members as well as non-members. This award targets BMOs who have textiles, apparels or their value chain partners as their members.

Details of winners are as below:

Award Sub Category	Winners
4.1 Promoting Green Environment (National/State/Regional LEVEL)	• Winner: Haryana Environment Management Society • 1st Runner up: South Gujarat Textile Processors Association • 2nd Runner up: United Sewing Machine & Parts Manufacturers Association
4.2 Promoting Social Issues (National/State/Regional LEVEL)	• Winner: Indian Textile Accessories & Machinery Manufacturers Association • 1st Runner up: Disha Shekhawati Women and Girls Development Institute • 2nd Runner up: Haryana Carpet Manufacturers Association
4.3 Promoting Green Environment (District/Cluster/SPV/Industrial Estate/ Industrial Area LEVEL)	• Winner: Jayadev Banana Farmers and Artisans Association • 1st Runner up: The Panipat Dyers Association • 2nd Runner up: Seharabazar Zari & Zarodoushi Product Manufacturing Industrial Cluster Cooperative Society Ltd
4.4 Promoting Social Issues (District/Cluster/SPV/Industrial Estate/ Industrial Area LEVEL)	• Winner: Nitya Sangha Mahila SHG Cooperative Society Limited • 1st Runner up: Khushali Artisan Handicraft Producer Company Ltd • 2nd Runner up: Shivalik Jankalyan Samiti
4.5 Special Award for Promoting Innovative Responsible Business Activity	• Rounak Centre for Cultural & Social Development Initiative

Joint Secretray. Ms. Prajakta Verma and Textile Commissioner, Ms. Roop Rashi presenting the awards to winners of CITI-FMC awards

Fashion Show

The award function concluded with a fashion show Earthloom – Threads of Heritage: A Fashion Show Celebrating Sustainable Heritage Weaves of India which was organized by Aalekh Foundation in collaboration with the Confederation of Indian Textile Industry (CITI).

The event showcased a fusion of heritage and modernity through four visionary designers: Rosy Ahluwalia's bold Khadi, Shilpi Gupta's reimagined Banarasi silk, Daniel Syiem's sustainable Ryndia silk, and Sanjukta Dutta's intricate Mekhala Chador.

Honourable Minister of State of Textiles, Shri Pabitra Margherita walking the ramp during the fashion show.

A key highlight of the show was Shri Pabitra Margherita, Hon'ble Minister of State for Textiles, gracing the ramp as the showstopper, donning Erisilk to showcase India's traditional weaves.

Adding a global spectacle, K-pop star Aoora, not only walked the ramp but also delivered an electrifying live performance, fusing fashion with international entertainment.

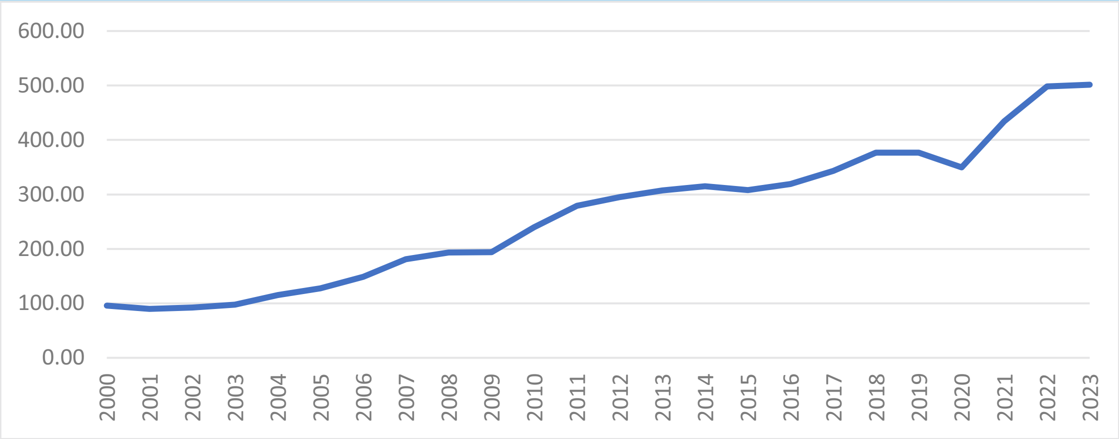
Show stared with the remarks of Dr Rennie Joyy, founder of Aalekh Foundation, during which she stated that *"The Earthloom show is more than just a showcase; it's a testament to the timeless beauty of India's heritage, seamlessly blended with modern sustainability."*

The CITI Textile Sustainability Awards served as a powerful reminder that sustainability in textiles is not just a choice but a necessity for long-term industry resilience. Honouring forward-thinking initiatives, the ceremony brought together distinguished leaders who reinforced the shared vision of a greener future.

SINGAPORE

Singapore has developed rapidly from a low-income country to a high-income country and with a GDP of about US$ 500 bn, Singapore has been amongst the world's top economies which has grown at a CAGR of about 7.5% during the last two decades. Manufacturing and Services sectors are the two most important pillars of the Singapore's economy.

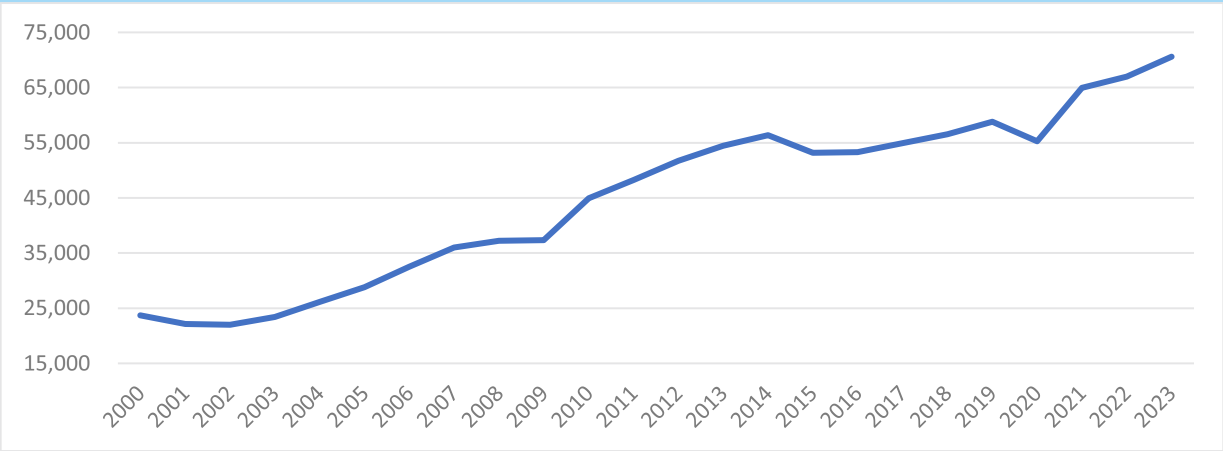
GDP (Current US$) of Singapore (US$ Billion)



Source: World Bank and CITI Analysis

Singapore is a high income economy with a gross national income of about US$ 70,590 in 2023 which has increased at a CAGR of about 5% during the last two decades. Singapore provides one of the world's most business-friendly regulatory environment and is ranked among the world's most competitive economies.

Gross National Income (GNI) Per Capita of Singapore (US$)



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

Overview of the Global Textile & Apparel Trade of Singapore

Singapore is a net importer of Textile and Apparel (T&A) products. In 2024, the country exported T&A commodities worth approximately US$ 2.05 billion to the global market, while its imports stood significantly higher at around US$ 3.19 billion. This trade imbalance highlights Singapore's dependence on external sources for its textile and apparel needs. Over the five-year period from 2020 to 2024, Singapore's exports of T&A products recorded a modest Compound Annual Growth Rate (CAGR) of 1%, indicating a slow but steady rise in outbound trade. In contrast, imports remained relatively negative, with a CAGR of -5% during the same period.

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

Year	Exports	Imports	Trade Balance
2020	1.98	3.91	-1.93
2021	2.27	3.07	-0.8
2022	2.42	3.39	-0.97
2023	2.06	3.21	-1.15
2024	2.05	3.19	-1.14
CAGR	1%	-5%	

Source: ITC Trade Map & CITI Analysis

A category-wise analysis of Singapore's Textile and Apparel (T&A) imports in 2024 reveals that Apparel was the dominant category, accounting for approximately 69.8% of the country's total T&A imports from the world. This underscores Singapore's significant reliance on imported clothing and garments to meet domestic demand. Fabric emerged as the second-largest category, contributing around 10% to the total imports, while Other Categories—which include items such as fibres, filaments, yarns, and home textiles—collectively accounted for about 8.2%. This distribution highlights the overwhelming importance of finished apparel in Singapore's T&A import profile.

Category Wise Singapore's Imports of T&A from World (US$ mn)

Row Labels	2020	2021	2022	2023	2024	CAGR	Share 2024
Fibre	165.90	226.26	157.91	96.90	178.35	1.8%	5.6%
Filament	13.39	32.18	38.70	17.74	28.68	21.0%	0.9%
Yarn	20.00	20.83	13.24	9.25	12.17	-11.7%	0.4%
Fabric	312.32	368.59	374.35	376.36	320.52	0.6%	10.0%
Apparel	2,041.85	1,915.15	2,337.55	2,292.21	2,231.02	2.2%	69.8%
Home Textiles	113.50	135.97	166.22	159.43	160.35	9.0%	5.0%
Others	1,245.69	370.11	300.99	260.79	263.49	-32.2%	8.2%
Grand Total	3,912.66	3,069.08	3,388.96	3,212.69	3,194.59	-4.9%	100.0%

Source: ITC Trade Map & CITI Analysis

Country Wise Imports of T&A by Singapore during 2024

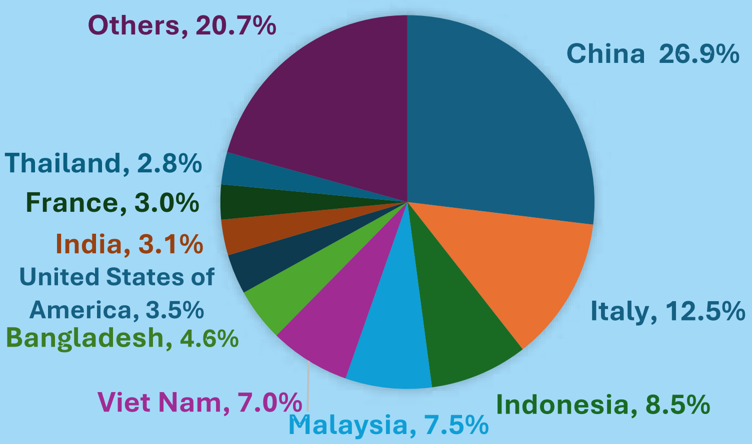
In 2024, China emerged as the leading supplier of textiles and apparel (T&A) commodities to Singapore, contributing approximately 26.9% to Singapore's total T&A imports from the world. It was followed by Italy and Indonesia, which held shares of around 13% and 8% respectively. Collectively, the top five countries accounted for about 62% of Singapore's total T&A imports during the year. India ranked as the 8th largest supplier of T&A products to Singapore in 2024. However, imports from India have shown a declining trend over the past five years, registering a negative Compound Annual Growth Rate (CAGR) of -5%.

Major Suppliers of T&A products to Singapore (US$ Mn)

S.NO	Exporters	2020	2021	2022	2023	2024	CAGR
1	China	1573.89	750.22	894.28	834.32	860.26	-14%
2	Italy	258.64	311.89	434.69	546.82	399.47	11%
3	Indonesia	418.94	425.84	368.91	225.95	270.55	-10%
4	Malaysia	230.81	263.60	213.40	240.82	238.51	1%
5	Viet Nam	189.90	179.70	228.60	218.18	223.01	4%
6	Bangladesh	122.91	129.23	162.77	106.33	147.02	5%
7	United States of America	100.29	117.89	118.22	137.64	110.39	2%
8	India	84.13	102.24	103.70	96.25	98.59	4%
9	France	64.32	82.48	87.51	97.03	96.62	11%
10	Thailand	62.27	64.49	67.20	73.57	88.92	9%
	Others	806.54	641.51	709.65	635.78	661.21	-5%
	World	3912.66	3069.08	3388.96	3212.69	3194.59	-5%

Source: ITC Trade Map & CITI Analysis

Country Wise share of top suppliers to Singapore



Source: ITC Trade Map

A categorical analysis of Singapore's textile and apparel (T&A) imports reveals that the top 10 commodities accounted for approximately 52% of the country's total T&A imports from the world in 2024. Among these, products classified under HSN 6105 have recorded the highest growth rate during the period 2020 to 2024, indicating a rising demand for these knitted or crocheted men's or boys' shirts. On the other hand, HSN 6204, which includes women's or girls' suits, ensembles, jackets, dresses, skirts, and similar articles, holds the largest share in Singapore's total T&A imports, highlighting its significance and consistent demand in the domestic market.

Imports of Top 10 Products By Singapore (US$ Mn)

HS Code	Product label	2020	2021	2022	2023	2024	CAGR	% Share
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	202.5	222.4	287.1	308.3	314.1	12%	10%
6109	T-shirts, singlets and other vests, knitted or crocheted	185.6	230.7	297.3	294.7	290.3	12%	9%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	131.3	148.0	196.1	199.2	196.2	11%	6%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...	134.5	162.4	200.8	211.0	193.8	10%	6%
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	82.1	127.7	141.7	148.7	143.2	15%	4%
5504	Artificial staple fibres, not carded, combed or otherwise processed for spinning	122.7	180.5	120.2	59.5	136.5	3%	4%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	143.0	185.5	173.5	128.1	126.6	-3%	4%
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of ...	89.7	75.3	123.6	111.7	103.3	4%	3%
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other ...	49.2	50.2	81.1	81.8	97.6	19%	3%
5911	Textile products and articles, for technical use, specified in Note 7 to chapter 59	83.8	98.0	93.1	75.4	85.2	0%	3%
		3912.7	3069.1	3389.0	3212.7	3194.6		

Source: ITC Trade Map

Textile & Apparel Trade Between India and Singapore

India was the 9th largest supplier of T&A products to Singapore in 2023 and imports from India have declined at a CAGR of -4.3% during the last 5 years.

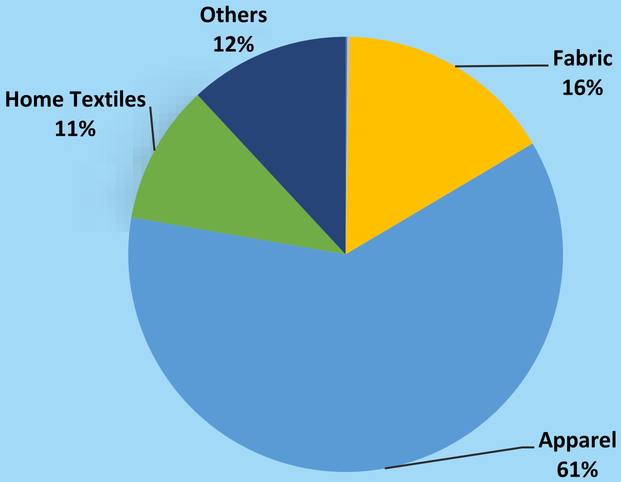
Singapore Imports from India (US$ Mn)

Row Labels	2020	2021	2022	2023	2024	CAGR	% Share
Fibre	0.09	0.09	0.09	0.08	0.12	6.3%	0.1%
Filament	0.13	0.04	0.20	0.01	0.02	-39.9%	0.0%
Yarn	0.53	0.34	0.21	0.17	0.16	-25.4%	0.2%
Fabric	8.21	16.82	10.34	10.58	15.97	18.1%	16.2%
Apparel	44.97	59.96	71.45	63.85	60.36	7.6%	61.2%
Home Textiles	9.63	13.21	10.28	10.83	10.21	1.5%	10.4%
Others	20.57	11.77	11.14	10.74	11.75	-13.1%	11.9%
Grand Total	84.13	102.24	103.70	96.25	98.58	4.0%	100.0%

Source: ITC Trade Map

A category-wise analysis of Singapore's Textile and Apparel (T&A) imports from India in 2024 indicates that Apparels were the most imported commodity, accounting for approximately 61% of the total T&A imports from India. This highlights the strong demand for Indian garments in the Singaporean market. The 'Others' category followed with a 12% share, reflecting a diverse import basket that includes products such as fibres, filaments, yarns, fabrics, and home textiles.

Category Wise share of Singapore's imports of T&A from India



Source: ITC Trade Map

** share of fibre, filament and yarn was miniscule in the total trade and hence it was incorporated in the others category*

In 2024, the top 10 textiles and apparel (T&A) commodities imported by Singapore from India accounted for approximately 64% of Singapore's total T&A imports from the country. Among these, HSN 6204 emerged as the largest imported category, contributing around 13% to the overall T&A imports from India. Notably, within the top 10 commodities, imports under HSN 6204 recorded the highest Compound Annual Growth Rate (CAGR) over the past five years, indicating a strong upward trend in demand for this specific product category.

Top 10 Commodities of T&A by Singapore From India (US$ Mn)

Product code	Product label	2020	2021	2022	2023	2024	CAGR	% Share
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	8.61	11.01	13.54	12.70	12.73	10%	13%
5607	Twine, cordage, ropes and cables, whether or not plaited or braided and whether or not impregnated, ...	4.47	6.97	7.17	7.10	7.24	13%	7%
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	2.55	2.68	4.94	6.12	7.24	30%	7%
5007	Woven fabrics of silk or of silk waste	1.64	1.06	2.69	1.32	6.71	42%	7%
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	4.59	6.26	12.30	6.58	5.91	7%	6%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	2.65	6.39	5.35	6.55	5.43	20%	6%
6109	T-shirts, singlets and other vests, knitted or crocheted	4.11	6.05	6.89	6.70	5.07	5%	5%
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other ...	2.18	5.28	6.13	4.36	4.70	21%	5%
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	2.77	3.43	5.36	3.86	4.51	13%	5%
5702	Carpets and other textile floor coverings, woven, not tufted or flocked, whether or not made ...	3.65	3.91	1.81	3.23	2.87	-6%	3%
TOTAL	Total T& A	84.13	102.24	103.70	96.25	98.58		

Source: ITC Trade Map

Way Forward:

With just about 3.1% share in Singapore's T&A imports from World in 2024, India till now has not been able to grab a considerable market share in Singapore market. There are certain product commodities in which India is having the requisite potential and Singapore is also importing from other countries, however there is limited trade between the two countries. To increase the market share, Indian exporters can focus on the below given commodities:

- HSN 6204: Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers
- HSN 6109: T-shirts, singlets and other vests, knitted or crocheted
- HSN 6203: Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches
- HSN 6104: Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers
- HSN 6205: Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)

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

- During Mar'25, Indian Textile exports were about 5.81% lower as compared to Mar'24 while Apparel exports registered a growth of 3.97% during the same time period.
- Cumulative exports of Textiles and Apparel during Mar'25 have registered a degrowth of 1.63% over Mar'24.
- During Apr'24-Mar'25, Indian Textiles exports registered a growth of 3.61% over the previous year while Apparel exports registered a growth of 10.03% during the same time period.
- Cumulative exports of Textiles and Apparel during Apr'24-'25 have registered a growth of 6.32% as compared to Apr'23-Mar'24.

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

Export category	Mar-24	Mar-25	% Change	Apr'23-Mar'24	Apr'24-Mar'25	% Change
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	1,094.18	1,117.81	2.16%	11,683.50	12,055.88	3.19%
Man-made Yarn/Fabs./made-ups etc.	439.36	435.64	-0.85%	4,679.14	4,869.44	4.07%
Jute Mfg. including Floor Covering	28.43	34.60	21.70%	338.85	384.10	13.35%
Carpet	129.00	137.41	6.52%	1,395.15	1,541.09	10.46%
Handicrafts excl. handmade carpet	279.49	130.42	-53.34%	1,802.29	1,766.57	-1.98%
Sub-Total Textiles	1,970.46	1,855.88	-5.81%	19,898.93	20,617.08	3.61%
Apparel	1,472.82	1,531.33	3.97%	14,532.19	15,989.33	10.03%
Textile and Clothing	3,443.28	3,387.21	-1.63%	34,431.12	36,606.41	6.32%
All Commodity	41,692.74	41,968.30	0.66%	4,37,072.03	4,37,416.52	0.08%
% of T&C in Total Exports	8.26%	8.07%		7.88%	8.37%	

Source: Press Information Bureau

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

Imports category	Mar-24	Mar-25	% Change	Apr'23-Mar'24	Apr'24-Mar'25	% Change
Cotton Raw & Waste	48.8	79.04	61.97%	598.66	1,219.32	103.67%
Textile yarn fabric, made-ups	160.82	192.95	19.98%	2,277.57	2,475.53	8.69%

Source: Press Information Bureau

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

Quick Estimates - Index of Industrial Production - Textiles & Clothing

Description	Weights	Index			Cumulative Index		
		Mar 24	Mar 25	% Change	April – March 2023-24	April – Mar 2024-25	% Change
Manufacture of textiles	3.291	106.9	112.1	4.9%	107.6	109.2	1.5%
Manufacture of wearing apparel	1.322	143.0	144.8	1.3%	109.9	116.7	6.2%

Source: CITI Analysis & Ministry of Statistics Planning & Implementation

- The General Index for the month of March 2025 is 3% percent higher as compared to the level in the month of March 2024.
- Textiles was up by 4.9% percent, Wearing Apparel was up by 1.3% percent in March 2025 over the same month previous year.

Textile Sector
Skill Council

Who we are :-

- Sector Skill Council for Textile & Handloom established in 2014.
- Guided by 11 industry associations and 3 export promotion councils.
- Recognized as an Awarding Body for textile and handloom sector by NCVET since, June 2022.
- Mandated to develop skilled workforce for textile value chain from spinning to fabric finishing.

Birds eye view of Indian Textile Industry :-

- Contributes to 27% of the revenue from foreign exchange, mainly through textile exports.
- Contributes to 14% value-addition in the manufacturing sector of the country.
- Second largest in terms of providing employment opportunities to more than 35 million people.
- India's textile industry is expected to reach USD 209 billion by 2029.
- Fifth largest producer of Technical Textiles with 4-5% Global Share.
- Technical textiles market is projected to increase to reach USD 3.7 billion by 2027.
- Industrial textiles market is likely to increase to reach USD 3.3 billion in 2027.
- Industry has around 4.5 crore employed workers including 35.22 lakh handloom workers across the country.
- Union Budget 2023-24, the total allocation for the textile sector was Rs. 4,389.24 crore (US$ 536.4 million).

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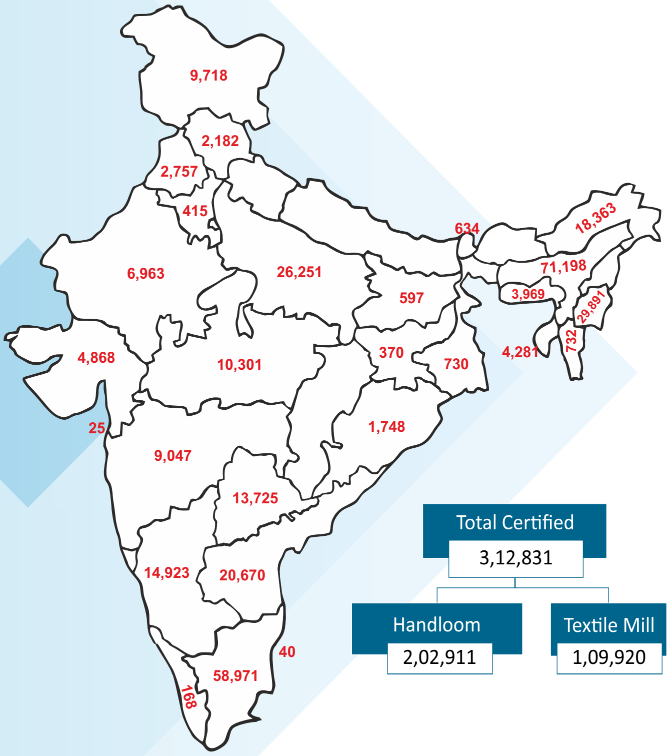
TEXTILE SECTOR SKILL COUNCIL
TSC
PERFECTING SKILLS

Training Achievements



What we have done :-

- Developed 71 industry relevant Qualification Packs.
- DigiBunai CAD software based training for Handloom Weavers.
- Class 10th opportunity through National Institute of Open Schooling (NIOS).
- Helping industry with 20 futuristic qualifications.
- Encouraged 692+ training center to contribute in Skill India.
- Facilitated career progression for 400+ handloom weavers through mudra loan and connecting them to direct market.

Contribution of Textile Industry in Skill Ecosystem :-

- Invest significantly in training unskilled youth, spending almost Rs. 332 Crore annually to train about 1.23K freshers.
- Facilitated development of industry relevant courses.
- Promoted Apprenticeship and On-the-Job Training
- Collaboration with educational institutions and vocational training centres.

Industry benefits under Skill Ecosystem :-

- Reimbursement of Skilling Cost as per the common norms for the duration of the courses between 300 – 400 Hrs.

Incentivisation under apprenticeship program :-

- Engage Apprentices in the band of 2.5% to 15% of total Manpower Strength.
- Employers are exempted from EPF and ESI contributions.
- Partial reimbursement of stipend to candidate

Some of the Future Qualifications of TSC :-

- Tape Plant Operator
- Tape Winder
- Circular Loom Operator
- Assistant Design Maker - Textiles

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